

# PEARL REQUIREMENTS

## WORKSTATION INSTALLATION




### COMPLETE ALL STEPS FOR EACH WORKSTATION

#### 1. BEGIN WINDOWS CONFIGURATION

##### VERIFY YOU ARE A LOCAL ADMINISTRATOR ON THE WORKSTATION

Before making the following changes to Windows settings, you must be a local administrator on the workstation.

1. Click the **Start** button  and Search for "**User Accounts**"
2. Select **Manage User Accounts**
3. Under **Users for this computer**, select the current **User Name**  
(If you do not know which is the current user name, click on each User Name and look at the Password section at the bottom of the window. The User Name that brings up the message "To change your password ..." is the current User Name.)
4. Check the **Group** column to verify that the current User Name lists **Administrators** as one of the groups

##### IF YOU ARE NOT A LOCAL ADMINISTRATOR ON THE WORKSTATION

If the person logged in to the computer does not have administrative rights, there are a couple of options:



1. A user who has an administrator login and password for this computer (such as your network or IT support person) may log in and follow the update instructions for you, or
2. A user who has an administrator login and password may temporarily grant you administrative rights during the update process.

*Bromelkamp Company does not have access to any of your administrator logins or passwords.*



##### TURN OFF USER ACCOUNT CONTROL

If using Windows VISTA or later, User Account Control (UAC) must be disabled.

##### VISTA

1. Open User Accounts by clicking the **Start** button , clicking **Control Panel**, clicking **User Accounts and Family Safety** (or clicking **User Accounts**, if you are connected to a network domain), and then clicking **User Accounts**.
2. Click **Turn User Account Control on or off**.  If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
3. Clear the **Use User Account Control (UAC) to help protect your computer** checkbox, and then click **OK**.

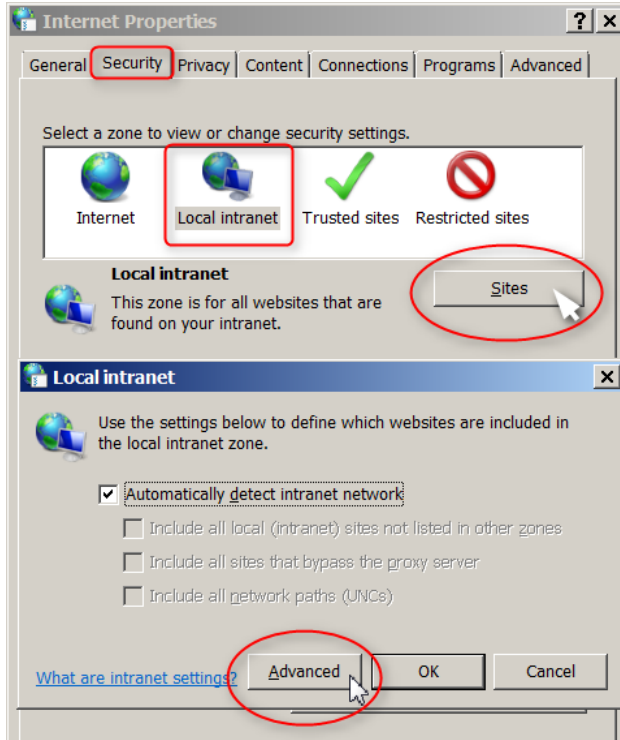
## WINDOWS 7 / 8 / 8.1 / 10

1. Click the **Start** button (  or  ) and Search for "UAC"
2. Select **Change User Account Control Settings**
3. Make a note of the UAC setting (you will reset it to this setting once Pearl is successfully initialized).
4. Slide UAC setting down to **Never Notify** (or leave it at Never Notify if it was already there)
5. **Reboot**

### EXPLICITLY ADD PEARL MAPPED DRIVE TO LOCAL INTRANET IN INTERNET OPTIONS

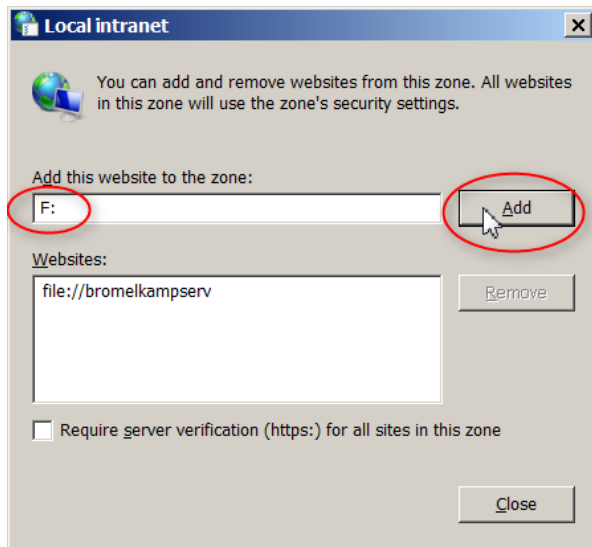
Adding the Pearl mapped drive to the Local Intranet in Internet Options facilitates more reliable connections between Pearl and Word for merge letters.

1. Open **Computer** and write down the drive letter of the file server share where Pearl is located
2. Open the **Control Panel**
3. Open **Internet Options**
4. Click the **Security** tab
5. Click on **Local Intranet**



6. Click on **Sites** to open Local intranet settings
7. Click **Advanced** to open Local intranet zones

8. Type the drive letter from Step 1 in the "Add this website to this zone" box . Be sure to include the colon (:).  
(Note: You cannot browse to the location, you must type.)



9. Click **Add**. (Note: It will translate the drive letter to a file://... path in the "Websites" section)
10. Click **Close**
11. Click **OK**
12. Close Internet Options by clicking **OK**
13. Close the Control Panel

## 2. CONFIGURE MICROSOFT OFFICE

### VERIFY SOFTWARE MEETS PEARL TECHNICAL REQUIREMENTS

Pearl has been tested and works with Office 2000, 2002 (XP), 2003, 2007, and the 32 bit versions of Office 2010, 2013 and 2016. Do not get the 64-bit version of Office at this time. *Pearl merge letters will not work in Office 365.*

<http://bromelkamp.com/Portals/0/files/Pearl%20Technical%20Requirements.pdf>

- Be sure the latest service pack for Microsoft Office is installed on each workstation BEFORE opening Pearl. Microsoft updates: [update.microsoft.com](http://update.microsoft.com)

(as of 04/01/2016: Office 2000, 2002 (XP), 2003, 2007 **SP3**; Office 2010: **SP2**; Office 2013: **SP1** )

- *In Office 2010, it may be necessary to change default expressions on form controls. If you encounter problems with F2 Find List searches, please call Bromelkamp at (toll-free) 877-767-6703.*
- Some users experience errors with Filters in Pearl reports in Microsoft Office 2010 with Service Pack 1 installed. Microsoft has released a hotfix which will resolve the issue. Please follow this link:  
<http://support.microsoft.com/kb/2596496>

## CONTACT BROMELKAMP COMPANY FOR MERGE LETTER CHANGES

Please call Bromelkamp (toll-free 877-767-6703) for code changes needed to run merge letters from Pearl in Office 2013/2016. (They are NOT in the current version of the Pearl update.) **These steps will not likely work for Office 365.**

## SAFE MODE

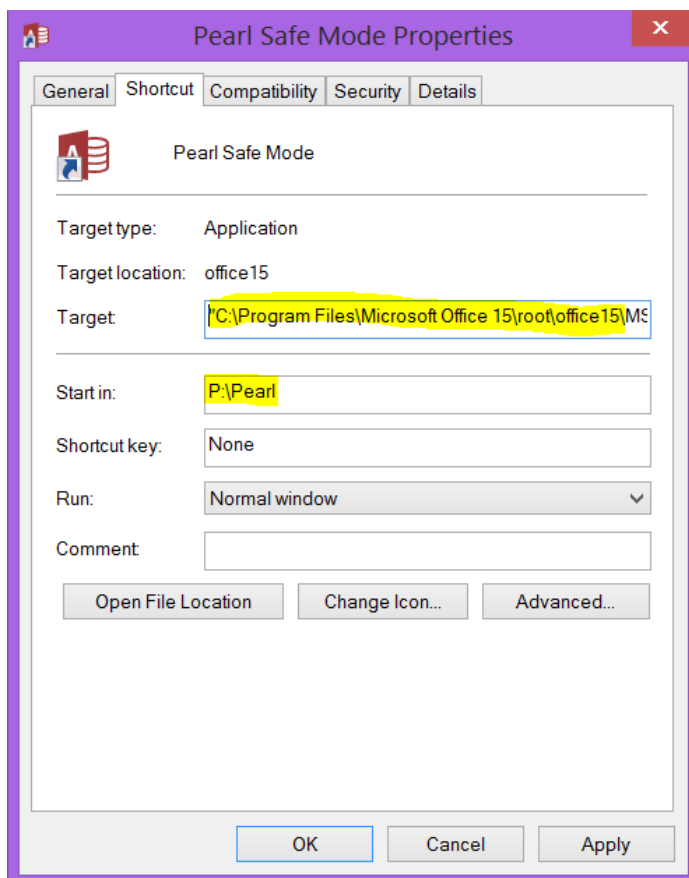
To use Pearl merge letter functionality in Office 2013/2016, it is necessary to open Access in Safe Mode. The easiest way to achieve that is to use a **/safe** switch in the shortcut to Pearl. It's a good idea to add "Safe Mode" to the name of the shortcut. By opening Access in Safe Mode, you will lose the ability to view or change Access Options. You can regain that ability by opening Pearl *without* the shortcut (i.e., from the Recent Files list within Access, or by double-clicking on Pearl.MDB directly).

*The file paths may be different on your system than those shown in this example.*

Full text in Target:

**"C:\Program Files\Microsoft Office 15\root\office15\MSACCESS.EXE" /safe "P:\Pearl\Pearl.MDB"**

**"[file path to MSACCESS.EXE]" /safe "[file path to Pearl.MDB]"**



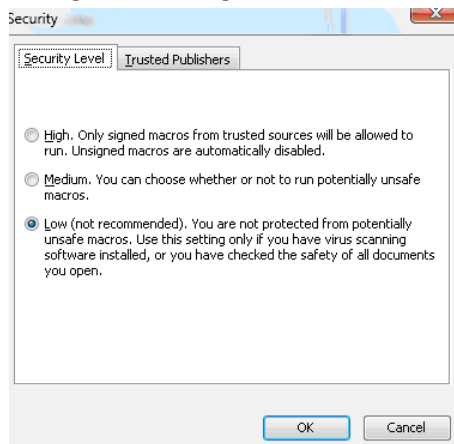
SET THE MACRO SECURITY LEVEL TO LOW IN MICROSOFT ACCESS

Pearl must run with macros enabled to work properly. Enabling all macros is the simplest method.

*(Please note: if you would prefer to enable macros only for the pearl database, please see the optional instructions for trusted locations in the Pearl Installation - Advanced Troubleshooting document available on the Bromelkamp website.)*

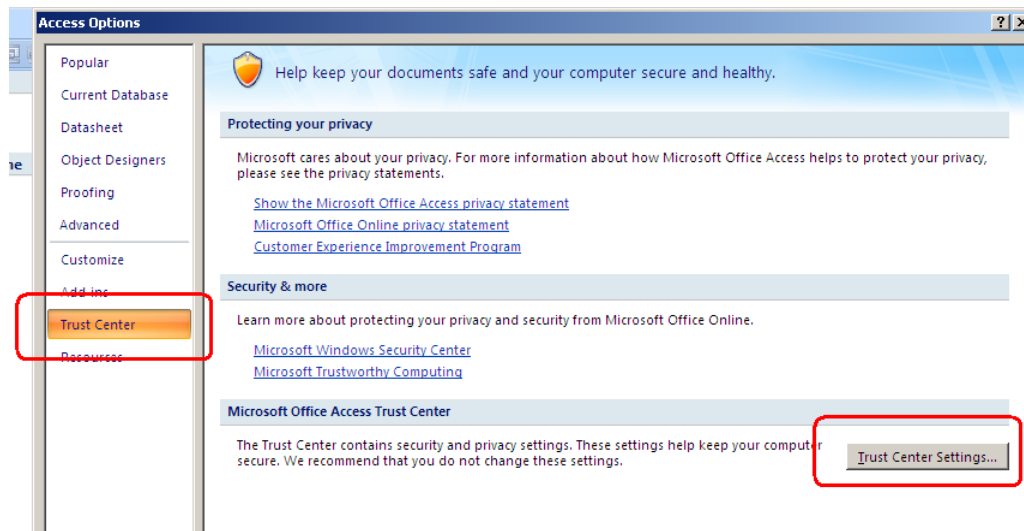
**ACCESS 2003**

1. Open **Microsoft Access 2003** without opening Pearl.
2. In the **Tools** menu, select **Macro: Security**.
3. Change the setting from **Medium** to **Low**.

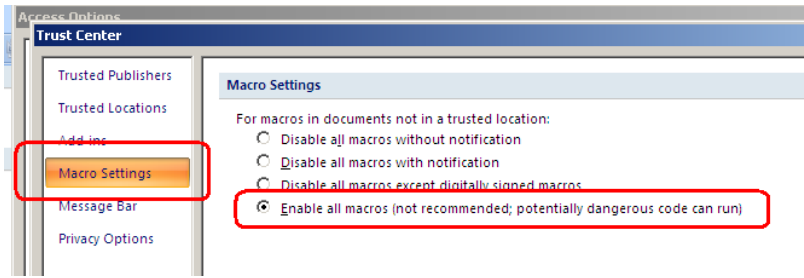


**ACCESS 2007 / 2010 / 2013 / 2016**

1. Open **Microsoft Access** without opening Pearl.
2. Open Access Options
  - Access 2007: Click the **Office Button** in the upper left corner > then click the **Access Options** button.
  - Access 2010/2013/2016: Click the **File** tab on the left side of the screen > then click **Options**.
3. Select **Trust Center** and click the **Trust Center Settings** button



4. In **Macro Settings**, select "Enable all macros"




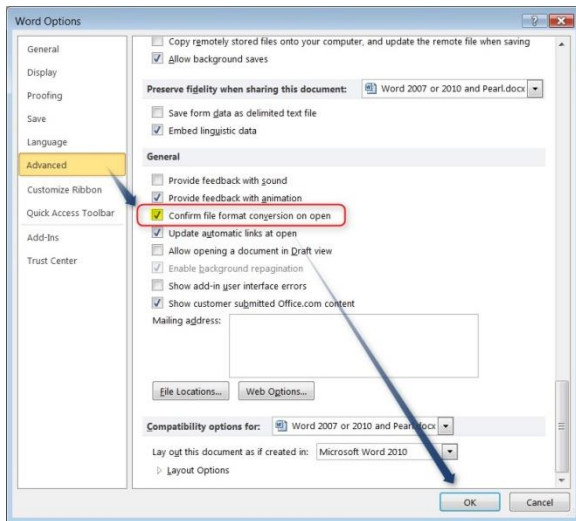
5. Click **OK** twice to close the Trust Center and Access Options menus and save the changes

## MICROSOFT WORD SETTINGS

### SET CONFIRM FILE FORMAT CONVERSION ON OPEN

Word must confirm file format conversion on open for Pearl merge letters to function.

1. Open **Microsoft Word**
2. Open **Word Options**
3. Word 2007: Click the **Office Button**  > then click **Word Options**
4. Word 2010/2013: Click the **File** tab **FILE** > then click **Options**
5. Select **Advanced settings**, and scroll down to the **General** section
6. Check box next to "Confirm file format conversion on open"



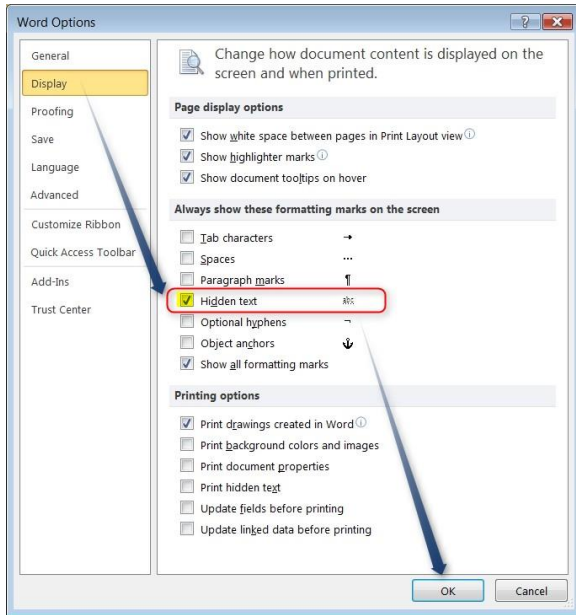
7. Click **OK** to close Word Options and save the change

### SET SHOW HIDDEN TEXT

Hidden text must be showing in order for Pearl Set commands to function.

1. Open **Microsoft Word**
2. Open Word Options
  - Word 2007: Click the **Office Button**  > then click **Word Options**

- Word 2010: Click the **File** tab **FILE** > then click **Options**
3. Select **Display** settings and find the "Always show these formatting marks on the screen" section
  4. **Check** the box next to "Hidden text", then click **OK**



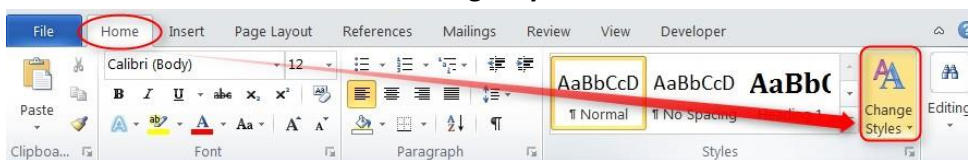
#### (OPTIONAL) CHANGE THE STYLE SET TO WORD 2003

Since Word 2007, the new default paragraph spacing is set to double-space paragraphs. This has the result of causing the entire address bloc to be double-spaced in ad-hoc (F5) letters from Pearl. It also causes letters to be double spaced when opened from Pearl Chronicle, even if they were originally created and printed as single spaced.

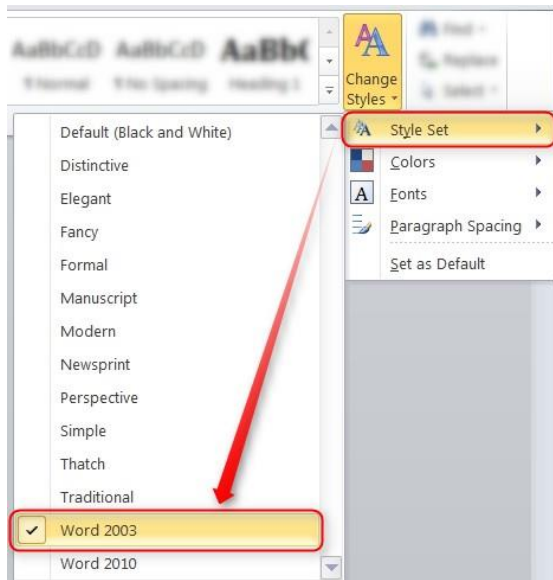
The easiest way to work around this behavior is to change the Style Set option so that all default formatting, including line and paragraph spacing, is the same as Word 2003.

#### WORD 2007/2010

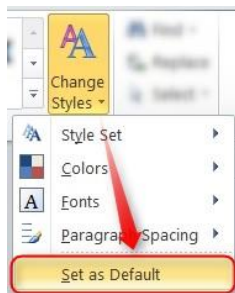
1. Go to the **Home** tab and click the **Change Styles** command



- From **Change Styles**, point to **Style Set**, and then click **Word 2003**



- To make this the default style set for all new documents, click **Change Styles** in the Styles group, and then click **Set as Default**



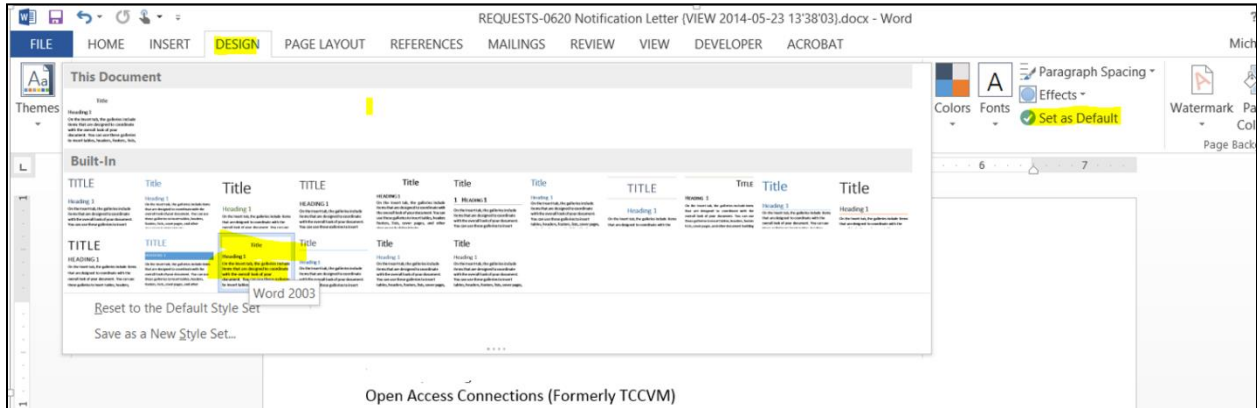
## WORD 2013/2016

- Go to the **Design** tab and click the drop-down arrow for style selection.





- Microsoft has decided you don't care about the name of the style, so the only way to find those names is to hover over the picture of the style. Even then, you may have a hard time getting the rollover text to display.

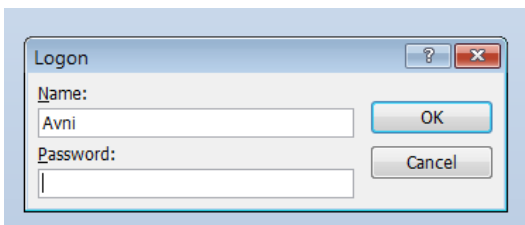


- After you have selected **Word 2003** as the style, click the **Set as Default** icon. This will make this the default style set for all new documents.

### 3. INITIALIZE DATABASE

(IF APPLICABLE) RECONNECT USERS TO THE WORKGROUP FILE FOR ACCESS SECURITY

You know you have Access Security if you get a separate Logon window for Pearl.



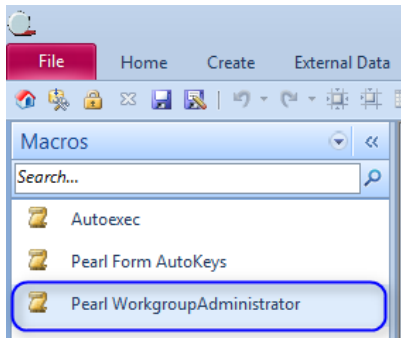
Pearl users will become disconnected from Pearl.mdw any time they open an Access database and the Pearl.mdw file is not available. Common situations include:

- Working on an off-line copy of Pearl at home over the weekend.
- Changing/installing Windows or Office on the computer.

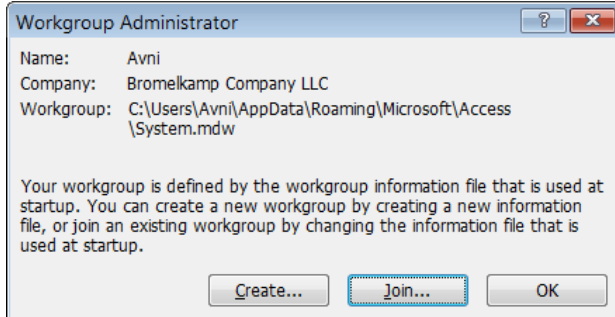
Steps to reconnect to workgroup for each user:

- Press **F11** to reveal the Navigation Pane.
- Scroll down to the **Macros**

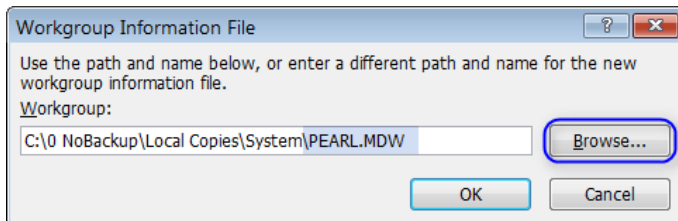
- Find the macro **Pearl WorkgroupAdministrator**. Double-click on it.



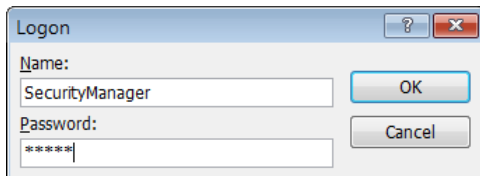
- The Workgroup Administrator dialog box will open, click **Join**



- Browse and then navigate to **\\Pearl\System\Pearl.mdw**. Select Pearl.mdw and click **Open**.



- Click **OK**. You should get a message that you have successfully joined the workgroup.
- Reopen Pearl and log in as SecurityManager so that Pearl can copy necessary files to the workstation.



## TEST PEARL FUNCTIONALITY (UAC IS STILL OFF AT THIS POINT)



- Open Pearl
- If applicable, the user should login with their own Pearl username and password (type over SecurityManager)
- Test your usual tasks, which may include data entry, reports, accounting, etc.
- If you have any difficulties with Pearl, please reference the additional information on the remaining pages of this document.
- Please contact Bromelkamp Support if you need assistance at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com).

## 4. CONTINUE WINDOWS CONFIGURATION



### RESTORE UAC SETTING

The last step for you is to restore UAC (User Account Control) to the original setting. It is EXTREMELY important that you remember to turn this back on as soon as you have completed the rest of the steps described in this document. To change this setting:

#### VISTA

1. Open User Accounts by clicking the **Start** button , clicking **Control Panel**, clicking **User Accounts and Family Safety** (or clicking **User Accounts**, if you are connected to a network domain), and then clicking **User Accounts**.
2. Click **Turn User Account Control on or off**.  If you are prompted for an administrator password or confirmation, type the password or provide confirmation.
3. Check the **Use User Account Control (UAC) to help protect your computer** check box, and then click **OK**.

#### WINDOWS 7 / 8 / 8.1 / 10

1. Click the **Start** button (  or  ) and Search for "UAC"
2. Select **Change User Account Control Settings**
3. Slide UAC setting back to its original location (if you are unsure, contact your IT support)
4. Reboot

### TEST PEARL FUNCTIONALITY WITH UAC SETTING RESTORED

1. Open Pearl
2. If applicable, the user should login with their own Pearl username and password
3. Test your usual tasks, which may include data entry, reports, accounting, etc.
4. If you have any difficulties, please reference the Pearl Installation: Advanced Troubleshooting document.
5. Please contact Bromelkamp Support if you need assistance at (877) 767-6703 or [support@bromelkamp.com](mailto:support@bromelkamp.com).

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**ALL STEPS FOR THIS WORKSTATION COMPLETED**