

Stand alone installation

Private Funds Manager can be installed either on the local hard disk of an individual PC or onto a Network to allow sharing, access from multiple location and the security of network backups.

For a stand alone installation check the following requirements:

- Your computer must have a minimum of 20Mb free before starting this installation.
- Your PC needs 32Mb of RAM to run this package.

All files are installed from the internet - you will be emailed the links when you order the PFM software.

Existing data

If you have existing data for example on a local hard disk, you will need to copy this to the new network location. The file(s) that require copying are PFM5.MDB and any others with an extension of .MDB (for archives etc)

Network installation

It is preferable to install the Private Funds Manager Plus onto a school network to allow sharing, access from multiple locations and the security of network backups.

Before beginning the installation procedure, check the following requirements:

- Network installations should be installed to a MAPPED network drive, that all users have appropriate Access Rights to access.
- Your drive must have a minimum of 20Mb free before starting this installation.
- Your PCs needs 32Mb of RAM to run this package.

Central files are installed from the internet - you will be emailed the links when you order the PFM software.

In addition you must install local files onto EVERY workstation that will run PFM

Again, these file are emailed to you when you order the PFM software.

Existing data

If you have existing data for example on a local hard disk, you will need to copy this to the new network location. The file(s) that require copying are PFM5.MDB and any others with an extension of .MDB (for archives etc)

Users and passwords

Importance of names.

If you add user names and log in as these names, **each separate person will have a different set of entries on the transaction screens for receipts.** This allows different users to process their own transactions as required. If you want everyone involved to see the same transactions, you must all log on using the same name or do not set up user names at all.

Adding Users

From the top left of the screen select FILE - SECURITY

Select ADD USER

Enter a new user name

Select Access Level required

Enter password then re-enter password as a check

Click on SAVE

Add any other users and passwords required.

Changing Passwords

To change your password use FILE – SECURITY and select the Change Password option.

Removing User Names

To remove user names use FILE – SECURITY and select the Change Password option.

Don't use a Password

To stop the system from using passwords previously set up, you need to first log in with a password and then use FILE – SECURITY – Don't ask for password