

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 Volunteer Software.

Before following these steps, make sure Office is installed with both MS Access (or the free Access Runtime) and Excel, and have read the *IT Topics* chapter in the [User Manual](#) (*PC requirements, 1920x1080 or 1920x1200 screen resolution, etc.*).

Also make sure you have read and agree to the Look 2 Consulting End User License Agreement, a copy of which can be found online [here](#).

The basic steps for installing the software are:

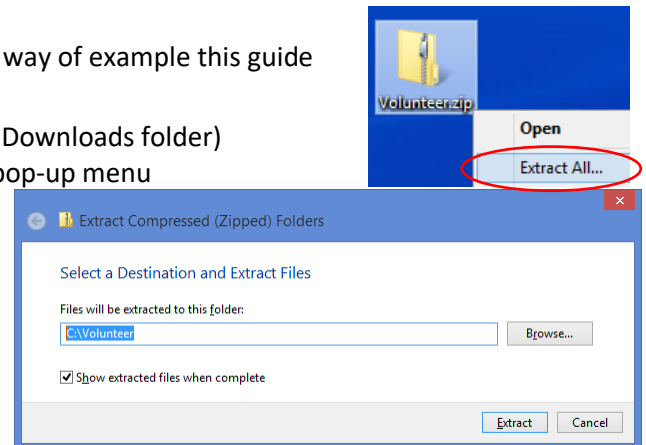
- Download and unzip the files
- Install the free version of the Adobe PDF Reader
- Configure Microsoft Access and Excel to “Trust” the files
- Link the GUI file to the backend databases according to the setup you desire
- Configure/customize the software for your organization
- Tweak some Windows settings
- Implement your Backup Plan for the data you’ll be generating

A high-level overview for each of these items is now given.

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 Volunteer 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:\Volunteer** (*could be anywhere, but this is used for this example*)
- d. Click the **Extract** button



You will have the following files:

- 3 database files (*DATA, CONFIG, GUI*)
- 2 Excel files: *ContactListsPerTask.xlsm* and *NewVolunteerContactReport_withDetails.xlsm*
- A shortcut link and some documentation (*version notes and a PDF of the User Manual*)
- Sub-folder “Resources” (*name badge background, logo, ico file, 2 batch files, 2 audio files, EULA, VolunteerAgreement.PDF*)
- Sub-folder “Reports” (*basically empty*)

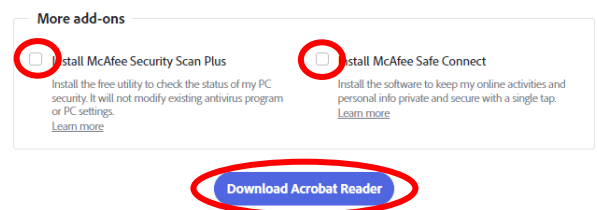
2. Install Adobe Acrobat PDF Reader

In order for the Volunteer Agreement form to be able to show the PDF for volunteers to e-sign, you must have Adobe Acrobat PDF Reader installed as your default PDF viewer. It’s free to download from Adobe’s website.

Search for “download free Acrobat Reader”.

While it may change, as of the time of this writing, it was available here: <https://get.adobe.com/reader/>

If you don’t want the optional offers, uncheck the 2 McAfee boxes prior to downloading. Then, click on Download Acrobat Reader (not the PRO version ... which only comes with a 7-day free trial) and complete the installation of the free PDF reader.

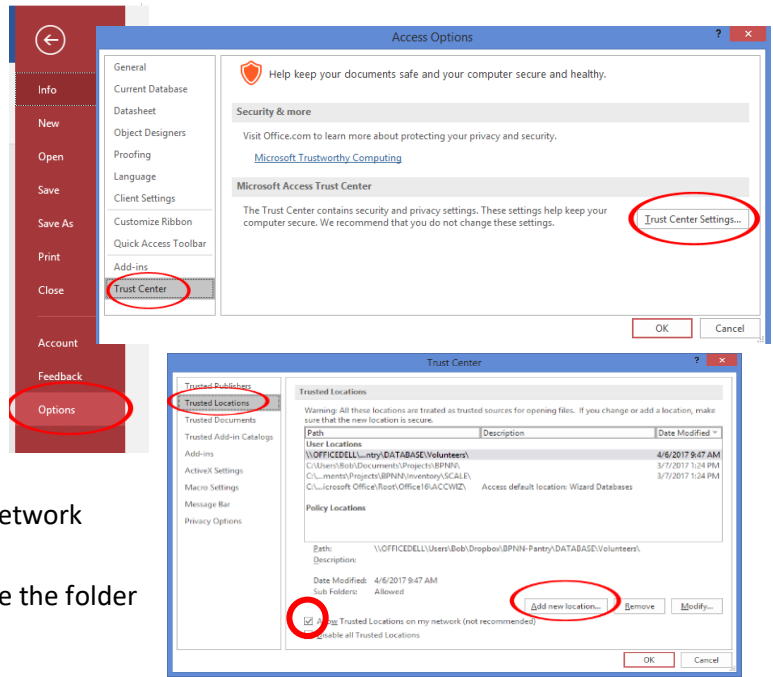


3. Trust Center Settings

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 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 mapped drive can be trusted)
- Click Add new location to select the folder where the folder where the GUI file has been saved



NOTE: if you use a Mapped V: 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_Volunteers_GUI.acdde is the compiled database front-end, and is what you launch to run the software. (GUI stands for Graphical User Interface)

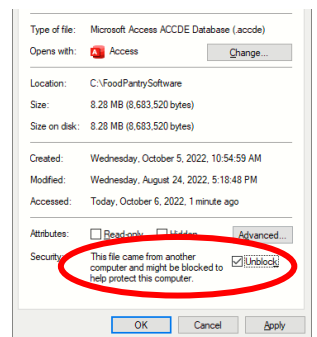
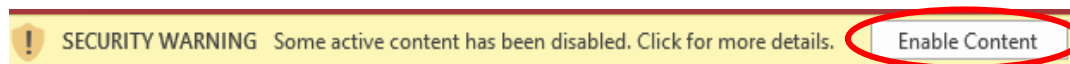
NOTE: if you are using the 32-bit version of Access, you need to instead launch **Look2_Volunteers_GUIx32.acdde**.

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

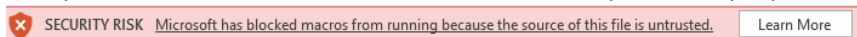


Depending upon your PC's security settings you may also have to right-click on the ACCDE file and check the Unblock box at the bottom of the General tab.

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 you get a startup error message that a path is invalid, see the next section for re-linking the tables.

5. Link Front-End Program (GUI) to Back-End Tables (DATA & CONFIG)

The 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).

There are 3 methods for linking the tables:

1. Automatic Self-Configure/Link ... the GUI re-configures itself upon startup (*one time per upgrade/update*)
2. Mapping the folder where DATA/CONFIG files reside to be the V-drive (*preferred!*)
3. Using Access to re-link the GUI file to a different location for DATA/CONFIG (*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.

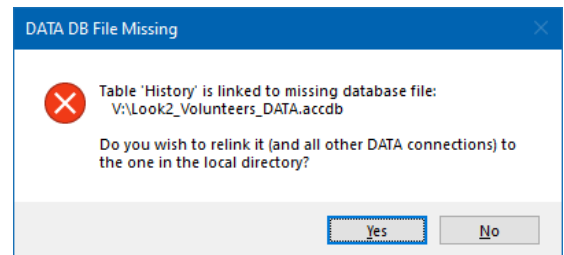
5.1. Automatic Self-Configure/Link

This is the simplest method of getting the software running, and is good for “testing out” the software. This is NOT the preferred method (which instead is covered in Section 5.2).

The Volunteer software automatically checks to see if the linked DATA and CONFIG databases exist in the default linked location (V: drive). If not, it then checks to see if they exist in the “local directory” of the GUI file. If so, it asks permission to then automatically change its own links and self-configure these settings for you.

Simply click YES at each prompt (once for the DATA file and once for the CONFIG file) 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).

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

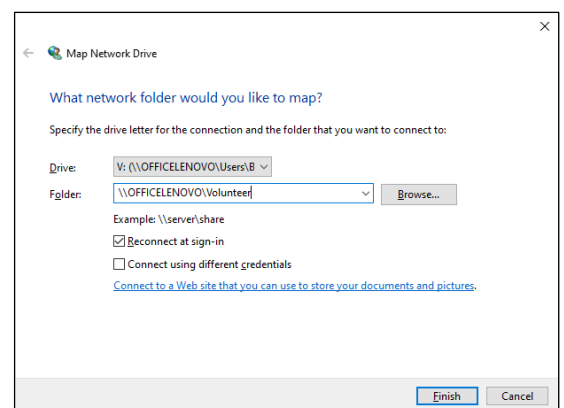
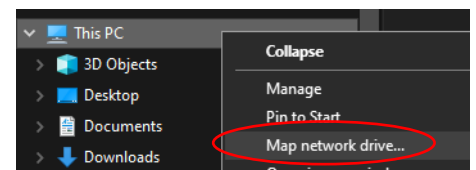


5.2. Mapping to V Drive

The GUI database ACCDE comes pre-configured to link to the DATA and CONFIG files if these all reside in a folder mapped as the root of the “V:” directory. The reason **this is the preferred method** is that with subsequent updates to the software, the 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:

Full details for this method are omitted from this overview document, but to get started follow these steps:

1. Share the folder in which you installed the software (*right-click on the folder and select Properties; Click Sharing Tab and click Advanced Sharing; check Share this Folder; make sure permissions are Full Control*). *If Sharing tab is missing, check Windows Defender settings/warnings.*
2. Right-click on ThisPC in the Windows Explorer and choose “Map network drive...” in the pop-up menu
3. Select V as the Drive letter, and browse to the shared folder
4. After creating the V: drive, be sure to revisit Section 3 and make that drive a Trusted Location.

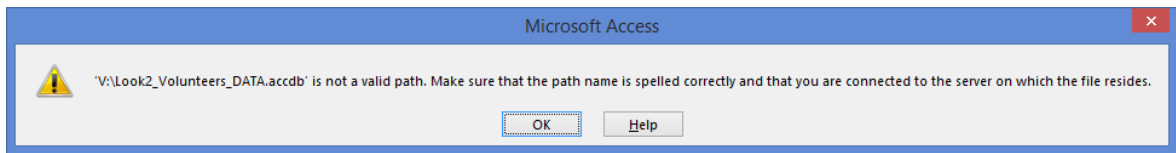


Please consult with an IT person (or web search) if you need help mapping a drive.

5.3. Access Link Table Manager

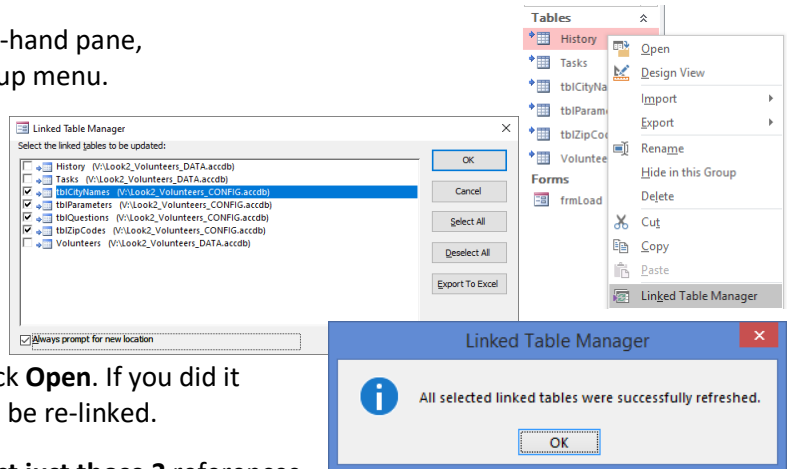
An “advanced” method of getting the software to work is to change the links to the various tables within the GUI database itself. This is NOT the preferred method. Only do this if you have a special situation in which you don’t want to use the above 2 methods.

- Open the GUI database file and do not use the startup auto-config feature. When you subsequently attempt to open a linked table, it should complain that the V path is not valid. Click OK.



(NOTE: actual screen shots look different for Office 2016 vs. Office 365, but the overall method is the same)

- Right-click on any one of the Tables in the left-hand pane, and choose **Linked Table Manager** from pop-up menu.
- **Check the 4** references to tables in the **CONFIG** database, and the “Always prompt” checkbox at the bottom of the window
- Click **OK** and browse to the where the database files are stored
- Select the **Look2_Volunteers_CONFIG.accdb** file and click **Open**. If you did it correctly, all of the CONFIG references should be re-linked.
- **Repeat** this process for the **DATA** tables (select just those 3 references and link them to the **Look2_Volunteers_DATA.accdb** file).
- Close the table manager and exit Access when done.



6. Running the Software

6.1. Supplied Examples/Passwords, Exiting

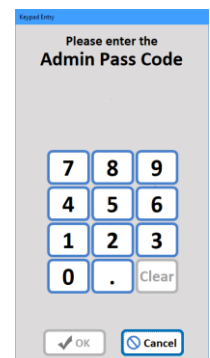
Please refer to the complete Volunteer Software Manual on how to use the system.

You can access a supplied example “Anonymous” account by entering “0000” as the last 4 digits of that profile’s phone number.

You can also click on the Create Account button to start defining your own.

➤ The default password for Admin is “1234”.

Once logged in as Admin, you can also shut down the software via the Exit Software button.

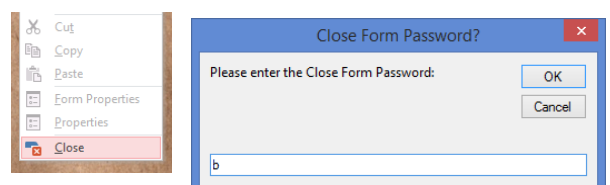


6.2. Gaining access to Access

Should you ever desire to gain access to the tables within the GUI file directly, you will need to 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.



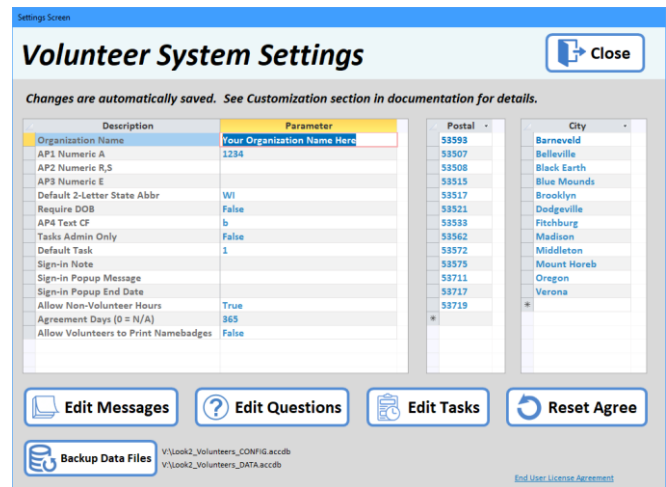
7. Configuring/Customizing the Software

There are many parameters for customizing the software to help meet the varying needs of different organizations. 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 Config in the Admin section.



Please refer to the Volunteer Manual for complete help on configuring the system. A summary checklist for installation purposes is as follows:

- Replace *logo.jpg* in Resources sub-directory (*height: 96 pixels ... width up to 132 pixels*)
- Replace *NameBadgeBackground.jpg* in Resources sub-directory (*3.5x2inches, 1050x600pixels*)
- Replace *VolunteerAgreement.pdf* in Resources sub-directory (*with yours of the same name*)
- Use the System Configuration feature as Admin within software to define:
 - Organization Name in *tblParameters*
 - List of cities (*tblCityNames*)
 - List of zip codes (*tblZipCodes*)
 - Various passwords: Admin functions, Reports, Lookup, getting to Access (*tblParameters*)
 - Other items: Require DOB, Tasks Admin Only, 2-Letter State Abbr, etc.
- Populate the list of tasks via the Edit Tasks feature as Admin within the software (*tblTasks*)
- Define the optional questions, if desired, using the Edit Questions feature
- Determine how you want to back up the data (see full manual for details)



8. Configure Windows

There are numerous settings on the PC which can affect the user experience when using the software. What follows is a brief checklist of some of the items to consider. 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)
- 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 20 minutes if so desired)
- Change login on startup to be automatic (WindowsKey+R, netplwiz)
- Unpin distracting icons from taskbar, also from Start Menu (e.g., games, Netflix, etc.)
- Taskbar Settings: Auto-hide (so software gets use of full screen resolution)
- Create shortcuts to files on desktop (Volunteer software, excel files, reports folder)
- Right-click Display Settings – Notifications and Actions – Turn off Tips/Tricks, Show welcome experience, OneDrive, Suggested
- Screen Saver Settings – 10 minutes – 3D text to "Tap to Volunteer", Wobble

- File Explorer – view file extensions
- Set desktop image to organization’s logo (Personalize, make fit=Center, white background)
- Turn on notifications for Restart (under Windows Update Settings – Restart Options)
- Install Chrome, create shortcuts to Look2Consulting.com, Google, and the organization’s home page
- Uninstall OEM bloatware (e.g., Dell Update Support Assist, Dell Update, or other such stuff)
- Set Access trusted directory, and also set Excel trust centers
- In Adobe Acrobat Reader 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”
- Go to Microsoft Store app and turn off Auto Updates

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*). 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 Volunteers Manual.