Quick Setup Guide for Look2 Registration Software v6.3

8/15/24

This document is not a comprehensive Installation Manual ... but rather a quick-reference guide to assist someone familiar with PC's on how to go about installing the Look2 Registration Software.

Before following these steps, make sure you have Office installed, with both MS Excel and Access (or the free Access Runtime ... all that's required for the PreRegistration system!), and have read the *IT Topics* chapter in the User Manual *(PC requirements, 1920x1080 or 1920x1200 resolution, etc.)*.

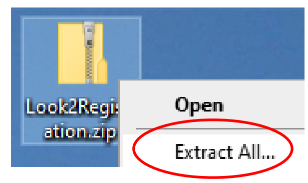
Ensure you have read and agree to the Look 2 Consulting End User License Agreement, a copy of which is online here.

The basic steps for installing the software are:

- Download and unzip the files, installing the fonts supplied
- Configure Microsoft Access to "Trust" the files
- Link the GUI file to the backend databases according to the setup desired
- Configure/customize the software for your organization
- Tweak some Windows settings
- Implement a Backup Plan for the data you'll be generating

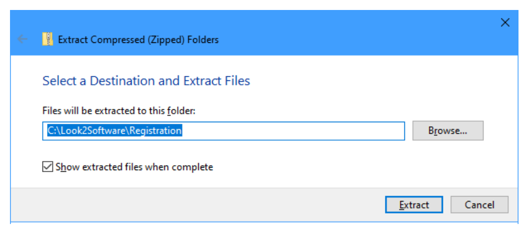
A high-level overview for each of these items is now given. You can also watch an on-line video covering the steps for a single-PC within the Video Tutorials section online.

1. Extract Zipped Contents to a Folder



While the folder can be located anywhere on your computer, by way of example this guide shows creating one in the root directory of C:

a. Save the Registration ZIP file (by default, it goes into your downloads folder)
b. Right-click the file and choose "**Extract All...**" from the pop-up menu
c. A dialog appears. Change the path to instead just be
   C:\Look2Software\Registration
   (could be anywhere, but this is used for this example)
d. Click the **Extract** button.



You will have the following files:

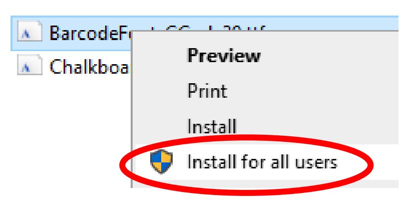
- 8 Database files: *DATA, CONFIG, MyPC, PreReg_DB, and two versions (32-bit and 64 bit) of each front-end program*
- 3 Excel files: *PrimaryContacts.xlsm and RegistrationDataSummary.xlsm, CustomSQL_Report.xlsm*
- Some documentation *(version notes and a PDF of the User Manual)*
- Sub-folder "Resources" *(ShoppingSlip and ID Card back templates; ico, audio, backup bat; 1 font subfolder, EULA, shortcuts)*
- Sub-folder "Reports" *(will store generated reports, and contains an example)*

2. Install Fonts

The software uses two special fonts:

- ChalkboardFont_ChalkDustCondensed.TTF
- BarcodeFont_CCode39.ttf.

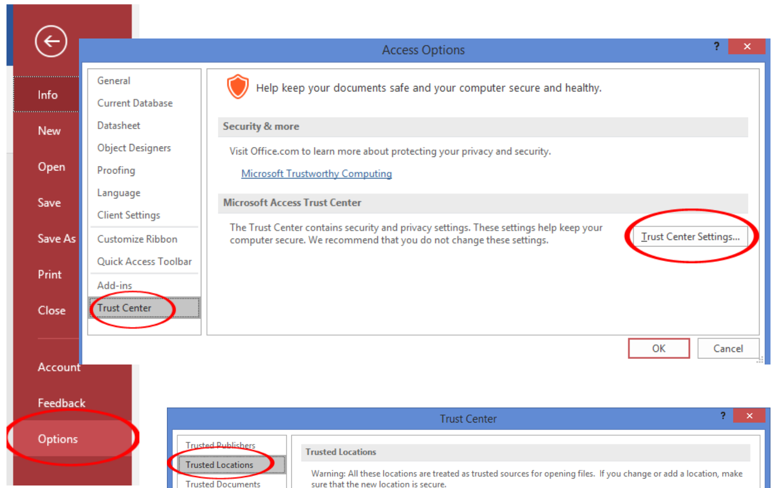
They are located in the Resources/Fonts directory.

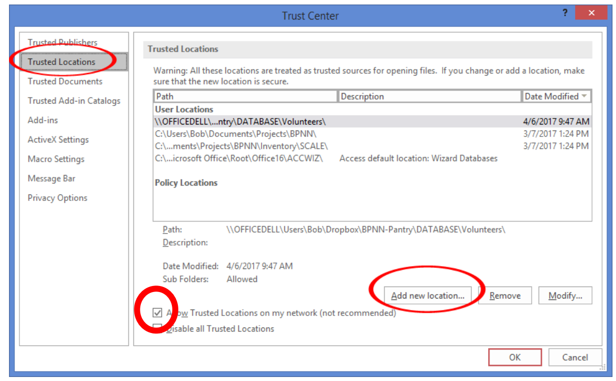


To install, simply right-click on **each** file and select "Install for all users"
(Windows 11: it's under the *Show More Options* selection)

(If you are not able to access this menu item, you can also just install for the current user by double-clicking on each font file and clicking the "Install" button).

3. Trust Center Settings





So you don't get security warnings every time you launch the software, and so the macros run to configure the software upon first launch, you must make the registration folder a "Trusted File Location".

(Note: not available with the free version of Access Runtime)

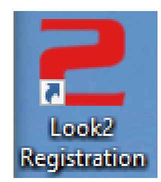
To do this:

- Launch Microsoft Access
- Choose Options from the main menu
- Click Trust Center in the left-hand list and then click the Trust Center Settings button
- Click Trusted Locations in the left-hand list
- Check the box: Allow Trusted Locations on my network *(so a mapped drive can be trusted)*
- Click "Add new location..." button to select the folder where the GUI file has been saved

  NOTE: if you use a Mapped R: Drive per Section 5.2, you should come back and add that location as well once that has been set up

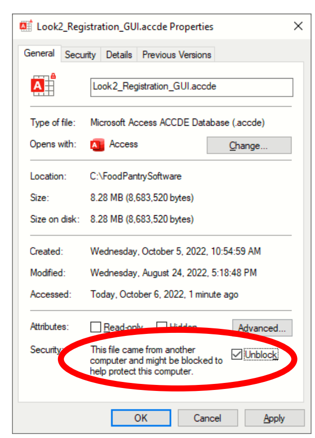
Repeat this Trust Center process within Microsoft Excel as well, so the Report macros will work too.

4. Initial Program Launch



Look2_Registration_GUI.accde is the compiled database front-end, and is what you launch to run the software *(GUI stands for Graphical User Interface)*.
NOTE: if the 32-bit version of Office is installed, instead run **Look2_Registration_GUIx32.accde.**

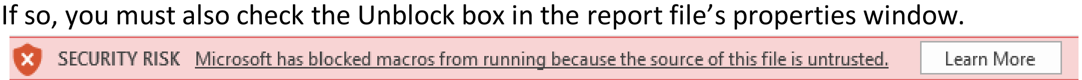
Suggestion: create a shortcut icon on the Desktop to make it easier to launch. One has been provided in the *Resources* directory: the GUI file is assumed to be in *C:\Look2Software\Registration,* with its icon in *Resources*.

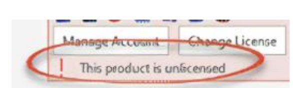


Depending upon your PC's security settings you may also have to right-click on the ACCDE file and check the Unblock box at the bottom of the General tab.

Upon initial launch, if you get a warning from Access stating the file contains content that has been disabled, simply click the Enable Content button near the top of the screen *(you may have to close the Load screen first).*

When launching an Excel Report, you may get a Security Risk message with a red background. If so, you must also check the Unblock box in the report file's properties window.





If your copy of Microsoft Office is not fully licensed/activated, it might prevent it from running.

If you get a startup error message that a path is invalid, see Section 5 for re-linking the tables.

5. Link Front-End Program to Back-End Tables

The main registration software employs a “client/server” design. As mentioned above, the front-end database is the one with GUI in its name. It needs to be linked to the other back-end databases (DATA, CONFIG, MyPC, PreReg_DB).

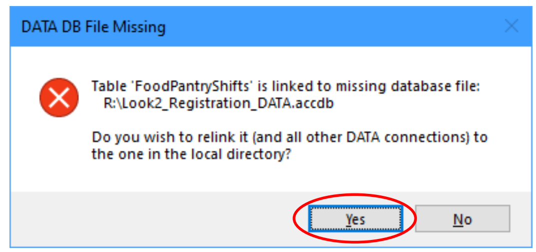
There are 3 methods for linking the tables:

- Automatic Self-Configure/Link ... for use when there is only 1 Registration PC *(one time per upgrade/update)*
- Map the folder where DATA/CONFIG/PreReg_DB files reside to be the R-drive for each PC *(**preferred!**)*
- Use Access to re-link the GUI file to a different location for the backend DB’s *(on-going hassle/work!)*

NOTE: see Sections 3 and 4 above for details on launching the software and what to do if your version of Access doesn’t initially permit the running of these macros.

5.1. Connect via Automatic Self-Configure/Link *(NOT preferred method!)*

This is the simplest method of getting the software running, and is good for “testing out” the software. However, it is NOT the preferred method (which instead is covered in Section 5.2). Also, this simple method only works when you have 1 PC for registration. If you have 2 or more machines wanting to share the same DATA, CONFIG, and/or PreReg_DB files, you will have to use one of the other two methods given in the next sections.



Start by launching the GUI file. The Registration software automatically checks to see if linked backend databases exist in the default linked location (R: drive). If not, it checks to see if they exist in the “local directory” of the GUI file, and if they do it asks permission to automatically change its own links and self-configure these settings.

Simply click YES at each prompt (for DATA, CONFIG, PreReg_DB) and the software should then be up and running. It will not prompt again unless you download a newer version of the software (at which time it will once again ask to be reconnected).

As for the MyPC file, it auto-links (without asking) to the local copy if it exists (the MYPC backend database file is typically kept locally and never shared, so Printer Names and also WorkstationID can be unique per PC running the software). If you want to change that link to some other location, relink it using the Access Linked Table Manager.

You will also need to use the “Set To Local” button in each of the Excel Reports.

5.2. Connect via Mapped R: Drive *(preferred method)*

The GUI database ACCDE comes pre-configured to link to the DATA, CONFIG, and PreReg_DB files when these all reside in a folder mapped as the root of the “R:” directory. It also assumes reports get generated to a Reports subfolder in the R: drive.

The reason **this is the preferred method** is that with subsequent updates to the software, the program GUI file(s) can simply be swapped-out and the more complex re-link process can be avoided. This makes for a more streamlined, headache-free deployment.

To use this method, follow these steps:

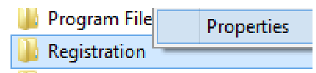
5.2.1. Share the Registration Backend Data Folder

Determine where you want the DATA, CONFIG, PreReg_DB backend database files. This can be on your “main” PC running registration, or these could be on a corporate server (thus allowing for remote access and/or automatic backup, and other server-based benefits). A Network Attached Storage (NAS) device could be used, but some may not work well in multi-user scenarios.

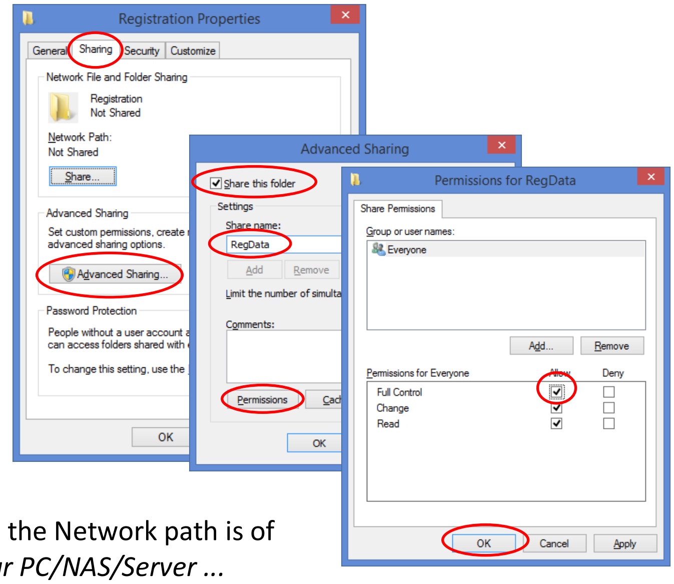
NOTE: it should NOT be one of the common “virtual cloud-storage” solutions if you’re running the GUI software on more than 1 PC. See the chapter in the Registration User Manual entitled: *Dropbox/GoogleDrive/Microsoft One-Drive Considerations.*

These steps for sharing are performed only at the location hosting the backend database files:

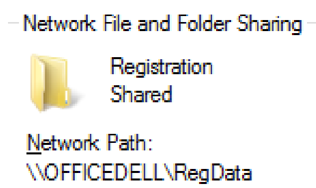
- Right-click the **Registration folder** hosting the backend files (*C:\Look2Software\Registration* drive in this example) and select **Properties**



- Click the **Sharing tab** and click **Advanced Sharing**
- Check **Share this folder**, enter the name **RegData** *(can be anything you wish, but this is the shared name used in this example)*, then click **Permissions**.
- In the Permissions dialog, we need to allow others to not only "read" the data, but also modify it. Check the "**Full Control**" box. Then click **OK**.
- Click **OK** to close the Advanced Sharing dialog.

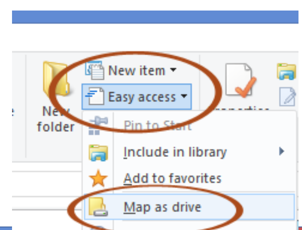


The Properties window now says the folder is shared, and the Network path is of the format **\\PC1\RegData** *(where PC1 is the name of your PC/NAS/Server ... OFFICEDELL in my example)*



5.2.2. Map R-Drive on PC running GUI program to Shared Folder

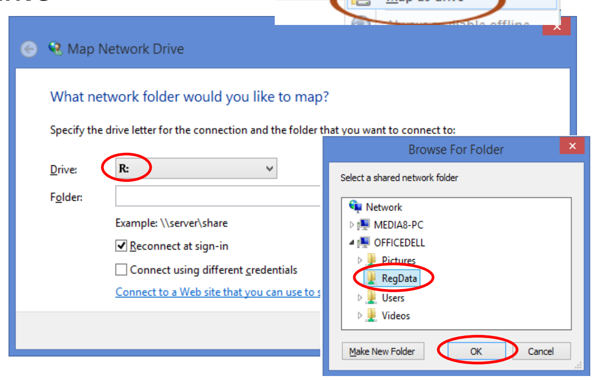
The final step, for each PC wanting to run the GUI file(s), is to map an R: drive to point to the shared folder containing the DATA, CONFIG, PreReg_DB backend files, and the Reports sub-folder.



- In the File Explorer, click on **Easy access** and select **Map as drive**
- Select "**R:**" from the Drive list and click **Browse**
- Browse to the location containing the Shared folder *(OFFICEDELL in this example)*. **Select** that folder, click **OK**.
- Back in the main Map Network Drive window, click **Finish**

When done, the folder now appears as the R: drive on your PC.

Since the registration GUI database is linked to the backend tables assuming they are in the R directory, this process thus ensures those links now work, and the software is ready to use.



5.2.3. Multi-Workstation Setup (for PC2, PC3, etc...)

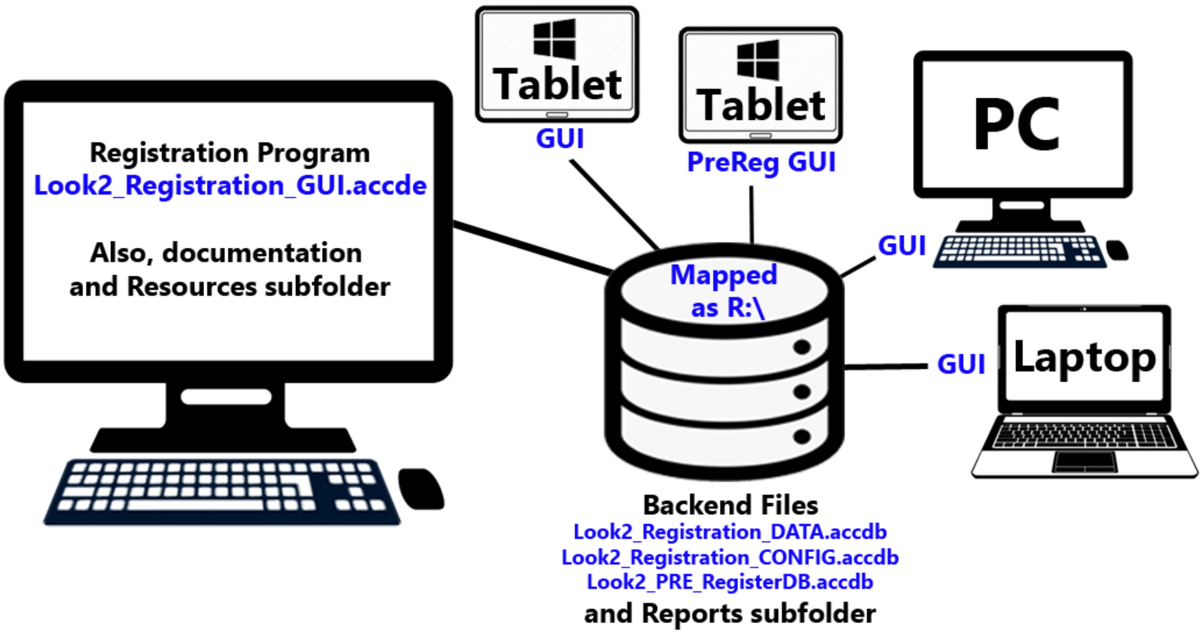
If you have additional PCs on the network and want them to share the same backend data files (thus having multiple entry terminals all able to register families to the same system), simple follow 2 steps:

- **Copy everything but** the backend DATA, CONFIG, and PreReg_DB files to those additional PCs (can be any folder, but it's preferred to be *C:\Look2Software\Registration*). Make sure the backend database files are **NOT** on those additional PCs. You do NOT share folders on these additional PCs.
- **Map the R: drive** on those additional PCs to point to the shared folder containing the backend DATA, CONFIG, and PreReg_DB files.

This makes the GUI program file on those other PCs use the same shared backend database files.

To run the Registration software on those additional machines, simply launch the GUI file local on those machines. They will automatically read/save data from the "master" shared files.

A visual of this mapping is shown below.



5.2.4. Pre-Registration System Setup

To run the Pre-Registration system, the only file that needs to be copied to the tablet (or kiosk, PC, etc.) is *Look2_PreReg.accde (or Look2_PreReg32.accde if running 32-bit office on that machine).* It can be located anywhere on that machine. Then, simply map the R:\ drive as described above, so it can thus access the backend files.

You can even just use the Free Access Runtime (if the launch warning doesn't bother you), since the PreReg system is minimal in its requirements.

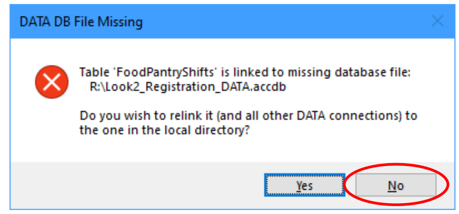
Access Runtime

If you've changed the default Household or Personal questions/answers supplied, be sure to edit the language translations of those items. See the complete Registration User Manual for details.

5.2.5. Trust Center Settings for R:

After creating the R: drive, be sure to revisit Section 3 and make that drive a Trusted Location (on each PC).

5.3. Connect via Access Link Table Manager *(NOT preferred method!)*

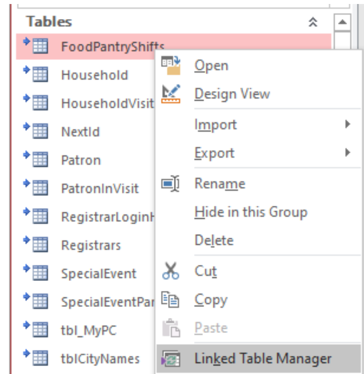


An “advanced” method of getting the software’s backend databases to work is to change the links to the various tables within the GUI database itself.

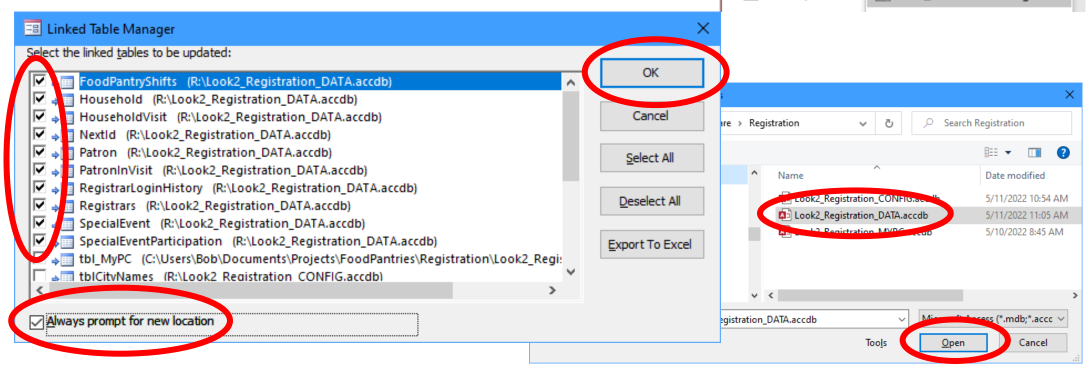
This is NOT the preferred method.

Only do this if you don’t want to use the R-drive method.

- Open the GUI database file. It should complain that the R path is not valid. As explained earlier, it can automatically set it to a local file. To manually link the various tables, click NO when prompted. It will then close the splash screen and allow you to modify the linked connections in Access.
- Right-click on any one of the Tables in the left-hand pane, and choose **Linked Table Manager** from pop-up menu
- Check the **Always prompt** box at the bottom, and **check all tables pointing to the DATA** database (should be the top 10 in the list).
  NOTE: this looks different for Access365 *(consolidated to only show the 3 files)*.
- Click **OK** and browse to the where the database files are stored



- Select the



Look2_Registration_DATA.accdb file and click **Open**. If done correctly, all DATA references should be re-linked.
- **Repeat** this process for the **CONFIG** tables (select just those 10 checkboxes at the bottom) and link them to the **Look2_Registration_CONFIG.accdb** file. Then repeat for the 3 PreReg_DB tables.
- Note: in general, the only file in the list that you will **not have to re-link is the MYPC file**, as it is intended to be a locally connected file with settings just for that one computer workstation.
- Close the table manager when done linking the DATA, CONFIG, and PreReg_DB backend databases.

6. Running the Software

6.1. Passwords for Supplied Example Registrars

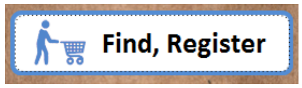
The main screen requires you to log in so that you can use the rest of the software. The initial database comes with example registrar users already defined in the system:

- User: ***Amanda Admin*** Password: ***password*** Role: Admin *(can access the reports and admin functions)*
- User: ***Ricky Reports*** Password: ***password*** Role: Reports *(can access the reports)*
- User: ***Inga Inactive*** Password: ***password*** Role: Inactive *(to show that name cannot log in)*
- User: ***Edward Express*** Password: ***password*** Role: Express *(to show items are hidden for Express checkin)*
- User: ***Valerie Volunteer*** Password: ***password*** Role: *blank (only Registrar functions, not Admin nor Reporting)*

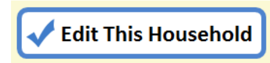
6.2. Supplied Example Households

Once signed in, you will want to find a household to learn the main features of the software. The system comes with example households with multiple people in them for this purpose. To view them, follow these steps:

- log in as any registrar *(per previous section)*
- click Find, Register button



- enter a single question-mark character (?) in the Database Search field *(wild-card search for "anything")*
- select a household and click Edit This Household *(or double-click a name)*



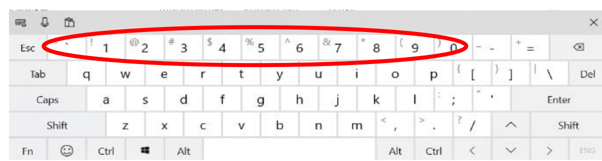
You can add a visit for these "test" households, and then delete the visit(s) so they don't show up in your official reports. Feel free to keep them around for training/testing, or you may delete them using the Admin Delete feature.

Please refer to the complete Registration Software Manual PDF on how to use the system.

6.3. Running/Exiting the Pre-Registration System

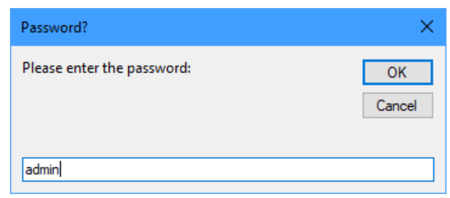
To run Pre-Registration on the Windows tablet/PC, simply run *Look2_PreReg.accde*. There is no login required.

If using a tablet without a physical keyboard, choose a virtual keyboard having numbers always visible. This will make entering date of birth, phone number and address easier for the patron.



To exit out of the PreReg system, **double-click** the Power button **2-times-in-a-row**.

Password: "admin".

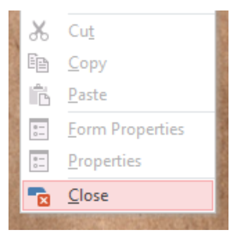


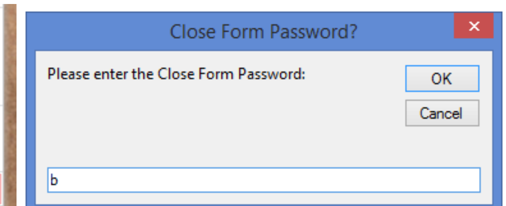
6.4. Gaining access to Access

Should you ever desire to gain access to the tables within the main Registration GUI file directly, close the main form.

To do this, right-click on any part of its background and choose "Close" from the pop-up menu.

It will prompt for a password. By default, the close-form password is the lower-case letter b.





6.5. Accessing the Desktop

The software was written so it makes use of the entire screen, without the usual window title/borders (so it's not "movable", more of a "kiosk" type of application). There is a minimize button in the upper left.

If you don't want to minimize the program but still gain access to the Desktop and/or other applications:

- Press the Windows key *(between the CTRL and ALT keys on the keyboard)*. This brings up the taskbar and windows menu, allowing you to then launch another program.

- While holding down the ALT key, cycle through running programs with each press of the TAB key … then let go of the ALT key to bring that window to the front.

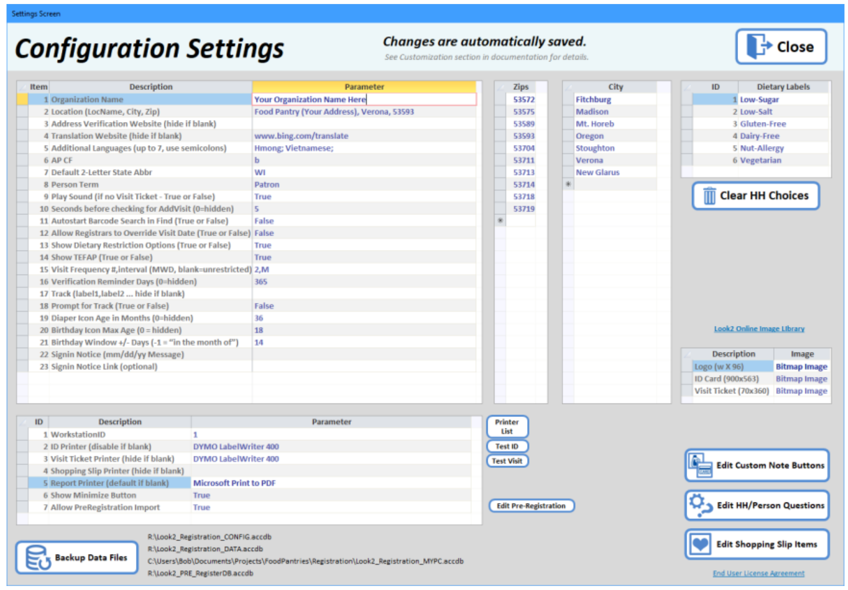
7. Configuring/Customizing the Software

There are many parameters for customizing the software to help meet the varying needs of different food pantries.

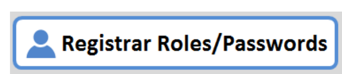
Someone familiar with Access can edit the tables directly. However, most of the parameters are also accessible within the software itself so that Administrators can make changes without having to get at the back-end tables.

Log in as an Admin and select Configuration Settings in the Admin section.
Please refer to the ***Registration Software Manual*** for help on configuration.

A quick installation checklist is as follows:

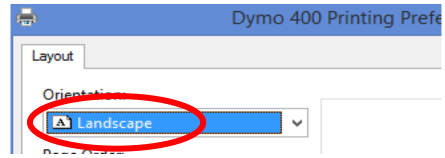


- ☐ Define the parameters in the main table, some highlights include:
  Item1: Organization Name
  Item3: Address Verification Website
  Item14: Show TEFAP
  Item15: Visit Frequency
  Item20: Birthday Icon Max Age
  There are many other parameters to set as well, but these should get you going…
- ☐ Edit the list of Zips and City names *(users can type in items not listed; these entries are in the dropdown lists to make data entry easier)*
- ☐ Update the Logo to be yours *(double-click the Logo Bitmap Image in the Images list)*
- ☐ Define optional questions, for Households as well as any desired for per-person, using the Edit Questions feature
- ☐ If using ID Cards, update the card's background image. If using Visit Tickets, update the right-hand edge image.
- ☐ Use the Custom Item Note Button editor to define these if desired (e.g., Senior Box)
- ☐ Decide if you want to use the Tracking labels/fields
- ☐ Define your own Registrars (then get rid of the example ones outlined above)

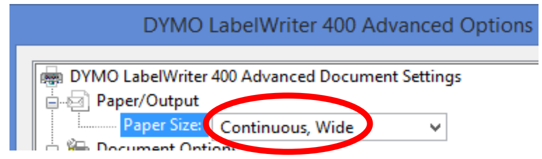


- ☐ Define the Shopping Slip items (if you are going to be using this feature)
- ☐ Decide if you're going to use the PreReg system. If so, edit the language table to make sure the questions match those configured for your system, and that the translations are correct.
- ☐ Define printer names if you'll be using ID Cards, Shopping Slips, or Visit Tickets, and define your default report printer. Some additional details when using special ID/Visit printers is given below.

Label Printer Note: if you've configured the system to use a label printer to print out a Visit Ticket for each household's visit or for ID Card printing, you must ensure the windows settings for the printer's default printing preferences is set correctly:

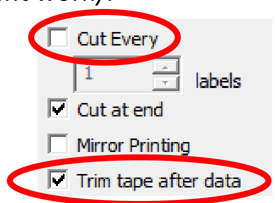


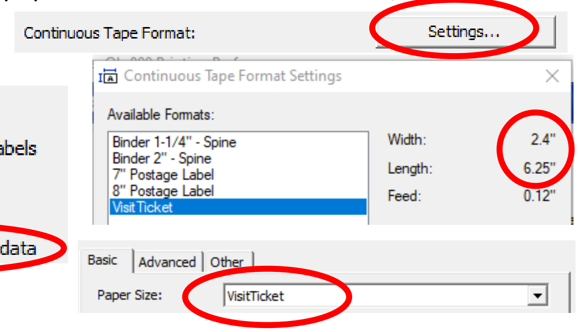
DYMO Printers: Orientation set to **Landscape,** Paper Size *(under Advanced Options)* is **Continuous, Wide**



The software has been tested with DYMO LabelWriter 400, 450 and 550. *NOTE: the new 550 requires DYMO branded paper … you'll get errors from the printer if generic paper is used.*

Brother Printers: As of this writing, testing with a QL-800 was done **without** using the required roll of non-adhesive paper … so it is <u>unclear if this will work</u> when that paper is used. With that in mind, these preferences "may" work *(since it worked with an adhesive label roll that was available for development work)*: Advanced - Continuous Tape Format, define a paper size that is longer than the widest item being printed (e.g., 2.4" X 6.25"), then set that size as the printer's default. Also, turn off Cut Every, but turn on **Trim tape after data**.





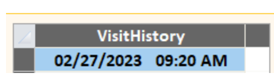
The DYMO appears to do a better job of centering the printout vs. the Brother, but the Brother does a nice job of cutting the printout.

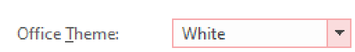
MagiCard 300 Printer: For ID Cards, it also has been tested with a dye-sublimation printer that uses platic ID cards. The model tested was the MagiCard 300, but it may work with other models as well.

8. Adjust Various Windows Settings

Here is a brief checklist of some settings on the PC which can affect the user experience when using the software. Not all may be necessary (and yet others may need to be added to the list) ... depending upon your IT policies, etc. Details are not given for each item (this document would be hundreds of pages long!), but rather this serves as a guide to help an IT-savvy person get through a more complete installation.

- ☐ Make sure Windows has all updates applied
- ☐ Make sure Office has all updates applied. Also ensure it is fully licensed (otherwise issues/notices 30 days out)
- ☐ If tables have dark headers, change the Office theme from Dark to White *(under File – Options - General)*





- ☐ File Explorer – turn on view of file extensions
- ☐ Right-click QuickAccess in Windows 10 – Options, turn off Show Recently/Frequently used. Pin Registration folder.
- ☐ Set Power Options: Sleep = "Never" … especially when DATA/CONFIG are on a network! Optionally set Screen to never turn off as well (though this is less critical … Screen can be set to 30 minutes if so desired)
- ☐ Screen Saver Settings if so desired: 30 minutes – 3D text to "Tap for Registration", Wobble
- ☐ Change login on startup to be automatic (Windows 10 - WindowsKey+R, netplwiz)
- ☐ Taskbar Settings: Auto-hide (so software gets use of full screen resolution on 1920x1080 displays)
- ☐ Unpin distracting icons from taskbar, also from Start Menu (e.g., games, Netflix, etc.)
- ☐ Create shortcuts to files on desktop (Registration software w/ico file, Excel report template file, reports folder)

- ☐ Right-click Display Settings - Notifications and Actions - Turn off Tips/Tricks, Show welcome experience, OneDrive, Suggested
- ☐ Set desktop image to organization's logo (Personalize, make fit=Center, white background) or Look2's Background (downloadable from Look2's document support page)
- ☐ Turn on notifications for Restart (under Windows Update Settings – Restart Options)
- ☐ Uninstall OEM bloatware (e.g., Dell Update Support Assist, Dell Update, or other such stuff)
- ☐ Go to Microsoft Store app and turn off Auto Updates
- ☐ Optional: install Chrome, create shortcuts to www.Look2Consulting.com, Google, and organization's home page
- ☐ Optional: download and install Acrobat Reader
- ☐ In Adobe Preferences, General, uncheck "Show me message when I launch…" and then check the "don't show messages while viewing". In Commenting section, disable "Enable text indicators and tooltips". Hide the Tools pane on right (simply click Tools to toggle). Set Updater section to be "Do not download or install updates automatically"

9. Come Up with Your Plan to Back Up Your Data

The configuration of your system and the data created are all stored in local database files (*DATA, CONFIG, MyPC)*. Come up with your plan on backing these up (either to the Cloud, a backup server, an external drive, etc.).

Additional details are covered in the Look2 Registration Manual.