

# IRIS 4.0 HOLDING PEN

## 1.0 ABOUT THE IRIS 4.0 HOLDING PEN

The IRIS 4.0 Holding Pen is an application that lets you review update requests submitted via your IRIS for the Web 4.0 web site, and easily merge those requests with your local IRIS 4.0 database.

## 2.0 INSTALLING THE HOLDING PEN WIZARD

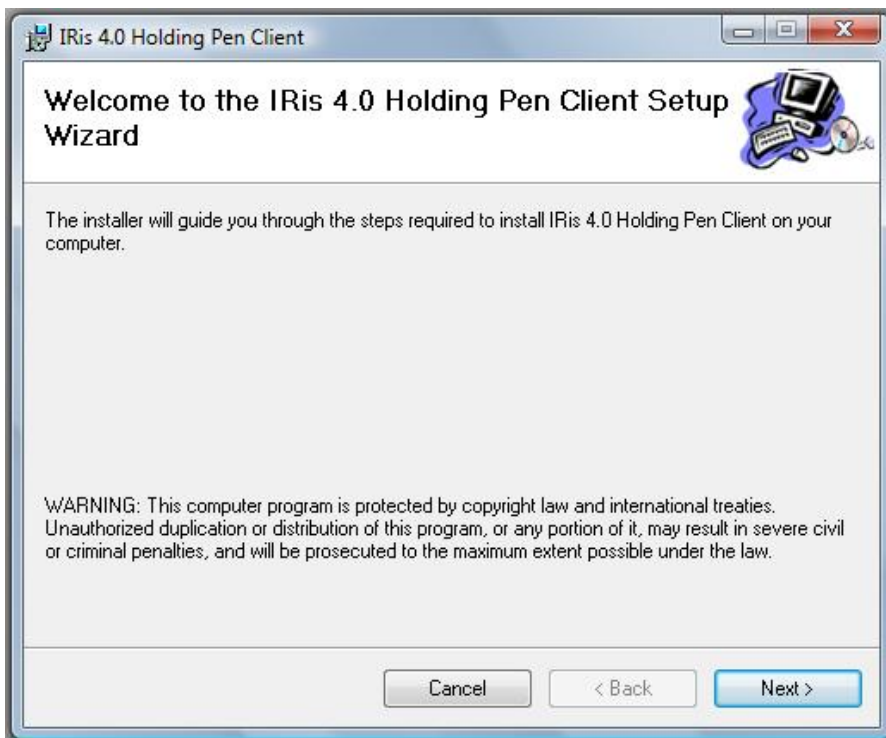
To install the IRIS 4.0 Holding Pen Wizard, go to the URL listed below and click on the link that says **4.0 Holding Pen**.

<http://www.suncoastprograms.com/downloads.html>

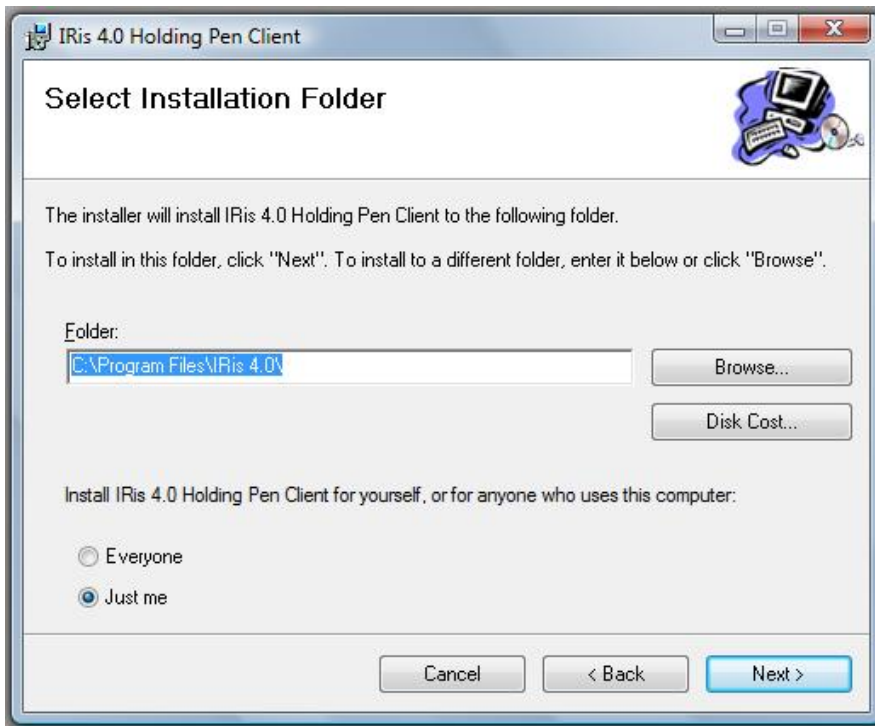
You will download a file called **IRISHoldingPenSetup.zip**.

Save this zip file to a local folder and unzip its contents.

Double-click on the file named **setup.exe**.



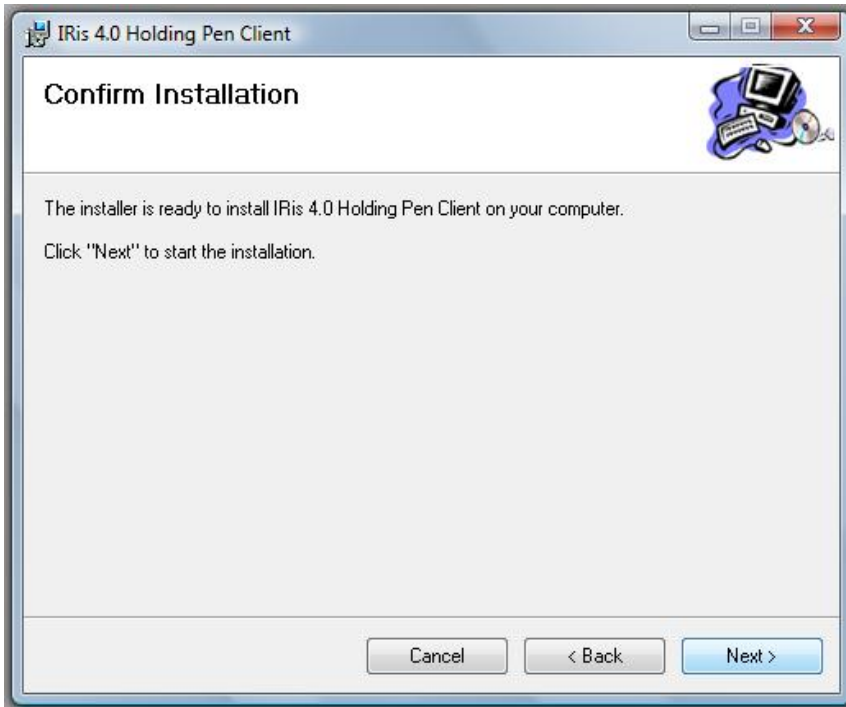
Click **Next** to continue.



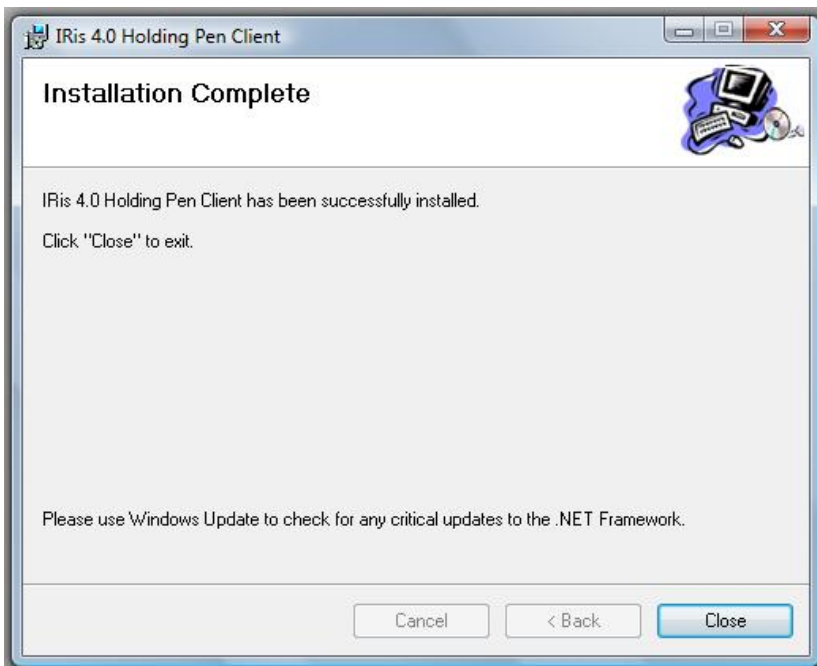
Select the installation path for the holding pen. By default, it should be the same as your IRis 4.0 installation path.

**NOTE:** In a multi-user environment, the Holding Pen should be installed to each workstation that will use the Holding Pen because the IRis 4.0 Holding Pen menu will only activate if it recognizes the file on the workstation. DO NOT INSTALL THE HOLDING PEN TO A NETWORK DRIVE.

Click **Next** to continue.



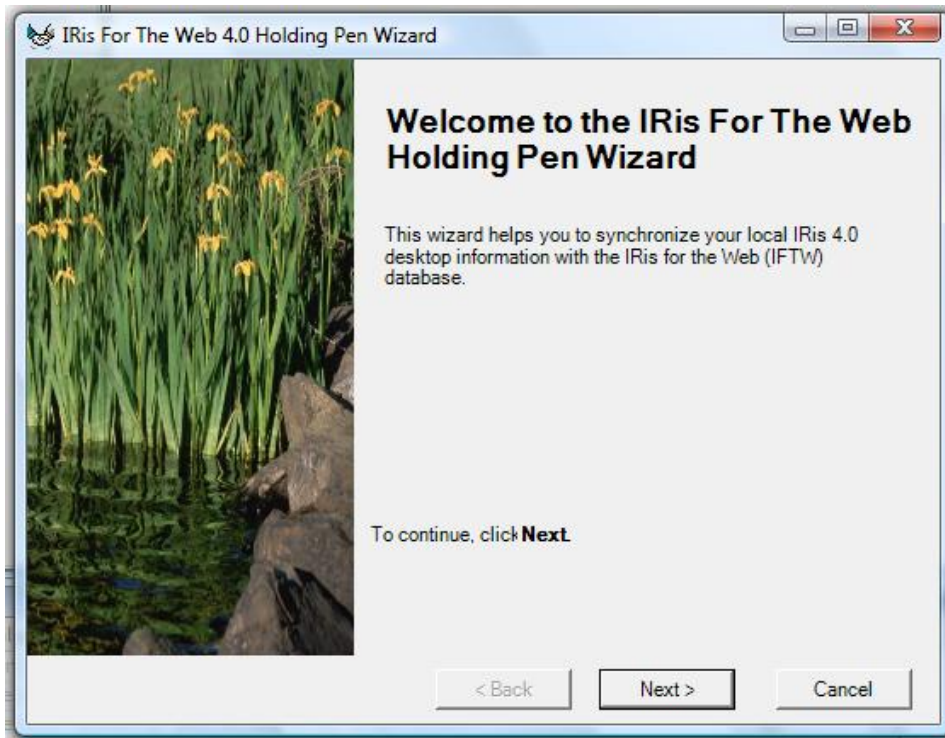
Click **Next** to start the installation. A progress screen will follow, then the completion screen.



At this point, the IRis 4.0 Holding Pen is installed and ready to be configured.

## 3.0 CONFIGURING THE HOLDING PEN

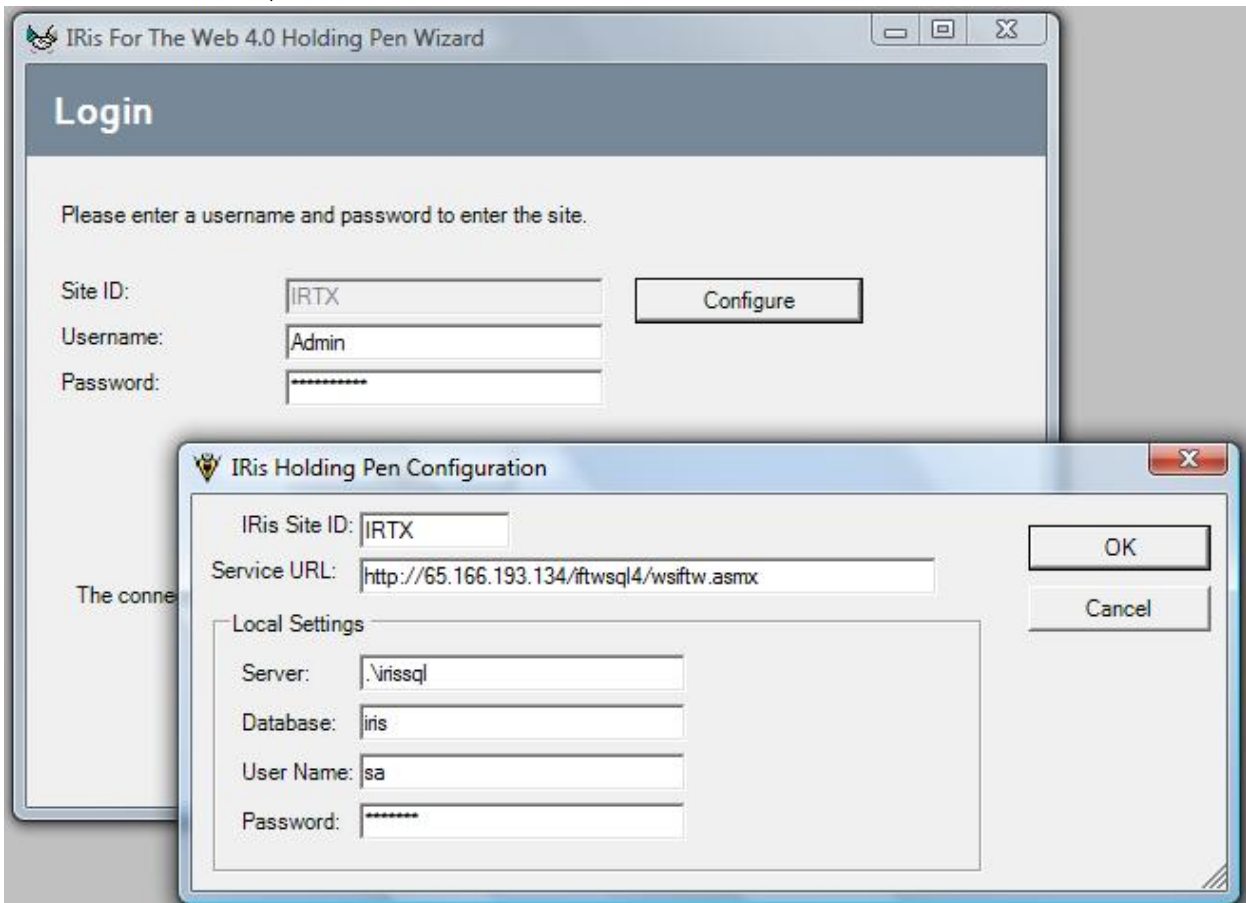
After you install the holding pen wizard successfully, there will be a new file in your installation directory (by default, this will be your **IRIS 4.0** directory) called **IRISHoldingPenWizard.exe**. Double-click on this file and launch the application.



You will first see the Holding Pen Start Screen. Click **Next** to continue.



The first time you run the holding pen wizard, you must enter in your configuration information so that it can communicate both with your local IRis 4.0 database and your web site. To do this, click on the **Continue** button.

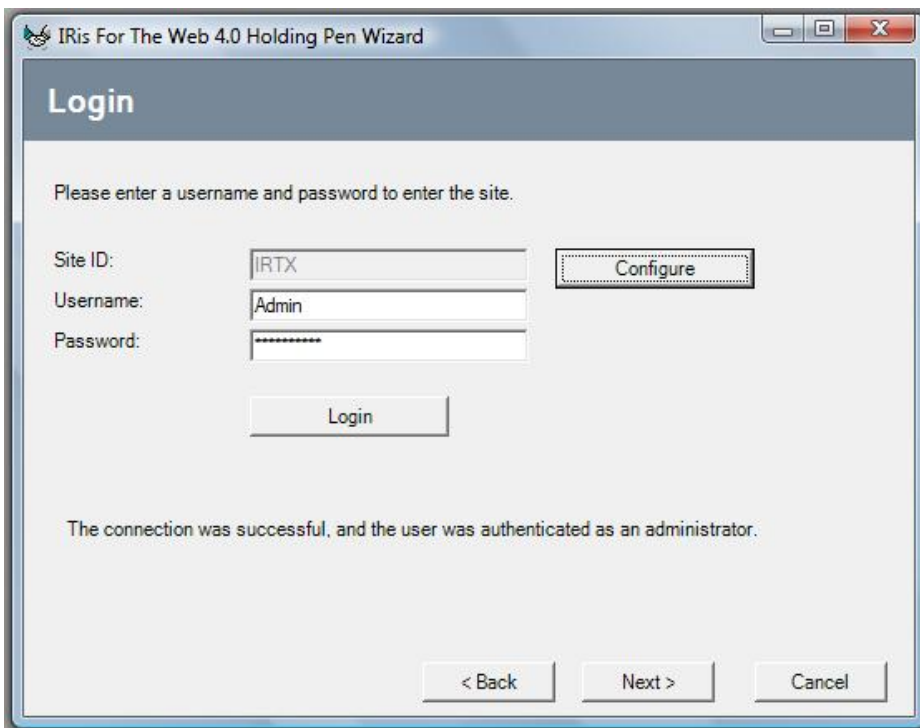


From this dialog, you can enter in your configuration information:

- **IRIS Site ID** – This is a 4-digit web site ID
- **Service URL** – Enter as shown
- **Local Settings**
  - **Server** – Enter the name of the server where IRIS 4.0 is installed. If using SQL Express database setup, enter: .\irissql
  - **Database** – Enter the name of your SQL database. If using SQL Express database setup, the default database name is: iris
  - **User Name** – If using SQL Express database setup, the default User Name is: sa
  - **Password** – If using the SQL Express database setup, the default password is: irismsde

The settings should remain the same from this point on, and will not need to be edited the next time you run the holding pen.

Click **OK** to accept the settings and continue.



Now that you have the settings configured, you can log in to the holding pen.

**NOTE:** This log in is with the IRIS for the Web web site, not your local IRIS 4.0. The holding pen requires an active Internet connection to operate.

For the Username and Password fields, enter the user name and password you normally use when logging into the IRIS for the Web 4.0 web site. The default login is:



- **User Name:** Admin
- **Password:** Suncoast

Click the **Login** button to attempt to log in. If your login was successful, the **Next** button will become enabled. Click **Next** to continue.

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