CCC PATHWAYS®

Setup and Configuration Guide for Pathways Mobile Estimating

CCC INFORMATION SERVICES INC.

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Introduction

This document reflects the necessary guidelines for configuring your systems to run the Pathways Mobile Estimating feature of the Pathways Estimating Solution using Windows™ workstations. This guide assumes that you are installing Pathways for the first time. If you are upgrading an existing network installation, your particular installation may differ slightly from the examples provided within this guide. For an existing standalone installation, you will essentially be converting your installation to a peer-to-peer network environment to allow the remote users to access your host system. CCC is aware that there are many possible client/server combinations available when setting up a remote network, but this document will cover only the most common ones. These configurations are the only ones certified to work correctly with Pathways Mobile Estimating. For further information, please consult your network technician.

Pathways Mobile Estimating relies on either your existing direct network connection or Microsoft's Dial-Up Networking connection to provide the connectivity from the remote system to the server. The setup and configuration of these connections is essentially the same, with the addition of the dial-up information for remote users.

Warning! Setting up a network requires a complete understanding of networking theory, as well as a thorough knowledge of DOS and Windows operating systems. We strongly urge you to enlist the services of a qualified vendor or consultant to install and set up your network.

CCC will answer general questions about running Pathways on a network. If you require extensive consultation on your network configuration or the Windows operating systems, you will need to enlist the services of a qualified network technician. CCC is not responsible for the setup or configuration of your internal network systems.

The following chapters will discuss the additional hardware and software requirements as well as the steps necessary to configure your systems to utilize the features of Pathways Mobile Estimating. Pathways Mobile Estimating consists of at least two systems, with one configured as the host, and the other configured as the remote. The host must create a share point that the remote systems will access in order to send and receive files between the two systems. The actual use of Mobile Estimating will be described in more detail in a later chapter titled "Using Pathways Mobile Estimating."

There are four choices for your dial-up server: Windows XP, Windows Vista, Windows 2000, or Windows Server 2003. While there may be other options available for a dial-up server, CCC feels that these four are the most common and widely supported remote access solutions, and are the only ones authorized for use with Pathways Mobile Estimating. Each server has its own pros and cons, with the ultimate decision probably coming down to which operating system is already installed at your location. The following chapters will discuss how to set up and configure each of these servers for use with Pathways Mobile Estimating.

If your remote systems will be accessing the server locally, the fastest, most reliable connection is available through a Local Area Network connection. For information on how to setup and configure your system for this type of installation, please refer to the *Network Configuration Guide for Pathways.*

CCC publishes a series of documents written specifically to aid your network technician in the installation of Pathways Estimating Solution on a network. The *Network Configuration Guide for Pathways* is available online in the Product Support area of our Web site at http://www.cccis.com/.

Once Pathways is set up and running, refer back to the "Configuring Pathways Mobile Estimating" chapter in this guide for instructions on how to configure the program to utilize the Mobile Estimating feature.

Chapter 1 – Additional Hardware and Software requirements

Apart from meeting the requirements as published in the latest edition of the *CCC Technical Requirements and Specifications* (available from http://www.cccis.com/), a system running Pathways Mobile Estimating must meet the following additional requirements:

Pathways Estimating Solution

- Version 4.4.00 or later (Version 4.5 or later is required for Windows® Vista® compatibility
- Mobile Estimating Feature enabled

Host (Server)

Dial-Up or Direct Serial Cable

Option 1:

- Windows 2000 Professional, XP, or Vista
- Must meet published file server requirements
- Dial-Up Server Installed
- 56K V.90 Windows compatible modem ***or***
- Available serial port with null modem cable

Option 2:

- Windows 2000 Server or 2003 Server
- Must meet published file server requirements
- Remote Access Service Installed ***or***
- Incoming Connection enabled (2000 Professional, XP, and Vista)
- 56K V.90 Windows compatible modem ***or***
- Available serial port with null modem cable

Direct LAN Connection

- Must meet published file server requirements

Remote (Clients)

Dial-Up and Direct Serial Cable

- Must meet published single user requirements
- Dial-Up Networking installed (RAS for NT clients)
- 56K V.90 Windows compatible modem ***or***
- Available serial port with null modem cable

Direct LAN Connection

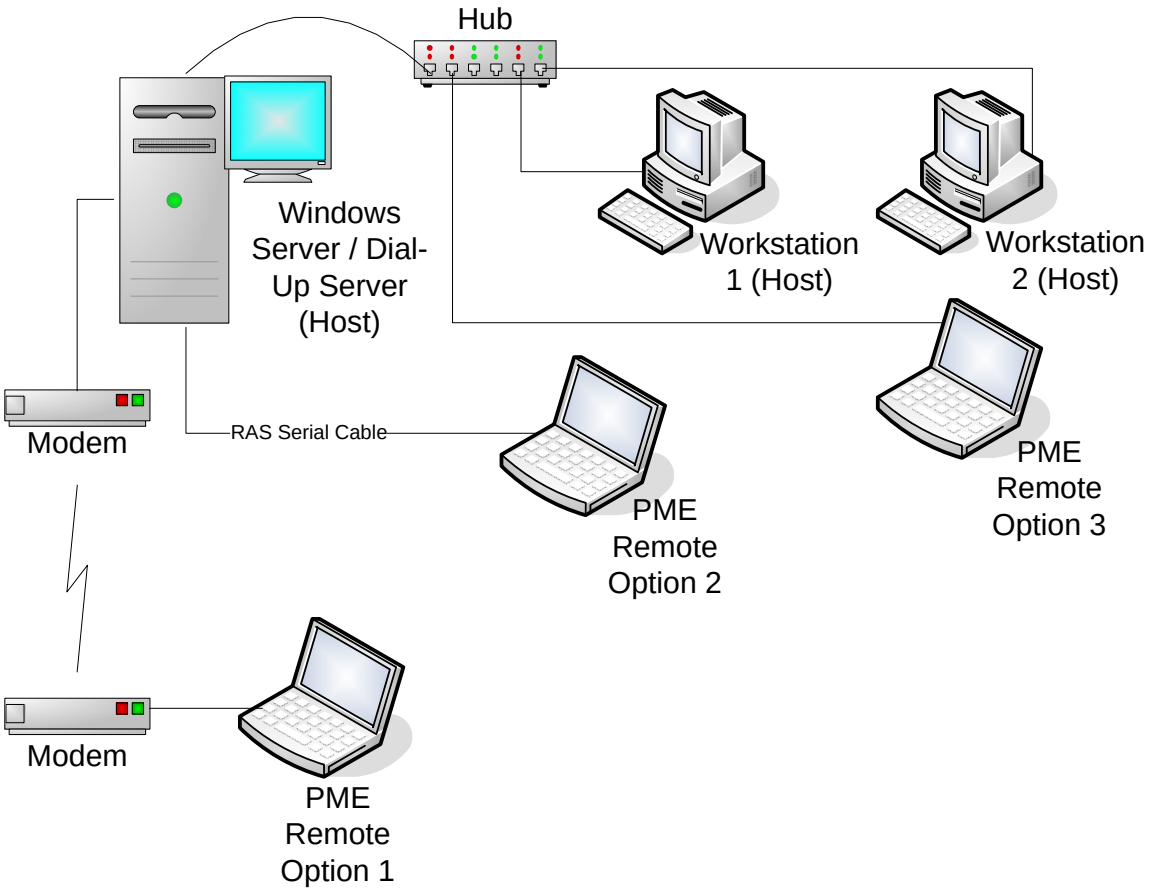
- Must meet published workstation requirements

Chapter 2 – Windows 2000 Remote Access Server Configuration

Overview

Prior to setting up your dial-up server, you should have configured your server according to the guidelines set forth in the either the *Windows Domain Configuration Guide* or the *Windows Peer-to-Peer Network Configuration Guide*, whichever is applicable. These guides are available at CCC's website at www.cccis.com.

Windows 2000 offers two options for handling remote dial-up and direct cable connections, depending upon which version of Windows 2000 you are using for your "server". Windows 2000 Professional introduces incoming dial-up and cable connections through its Network and Dial-up Connections control panel. Windows 2000 Server, on the other hand, offers a more traditional approach, relying on an updated version of NT's Remote Access Server, or RAS for short. Please refer to the appropriate sections for setting up your particular server.



Windows 2000 Remote Access Server (Windows 2000 Server)

Install your RAS Server

Important! Your modem must be connected and configured properly prior to beginning the setup of your Remote Access Server.

1. Log in at the server as an Administrator.
2. From your Windows 2000 desktop click Start > Programs > Administrative Tools, and then click Routing and Remote Access.
3. In the Routing and Remote Access console, select the entry for your server, then right-click it and select Configure and Enable Routing and Remote Access.

4. From the Routing and Remote Access Server Setup Wizard, click Next.
5. Click Set up a basic remote access server, and click Next.
6. Select Remote Access Server from the Common Configurations list, and click Next.
7. Verify that TCP/IP is listed in the Protocols box, and select "Yes, all of the required protocols are on this list." Click Next.

Note If TCP/IP is not listed, then you must add the protocol by selecting "No, I need to add protocols."

8. Under IP Address Assignment, select Automatically if you are using a DHCP server. If not, select "From a specified range of addresses." Click Next.
9. If you selected Automatically in step 8, skip to step 10. Under Address Ranges, click New. Enter a starting address of 192.168.55.1 and an ending address of 192.168.55.10. This will provide a non-routable range of 10 addresses. Click OK to accept the new range, then click Next.
10. Under Managing Multiple Remote Access Servers, select "No, I don't want to set up this server to use RADIUS now." Click Next.

Note This assumes that you are not using multiple Remote Access Servers and are not utilizing a RADIUS server. If you are unsure, consult with your network technician.

11. Click Finish to close the Wizard.

Grant dial-in permissions (Windows 2000 Server)

1. Log in at the server as an Administrator.
2. From your Windows 2000 desktop click Start > Programs > Administrative Tools, and then click Active Directory Users and Computers.
3. Click on the Users folder under your domain entry to display all of the users and groups in your domain.
4. Open the properties for a user that you wish to grant dial-in access to by double-clicking the user's name.
5. Click the Dial-in tab at the top of the window, then click the radio button next to Allow Access. Click OK to close the user properties.
6. Repeat steps 4 and 5 for each user that you wish to grant dial-in access to.
7. Close the Active Directory Users and Computers window and the Administrative Tools window.

Set up an incoming connection server (Windows 2000 Professional)

1. Log in as an Administrator.
2. From your Windows 2000 desktop click Start > Settings > Network and Dial-Up Connections and select Make New Connection.
3. When the Welcome to the Network Connection Wizard windows appears, click Next to continue.
4. For the connection type, select Accept incoming connections and click Next.
5. Under Connection devices select the device to be used for incoming connections.
6. **Note** This should be a modem for dial-up connections, or a RAS Serial Cable or parallel port for physical connections. For instructions on installing a RAS Serial Cable, refer to the "Reference Installation Instructions" at the end of this chapter. When asked whether to allow virtual private connections, select Do not allow virtual private connections, and click Next.
7. Under Users allowed to connect, select all of the users that will be accessing this server via this connection and click Next.
8. Under Networking Components, select Internet Protocol (TCP/IP) and click Properties.
9. Under Network access, deselect Allow callers to access my local area network. (This change is for added security. It will limit the dial-up user's access to the Dial-up Server only.)
10. Under Assign TCP/IP address assignment, select Assign TCP/IP addresses automatically using DHCP. Select OK to close the Incoming TCP/IP Properties window, then click Next.

11. Enter a name for the new connection, then click Finish.

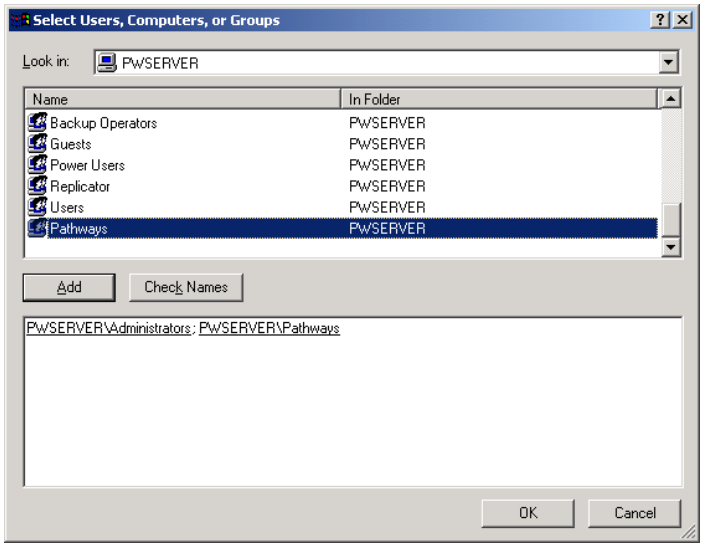
Create a share point on the server (2000 Server and Professional)

If you have not already done so, you must create a share point on the server that your remote users can access Pathways data from. If Pathways is already setup and running on your network, you can skip to the *Windows 2000 Remote Client Configuration* chapter of this guide.

1. Log in as an Administrator.
2. From your Windows 2000 Server desktop, click on Start > Programs > Accessories, and then click on Windows Explorer.
3. In Explorer, create a new directory in the root of the selected drive (e.g., CCCAPPS). This is the directory where Pathways will be installed and will be shared with the Pathways users.

Note If Pathways is already installed on a standalone system that will be acting as the dial-up server, locate and share the C:\PATHWAYS\DATA instead of CCCAPPS.

4. Right-click the CCCAPPS directory, and select Sharing. Click the Share this folder option, and leave the Share name set to CCCAPPS.
5. On the Sharing tab, click on Permissions,
6. When the Share Permissions windows displays, click Add.



7. In the Select Users, Computers, or Groups window, double-click the user accounts that will need access to this folder, and then click Ok.
8. In the Security tab, select each user and assign them Full Control under Allow.
9. Confirm that both groups have been added with Full Control access. If not, select the appropriate group and correct the type of access.

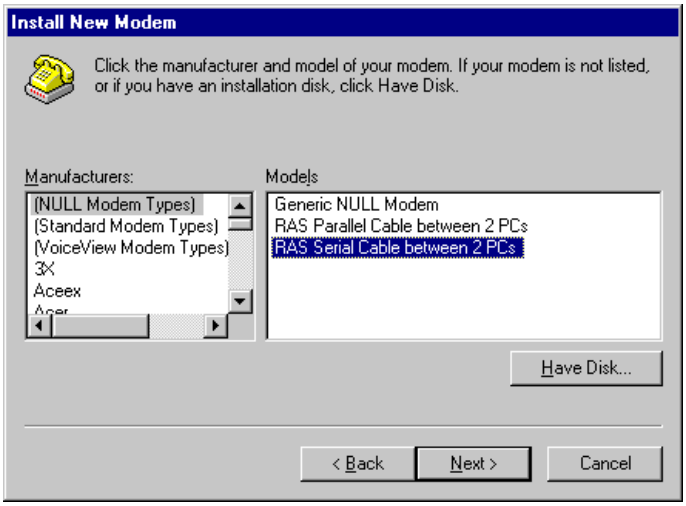
10. Now select the group Everyone and click Remove. Finally, click OK. This will establish CCCAPPS as the shared network drive/directory and grant the Pathways group the proper access.

Reference Installation Instructions

To Install a RAS Serial Cable for Windows 2000

1. From your Windows 2000 desktop click Start > Settings > Control Panel to open the Control Panel.
2. Double-click the Phone and Modem Options icon.
3. Click the Modems tab at the top of the window, then click the Add button.
4. Click the checkbox next to Don't detect my modem; I will select from a list. Click Next.
5. Under Manufacturers select NULL Modem Types. (If this is not listed, click the Have Disk button, and under Copy manufacturer's files from: enter **d:\util\modems\rascable**. The Pathways Estimating Solution CD must be in the drive.)

Note If your CD-ROM drive is assigned to a letter other than d, substitute that letter for d.



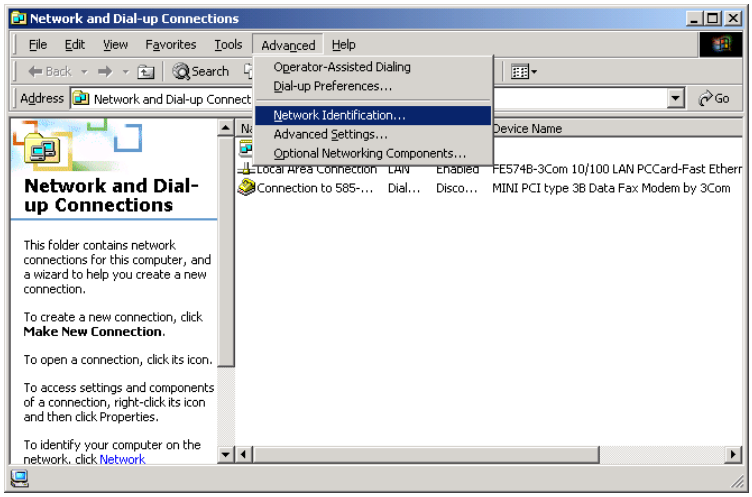
6. Under Models select RAS Serial Cable between 2 PCs. Click Next.
7. Select the port to use with this modem (e.g., COM2). Click Next.
8. When the Digital Signature Not Found dialog appears, click Yes to continue the installation.
9. Click Finish to complete the installation, then click OK to close the Phone and Modem Options window.

Note To install a USB Bridge Cable instead of a RAS Serial Cable, follow the manufacturer's installation instructions.

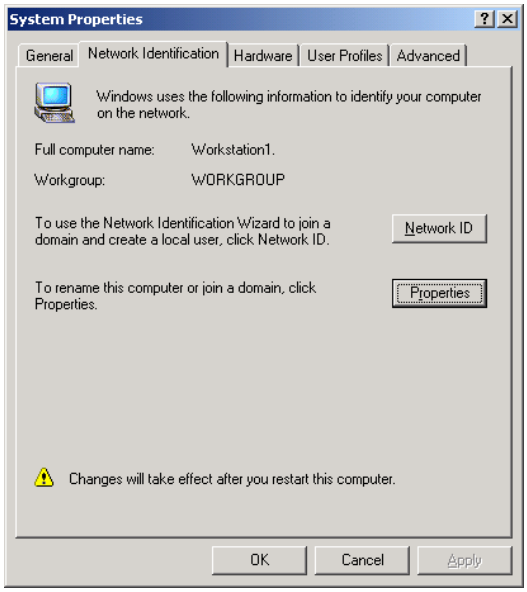
Chapter 3 - Windows 2000 Remote Client Configuration

Configure network identification settings

1. Logon as an Administrator.
2. From the Windows 2000 Professional desktop click Start > Settings > Network and Dial-up Connections.



3. Click the Advanced menu item at the top of the window, and select Network Identification.



4. When the System Properties windows displays, click the Network Identification tab. Verify that the workstation has a unique computer name (e.g., Workstation1). No other computer on your network should have the same name.

5. The workgroup name can be anything you choose, but must be the same on every computer on your network. To change either the computer or workgroup name, click the Properties button and make any necessary changes.
6. When finished, click OK.
7. If prompted to restart your computer, click Yes.

Create a new connectoid to connect to your Pathways dial-up server

1. From your Windows 2000 Professional desktop click Start > Settings > Network and Dial-Up Connections, and select Make New Connection.
2. When the Welcome to the Network Connection Wizard windows appears, click Next to continue.
3. Select Dial-up to private network, and then click Next. The Select a Device window appears.
4. If you have multiple devices installed, click the modem that you want to use for the connection, and then click Next.
5. Enter the area code and phone number for the dial-up server. (You may need to click the checkbox in front of Use Dialing Rules to enable the area code field.) Click Next.
6. Under Connection Availability, select For All Users. Click Next.
7. Enter a name to use for this connection (e.g., **Pathways Server**), and click Finish.

Using your Dial-Up Connection

1. From the Windows 2000 Professional desktop click on Start > Settings > Network and Dial-Up Connections.
2. Double-click your new connection.
3. Enter your user name, password, and domain (if applicable), and click the checkbox Save Password.

Note Your user name and password must match what has been set up on the server.

4. Click Dial.
5. Once the connection has been established, proceed to the next section.

Map a network drive

1. From your Windows 2000 Professional desktop click Start > Search > For Files or Folders.
2. Maximize the Search Results window, and select Computers under Search For Other Items.
3. Enter the name of your dial-up server, and click Search Now. (You may have to click Find Now several times before the server name can be resolved.)
4. Once the server is found, double-click the server name in the results window.

5. The shared CCCAPPS (or Data) folder should be visible in the window that appears. Right-click the folder and select Map Network Drive.
6. Select the drive letter that you wish to map to the server (e.g., H:).
7. Select Reconnect at Logon, and then click Finish.
8. Close the Search and Explorer windows.

Note Make a note of the exact path to the PPEWKF directory (e.g., **H:\pathways\data\ppewkf** for a typical network share, or **H:\ppewkf** for a typical standalone share.) You will need this information during the configuration of Pathways.

Important! Since this mapped drive letter has been established over a dial-up connection, your system will NOT be able to restore the drive mapping at the time of boot up. Therefore, you will receive a “Restoring Network Connections” error during boot up. You must click OK in response to this error. Do NOT click the “Do not try to restore the connection in the future” option, or you will lose your drive mapping.

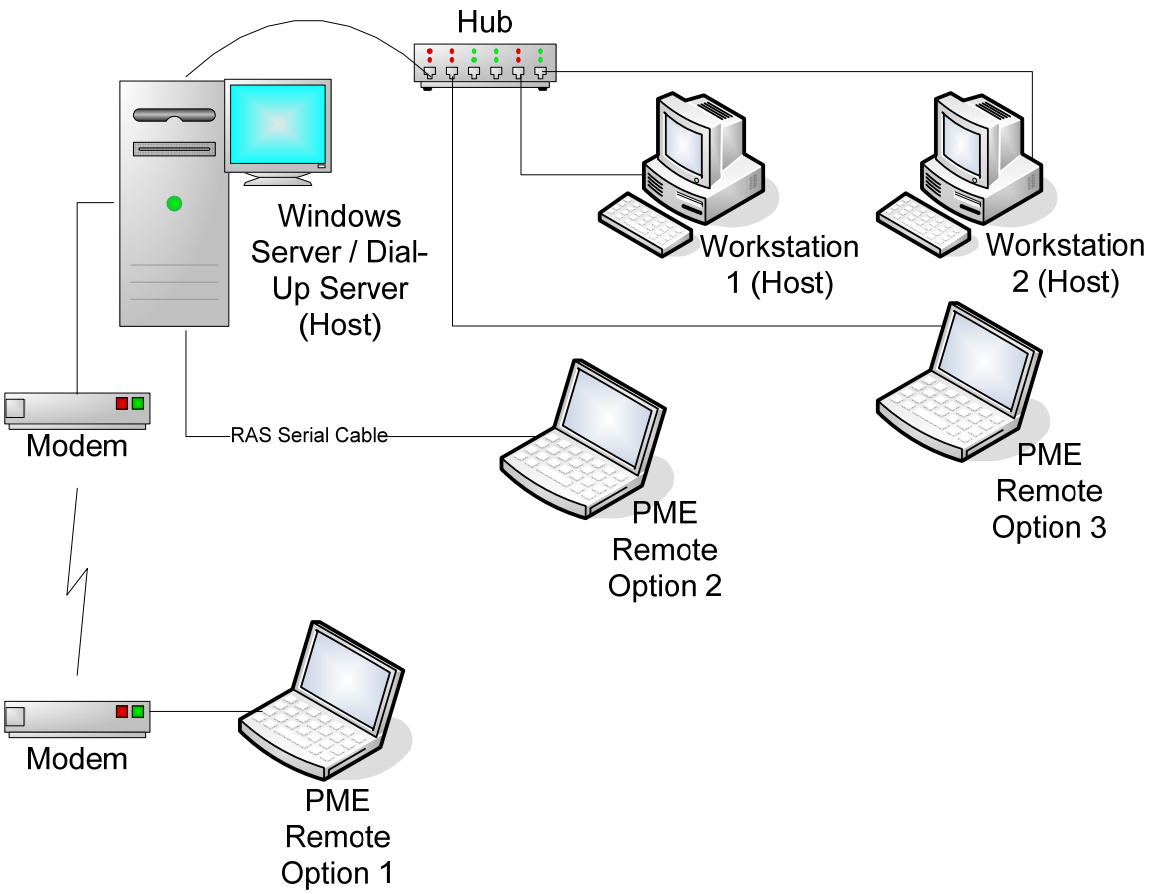
You have just completed the system configuration portion of your Pathways Mobile Estimating Dial-Up Server and remote clients. Proceed to the Configuring Pathways Mobile Estimating chapter of this guide for information on configuring Pathways Estimating Solution for your system.

Chapter 4 – Windows Server 2003 Remote Access Server Configuration

Overview

Prior to setting up your dial-up server, you should have configured your server according to the guidelines set forth in the either the *Window Domain Configuration Guide* or the *Windows Peer-to-Peer Network Configuration Guide*, whichever is applicable. These guides are available at CCC's website at www.cccis.com.

Windows offers two options for handling remote dial-up and direct cable connections, depending upon which version of Windows you are using for your "server". Windows XP Professional allows incoming dial-up and cable connections through its Network and Dial-up Connections control panel. Windows Server 2003 offers a more traditional approach for a Remote Access Server, or RAS for short. Please refer to the appropriate sections for setting up your particular server.



Windows Server 2003 Remote Access Server

Install your RAS Server

Important! Your modem must be connected and configured properly prior to beginning the setup of your Remote Access Server.

1. Log in as an Administrator.
2. From your Windows Server 2003 desktop click Start > All Programs > Administrative Tools, and then click on Routing and Remote Access.
3. In the Routing and Remote Access console, select the entry for your server, then right-click it and select Configure and Enable Routing and Remote Access.
4. In the Routing and Remote Access Server Setup Wizard, click Next.
5. Select Remote Access (dial-up or VPN), and click Next.
6. Click Dial-up for dial-up access, and then click Next.
7. Select the Network connection, and then click Next.
8. When the IP Address Assignment window displays, select Automatically if you are using a DHCP server. If not, select "From a specified range of addresses." Click Next.
9. If you selected Automatically in step 8, skip to step 10. Under Address Ranges, click New. Enter a starting address of 192.168.55.1 and an ending address of 192.168.55.10. This will provide a non-routable range of 10 addresses. Click OK to accept the new range, then click Next.
10. Accept the default setting of "No, use Routing and Remote Access to authenticate connection requests, and then click Next.
11. Click Finish to close the Wizard.

Grant dial-in permissions (Windows Server 2003)

1. From your Windows Server 2003 desktop click Start > All Programs > Administrative Tools.
2. Click Active Directory Users and Computers.
3. Right-click the user account that you want to grant remote access rights to.
4. Click on Properties, and then click on the Dial-in tab.
5. Select the radio button next to Allow Access. Click OK to close the user properties.
6. Repeat steps 3 through 5 for each user that you wish to grant dial-in access to.
7. Close the Active Directory Users and Computers window and the Administrative Tools window.

Set up an incoming connection server (Windows XP)

1. Log in as an Administrator.
2. From your Windows XP desktop click Start > Control Panel > Network Connections and select Create a new connection.

3. When the Welcome to the Network Connection Wizard windows appears, click Next to continue.
4. In the Network Connection Type, select Set up an advanced connection and click Next.
5. In the Advanced Connection Options, select Accept incoming connections and click Next.
6. In Devices for Incoming Connections, select the device to be used for incoming connections.

Note This should be a modem for dial-up connections, or a RAS Serial Cable or parallel port for physical connections. For instructions on installing a RAS Serial Cable, refer to the "Reference Installation Instructions" at the end of this chapter.

7. When asked whether to allow virtual private connections, select Do not allow virtual private connections, and click Next.
8. Under Users allowed to connect, select all of the users that will be accessing this server via this connection and click Next.
9. Under Networking software, select Internet Protocol (TCP/IP) and click Properties.
10. Under Network access, deselect Allow callers to access my local area network. (This change is for added security. It will limit the dial-up user's access to the Dial-up Server only.)
11. Under TCP/IP address assignment, select Assign TCP/IP addresses automatically using DHCP.
12. Deselect Allow calling computer to specify its own IP address. Select OK to close the Incoming TCP/IP Properties window, then click Next.
13. When the Completing the New Connection Wizard window displays, click Finish.

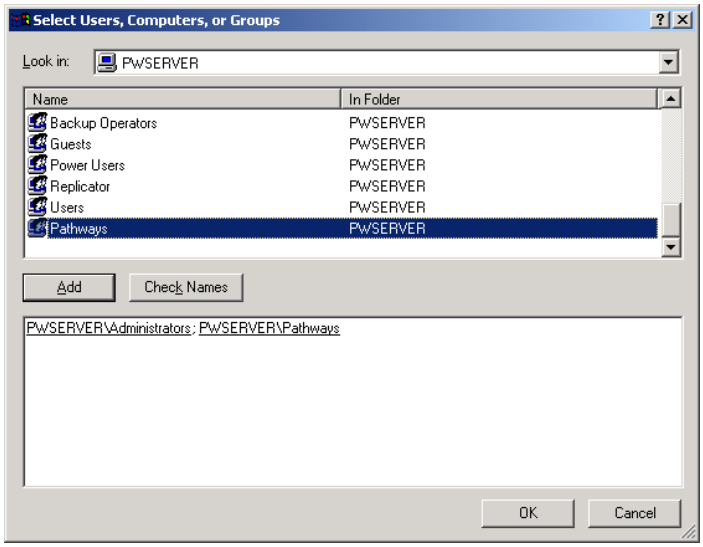
Create a share point on the server (2003 Server and XP)

If you have not already done so, you must create a share point on the server that your remote users can access Pathways data from. If Pathways is already setup and running on your network, you can skip to the *Windows XP Remote Client Configuration* chapter of this guide.

1. From your Windows XP desktop, or your Windows Server 2003 desktop, right-click the Start button, then select Explore.
2. In Explorer, create a new directory in the root of the selected drive (e.g., CCCAPPS). This is the directory where Pathways will be installed and will be shared with the Pathways users.

Note If Pathways is already installed on a standalone system that will be acting as the dial-up server, locate and share the C:\PATHWAYS\DATA instead of CCCAPPS.

3. Right-click the CCCAPPS directory, and select Sharing. Click the Share this folder option, and leave the Share name set to CCCAPPS.
4. Click on the Permissions button, then click Add. Locate and add the following groups: Administrators and Pathways. Make certain that both groups have been added, and click OK.

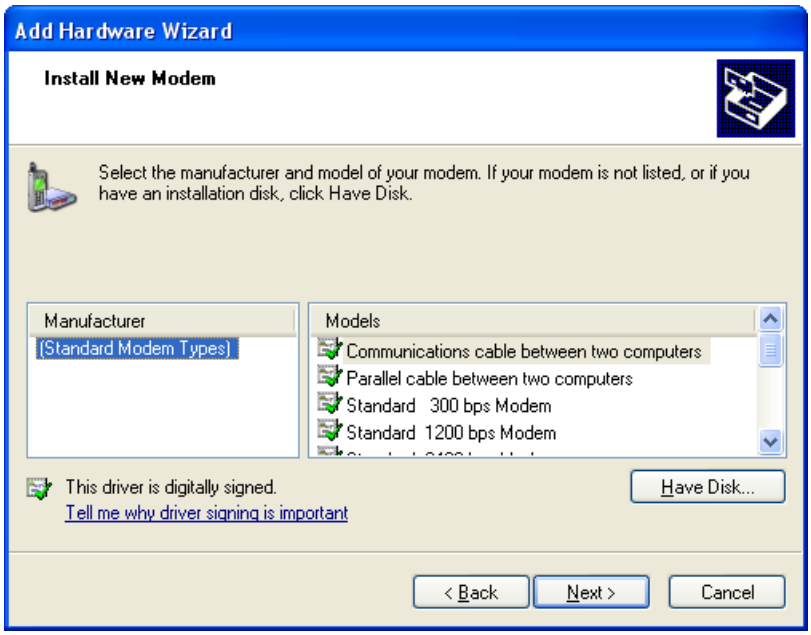


5. Now select Administrators, and assign them Full Control under Allow. Do the same for the Pathways group.
6. Confirm that both groups have been added with Full Control access. If not, select the appropriate group and correct the type of access.
7. Now select the group Everyone and click Remove. Finally, click OK. This will establish CCCAPPS as the shared network drive/directory and grant the Pathways group the proper access.

Reference Installation Instructions

To Install a Communications Cable for Windows XP

1. From your Windows XP desktop click Start > Control Panel to open the Control Panel.
2. Double-click the Phone and Modem Options icon.
3. Click the Modems tab at the top of the window, then click the Add button.
4. When the Add Hardware Wizard displays, select the checkbox next to Don’t detect my modem; I will select from a list. Click Next.



5. When the Install New Modem window displays, Under Manufacturer, select Standard Modem Types. (If this is not listed, click the Have Disk button and under Copy manufacturer's files from: enter **d:\util\modems\rascable**. The Pathways Estimating Solution CD must be in the drive.)

Note If your CD-ROM drive is assigned to a letter other than d, substitute that letter for d.

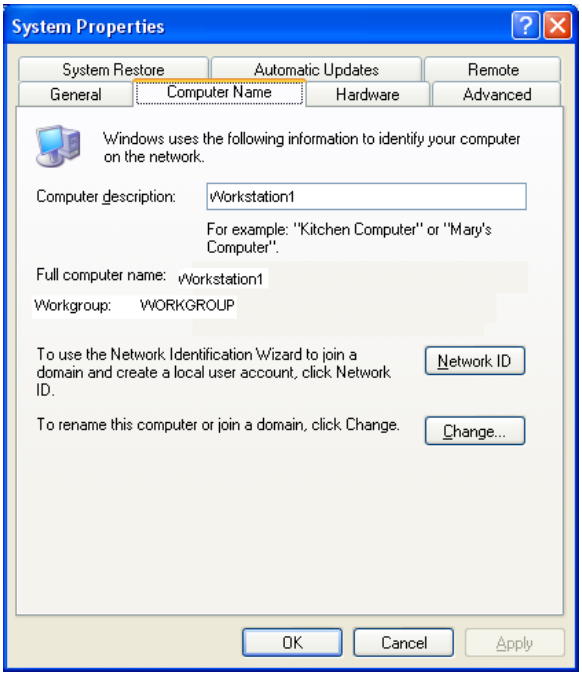
6. Under Models, select Communications cable between two computers, and click Next.
7. Select the port to use with this modem (e.g., COM1). Click Next.
8. Click Finish to complete the installation, then click OK to close the Phone and Modem Options window.

Note To install a USB Bridge Cable instead of a RAS Serial Cable, follow the manufacturer's installation instructions.

Chapter 5 - Windows XP Remote Client Configuration

Configure network identification settings

1. From your Windows XP desktop click Start and then right-click on My Computer.
2. Select Properties.



3. When the System Properties window is displayed, click the Computer Name tab.
4. On the Computer Name tab, verify that the workstation has a unique computer name (e.g., Workstation1). No other computer on your network should have the same name.
5. The workgroup name can be anything you choose, but must be the same on every computer on your network.
6. To change either the computer or workgroup name, click the Change button and make any necessary changes.
7. When finished, click OK.
8. If prompted to restart your computer, click Yes.

Create a new connectoid to connect to your Pathways dial-up server

1. From your Windows XP desktop click Start > Control Panel > Network Connections, and select Create a new connection.
2. When the New Connection Wizard window displays, click Next to continue.
3. Select Connect to the network at my workplace, then click Next.

4. Select Dial-up connection, then click Next. The Select a Device window appears.
5. Click the modem that you want to use, and then click Next.
6. Enter a name to use for this connection (e.g., **Pathways Server**), and click Next.
7. Under Phone number, enter the phone number to dial, then click Next.
8. Under Create this connection for, select Anyone's use, then click Next.
9. When the Completing the New Connection Wizard window displays, click Finish.

Using your Dial-Up Connection

1. From your Windows XP desktop click Start > Connect To, and select your new connection.
2. When the Dial-Up window displays, enter your user name and password.

Note Your user name and password must match what has been set up on the server.

10. Select the option Save this user name and password.
11. Select the option Anyone who uses this computer.
12. Click Dial.
13. Once the connection has been established, proceed to the next section.

Map a network drive

1. From your Windows XP desktop click Start > My Computer, and then right-click and click Explore. To connect a drive from Windows Explorer, right-click Start, and then click Explore.
2. On the Tools menu, click Map Network Drive.
3. In the Drive box, click a drive letter.
4. In the Folder box, click Browse to find the computer.
5. Once the computer is found, double-click the computer name.
6. The shared CCCAPPS (or Data) folder should be visible. Click the folder and click OK.
7. Select Reconnect at Logon, and then click Finish.

Note Make a note of the exact path to the PPEWKF directory (e.g., **H:\pathways\data\ppewkf** for a typical network share, or **H:\ppewkf** for a typical standalone share.) You will need this information during the configuration of Pathways.

Important! Since this mapped drive letter has been established over a dial-up connection, your system will NOT be able to restore the drive mapping at the time of boot up. Therefore, you will receive a "Restoring Network Connections" error during boot up. You must click OK in response to this error. Do NOT click the "Do not try to restore the connection in the future" option, or you will lose your drive mapping.

You have just completed the system configuration portion of your Pathways Mobile Estimating Dial-Up Server and remote clients. Proceed to the Configuring Pathways Mobile Estimating chapter of this guide for information on configuring Pathways Estimating Solution for your system.

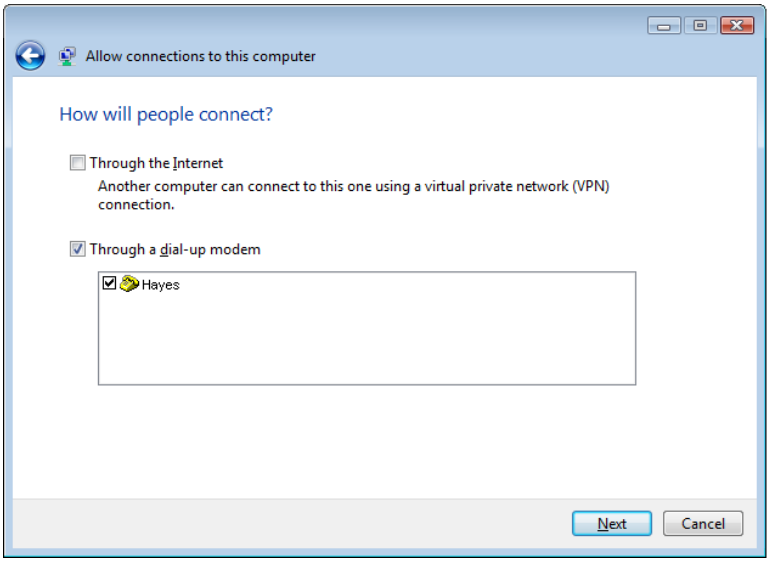
Chapter 6 - Windows Vista Dial-up Server Configuration

Set up an incoming connection server (Windows Vista)

1. Log in as an Administrator.
2. From your Windows Vista desktop click Start > Control Panel > Network and Internet > Network and Sharing Center, and click on Manage network connections.
3. Click on File, and then click New Incoming Connection.

Note If you don't see the File menu, press the ALT key.

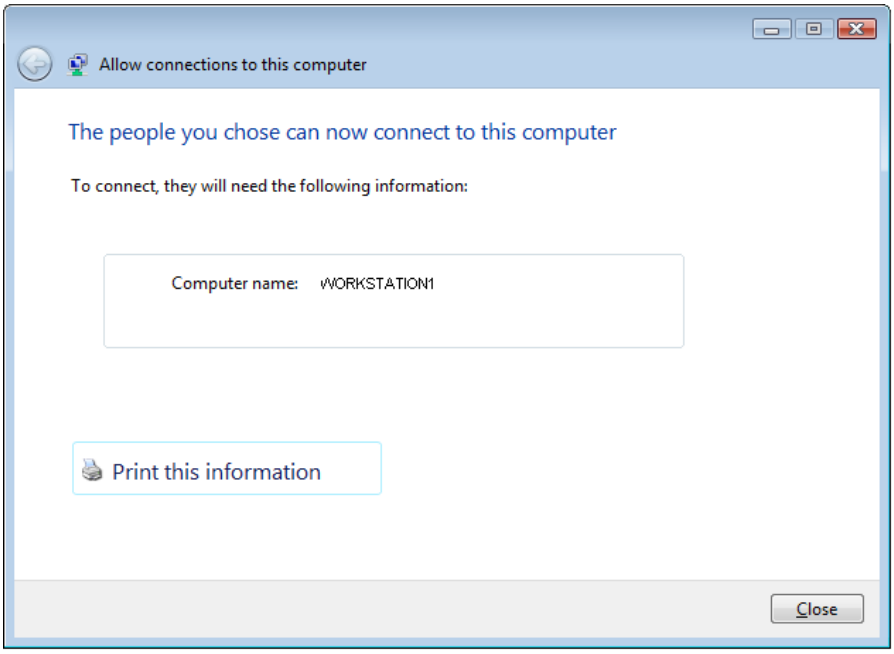
4. If the User Account Control window displays, click Continue.
5. Under User Accounts on this computer, select each user who will be using this connection, and click Next.



6. When the How will people connect? window is displayed, check Through a dial-up modem, and then check the modem.

Note This should be a modem for dial-up connections, or a RAS Serial Cable or parallel port for physical connections. For instructions on installing a RAS Serial Cable, refer to the "Reference Installation Instructions" at the end of this chapter.

7. Click Next.
8. If it is not already highlighted, select Internet Protocol Version4, and click Properties.
9. Uncheck Allow callers to access my local area network, and click OK. Then click Allow Access.



10. When The people you chose can now connect to this computer is displayed, write down the computer name, or click Print this information, then click Close.

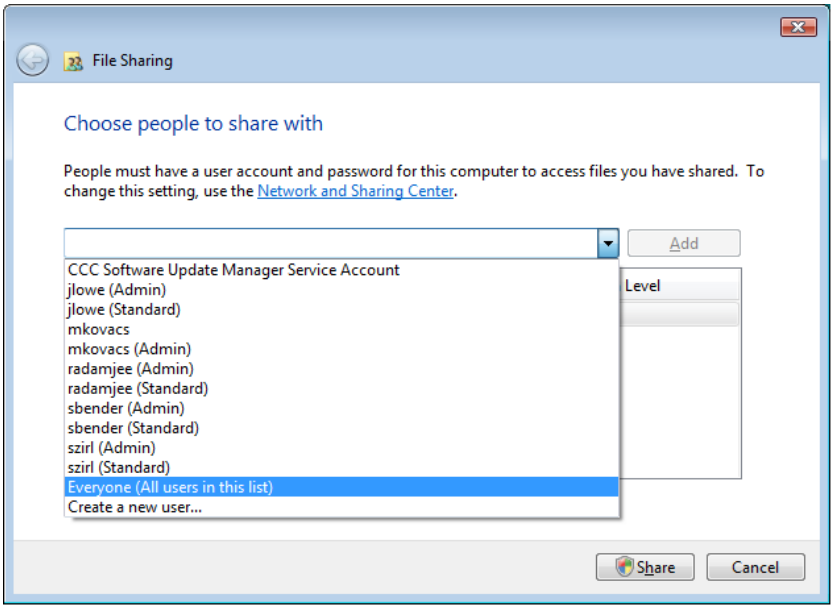
Create a share point on the server (Windows Vista)

If you have not already done so, you must create a share point on the server that your remote users can access Pathways data from. If Pathways is already setup and running on your network, you can skip to the *Windows Vista Remote Client Configuration* chapter of this guide.

1. In Explorer, create a new directory in the root of the selected drive (e.g., CCCAPPS). This is the directory where Pathways will be installed and will be shared with the Pathways users.

Note If Pathways is already installed on a standalone system that will be acting as the dial-up server, locate and share the C:\PATHWAYS\DATA instead of CCCAPPS.

2. Right-click the CCCAPPS folder, and select Share.
3. When the Choose people to share with window displays, select the drop list and add the users who will need access to this folder, then click Add, and then click Share.

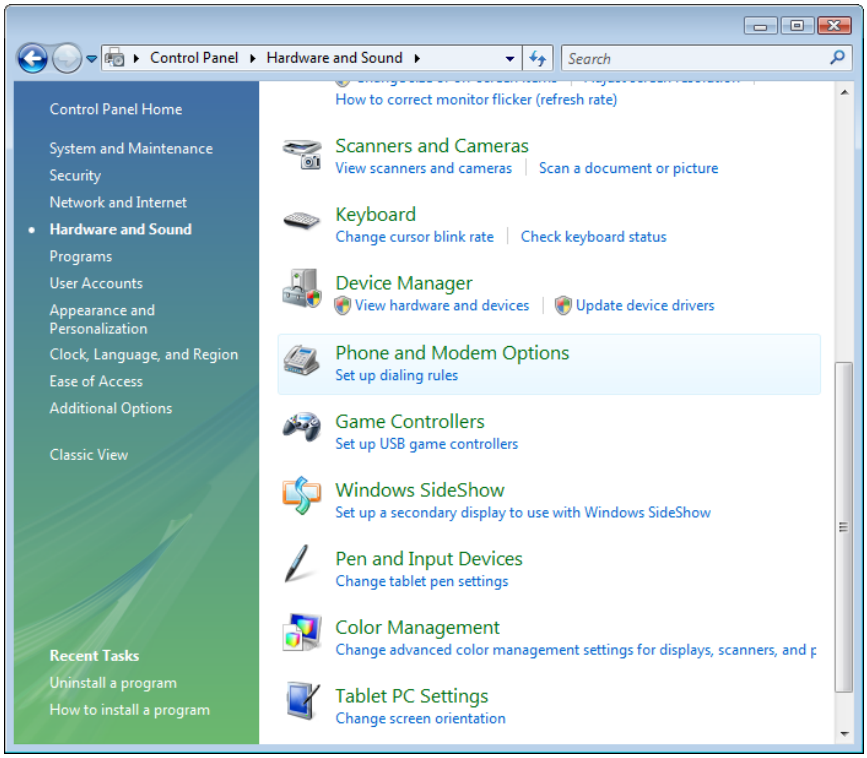


4. Now select Administrators, and assign them Full Control under Allow. Do the same for the Pathways group.
5. Confirm that both groups have been added with Full Control access. If not, select the appropriate group and correct the type of access.
6. Now select the group Everyone and click Remove. Finally, click OK. This will establish CCCAPPS as the shared network drive/directory and grant the Pathways group the proper access.

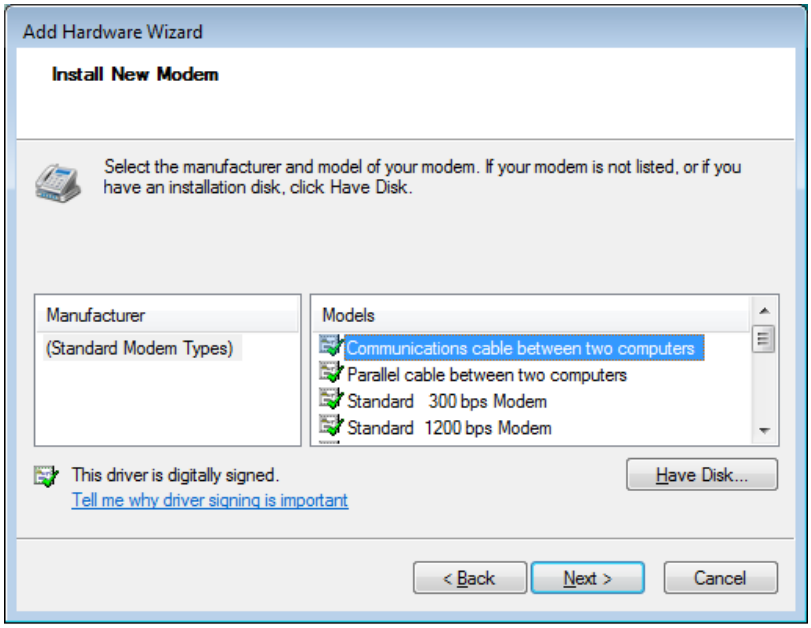
Reference Installation Instructions

To Install a Communications Cable for Windows Vista

1. Click Start > Control Panel to open the Control Panel.
2. Click the Hardware and Sound link.



3. Click the Phone and Modem Options link.
4. Click the Modems tab at the top of the window, then click the Add button.
5. If the User Account Control window displays, click Continue.



6. When the Install New Modem window displays, select Don’t detect my modem; I will select from a list, and click Next.

7. Under Manufacturer, select (Standard Modem Types). (If this is not listed, click the Have Disk button and under Copy manufacturer's files from: enter **d:\util\modems\rascable**. The Pathways Estimating Solution CD must be in the drive.)

Note If your CD-ROM drive is assigned to a letter other than d, substitute that letter for d.

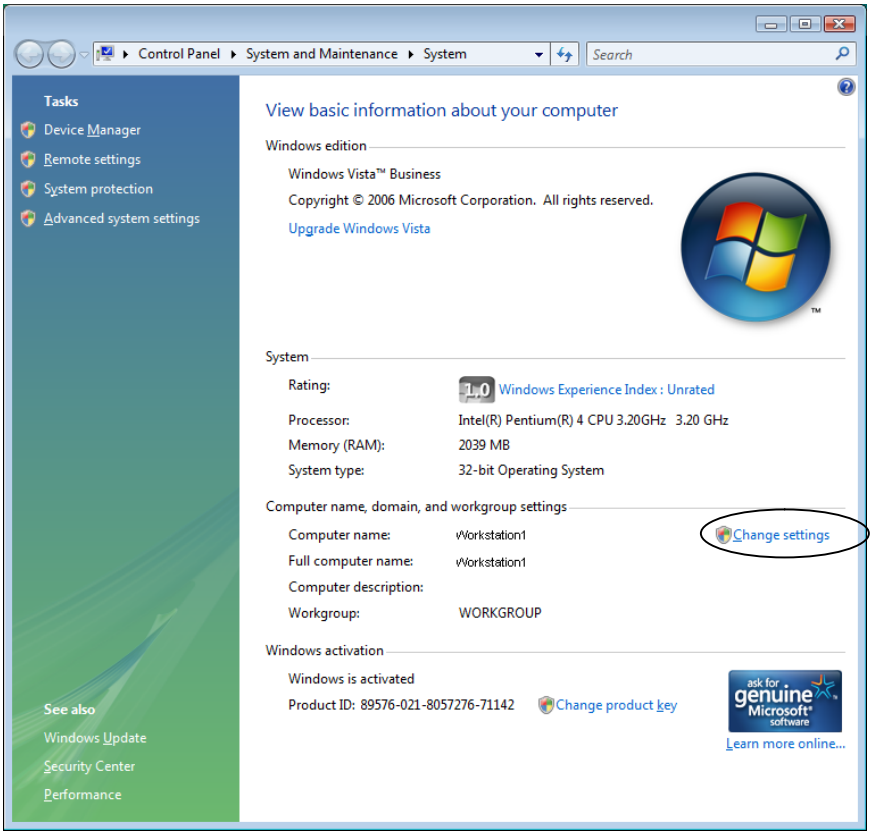
8. Under Models, select Communications cable between two computers, and click Next.
9. Select the port to use with this modem (e.g., COM1). Click Next.
10. Click Finish to complete the installation, then click OK to close the Phone and Modem Options window.

Note To install a USB Bridge Cable instead of a RAS Serial Cable, follow the manufacturer's installation instructions.

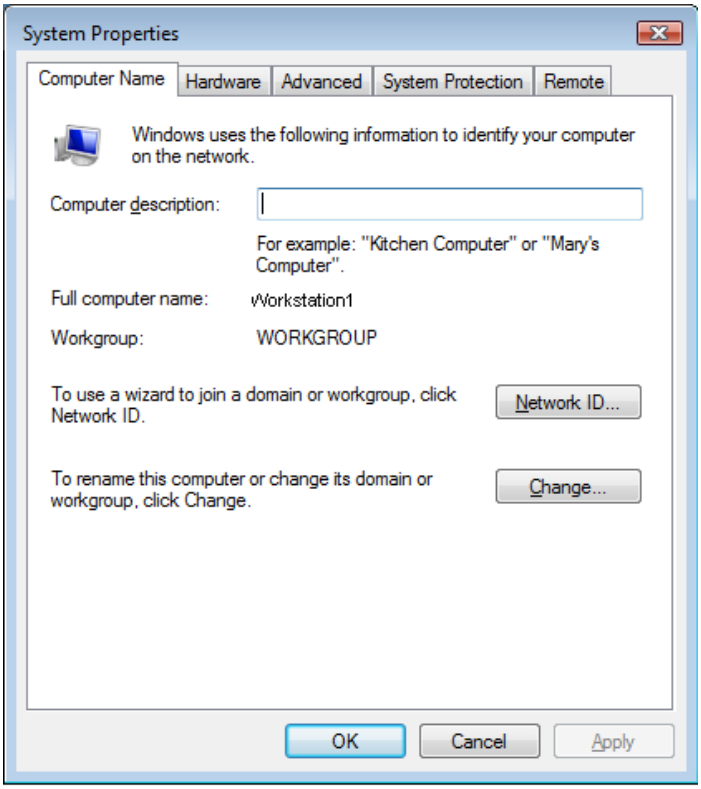
Chapter 7 - Windows Vista Remote Client Configuration

Configure network identification settings

1. Click Start > Control Panel > System and Maintenance > System.



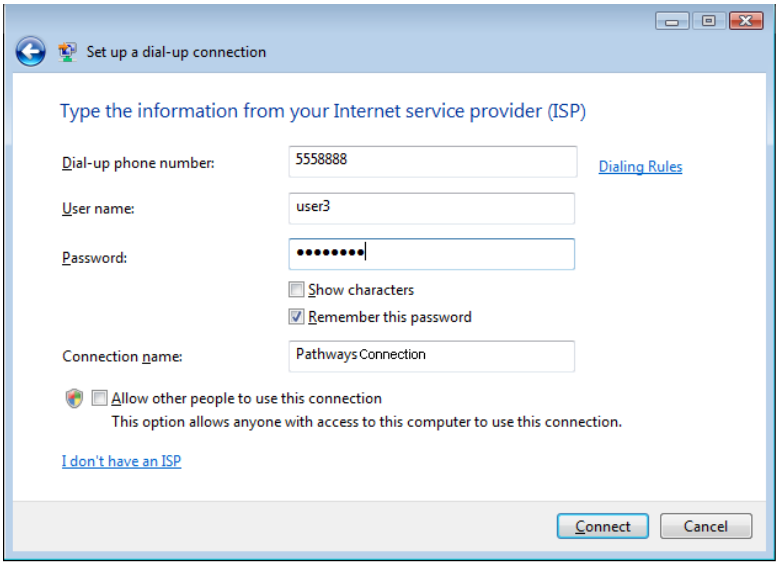
2. When the View basic information about your computer windows displays, verify that the workstation has a unique computer name (e.g., workstation1). No other computer on your network should have the same name. The workgroup can be anything you choose, but must be the same on every computer on your network. If you are satisfied with these settings, close the window.
3. To change either the computer or workgroup name, click the Change settings link.
4. If the User Account Control window displays, click Continue.



5. When the System Properties window is displayed, click Change, and make any necessary changes, then click Ok.
6. Click Ok to close the System Properties windows.
7. If prompted to restart your computer, click Yes.

Create a new connectoid to connect to your Pathways dial-up server

1. Logon as an Administrator.
2. From your Windows Vista desktop, click Start > Connect To.
3. When the Connect to a network window displays, click the Setup a connection or network link.
4. Click the Setup a dial-up connection link, and click Next.
5. Click the modem that you want to use for this connection, and then click Next.



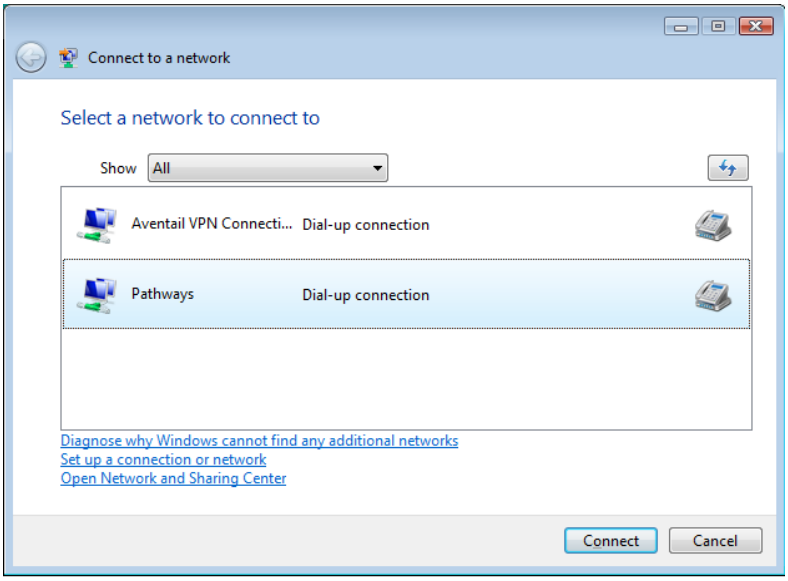
6. Enter the Dial-up phone number, User name, Password, and Connection name.
7. Select the Remember this password check box, and then click Connect.

Note Your user name and password must match what has been set up on the server.

8. When the Connect window displays, click Dial.
9. Once the connection has been established, proceed to the next section.

Using your Dial-Up Connection

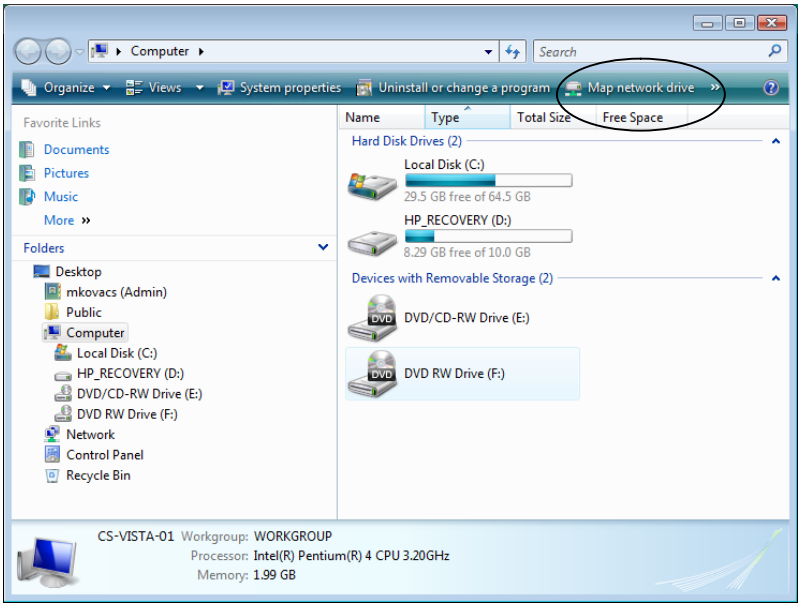
1. From your Windows Vista desktop, click Start > Connect To.



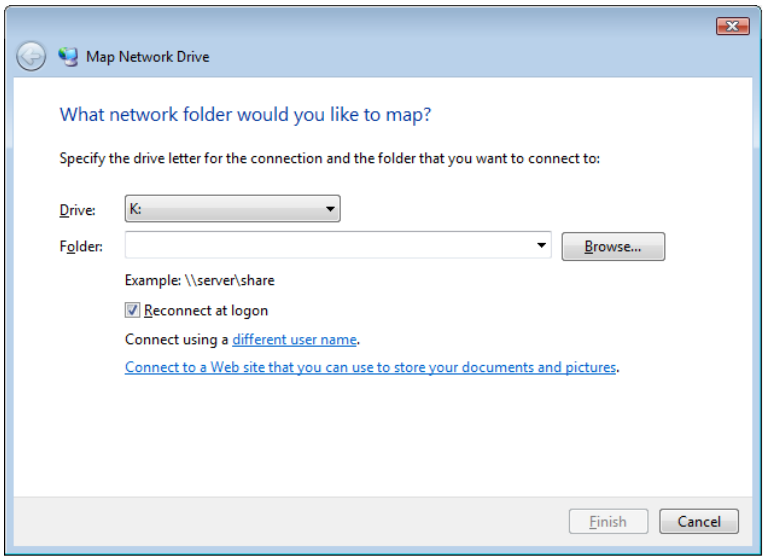
2. When the Select a network to connect to window displays, click on the connection, and then click Connect.
3. When the Connect window displays, click Dial.

Map a network drive

1. To connect a drive, click Start > Network.



2. On the Command Bar, click Map Network Drive.



3. When the What network folder would you like to map? window displays, click a drive letter from the drop list.
4. In the Folder box, click Browse to find the computer.
5. Once the computer is found, double-click the computer name.
6. The shared CCCAPPS (or Data) folder should be visible. Click the folder and click OK.
7. Select Reconnect at logon, and then click Finish.

Note Make a note of the exact path to the PPEWKF directory (e.g., **H:\pathways\data\ppewkf** for a typical network share, or **H:\ppewkf** for a typical standalone share.) You will need this information during the configuration of Pathways.

Important! Since this mapped drive letter has been established over a dial-up connection, your system will NOT be able to restore the drive mapping at the time of boot up. Therefore, you will receive a “Restoring Network Connections” error during boot up. You must click OK in response to this error. Do NOT click the “Do not try to restore the connection in the future” option, or you will lose your drive mapping.

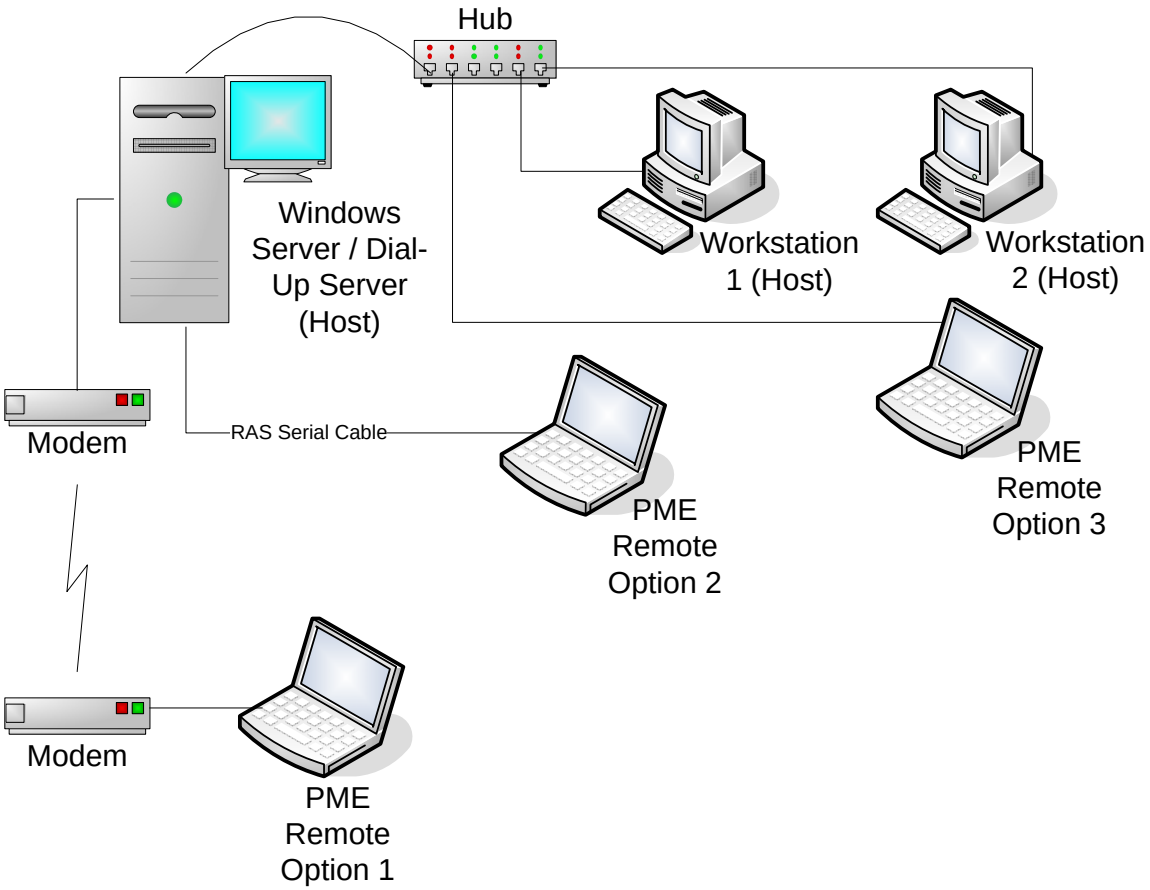
You have just completed the system configuration portion of your Pathways Mobile Estimating Dial-Up Server and remote clients. Proceed to the Configuring Pathways Mobile Estimating chapter of this guide for information on configuring Pathways Estimating Solution for your system.

Chapter 8 – Novell File Server with Windows XP Dial-up Server

If you will be running Pathways Estimating Solution in a network environment using a Novell file server, you will need to set up one of your client workstations as your dial-up server. We recommend using a Windows XP SP2 for this purpose because of its ease of setup. You will need to setup and configure your network per the instructions in the *Network Configuration Guide for Pathways*. Once the network is up and running, refer to the "Windows XP Dial-Up Server Configuration" chapter of this guide to setup and configure your dial-up server.

When running Pathways Mobile Estimating in this configuration, there are a couple of noteworthy changes to the Host configuration. An additional drive letter must be mapped from each of the LAN workstations to the Windows XP dial-up server. This mapping must be setup within the Pathways Host installation in order for the Mobile Estimating feature to function correctly. This is demonstrated in the following example:

This example assumes a standard network installation where Pathways is residing on a Novell file server and all of the workstations are connected to the server using the G: drive mapping. An additional drive letter (e.g., H:), needs to be mapped from each of the workstations running Pathways on the network to the system that will be acting as the dial-up server. This includes the dial-up server itself. Only one system on the network can act as the dial-up server. The dial-up server must be active (running) at all times, since it will be accessed by all of the other workstations on the LAN as well as the remote workstations. The following sections will outline the steps necessary to create and share the directory on your dial-up server in this configuration.



Create a share point on the dial-up server

1. In Explorer, create a new directory on the selected drive (e.g., CCCAPPS). This is the directory where the Pathways Mobile Estimating files will be shared with the Pathways users.
2. Highlight the CCCAPPS directory using the right mouse button. When the menu drops down, click on Sharing.
3. Click the Shared As option, then accept CCCAPPS for the Share Name. In the Access Type area, choose Full. Enter a Full Access Password in the appropriate field. This is the password your users will have to enter to gain access to the Pathways files. This will establish C:\CCCAPPS as the shared network drive/directory.

Notes

- CCC strongly recommends that you use a password to secure your share points. This will help prevent unauthorized access to your files if this system is used to access the Internet.
- If you fail to require a password, other Internet users could gain full access to all of your data and files!

Create Pathways Mobile Estimating directories

1. Create a **PPEWKF** directory within the CCCAPPS directory.
2. Create a **TOHOST** directory and a **PPEEVENT** directory within the PPEWKF directory.

Note The directory names must be exact, or Pathways will not be able to transfer the files correctly.

Create a substitute drive letter to the shared resource on the dial-up server

1. A drive letter must be substituted on the dial-up server for the network share created above. On Windows 9x/Me*, this is done with the Subst command. Include the following command in your Autoexec.bat file to map a drive letter to the share:

subst h: d:\cccapps

Notes

- *On Windows Me systems, you must create a separate batch file and add it to the Start > Programs > Startup group that executes when Windows boots.
- Replace h with whatever drive letter you will use to map from the workstations, and replace d with the drive that you created the CCCAPPS directory on.
- You cannot share a subst (short for “substituted”) drive (e.g., H:).

2. On startup, when the Autoexec.bat executes the subst command, the file server will recognize the h drive as if it were the CCCAPPS directory. After you have modified the peer server’s Autoexec.bat, restart the computer.

Map a network drive from LAN and Remote clients

1. From the Windows desktop, click Start > Find > Computer.
2. Type the name of your dial-up server, and click Find Now. (You may have to click Find Now several times before the server name can be resolved.)
3. Once the server is found, double-click the server name in the results window.
4. The shared CCCAPPS folder should be visible in the window that appears. Right-click the folder and select Map Network Drive.
5. Select the drive letter that you wish to map to the server (e.g., H:).

Note This drive letter must be the same for all workstations.

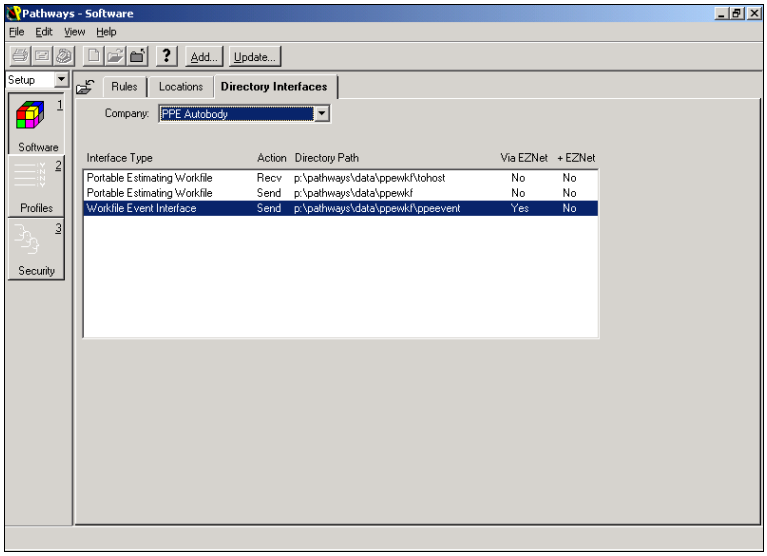
6. Select Reconnect at Logon, and then click OK.
7. Make a note of the exact path to the **PPEWKF** directory (e.g., **H:\ppewkf** for a typical network share.) You will need this information during the configuration of Pathways.

You have just completed the system configuration portion of your Pathways Mobile Estimating Dial-Up Server and remote clients. Proceed to the "Configuring Pathways Mobile Estimating" chapter of this guide for information on configuring Pathways for your system.

Chapter 9 - Configuring Pathways Mobile Estimating

Set up and configure Mobile Estimating—Host

1. Log into Pathways using "ACCESS" as your login ID and "PATHWAYS" as your password. (Or use a login ID with a supervisor status.)
2. Select View > Setup > Software. Select the Communications software module.
3. Select the Directory Interfaces tab.
4. Select your Repair Facility company from the drop list.
5. Listed in the Interface Type field are 3 or more directory interfaces. Modify only the directory paths for portable estimating (i.e., those that contain **…\ppewkf\…)** by double-clicking on a directory interface (e.g., **c:\pathways\data\ppewkf\tohost**).
   Do not modify the directory interfaces of other products you may have installed, such as PDI.

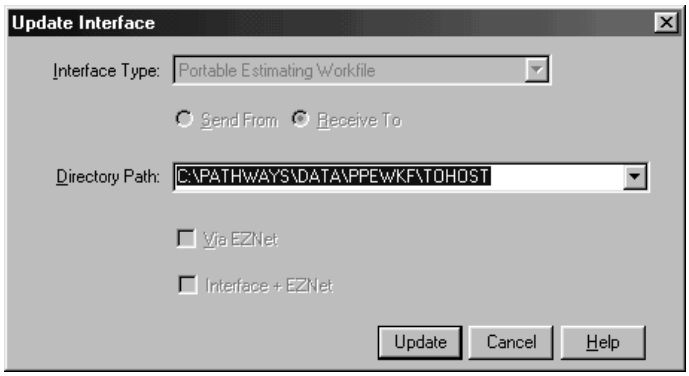


Interface Type	Action	Directory Path	Via EZNet	Interface + EZNet
Portable Estimating Workfile	Send From	c:\pathways\data\ ppewkf	No	No
Portable Estimating Workfile	Receive To	c:\pathways\data\ ppewkf\tohost	No	No
Workfile Event Interface	Send From	c:\pathways\data\ ppewkf\ppeevent	Yes	No

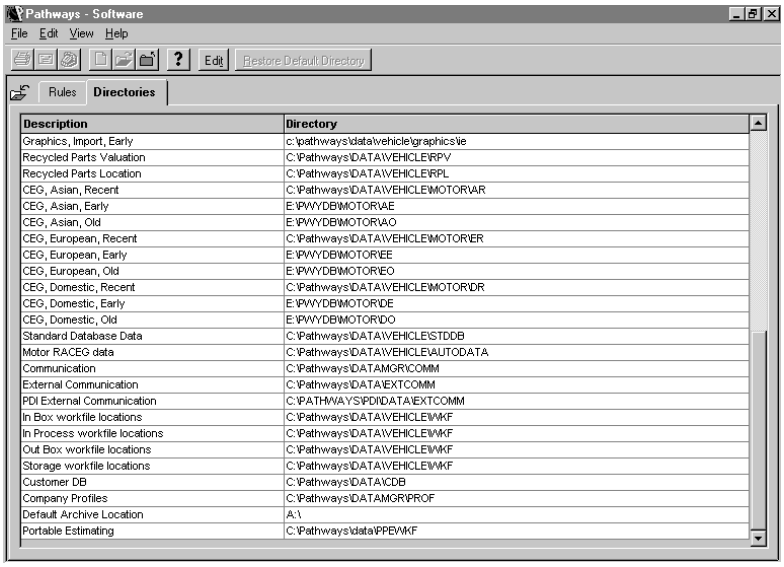
This chart lists the data from the screen above

6. The Update Interface dialog box appears. In the Directory Path field, change only the portion of the path that maps it to the Pathways directory. (Use the path you created when you followed the instructions in the sections of this document titled "Map a

network drive." This section can be found in both Chapter 2 – "Windows 9x/Me Dial-Up Server and Remote Client Configuration" and Chapter 3 – "Windows NT RAS Server and Remote Client Configuration." Use the chapter that is applicable to you.)



7. Click Update.
8. Repeat for the other two Pathways directory paths. Do not modify the directory interfaces for non-Pathways products.
9. Click the Close icon from the toolbar to return to the Software screen. Double-click on the Managers software module.
10. Select the Directories tab. Scroll to the last entry: Portable Estimating.

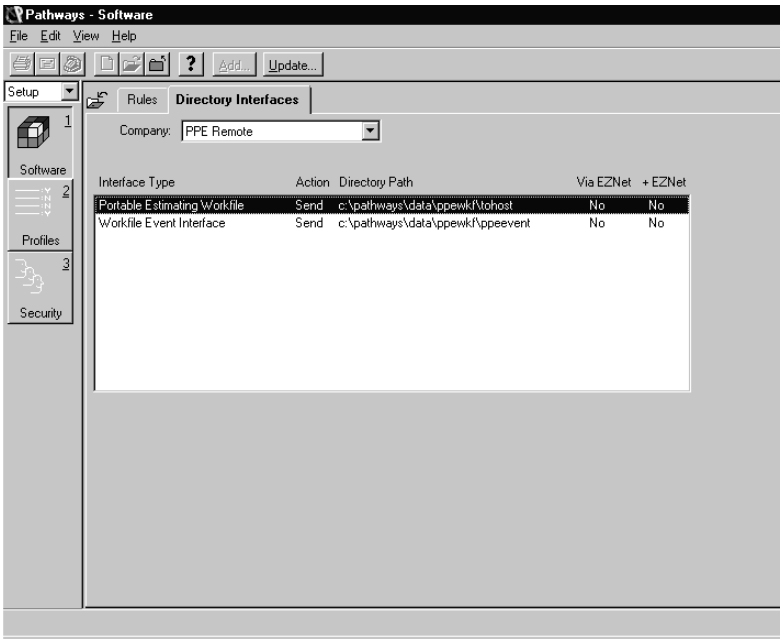


Description	Directory
Graphics, Import, Early	c:\pathways\data\vehicle\graphics\ie
Recycled Parts Valuation	C:\Pathways\DATA\VEHICLE\RPV
Recycled Parts Location	C:\Pathways\DATA\VEHICLE\RPL
CEG, Asian, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\AR
CEG, Asian, Early	E:\PWYDB\MOTOR\AE
CEG, Asian, Old	E:\PWYDB\MOTOR\AO
CEG, European, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\ER
CEG, European, Early	E:\PWYDB\MOTOR\EE
CEG, European, Old	E:\PWYDB\MOTOR\EO
CEG, Domestic, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\DR
CEG, Domestic, Early	E:\PWYDB\MOTOR\DE
CEG, Domestic, Old	E:\PWYDB\MOTOR\DO
Standard Database Data	C:\Pathways\DATA\VEHICLE\STDDB
Motor RACEG data	C:\Pathways\DATA\VEHICLE\AUTODATA
Communication	C:\Pathways\DATAMGR\COMM
External Communication	C:\Pathways\DATA\EXTCOMM
PDI External Communication	C:\PATHWAYS\PDI\DATA\EXTCOMM
In Box workfile locations	C:\Pathways\DATA\VEHICLE\WKF
In Process workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Out Box workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Storage workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Customer DB	C:\Pathways\DATA\CDB
Company Profiles	C:\Pathways\DATAMGR\PROF
Default Archive Location	A:\
Portable Estimating	C:\Pathways\data\PPEWKF

11. Click the Edit button from the toolbar, and click Yes on the Confirm screen.
12. Modify the directory path, if necessary, to reflect the location of your \PPEWKF directory. (e.g., **C:\PATHWAYS\DATA\PPEWKF**. If the directory is located on another server, replace C with the drive letter you have mapped to that server.)
13. Click the Close icon from the toolbar to save the change and return to the Software screen.

Set up and configure Mobile Estimating—Remote

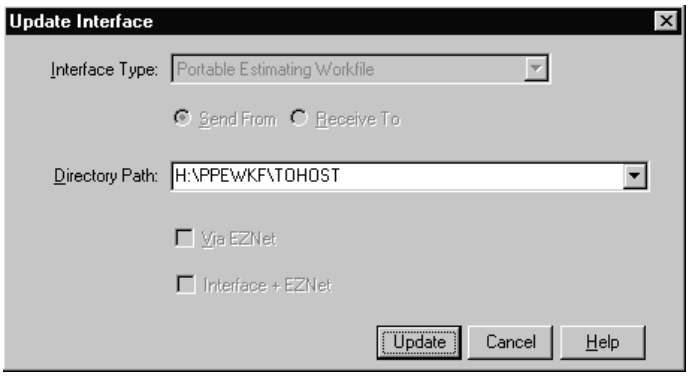
1. Log into the program using "ACCESS" as your login ID and "PATHWAYS" as your password. (Or use a login ID with a supervisor status.)
2. Select View > Setup > Software. Double-click on the Communications software module.
3. Select the Directory Interfaces tab.
4. Select your Repair Facility company from the droplist.



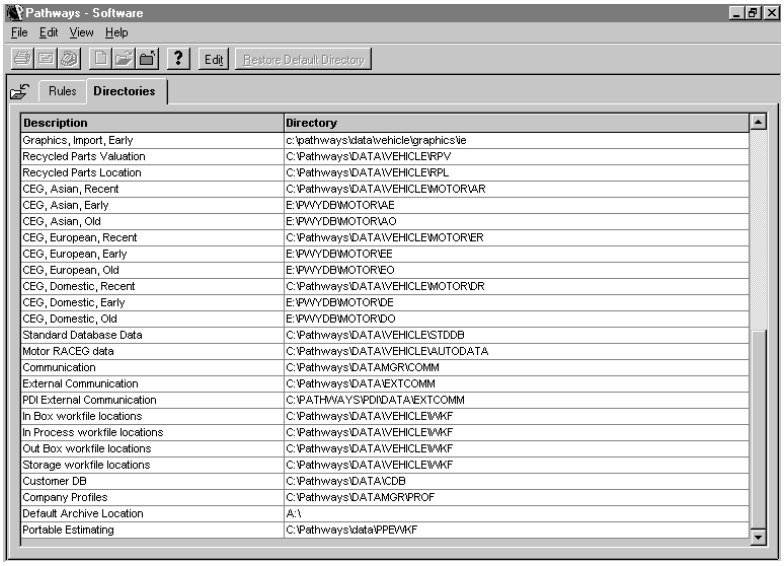
Interface Type	Action	Directory Path	Via EZNet	Interface + EZNet
Portable Estimating Workfile	Send From	*:\\pathways\ data\ppewkf\tohost	No	No
Workfile Event Interface	Send From	*:\\pathways\data\ ppewkf\ppeevent	No	No

This chart lists the data from the screen above.

5. The Update Interface dialog box appears. In the Directory Path field, correct the path to reflect your drive mapping (Use the path you created when you followed the instructions in the sections of this document titled "Map a network drive." This section can be found in both Chapter 2 – "Windows 9x/Me Dial-Up Server and Remote Client Configuration" and Chapter 3 – "Windows NT RAS Server and Remote Client Configuration." Use the chapter that is applicable to you.)



6. Click Update.
7. Click the Close icon from the toolbar to return to the Software screen. Double-click on the Managers software module.
8. Select the Directories tab. Scroll to the last entry: Portable Estimating.



Description	Directory
Graphics, Import, Early	c:\pathways\data\vehicle\graphics\ie
Recycled Parts Valuation	C:\Pathways\DATA\VEHICLE\RPV
Recycled Parts Location	C:\Pathways\DATA\VEHICLE\RPL
CEG, Asian, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\AR
CEG, Asian, Early	E:\PWYDB\MOTOR\AE
CEG, Asian, Old	E:\PWYDB\MOTOR\AO
CEG, European, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\ER
CEG, European, Early	E:\PWYDB\MOTOR\EE
CEG, European, Old	E:\PWYDB\MOTOR\EO
CEG, Domestic, Recent	C:\Pathways\DATA\VEHICLE\MOTOR\DR
CEG, Domestic, Early	E:\PWYDB\MOTOR\DE
CEG, Domestic, Old	E:\PWYDB\MOTOR\DO
Standard Database Data	C:\Pathways\DATA\VEHICLE\STDDB
Motor RACEG data	C:\Pathways\DATA\VEHICLE\AUTODATA
Communication	C:\Pathways\DATAMGR\COMM
External Communication	C:\Pathways\DATA\EXTCOMM
PDI External Communication	C:\PATHWAYS\PDI\DATA\EXTCOMM
In Box workfile locations	C:\Pathways\DATA\VEHICLE\WKF
In Process workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Out Box workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Storage workfile locations	C:\Pathways\DATA\VEHICLE\WKF
Customer DB	C:\Pathways\DATA\CDB
Company Profiles	C:\Pathways\DATAMGR\PROF
Default Archive Location	A:\
Portable Estimating	C:\Pathways\data\PPEWKF

9. Click the Edit button from the toolbar, and click Yes on the Confirm screen.
10. Modify the directory path to reflect your drive mapping. (e.g., **H:\PPEWKF**. If the drive of the path you've mapped to the server is assigned a letter other than H, replace H with the appropriate letter.)
11. Click the Close icon from the toolbar to save the change and return to the Software screen.

Chapter 10 - Using Pathways Mobile Estimating

If you use Pathways Mobile Estimating (also known as Pathways Portable Estimating), you can work on estimates on a remote unit and then transfer the information to your main computer, your host unit. The remote unit can be connected to the host unit via serial cable, dial-up networking connection, or network. To connect your units, Pathways uses Microsoft RAS (Remote Access Server). In order to let you transfer files between your remote and your host unit, the program sets up special directories on your system. You will need to properly connect your host and remote unit, using a LAN, a modem, or a serial cable.

Host Unit

If you are a host unit, you can send workfiles with digital images and Recycled Parts Services (RPS) data to the remote unit.

To send workfiles from a host unit to a remote unit

1. On the host unit, select View > In Process.
2. Highlight the workfiles you want to send to the remote unit.
3. Click the Send to Remote button on the toolbar. A message displays that says "Workfile successfully moved to Out Box."

Pathways Estimating Solution moves the selected workfiles to the transfer directory, from which they can be retrieved by the remote unit. Meanwhile, copies of the original workfiles are moved to the Storage section for safe keeping.

Note Do not use the workfiles that are in storage unless the files on the remote unit get lost or damaged.

Remote Unit

When you are ready to retrieve your assignments from a host unit, begin by properly connecting your remote unit to the host unit. Follow the instructions in the applicable sections of this guide.

To retrieve assignments onto a remote unit from a host unit

1. Connect the remote unit to the host unit (using a LAN, modem, or serial cable).
2. Move into the In Box. (View > In Box). The program automatically connects to the host and displays available portable estimating workfiles and any Recycled Parts Services (RPS) data that came with the workfiles.

   -or-

   If you are already in In Box before you hook up your remote unit to the host unit, you'll need to refresh your screen. Select File > Portable Estimating > Refresh, or use the Refresh button on the toolbar.
3. When the workfiles appear in your In Box, select the file or files you want to work with (hold down the CTRL key and highlight multiple workfiles, or select File > Select all to select all of the workfiles).

4. Hit the Move to In Process button from the toolbar. The program moves the files to the In Process section, where you can work with them.
5. When you have finished retrieving your workfiles, select the Disconnect button on the toolbar, or select File > Portable Estimating > Disconnect to disconnect from the host.

You are ready to work with the files as you normally would, with these exceptions:

- You cannot convert the status of the workfile.
- You cannot lock an estimate or supplement.
- You cannot submit a Total Loss Valuation Request.
- Your remote unit will not generate EMS data.
- Your remote unit cannot communicate with EZNet.

To send a workfile from a remote unit to a host unit

When you are ready to return the workfile to the host unit, close the workfile, and reconnect to the host machine.

1. Select any workfiles you want to send back to the host.
2. Click the Return to Host button, or select File > Portable Estimating > Return to Host. The files transfer back to the host unit's In Box.
3. Disconnect the remote unit from the host unit.

Troubleshooting Problems

If you encounter errors when attempting to send or receive files to or from the remote workstations, make sure that you check the following items:

1. Verify that the directory interfaces on both the host and remote systems are set up correctly, and that the directories that they point to actually exist and are shared correctly.
2. Verify that the directory entry in the Directories tab of the Manager software module is correct, and that the directory that it points to actually exists.
3. Verify that the Dial-Up Networking information in the Portable Estimating section of the Manager software module on the remote workstation is correct.
4. Verify that the mapped drive letter to the host's shared directory is valid, and that the directories referenced in the directory interfaces are accessible.
5. Verify that you can manually connect to the host computer by double-clicking the connectoid. Once connected, verify the mapped drive letter and directories are accessible.

If any of the above items are incorrect or not functioning, make any necessary changes and re-attempt the connection. For information on the correct settings necessary for each of these items, refer back to the appropriate section of this guide.