



## Gauges for PC Client Selection

*Intended for Decision Makers, Architects and Desktop Admins*

### Background

The Newlook Smartclient has been designated as the client software of choice for use with the Financial Portrait Software System™, an accounting and financial reporting suite created and supported by Tegratecs Development Corp. ®

The Smartclient runs on most any type of Windows desktop and was originally developed by looksoftware Pty Ltd of Australia. Tegratecs has developed a custom repository that can be installed on top of the desktop version by an admin simply by following an internet link ( at [www.financialportrait.com](http://www.financialportrait.com) )



looksoftware has been a consistent market leader in delivering quality user experiences with Windows clients and the IBM i server line for many years. We have seen technical leadership and platform harmony from looksoftware firsthand for over 10 years. The bottom line is the Smartclient was a far better complement to Financial Portrait than we could have developed ourselves. Today, the innovation continues from looksoftware as a Fresche Solutions brand.

The Smartclient can be installed as a desktop application or used within a browser window with an ActiveX plug-in. Please see the *Technical Configuration Facets by Type of Client* section of this document for more details.

### Choosing which Client Type to Install

- On this CD, there are two flavors of the Smartclient, one runs on the PC desktop (Windows client) and the second, via Internet Explorer (the Web client). Both are located under the “admin\1 - install” folder and require administrator rights to install. Both offer speedy performance.
- For existing Financial Portrait clients, we recommend the Windows client.
- If a user has administration rights to his/her PC, then the web client is easiest to install. In fact, it can be downloaded, installed and run by clicking on a link on our website page, <https://www.financialportrait.com/fpsnldeployment/WelcomeToWebClientDeploymentSecured.aspx>
  - This is a reasonable way to evaluate and preview Financial Portrait v4 on your PC using our IBM i server. In some situations, the web client is applicable for remote users that need only occasional access to the IBM i sever.
- If the user does not have administration rights to the PC, it is recommended that the administrator follow the directions we have prepared (on CD). Considerations are included for working within a controlled desktop environment.



## Overview

- The enclosed *Smartclient with Financial Portrait Client CD* contains everything your company needs to efficiently administer, install, run, update and cleanly remove the 8.0 version of the looksoftware Smartclient
- Smartclient offers a pleasing and speedy graphical user interface, navigation improvements, a quicker learning curve for new users and extensions that enable software developers to integrate desktop software and web services
- We have focused on making it easy for users to transition to the Smartclient GUI from a textual interface (most V3 installations)
- Smartclient is configured with a Financial Portrait “repository”, a collection of rules and guidelines for how to present the GUI and perform desktop and web services integration when using Financial Portrait
- The Financial Portrait version of the Smartclient contains a menu option for running the base (standard) repository, which in many cases, can look pretty nice with your internally development applications (or other packaged IBM i software) right out of the box
- In order for remote users to connect to your company’s IBM i server using Smartclient via the internet (without requiring a VPN), we have provided setup and configuration examples in the Financial Portrait Installation Guide. Included are setup steps for using SSL (secure sockets layer) without any additional software licenses to purchase.
- For our client’s convenience, we have built in an automated update options that retrieve client-side FP version-specific enhancements. This significantly reduces the time required (for PC administrators and/or PC users) to keep the Smartclient with FPS current and up to date. We also have worked hard to satisfy the interests of PC administrators. In a controlled desktop situation, installation requires an administrator.
- Instructions included on CD for complete removal of Smartclient and ActiveX components

## Licensing Overview

- The Smartclient software on this CD can be used with a temporary or permanent license
- License codes can be based on the client (MS Windows PC) or server (IBM i O/S)
- When you first install a Smartclient version on any given PC, you can automatically obtain a PC-based 30-day license of the Smartclient standard version (on that PC)
- License extensions, developer version licenses and server-based licenses can be granted by Fresche Solutions or obtained through Tegratecs Development Corp.
- If using server licensing (known as host based licensing), the license is checked and allocated when connecting to the IBM i server. Licenses are allocated (or counted as in use) based on active users not sessions (a user running many sessions on a single PC counts as one license). A PC that connects to the Tegratecs Development Corp. IBM i server using host-based licensing uses an Tegratecs Smartclient license. Thus, Smartclient can be installed on more PCs than there are licenses available to run, just not all of the PCs can be active.

## Technical Configuration Facets by Type of Client (as configured by Tegratecs)

- **Windows Client** (Smartclient .exe)
  - Installs using InstallShield Wizard
  - Directions on CD under folder: admin\1 - install\Windows client (b group)
  - Administrative rights are required on the PC when doing the initial install
  - Creates folder in Program Files
  - Removes via Add/Remove Programs under Control Panel. Instructions on CD under *Removal* for complete cleaning of PC.
  - Executes from Start menu or desktop shortcut
  - Requires connection to IBM i in order to perform FPS business application tasks
  - Can be used by users outside of the company's internal LAN if channel is setup
  - Has feature to retrieve updates of the Financial Portrait repository via the internet if authorized by administrator of PC. Updates are digitally signed CAB files served by IIS web server and configured according to Microsoft standards for web deployment (install and run capability) using looksoftware's Web Deployment Wizard.
  - Fastest and thus the most applicable for tasks involving a lot of data entry
  
- **Web Client** (Smartclient as an ActiveX component in browser)
  - Recommended when evaluating Financial Portrait
  - Directions on CD under folder: admin\1 - install\Web client - (a group)
  - Administrative rights are required on the PC when doing the initial install
  - Invoked using IE browser
  - Also recommended for remote users with admin rights requiring occasional access to IBM i applications. Or remote users who can have installation performed on their PC by a company admin in advance.
  - Downloads from Windows 200x IIS and several other types of web servers
  - Configurations on this CD can also be downloaded from one of our IIS web servers
  - Downloads and installs newlook ActiveX control into Windows/Downloaded Program Files
  - Installs using standard Windows .CAB files method
  - All .CAB files from Tegratecs Development Corp. are digitally signed
  - Creates folder in Program Files
  - Executes in IE browser
  - Requires connection to an IBM i server to perform FPS business application tasks
  - Can be used by users outside of the company's internal LAN if channel is setup
  - Automatically checks for Financial Portrait repository updates and installs them if found
  
- Other client options are available from Fresche Solutions looksoftware brand based on version