Step-by-Step Install Instructions

State of Arizona

Governor's Office of
Strategic Planning & Budgeting
1700 W. Washington, Suite 600
Phoenix, AZ 85007
Phone: (602) 542-5381

Updated June 13, 2016

Overview

From the Internet browser, enter address:
http://azospb.gov/budget-development.aspx

OSPB emails its budget & planning contacts to let them know when a system is ready to download and use, some time at the end of the fiscal year.

The button captions will change from "Not Available" to "Now Available" as they become ready for use.

This Web page has the software & user guide downloads for the following systems:

- CLIFF
- AZIPS
- BUDDIES

The install program is the same steps for all three systems. An Install of BUDDIES will be illustrated below. The general procedure to follow is:

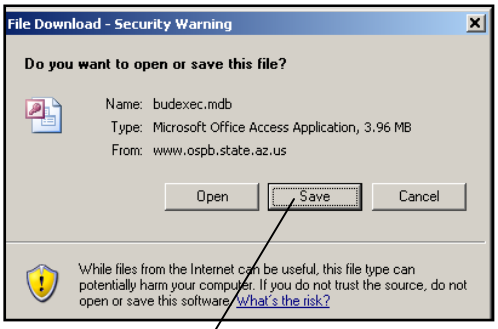
- ✓Download an install file
- ✓Make necessary settings to Access
- ✓Install the system
- ✓Download the system's user guide
- ✓Add any additional users to the system

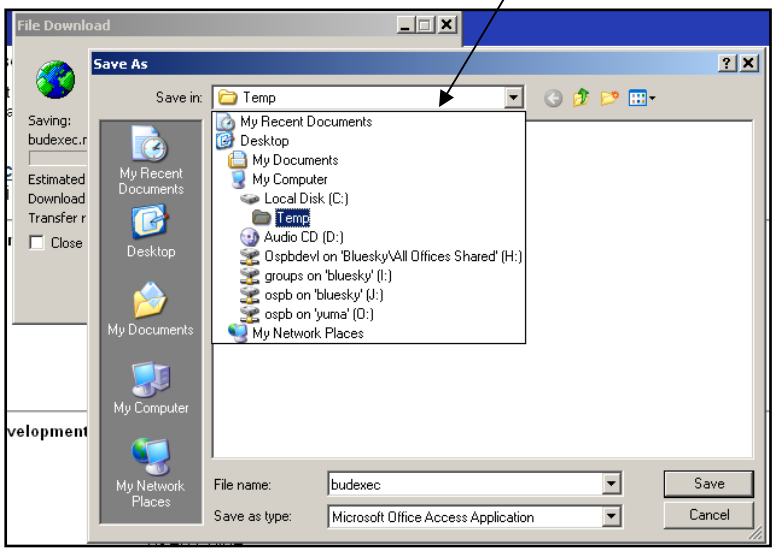
Download an Install File

1. Click (left-click) on one of the **System** buttons on the Web page.
2. A dialog will ask: **Do you want to open or save this file?** Do NOT **Open**. Click the **Save** button. (If you **Open** and try to install, the install won't work.)
3. A **Save As** dialog will appear. For the **Save in:** drop-down select a path like: Desktop/My Computer/Local Disk (C:)/Temp

   Or, it may be easier to just save it to your desktop. If you do, delete it from your desktop when you're done installing the system.

   Click **Save** at the bottom of the dialog.
4. If you really need to re-install a system, a **Replace** dialog will appear. **Overwrite** the existing file. Re-installs are an exception to the instructions. Read more on this below.
5. A **Download** dialog will show the progress while saving. It will end with the message **Download Complete**. Click **Close** on this dialog if it doesn't automatically close for you. (It depends on your settings.)
6. Repeat this process for each system you want to install.





Make Necessary Settings to Access

If you are installing on behalf of someone else, be logged in as the user so the shortcut that gets created will appear on their desktop and the Microsoft Access settings are correct.

The OSPB systems will run on Microsoft Access versions 2000, 2002, 2003, 2007 and 2010. All systems are able to run on both 64 bits and 32 bits Microsoft Access 2010 system.

To find out what version of Access you have:

1. Start MS Access. Click on the Windows **Start** button. Pick **Programs**, **Microsoft Access** or pick **Programs**, **Microsoft Office**, **Microsoft Access**.
2. If a dialog pops up asking you to select a database, click **Cancel**.
3. From the menu, select **Help**, **About Microsoft Access**. The **Year** will be displayed. Click **OK**.

If you have Access 2000 or 2002, exit Access and begin the Install. Talk to your IT staff about upgrading to a newer version of Access that can be better supported.

If you have Access 2003 follow these steps:

4. Pick Tools from the menu. Select **Macro**, **Security…**.
5. Select **Low** when running OSPB systems. You should change the setting back to **Medium** or **High** before opening other database files that may be a security issue. Click **OK**. Exit Access and begin your install.

If you have Access 2007 follow these steps:

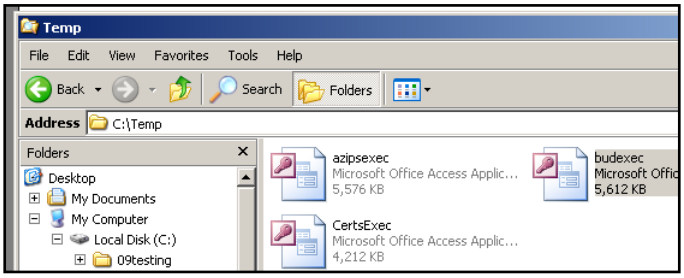
6. Select the circular windows icon from the top left of the screen.
7. Select Access Options.
8. Select Trust Center.
9. Select Trust center settings.
10. Go to Macro settings and click the radio button next to enable all macros.

If you have Access 2010 follow these steps:

11. Select the "file" tab from the top left of the screen.
12. Select Options.
13. Select Trust Center.
14. Select Trust center settings.
15. Go to Macro settings and click the radio button next to enable all macros.

Install the System

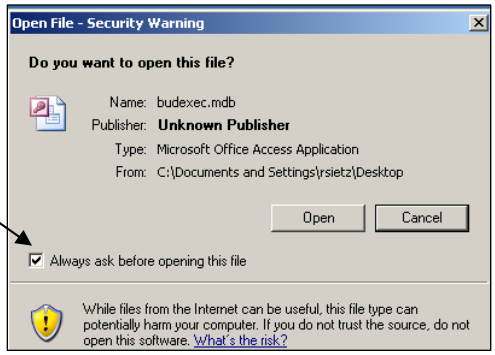
1. From your desktop, select the **My Computer** shortcut. Double-click on **Local Disk (C:)**. You may need to click on the phrase **Show the contents of this folder**. Double-click on the **Temp** folder to open it. Or, open whatever folder you saved the file to. Maybe this was to the desktop.



2. Double-click on one of the install files:
   - AzipsExec.mdb *AZIPS*
   - BudExec.mdb *BUDDIES*
   - CliffExec.mdb *CLIFF*

3. An **Open File – Security Warning** dialog may appear because OSPB is an unknown publisher.

   Be sure to <u>remove the checkmark</u> from the prompt **Always ask before opening this file**. Click **Open** to begin.

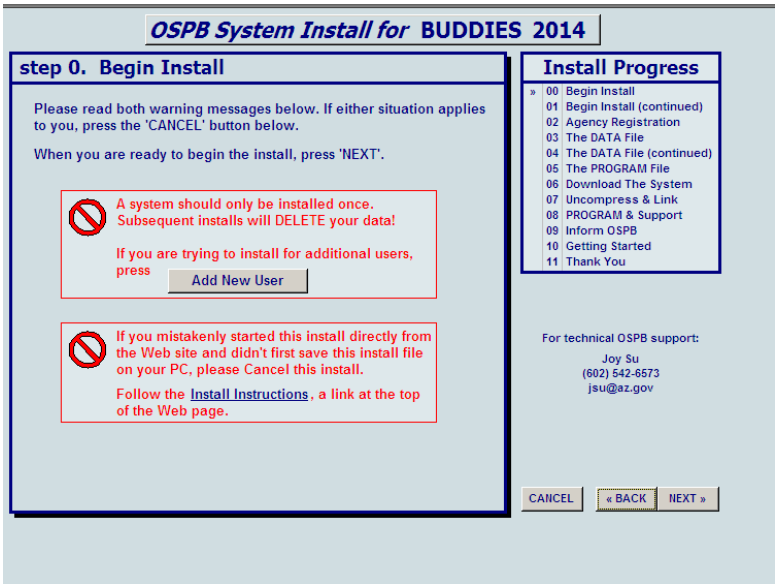


4. A second **Security Warning** dialog may appear, noting that programs may harm your computer. Click **Open** to this generic message.

5. Access 2007 may display an additional warning. An **Action Failed** dialog may appear depending if Access was set with a default **Disabled Mode**. If so, do the following:
   - Click the **X** to close the dialog.
   - Below the Access toolbar is a strip that's titled **Security Warning**. Click **Options…**
   - The **Microsoft Office Security Options** dialog appears. Click **<u>Open the Trust Center</u>** in the bottom left.
   - A **Trust Center** dialog appears. Click **Macro Settings** on the left side and then select **Enable all macros…**. Click **OK** at the bottom of the dialog.

Install the System (continued)

6. Wait a moment and a window will appear to guide you through the rest of the install. The Title will read:
   OSPB System Install for …



7. **Maximize** your Access window size for easy reading. Notice the **Install Progress** box in the upper right corner.

8. Start by reading the warning messages to decide if you should begin the install.

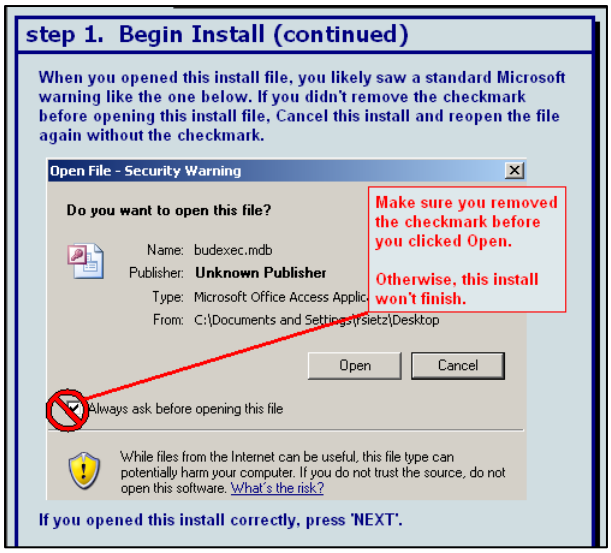
   The instructions to **Add New User** is covered later in this document.

   After reading the warning messages, click **NEXT »** to move to Step 1.

   Pressing **CANCEL** will quit the install.

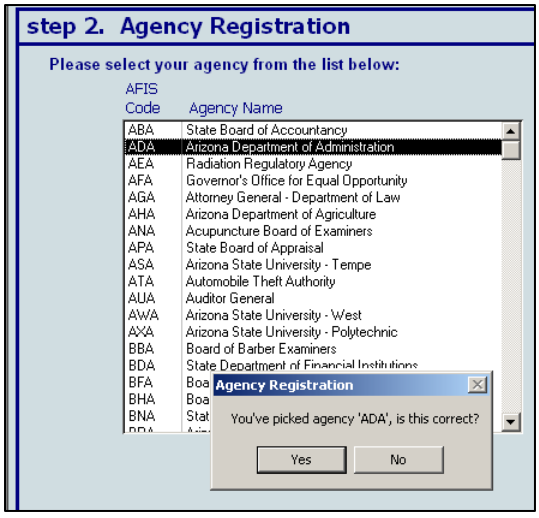
9. This is just a reminder to make sure you removed the checkmark on the Security Warning dialog before you opened the install file.

   Click **NEXT»** to move to Step 2.

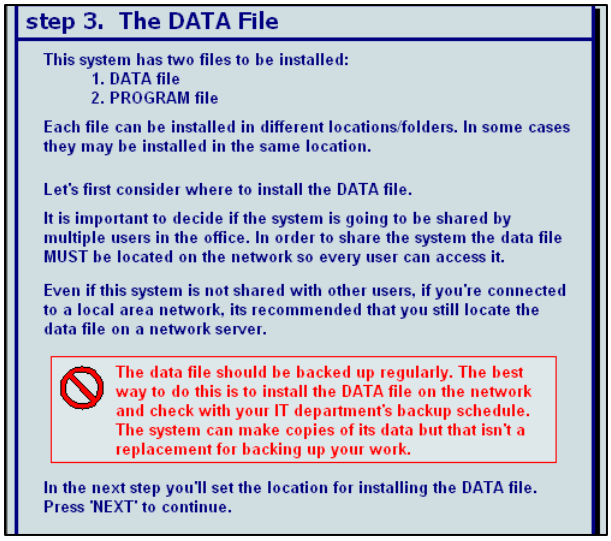


10. Select your **Agency Name** from the list and confirm it when asked.

    Click **NEXT»** to move to Step 3.



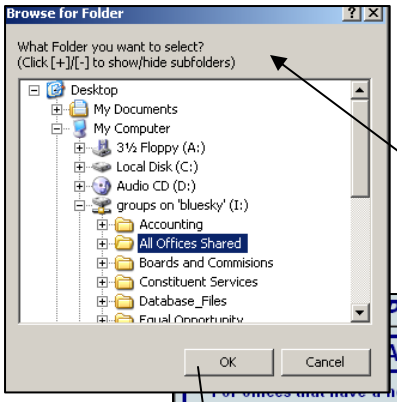
11. After reading about where to install parts of the system and acknowledging the warning, press **NEXT »** to continue to step 4.

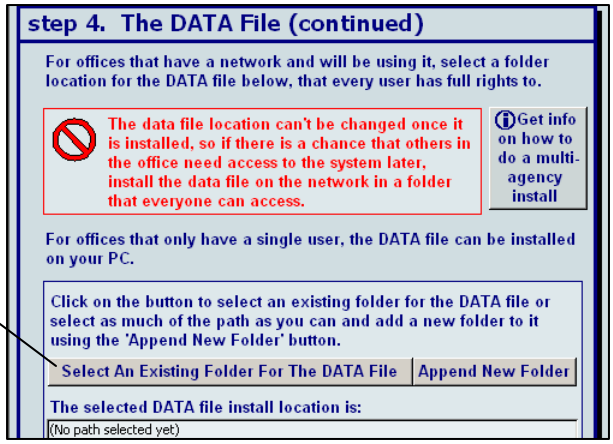


Install the System (continued)

12. Begin by clicking the button, **Select An Existing Folder For The Data File**. A dialog, shown below, will let you select a path. Even if the folder doesn't exist yet, at least select a drive letter or as much of the path that does exist.

    The OSPB System install now automates the install for the few people who need to do the budget/ plan for more than one agency. Choose the same locations for each agency if you like. The install creates subfolders & icons to keep each agency separate.



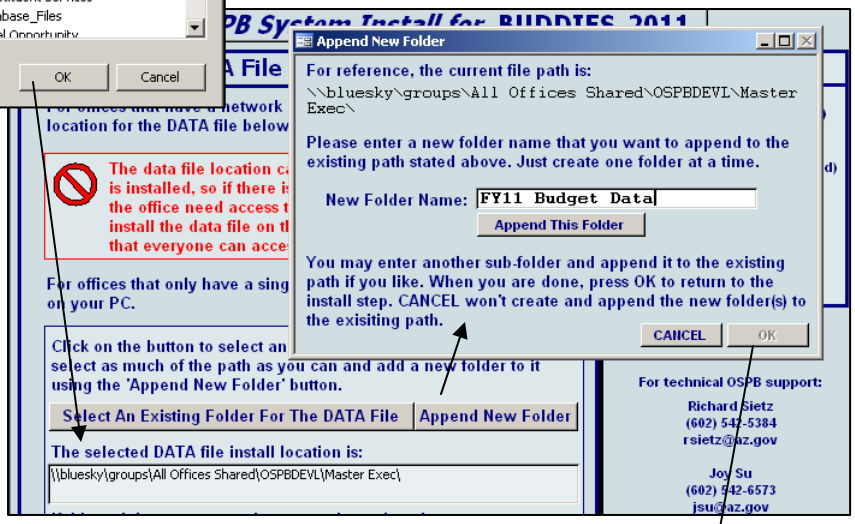


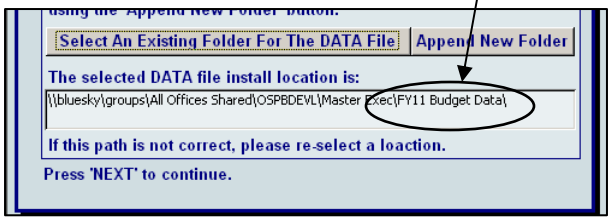
13. Optionally, click on **Append New Folder** if you want to create a new folder after the existing path just selected.

    A dialog appears, asking you to append one new folder name at a time to the current path.

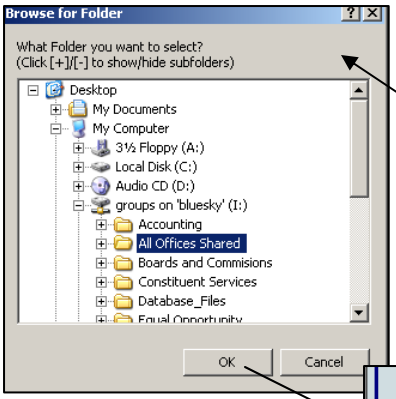
    After typing a new folder name, click **Append This Folder**. Finally click **OK** to close the dialog and return to step 4.

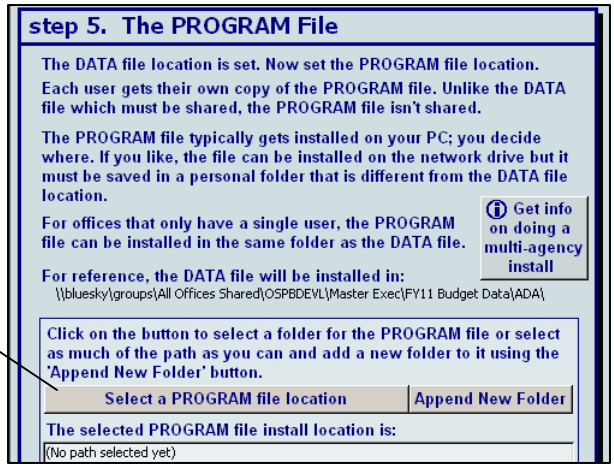
    Notice that your new folder will be created for you and appended to the previously selected location.

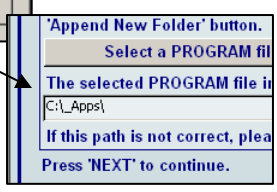




14. Step 5 is like step 4. First **Select a PROGRAM file location** and select as much of an existing path as possible, or at least choose a drive letter.



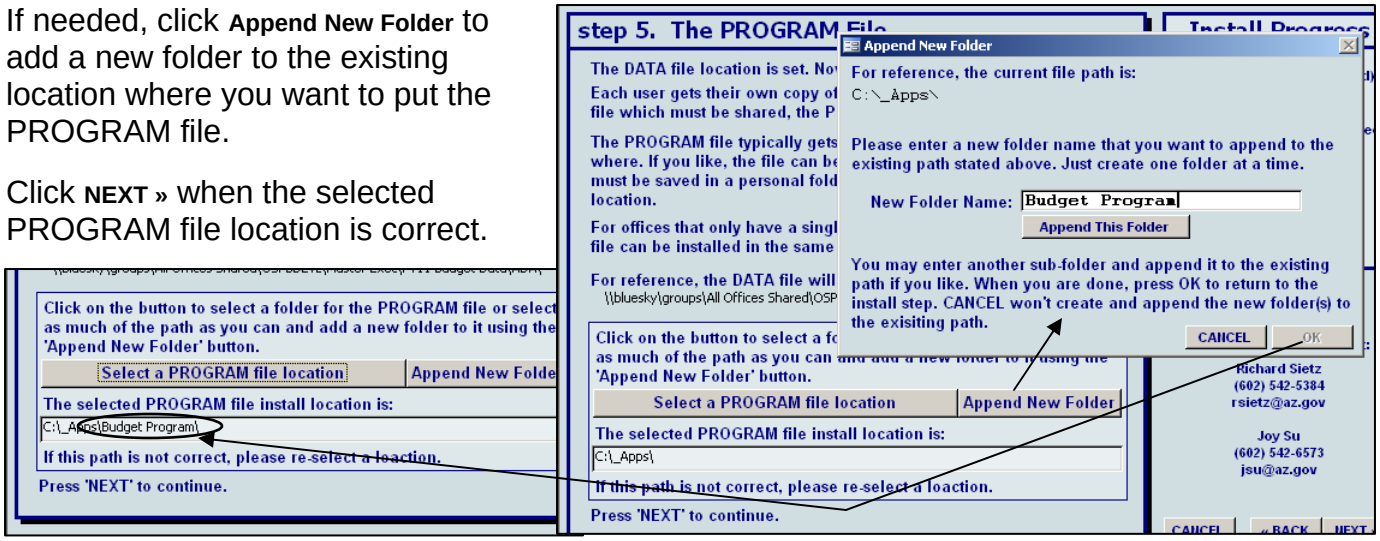




Install the System (continued)

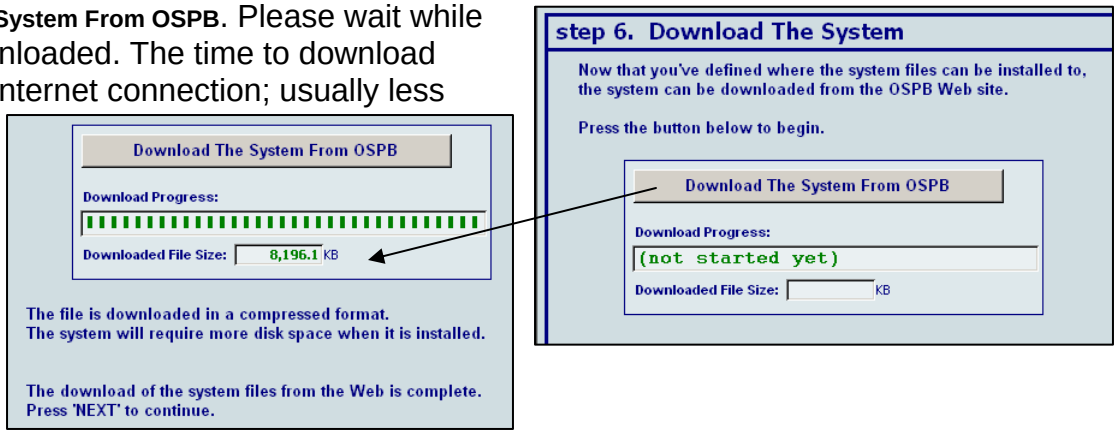
15. If needed, click **Append New Folder** to add a new folder to the existing location where you want to put the PROGRAM file.

    Click **NEXT »** when the selected PROGRAM file location is correct.



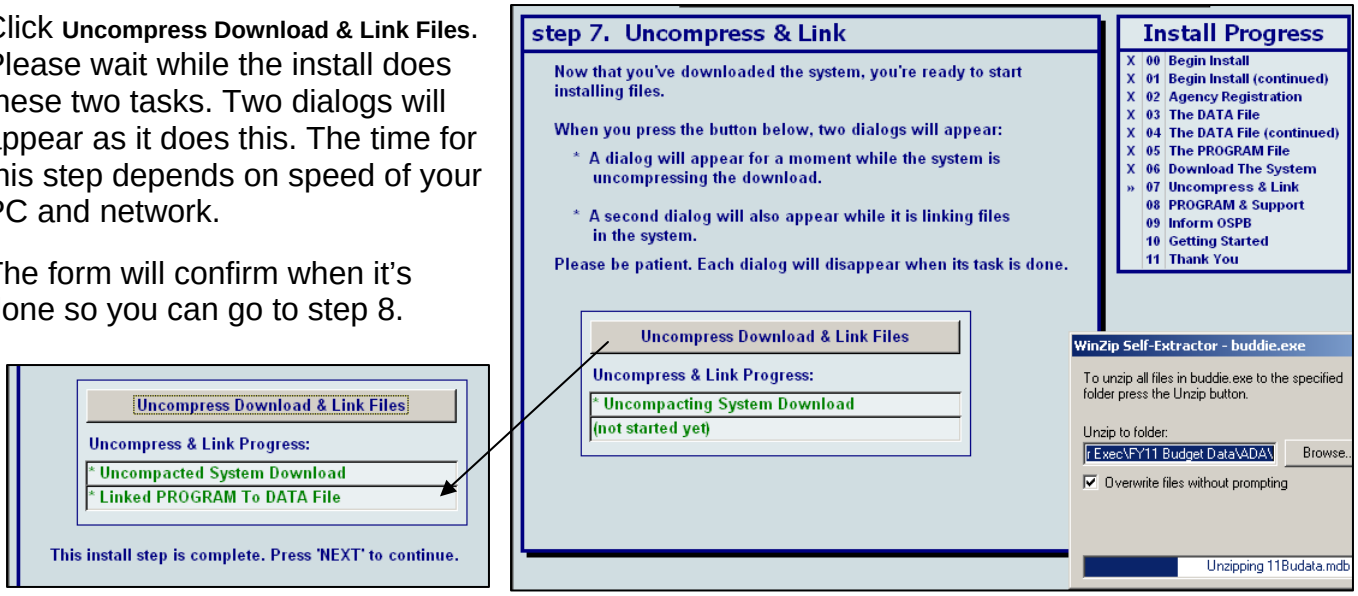
16. Click **Download The System From OSPB**. Please wait while the system is downloaded. The time to download depends on your internet connection; usually less than 5 minutes.

    When it is done, the form will confirm it completed this step so you can move to the next step.



17. Click **Uncompress Download & Link Files**. Please wait while the install does these two tasks. Two dialogs will appear as it does this. The time for this step depends on speed of your PC and network.

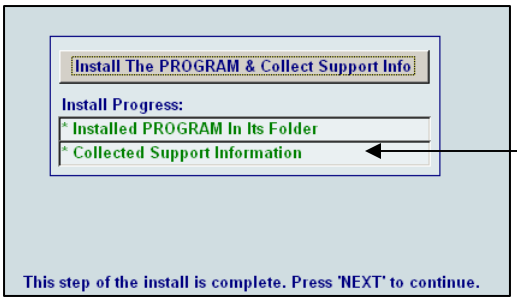
    The form will confirm when it's done so you can go to step 8.

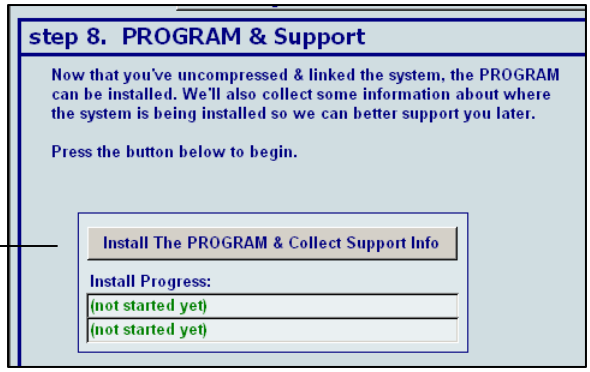


Install the System (continued)

18. Click the **Install The PROGRAM & Collect Support Info** button. This step should run relatively quickly. The install will let you know when it's done.

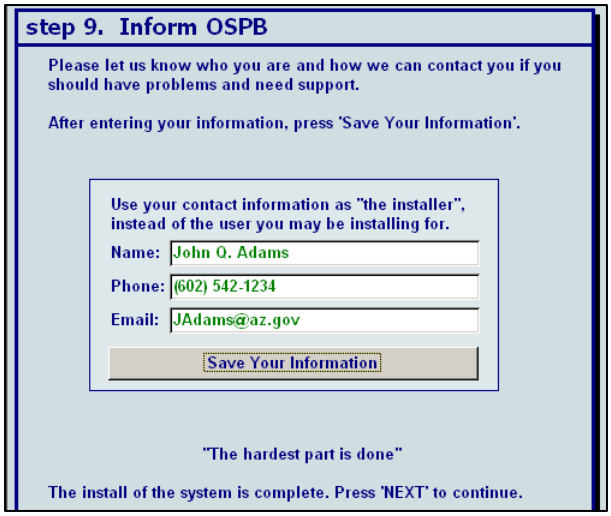
    Press **NEXT »** when this step is done.





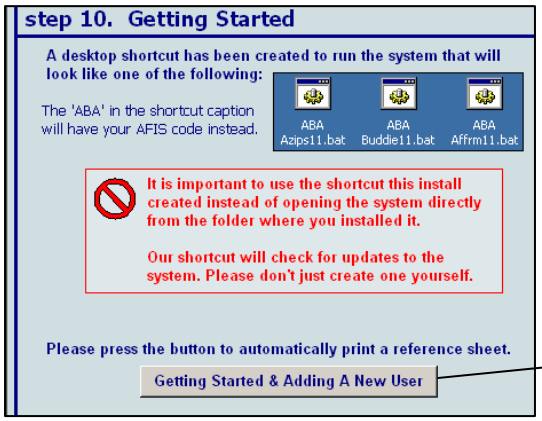
19. This step is just a matter of letting us know who actually installed the system so we can better support you. Fill in blanks & click **Save Your Information**.

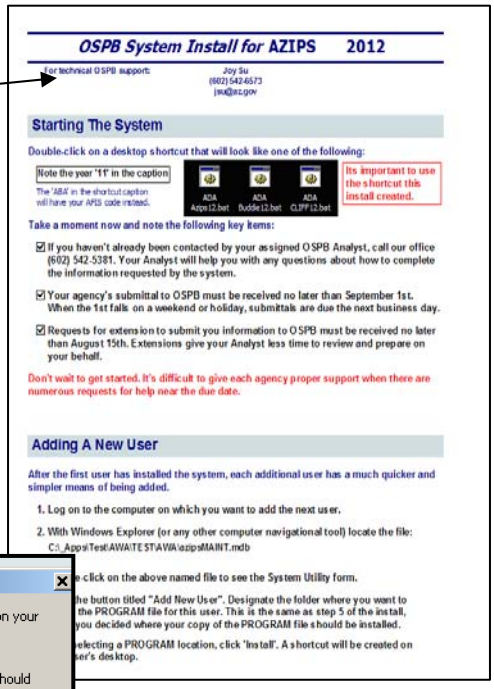
    Click **NEXT »** to find out how to get started.



20. Click **Getting Started & Adding A New User.**

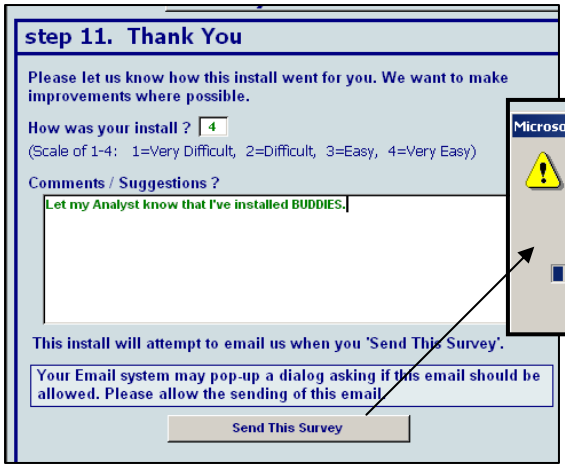
    A hardcopy will automatically print. Keep your copy of the "getting started" sheet. It has custom instructions on how to add another user.

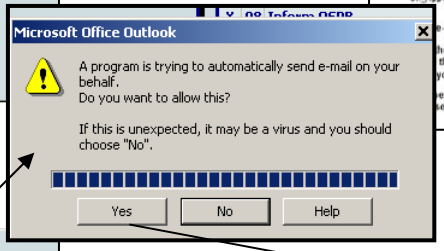


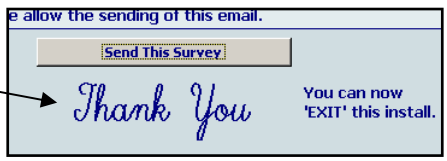


21. Please let us know how the install when for you and give us any feedback. Then click **Send This Survey**. A dialog like the one shown above may appear. In the example of Outlook, click **Yes** to send the email to OSPB.

    If the email can't be sent for some reason, don't worry, it's not critical to the install – you can still continue with the install. Sending the email is very helpful and we'd like to know if this was a problem for you.







Install the System (continued)

22. Click **Exit**...you're done. If you are installing more than one system, go back to page 2, number 3 above and select your next system.

23. Close the window where you started the install from; likely called 'Temp'.

    As you saw in the install, our names, phone & email is available for technical support during the install. Once you begin using the system, your contact for questions/comments is your assigned OSPB Analyst. You can find your Analyst by visiting the Web page www.OSPB.State.AZ.US, and clicking on the link Contact Us.

User Guide

1. On OSPB's Download Web page, click (left-click) on a **User Guide** button.

2. A dialog will ask: "Do you want to open or save this file?" Unlike the **System** button, click on the **Open** button.

3. After a moment, the document will open in Adobe Reader. From the toolbar you can save a copy to your PC or print a hardcopy. Using the system will be easier if you can reference a hardcopy.

   Your assigned OSPB Analyst is available should you have further questions. If your Analyst hasn't already contacted you, call OSPB at (602) 542-5381.

Add New User

After the first user has installed the system, each additional user has a much quicker & simpler means of being added. One of the steps during the install was to print a reference sheet. It includes the steps to add a new user.

The instructions are modified depending on where the system was installed. If you need another copy of the instructions:

1. Re-run the install. On the first page is a warning that has a button, which displays the instructions. Print a hardcopy using the printer icon on the top toolbar. Close the report and press **CANCEL** to quit the install.

Or

2. Open the system on the PC where it was installed. From the menu select **Utility**. From that form select **Add New User** and print a copy. **Exit** the system.