Installing and Setting Up the Snap-on EPC

Snap-on®

BUSINESS SOLUTIONS

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1. Introduction

Welcome to the DVD version of *The Snap-on EPC.* In just a short while, you will join part specialists around the world who use the DVD version of the most advanced, user friendly EPC Snap-on has ever produced. Now, you can find the right part the first time, faster than ever before!

Installation Overview

The installation process involves a few stages:

1. Verify that your system meets the minimum requirements (see *Minimum Requirements*).

2. Install the software (see *Installing the Snap-on EPC*).

3. License the product (see *Licensing the Snap-on EPC*).

4. If you are using a server/client system, you will also need to set up the EPC on each client connected to a server.

Migrating from PMPro or an Earlier EPC

If you are migrating from PMPro or an earlier Snap-on EPC, we have included instructions for quickly importing your saved user notes directly into the new EPC (see *Importing User*).

Updating the EPC

Snap-on's Q.link automatic update tool delivers frequent data updates directly to your computer. This means that you do not need to run monthly data updates! Occasionally however, you will need to run a baseline DVD update, which is necessary to keep your EPC running at its optimal performance. It is very important that you run each baseline update as soon as you receive it.

For more information on automatic updating and baseline updates, please see *Updating the EPC*.

Integrating with your DMS

The Snap-on EPC provides a number of advanced options for integrating with your Dealer Management System (DMS). The integration option you use is determined by the DMS you use and your system configuration. For more information on Snap-on Integration, see the EPC help file, which you can access by clicking **Help** -> **User Guide,** then selecting **Configuring Integration**.

Getting Help

Getting help with EPC installation or configuration is readily available. From the EPC's Help menu, select User Guide to open the online help. The SBS customer support team or your EPC provider stands ready to offer the world class support you expect from Snap-on.

You can find information about all your support options or training options at:

http://www.snaponbusinesssolutions.com/

2. Minimum Requirements

Your system must meet the following *minimum* requirements before you can load the software. Running more than one application at a time may affect speed and general system performance. Additional hardware may be required to support other applications.

The required free space listed for the hard drive is for each Snap-on EPC. Additional free space will be required to run additional EPCs or other software.

Client-Server Network

Server	
Windows version	Microsoft® Windows® Server 2003 Standard Edition or Windows Server 2003 Enterprise Edition
	Microsoft Windows Server 2008 Standard Edition, or Windows Server 2008 Enterprise Edition
Processor	Intel® Pentium® 4, 2 GHz or higher
Memory	2 GB RAM or higher
Hard drive free space	40 GB
DVD drive	16x DVD drive
Video	1024 x 768 resolution, 16-bit color
Client	
Windows version	Windows XP Pro (SP2, 32 bit) or Vista Business, Enterprise or Ultimate editions (32 bit), Windows 7 Professional or Windows 7 Ultimate (32 or 64 bit OS), or Enterprise
Processor	Intel Pentium 4, 2 GHz or higher
Memory	1 GB RAM or higher
Hard drive free space	2 GB
Video	1024 x 768 resolution, 16-bit color
Browser	Internet Explorer 7

Standalone PCs

Windows XP	
Version	Microsoft Windows XP Professional with Service Pack 2 or higher. XP Media Center is not required.
Processor	Intel Pentium 4, 2 GHz or higher
Memory	2 GB RAM or higher
Hard drive free space	40 GB
DVD drive	16x DVD drive
Video	1024 x 768 resolution, 16-bit color
Browser	Internet Explorer 7
Windows Vista® or Windows 7	
Version	Windows Vista Business or Windows Vista Ultimate, Windows 7 Professional or Windows 7 Ultimate (32 or 64 bit OS), or Enterprise
Processor	Intel Pentium 4, 2 GHz or higher
Memory	2 GB RAM or higher
Hard drive free space	40 GB
DVD drive	16x DVD drive
Video	1024 x 768 resolution, 16-bit color
Browser	Internet Explorer 7

3. Installing the Snap-on EPC

This section contains everything you need to know to install the Snap-on EPC on a server/client or standalone system. Your Snap-on EPC DVD set may include more than one DVD. The number of DVDs depends on the data sets to which you have subscribed.

Installing the Software

Note: Complete this installation procedure for each of the data sets to which you subscribe. This will ensure that all the parts data you need is added to your EPC.

1. Insert the Snap-on EPC DVD (DVD #1, if you received more than one DVD) into a DVD drive on the server or standalone system. **Hint:** If you have two DVDs, and your computer has two DVD drives, you can save time by inserting both DVDs at the same time.

2. Wait a few seconds until the Choose Setup Language window appears:

    Note: If the above window does NOT appear, click **Start** -> **Run** to open the Run dialog box and type **D:\Setup.exe,** and then click **OK**. If necessary, substitute your DVD drive letter for the letter D.

3. Select a language from the drop-down menu and click the **OK** button. The Setup Progress Status window opens in the background and monitors the installation progress. Wait a few seconds until the Welcome window also opens:
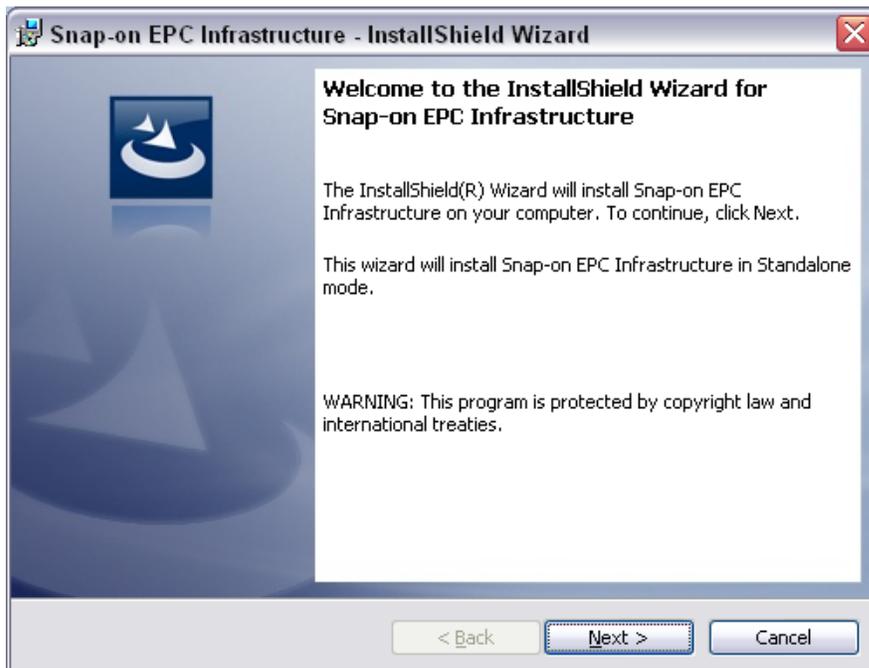

4. Click the **Next** button to open a License Agreement window.

5. Read the agreement, mark the **Accept** button, and then click the **Next** button to open the Destination Folder window (in some instances, the Destination window may not open. If this happens, go to the next step):
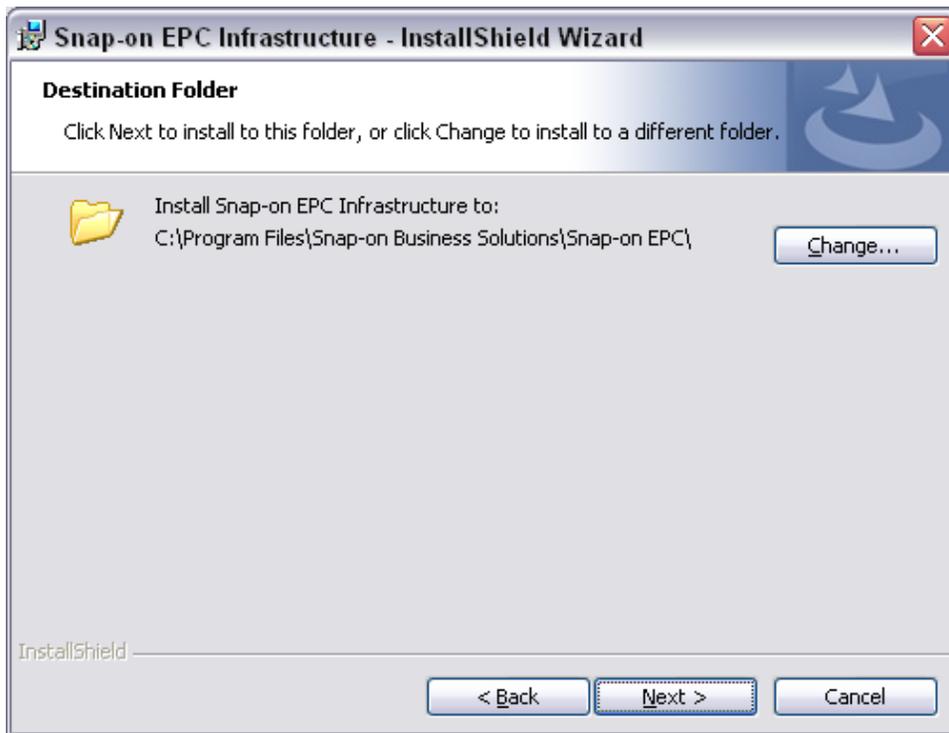
    Note: In the Destination Folder Window, you can change the location on your system to which the EPC will be installed. We recommend you accept the default location.

6. Click the **Next** button to open the Ready to Install the Program window:
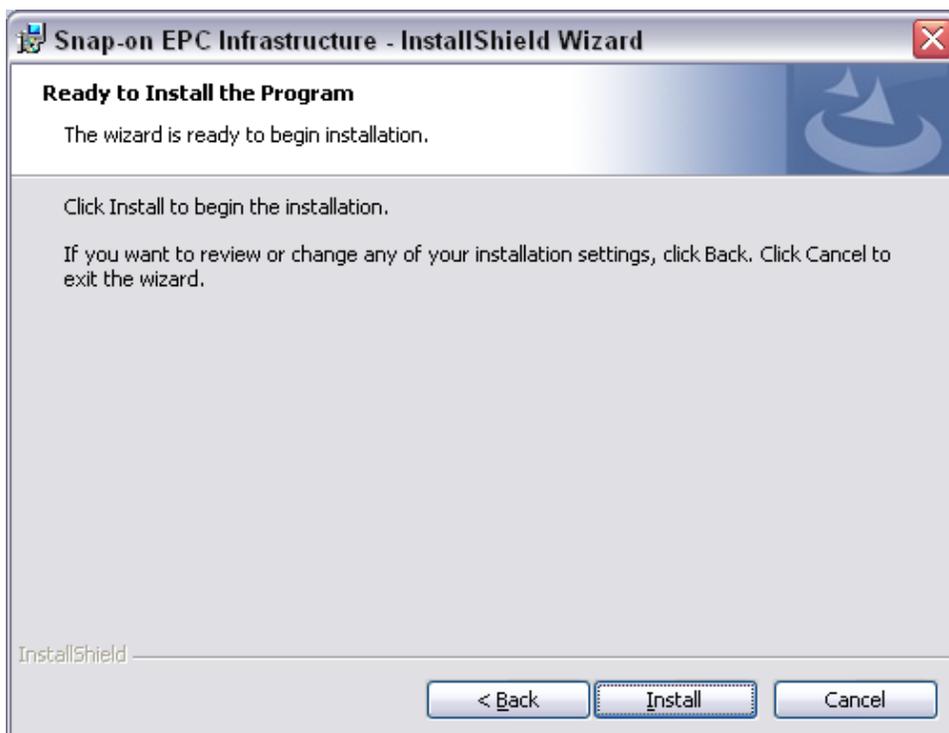
7. Click the **Install** button to begin the installation.

Note: During the installation process, you may be asked to install or update Adobe® Air® or the Launch EPC software. Follow the onscreen instructions. The EPC installation process will continue once these products are up to date.

The "Up to date" notification appears in the Setup Progress Status window as each component is installed.

8. If your data set includes more than one DVD (and you are using one DVD drive) you will be prompted insert another DVD during the installation. When prompted, insert the specified DVD and click **OK**.

When the "Up to date" notification appears next to all the items in the Setup Progress Status window, including Final Configuration, the installation is complete.
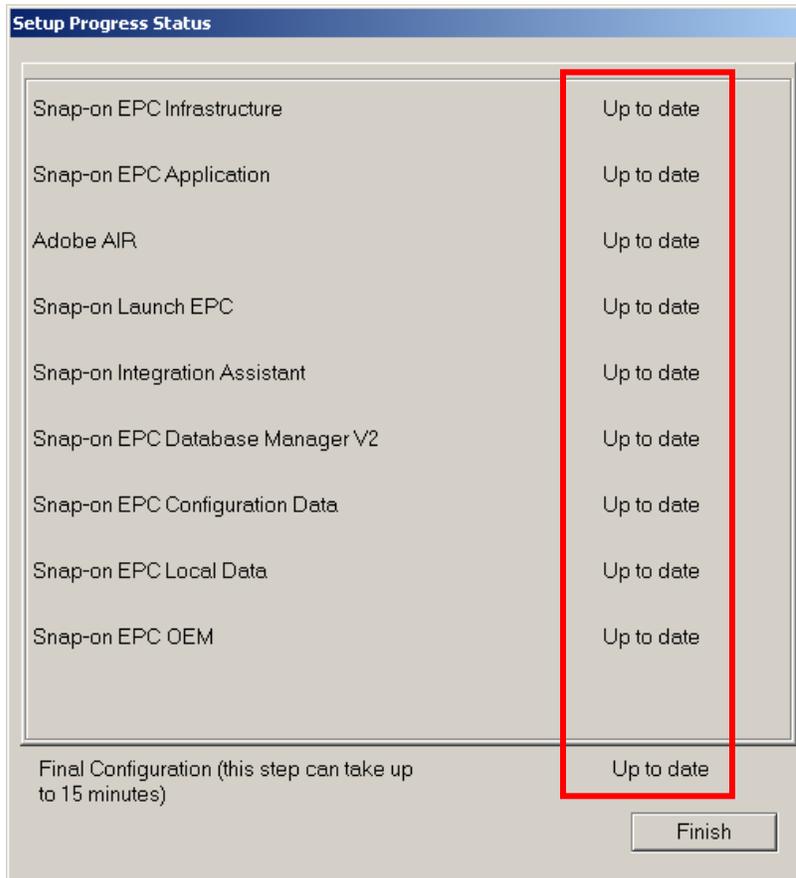

9. Click the **Finish** button to complete the installation.

10. Repeat the installation process for each data set to which you have subscribed.

4. Licensing the Snap-on EPC

Before you can use the Snap-on EPC, you must activate your license. To activate your license, your computer must be connected to the Internet. If it is not connected to the Internet, please contact SBS Technical Support for assistance.

1. From the Windows Desktop, click **Start** -> **All Programs** -> **Snap-on EPC** -> **License Manager** to open the Server Settings window.

2. Enter your dealer code into the **Dealer Code (BAC)** field.

    Note: If you have more than one dealer code, enter each into the field, separated by commas.

3. Click the **OK** button to open the Local License Manager window:
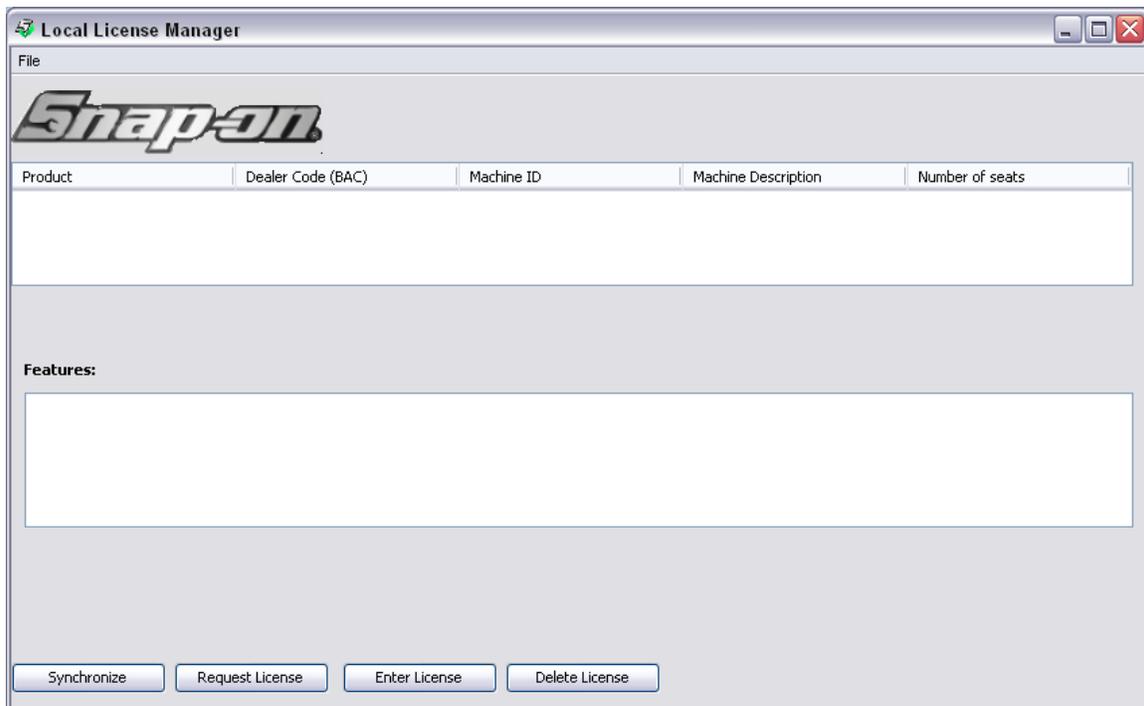

4. Click the ⊠ icon to close the Local License Manager window. Your license is now active.

5. Setting Up PC Clients on a Windows Network

This section describes how to set up PC Client to run the Snap-on EPC over a Windows network. *You will need to know your server's name to complete this process.*

At each PC Client:

1. Log on to the PC client with **Administrative** privileges.

2. From the Windows Desktop, double-click the **My Network Places** icon, or **My Computer** and then **My Network Places**.

3. Navigate to the server where the EPC is loaded.

4. Double-click the server's name.

5. Double-click the **Snap-on EPC Client** folder.
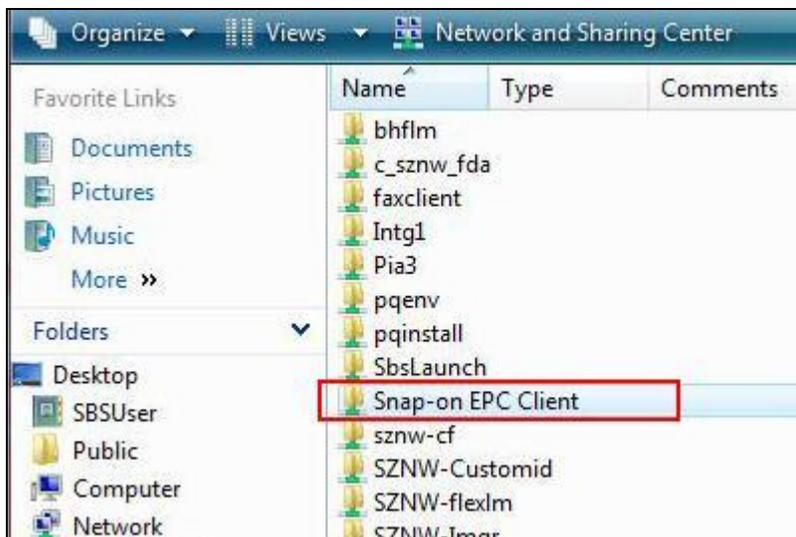
6. With the Snap-on EPC Client folder open, click the **setup.exe** file to start the installation.

7. Select a language, and then click **Next** to open the Welcome window.

8. Click **Next** to open the Choose Folder window.

9. Click **Next** to begin the client setup.

    During the client setup process, you may be asked to install or update the Adobe Air or Launch EPC components. Should this occur, follow the onscreen instructions to complete each installation.

10. When the setup is complete, the Completion window appears. Click **Finish** to close the Completion window.

6. Opening the Snap-on EPC

Open the EPC by clicking the Snap-on EPC icon on your Desktop, or by clicking **Start** -> **All Programs** -> **Snap-on EPC** -> **Snap-on EPC**.

Depending on your data set, you may be asked to select a business region and enter some information about your dealership the first time you open the EPC.

If the Business Region Selection window appears, do the following:

1. Select your region from the menu, then click **Continue** to open the Dealer Information window:

2. Enter as much information about your dealership as you can. Entering email configuration information will allow you to email EPC or parts information feedback directly to the OEM and to Snap-on. Please consult your system administrator for information about your email settings.

    Note: You can complete or change your dealer information later by selecting **Settings** -> **Application Settings** -> **Dealer Settings** from within the EPC.
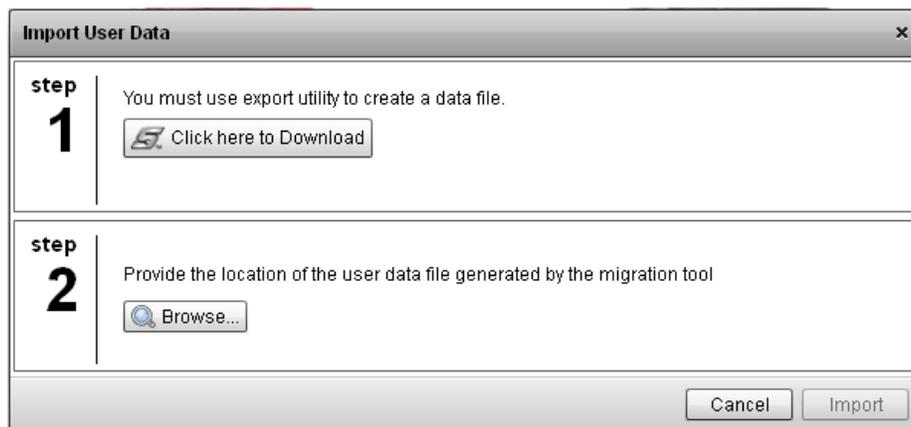
3. Click the **Finish** button to open the EPC.

7. Importing User Data

If you previously used PMPro or an earlier Snap-on EPC, you can move your user notes and integration to the Snap-on EPC. Importing user data is a two-step process.

Step 1: Exporting Data to a User Data File

1. Click **Manage** -> **Import User Data** to open the Import User Data window:

2. Click the **Click Here to Download** button to open the File Download window:

3. Click **Run**. When the download is complete, the Export window opens.

4. Select a language.

5. Select the data set(s) for which you want to import the user data.

   Note: Data sets listed under "Please Select Data" will vary according to the data sets stored on your system.

6. Click **Browse** and select the location to which you want to export the user data file.

7. Click the **Export** button. The message "Export Complete" will be displayed.

   Note: By default, the notes will be exported into a "SBSImport.zip" file.

8. Click **OK** the close the message.

9. Click the **Done** button to close the Export window.

Step 2: Importing the User Data

1. From the Import User Data window, click the **Browse** button to open the Select File to Upload window.

2. Locate the folder to which you exported the user data file and select the **SBSImport.zip** file.
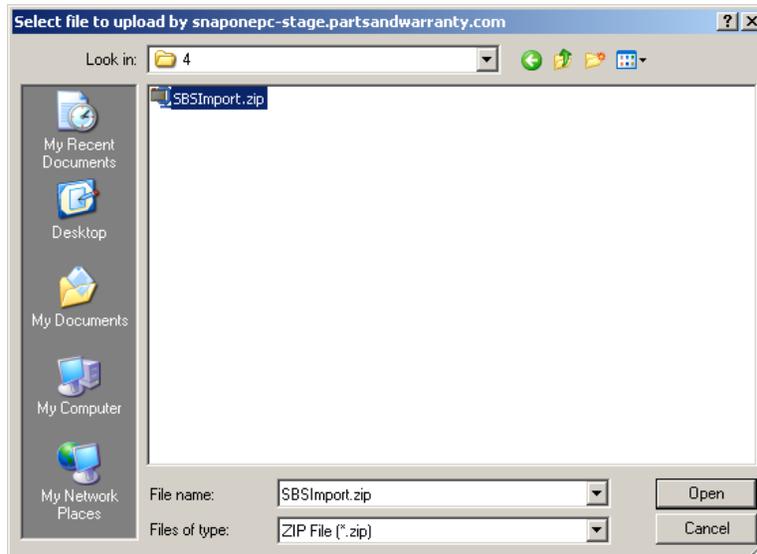
3. Click **Open**. The Import User Data window now displays the name of the user data zip file:
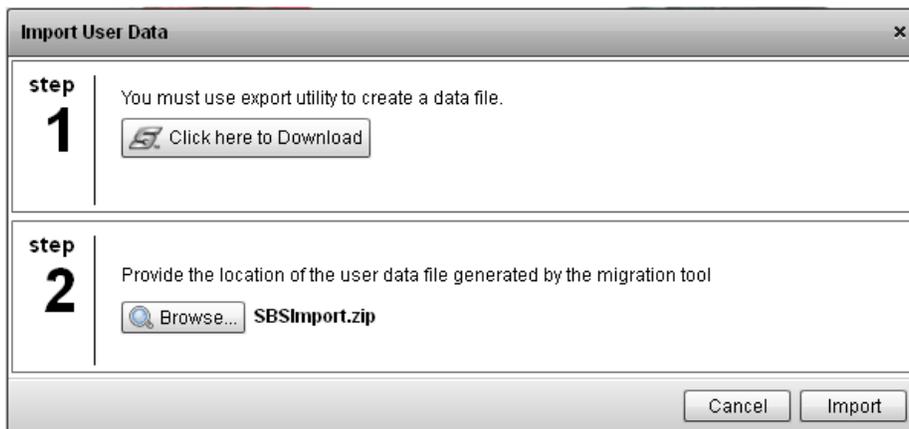
4. Click the **Import** button. A window shows the results of the import.

5. Click the **Close** button. The user notes and integration settings have now been exported from your old application and imported into the new EPC.

8. Updating the EPC

Note: The instructions in this section pertain to the DVD version of the EPC only. If you use the Internet version, updates occur automatically, with no user action required.

If you use the DVD version of the Snap-on EPC, entering your dealer code enables the automatic update feature. If your EPC is functioning properly, you already entered your dealer code when you activated your license (see the *Licensing the EPC* section of this document).

Once your computer has successfully completed its first automatic data update (DVD version only), you will no longer receive monthly update DVDs for that computer. If you normally receive additional sets of disks for other computers, those disks will continue to arrive until those computers have linked with Q.link.

Q.link Automatic Updating

Q.link updates are performed automatically over the Internet, according to the schedule you set. By default, your computer will look for and download available data updates every day at 9:00 p.m.

Important: Your computer must be turned on and connected to the Internet at the scheduled download time.

Changing Your Update Schedule (DVD Version Only)

To change your update schedule:

1. With the EPC open, select **Manage** -> **Manage Updates** to open the Product Updates window.

2. Use the drop down menus to make your changes.

3. Click the **Close** button to implement your changes.

Understanding the Product Updates Window
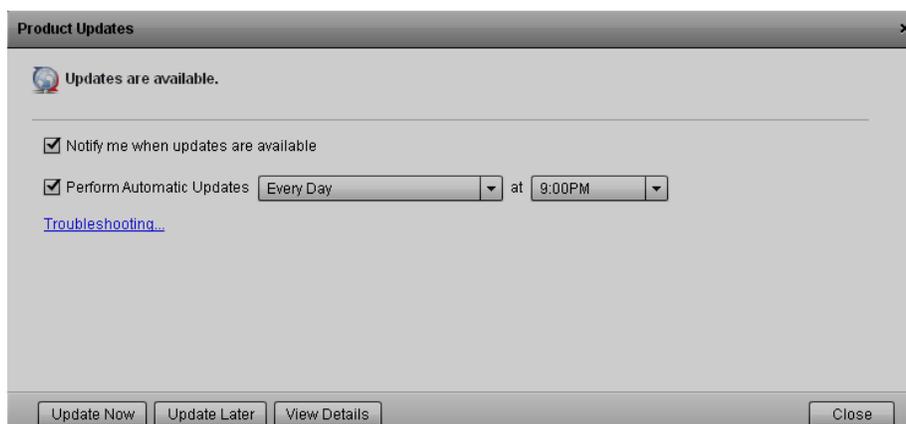
Feature	Use
Notify me when updates are available	If this box is marked, you will receive a notice when an uninstalled update is available. The notice appears when you open the EPC.
Drop-down Menus	Schedule the frequency and time at which automatic updates will occur.
Troubleshooting link	Displays information that may be useful in diagnosing Q.link problems.
Update Now, Update Later, and View Details buttons	Buttons appear if an update is available and allow you to run manual updates.

What are Baseline Updates?

From time to time, extensive changes to the EPC are required. When this occurs, you will receive a set of *baseline update* DVDs for the EPC. **It is very important that you run an update from the baseline DVDs as soon as you receive them.** Without the correct baseline update installed on your system, you will no longer be able to receive Q.link updates.

Running a Baseline Update

The following procedure will update the EPC on your Windows standalone system or on your Windows server. The procedure has two steps: *Backing Up Your User Files* and *Updating the Application.*

Backing Up Your User Files

Before beginning the EPC baseline update, you must first backup your user files. SBS recommends that you back-up your files to an external device, such as a USB flash drive.

To backup user files:

1. Close any open programs, then reboot your system.

2. Click **Start** -> **All Programs** -> **Snap-on EPC** -> **Backup** to open the Backup & Restore window:
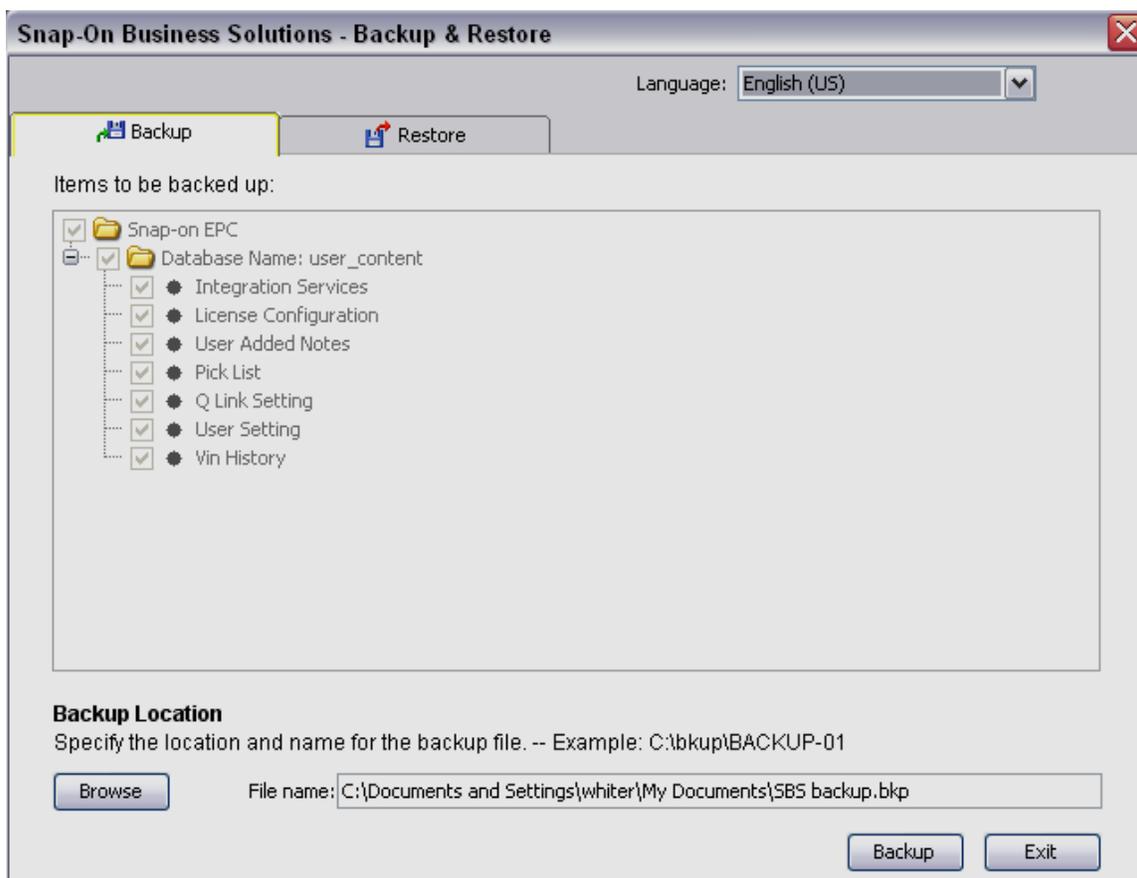
3. Make sure that the correct address for your backup location is displayed in the **File name** field.

4. Click **Backup** to back up your files. The Backup Completed window appears.

5. Click **OK** to close the Backup Completed window.

6. Click **Exit** to close the Backup & Restore window.

Updating the EPC

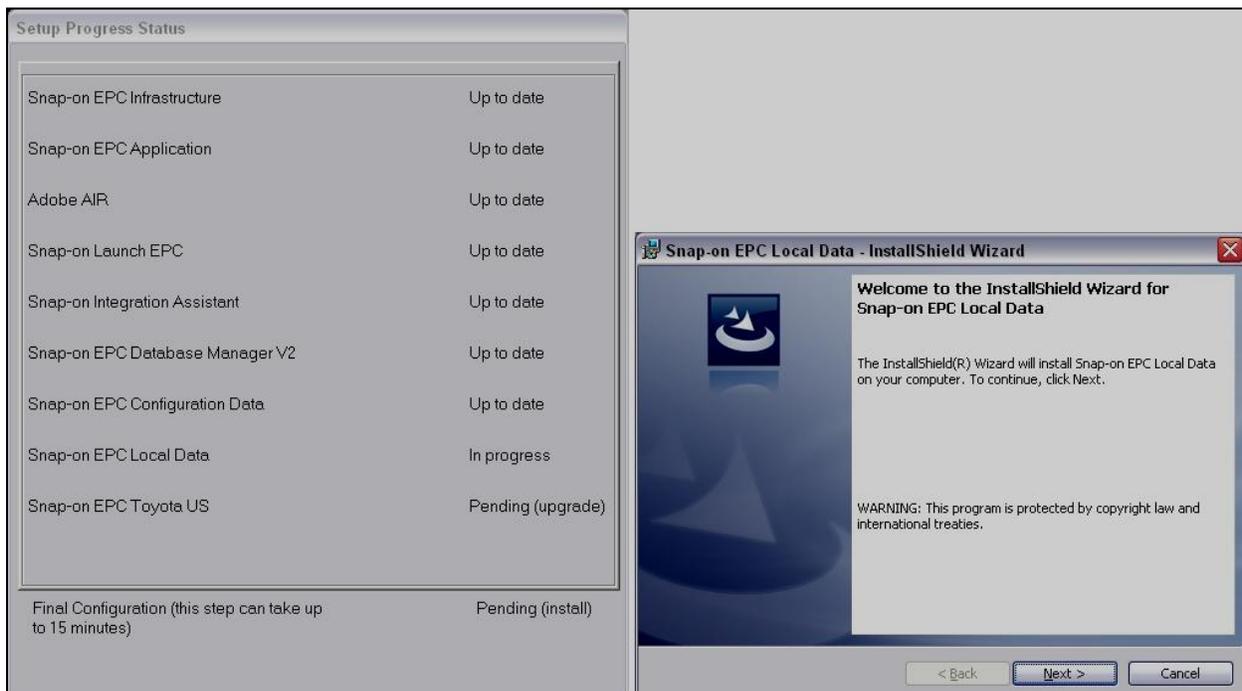**Note**: You must be logged in as **Administrator**.

Note: The number of DVDs included in your baseline update may vary depending on the data set to which you subscribe.

To update the EPC:

1. Insert the EPC DVD #1 into a DVD drive, then wait until the Select Language dialog box appears:

2. Select a language, then click **OK.** Two windows will open:

3. The Setup Progress Status window will remain open and will display the update's progress throughout the process. From the Welcome window, click the **Next** button to open the Ready to Install the Program window:
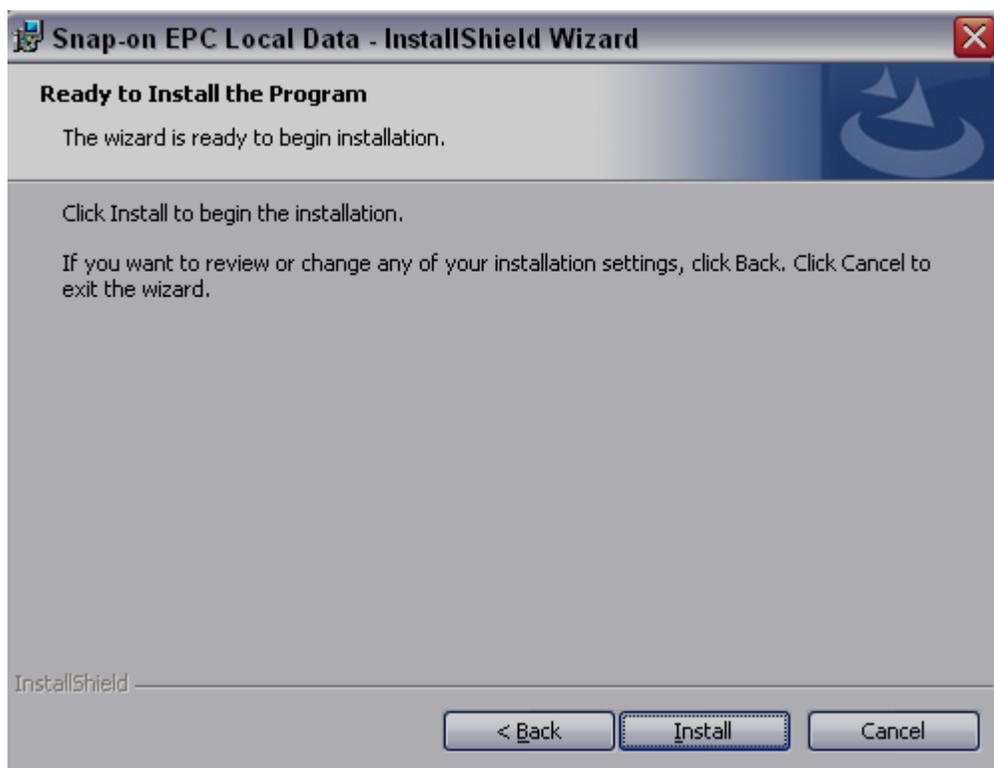
4. Click the **Install** button to begin the update.

5. During the process, you may be prompted to insert a different DVD. Follow the onscreen prompts.

6. The installation is complete when all the items in the Setup Progress Status window are marked as "Up to date," Click the **Finish** button to close the window. The update is complete.