



Installation and Configuration Guide for the Meta5 Starter Edition

V4.3

First Edition September, 2015

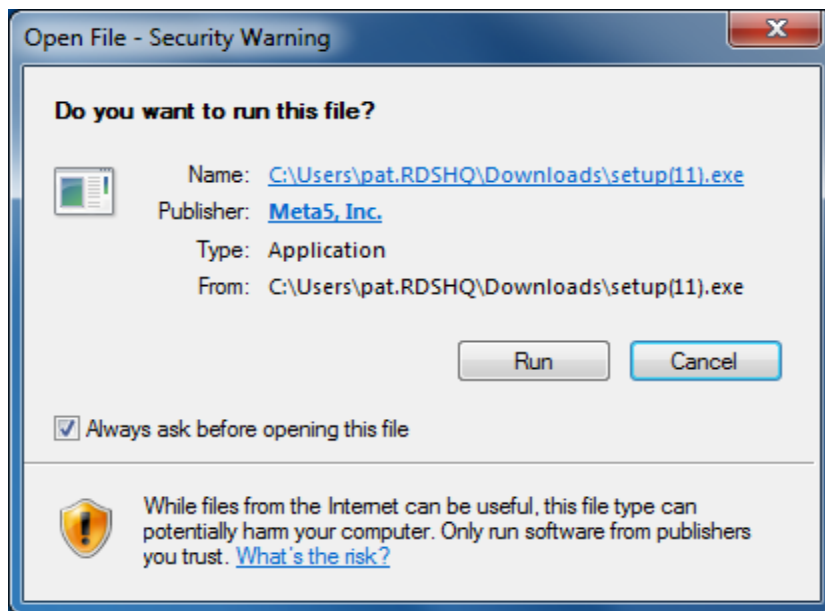
Installation of Meta5 Starter Edition

This guide will step you through the process of installing and configuring the Meta5 Starter Edition software.

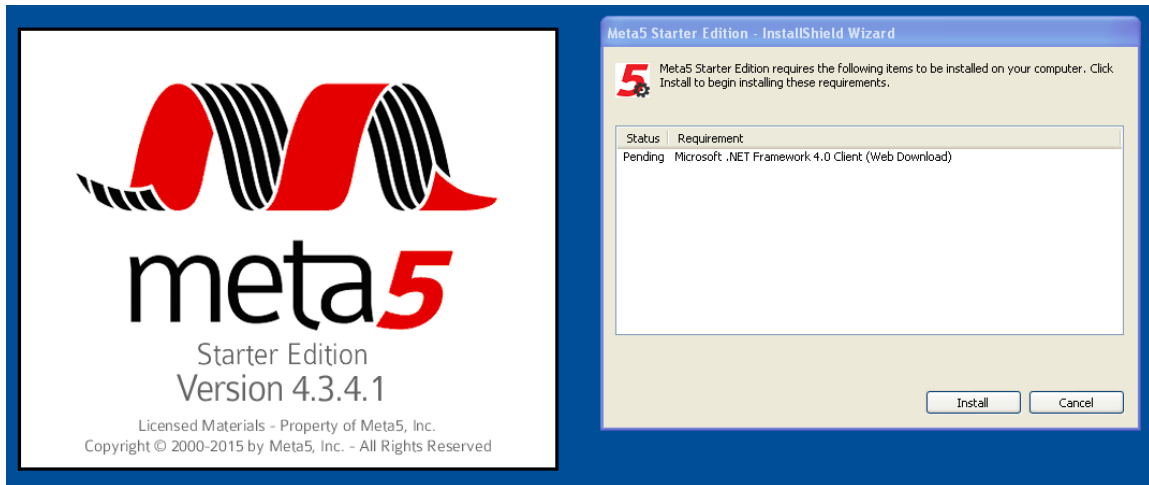
If you plan on installing the Meta5 Starter Edition, you must have an internet connection and access to a valid email account. These are necessary to install Meta5 as registration is required to run our software.

In order to start the installation, you will need to obtain the Meta5 **setup.exe** installation program. The **setup.exe** file can be downloaded directly from our website www.meta5.us/download/setup.exe or it can be obtained through one of our distribution channels. If you would like to read more information about Meta5 before downloading and installing our software please visit our Free Trial webpage at <http://www.meta5.us/products/free-trial/>. There you will find additional reading materials and YouTube videos about Meta5.

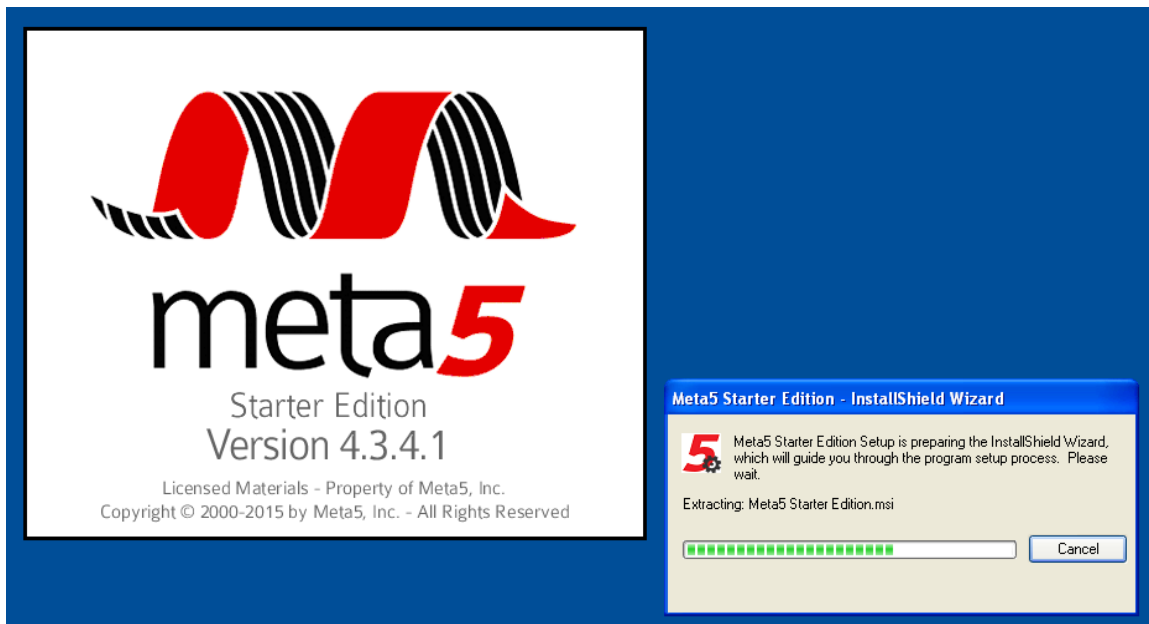
Once you have the **setup.exe** file, double click it to start the installation. After starting the installation, you may see Security Warning messages similar to the one shown below. This is normal, click 'Run' to continue.



NOTE for Windows XP users: Meta5 requires the .NET 4.0 framework to be installed and will auto detect if this component is installed on your computer. If it is installed, the installation will continue normally and skip this section, if not, you will be prompted to install the .NET Framework before proceeding. An example of this message is shown below.



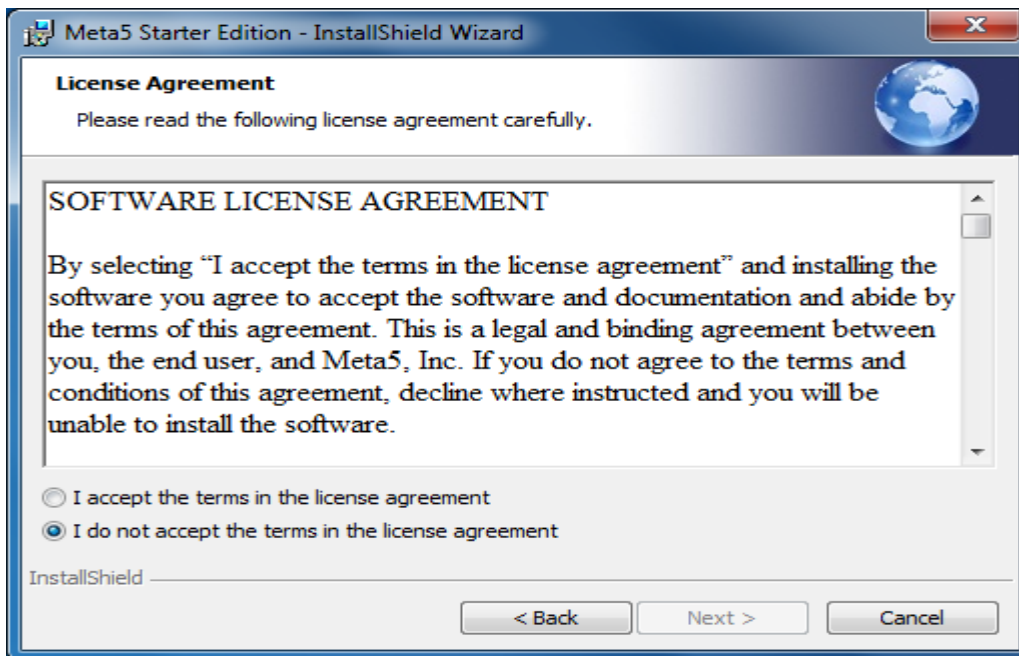
Click 'Install' to proceed if you are prompted with this message. The installation of .NET 4.0 may take about 15 minutes to complete. Once the .NET 4.0 Framework is installed or if it's installed on your PC already, you will see the InstallShield wizard start to extract the Meta5 Starter Edition.msi installer.



After the information is extracted, the InstallShield Wizard will begin.

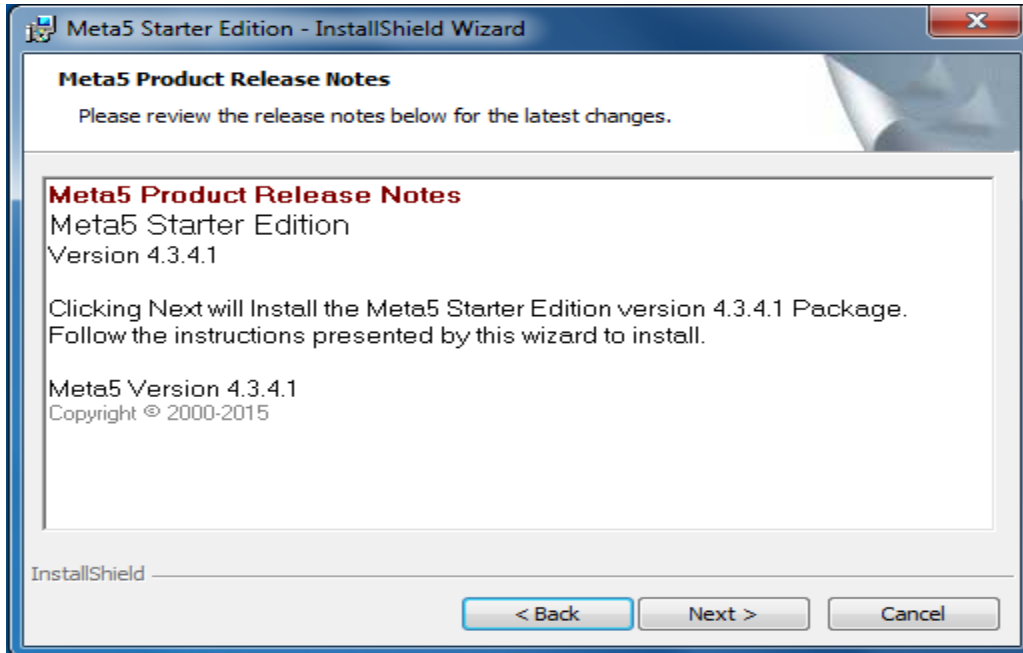


Click 'Next' to continue.

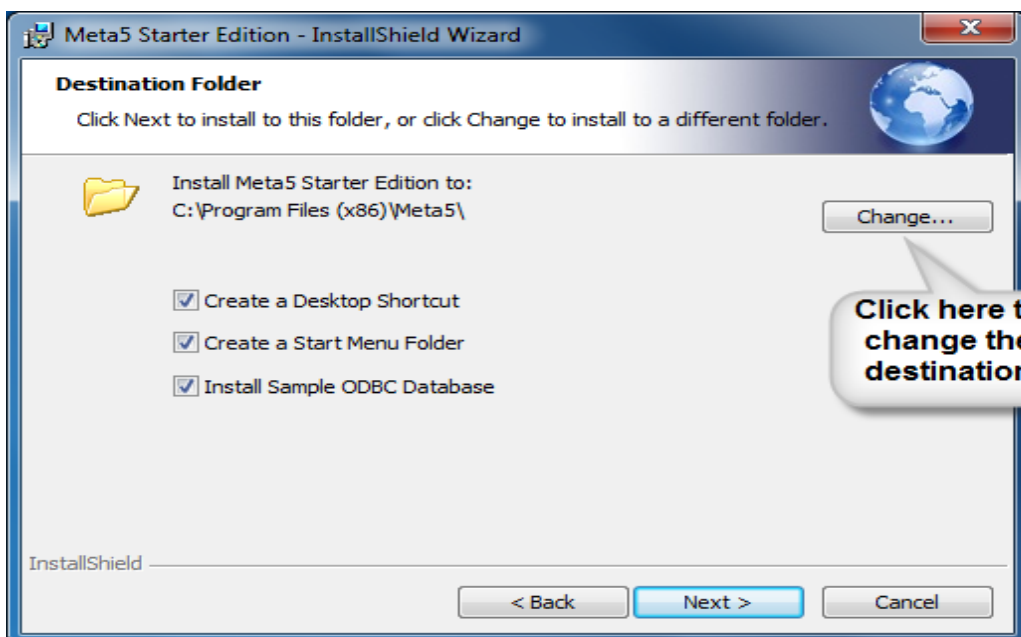


You will then see the licensing agreement. Please read the licensing agreement carefully, and if you accept the terms, select the 'I accept' option and click 'Next'.

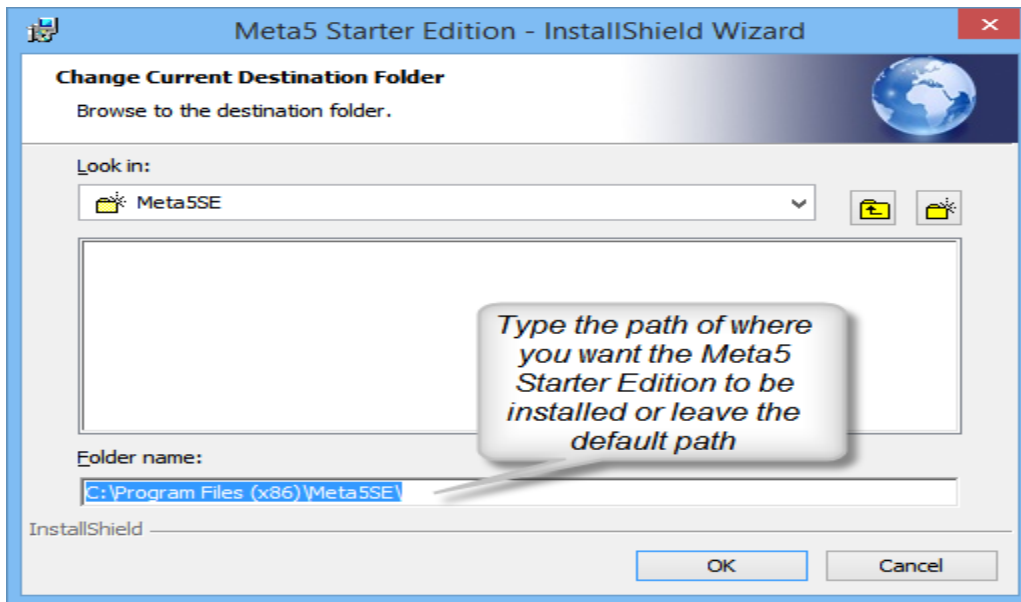
The Release Notes page appears next. This page provides you with the latest news about Meta5 Starter Edition, as well as the current version of your installation.



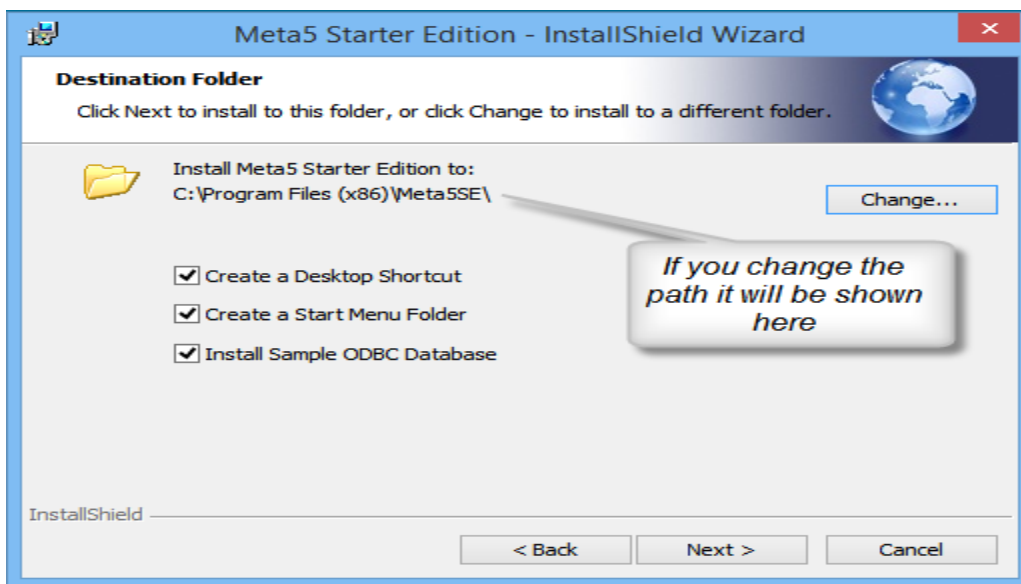
After reading the Release Notes, click 'Next' and the 'Destination Folder' window will appear.



By default, Meta5 will install the *Meta5 Starter Edition* in the *Program Files Meta5* directory on your 32-bit computer and in the *Program Files (x86)Meta5* directory on a 64-bit computer. If you wish to change the location, click the 'Change' button. After doing so, a new 'Change Current Destination Folder' window will appear as show below.



Enter the new desired location, in the 'Folder name' section and click 'OK' to save your new location.

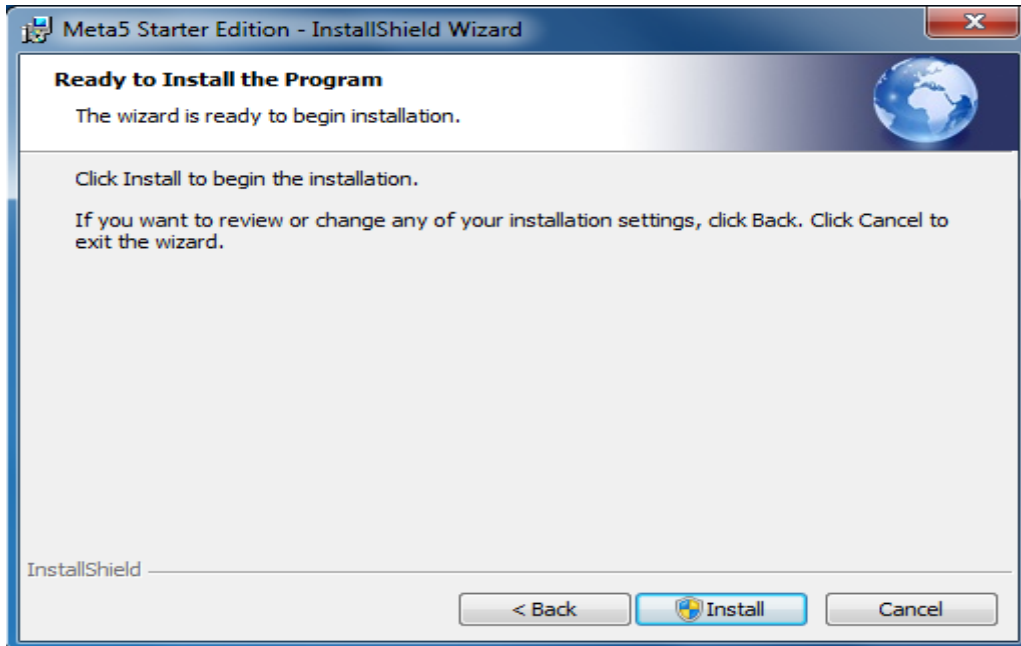


The new directory path will now show in the destination folder window. If the directory doesn't already exist, the installer will create it automatically.

You are also shown 3 installation option checkboxes. The description of each is described below. Select the options you desire.

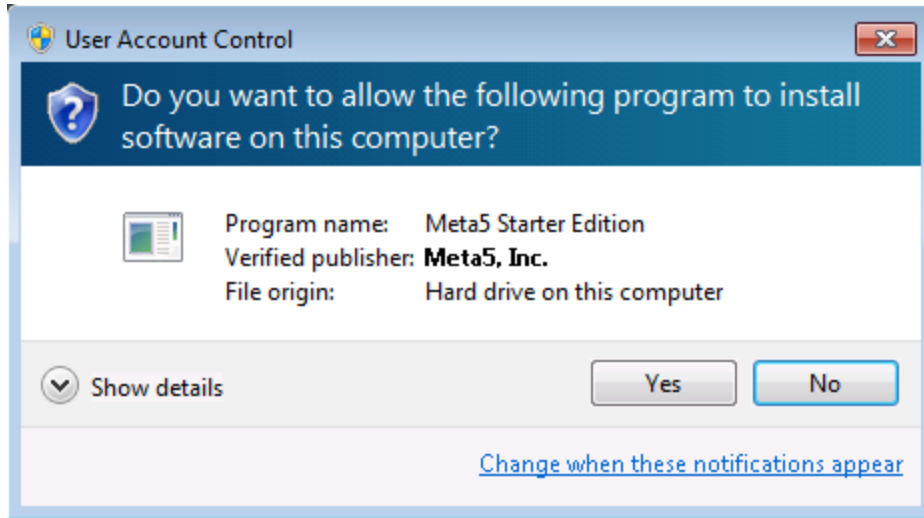
- **Create a Desktop Shortcut** -Checking this box will put a Meta5 shortcut icon on your Windows desktop, this is helpful for easily starting *Meta5 Starter Edition*. We suggest you enable this.
- **Create a Start Menu Folder** - Checking this box will organize your Meta5 programs in your Start Menu. We suggest you enable this.
- **Install Sample ODBC Database** – Checking this box will install a 5 Meg Access database file called *Meta5 Sample DB.mdb*. This file will be located in the *Program Files\Meta5\db* directory (Note: Installation of MS Access is not required). In addition a 32-bit ODBC data sources will be created called *Meta5 Sample DB*. Although this database is not required to run the Starter Edition, we highly encourage you to install it, as it is used in our examples and tutorials.

After choosing your destination folder and installation options, click 'Next' to begin the installation.

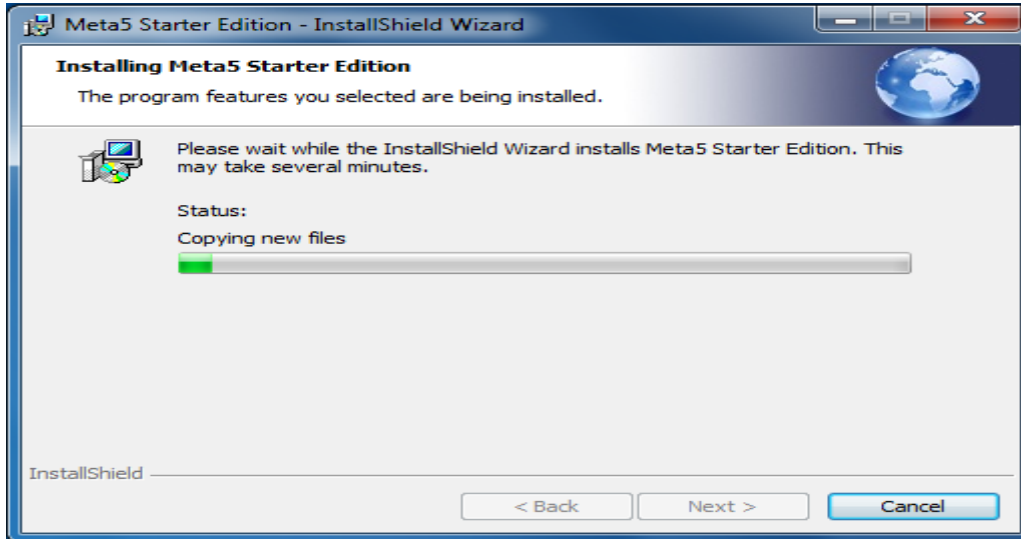


To proceed Click '*Install*' .

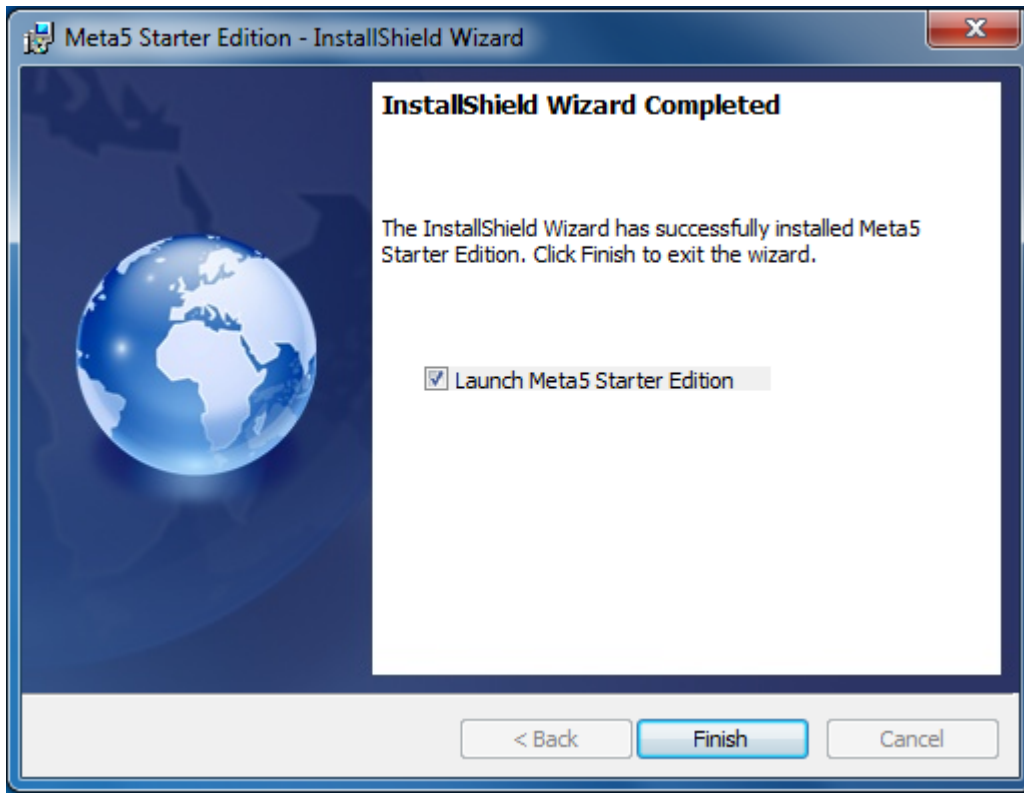
Next, a security window may appear



If this window appears Click 'Yes' to continue the installation.

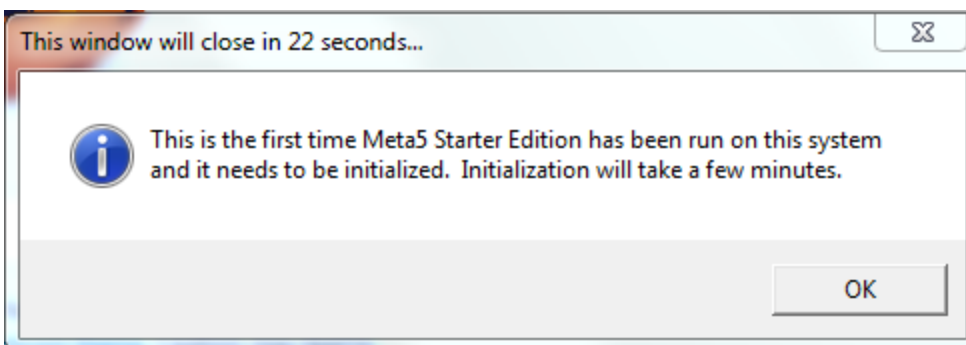


Meta5 files will now be copied to the destination folder. The status bar will show the progress of the installation. This process will take a few minutes. Once all files are copied, you will be presented with the InstallShield completion screen that is shown below.

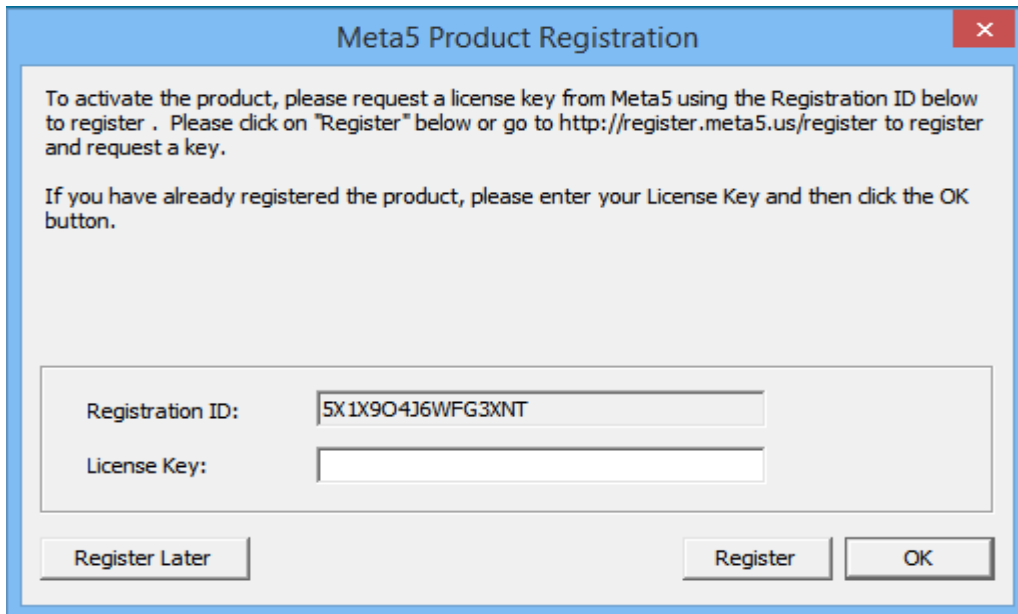


While the InstallShield indicates that the installation is completed, there is still a Meta5 initialization process that is required before you can use Meta5. We recommend that you keep the 'Launch Meta5 Starter Edition' checkbox checked on this window so that the Meta5 Starter Edition initialization process may continue.

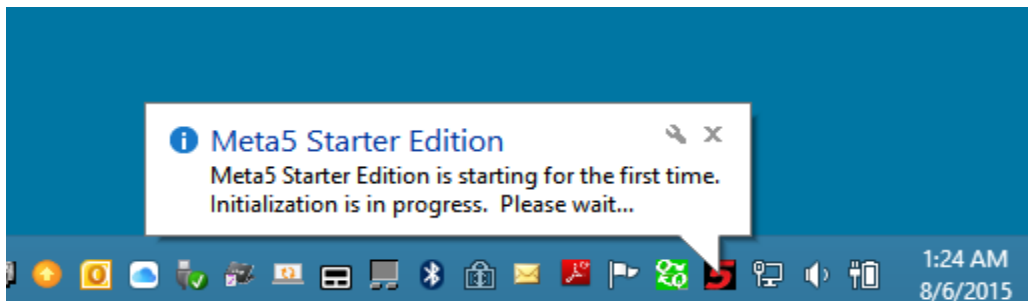
Click 'Finish' and the InstallShield part of the installation is now complete. After the InstallShield process is completed, you will see a window similar to the one below telling you that the Meta5 Starter Edition will be initialized.



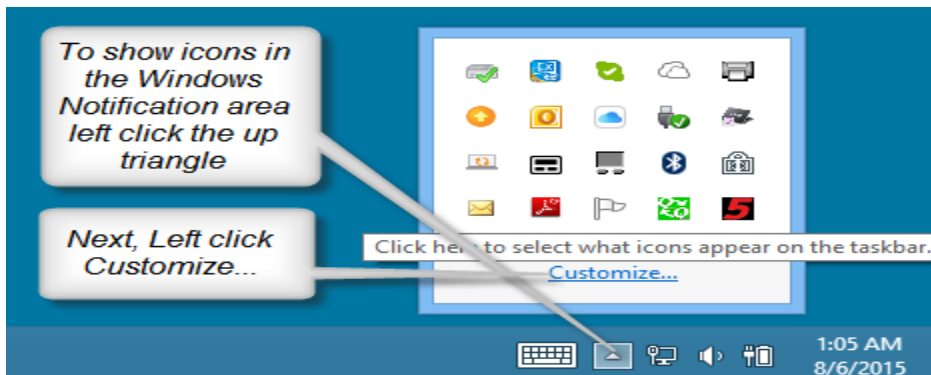
Immediately after this window appears the Meta5 Product Registration window appears, like below;



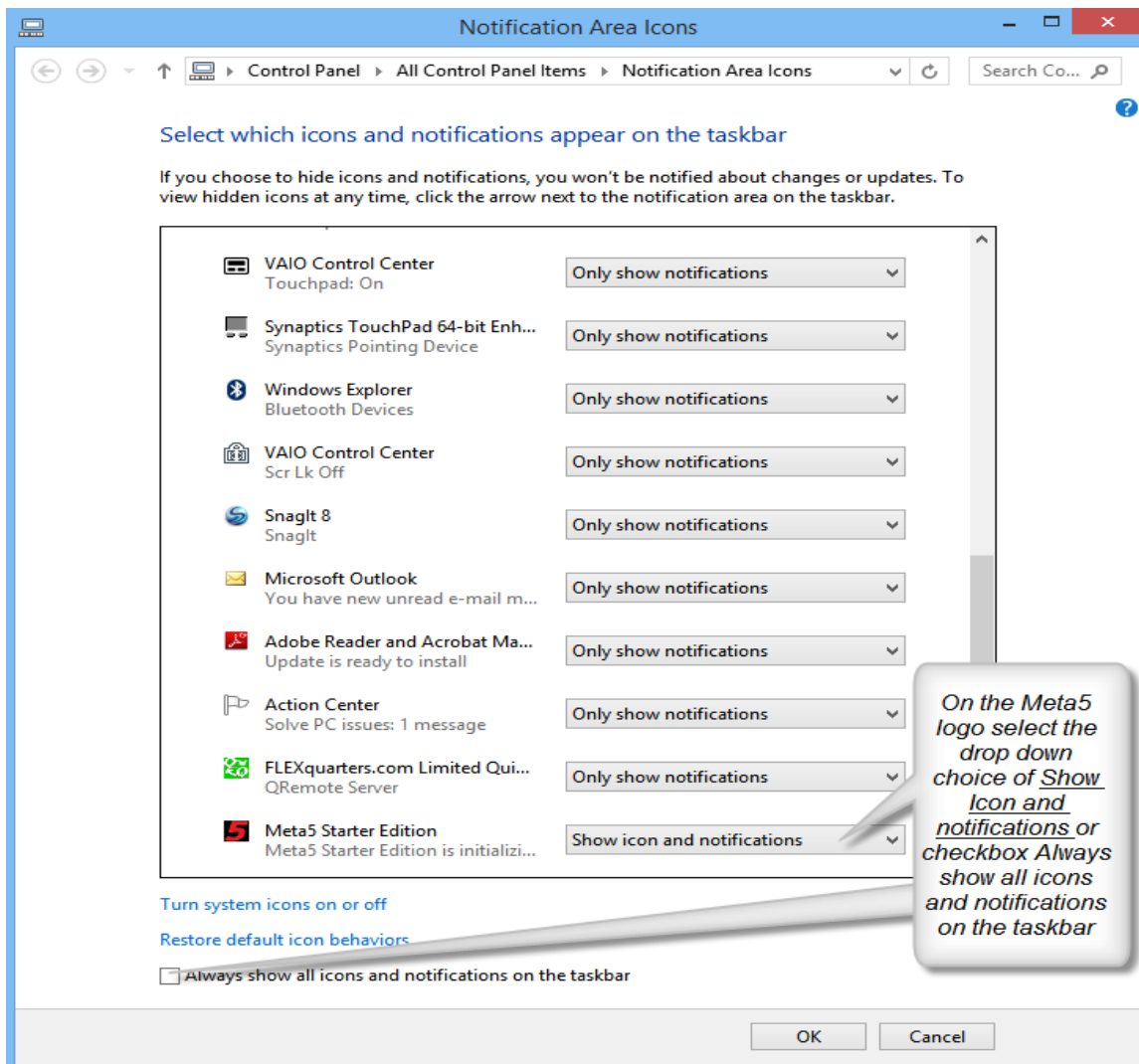
You should also see a little black Meta5' icon appear on the notification area of your Windows toolbar, if you don't see this icon, it means that your Windows notification toolbar is hidden. We recommend that you turn your Windows notification toolbar on.



If you need to turn on your Windows notification toolbar on it will look like the picture below instead of the one above. Looking at the below picture left click on the up triangle in the Windows task bar. Then left click Customize...



After clicking Customize the following *Notification Area Icons* window will appear;



Next *Show icon and notifications* on the Meta5 logo program or select the checkbox to *Always show all icons and notifications on the taskbar*. When you

enable one of these choices you will see the Meta5 black logo on your task bar and will look something like this;



This icon will remain black until the registration process has been completed and Meta5 is finished being initialized.

Now, getting back to the registration window...

A screenshot of the "Meta5 Product Registration" dialog box. The title bar is blue with a close button (X) on the right. The main area has a light gray background with the following text:

To activate the product, please request a license key from Meta5 using the Registration ID below to register . Please click on "Register" below or go to <http://register.meta5.us/register> to register and request a key.

If you have already registered the product, please enter your License Key and then click the OK button.

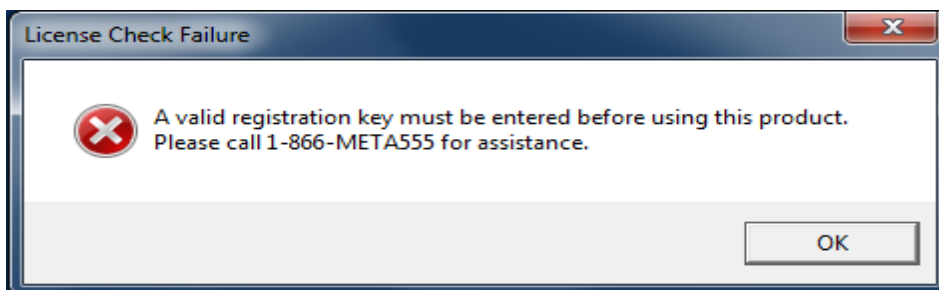
Below the text are two input fields:

Registration ID:

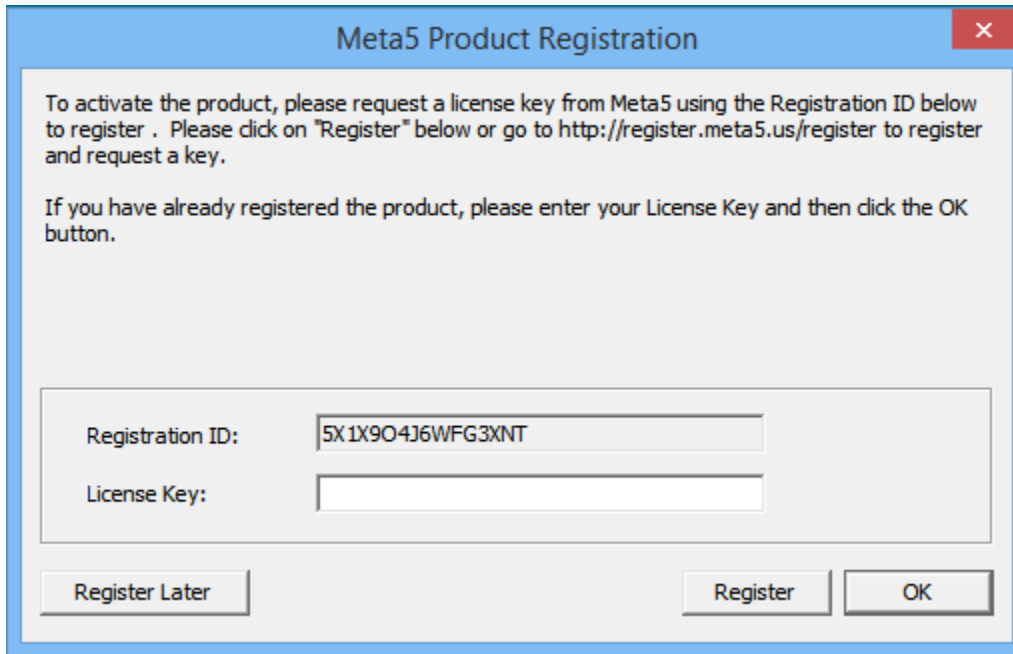
License Key:

At the bottom are three buttons: "Register Later", "Register", and "OK".

It is required that you register Meta5 to obtain a License Key in order for Meta5 to work. If you choose Register Later, Meta5 will not work and you will receive the following message.



If you are not ready to register or if you do not have internet connection, you can always register later by starting the Meta5 Starter Edition from the shortcut created on your desktop. Upon restarting Meta5 you will once again come to the 'Meta5 Product Registration' window;



The image shows a Windows-style dialog box titled "Meta5 Product Registration". The dialog has a blue title bar with a close button (X) in the top right corner. The main content area is white and contains the following text:

To activate the product, please request a license key from Meta5 using the Registration ID below to register . Please click on "Register" below or go to <http://register.meta5.us/register> to register and request a key.

If you have already registered the product, please enter your License Key and then click the OK button.

Below the text are two input fields:

- Registration ID:
- License Key:

At the bottom of the dialog are three buttons: "Register Later" on the left, "Register" in the middle, and "OK" on the right.

To continue and to obtain your License Key, select *Register* (NOTE: be sure you are connected to the internet for this to work)

Once you click 'Register' from the Product Registration screen your browser will launch and it will be directed to the registration page on our website. The page will look like the example shown on the next page.

The screenshot shows a web browser window with the URL `http://register.meta5.us/?regid=5X1X9O4J6WFG3XNT`. The page has a navigation bar with 'Home', 'Register', and 'Shop' links. Below the navigation bar is the Meta5 logo. The main heading is 'Register Your Meta5 Software Here'. A note states: 'Note: All Meta5 software needs to be registered and obtain a license key before it can be activated.'

The registration form includes the following fields and sections:

- Required Fields:** First Name*, Last Name*, Registration Key* (with example '5X1X9O4J6WFG3XNT'), Your Email* (with note 'We will send the License Key to your email'), and Paid versions. Enter your paypal txn id: (Used for License generation).
- Optional Fields:** Phone Number, Company, Title, and Company Address.
- How did you hear about us?** A list of checkboxes for Google, Google Ad, Colleague, Email, Meta5 Sales Rep, Facebook, Twitter, Conference, Blog, Corporate IT, and Other.
- Which databases do you use?** A list of checkboxes for Access, Oracle, SQL Server, DB2, Teradata, IBM Netezza, Sybase IQ, MySQL, and Other.
- What software do you use?** A list of checkboxes for SAP Business Objects/Crystal, Cognos, QlickView, Tableau, Microstrategy, MS Excel, MS Access, MS Reporting Services, and Other.
- Which Windows Operating System are you using for this installation?** A list of checkboxes for XP, Vista, Win 7, Win 8, Win 10, Mac Parallels, Win 2003, Win 2008, Win 2012, Win 2016, and Other.
- What problems are you trying to solve using Meta5?** A text area for user input.
- Is there anything else you would like to share with us?** A text area for user input.
- Enter Coupon Code:** A text input field followed by a 'Get Your License Key' button.

Callouts in the image highlight the required fields and provide additional instructions:

- A callout box says: 'These are the only required Fields' pointing to the First Name, Last Name, Registration Key, and Email fields.
- A callout box says: 'We would appreciate any additional information you could give to us.' pointing to the optional fields.
- A callout box says: 'Click here to Get Your License Key emailed to you.' pointing to the 'Get Your License Key' button.

A note at the bottom of the form states: 'Note: After clicking "Get Your License Key" you will receive an email within 5 minutes with your license key from Meta5Registration@meta5.com. Please be sure to register with a valid email address.'

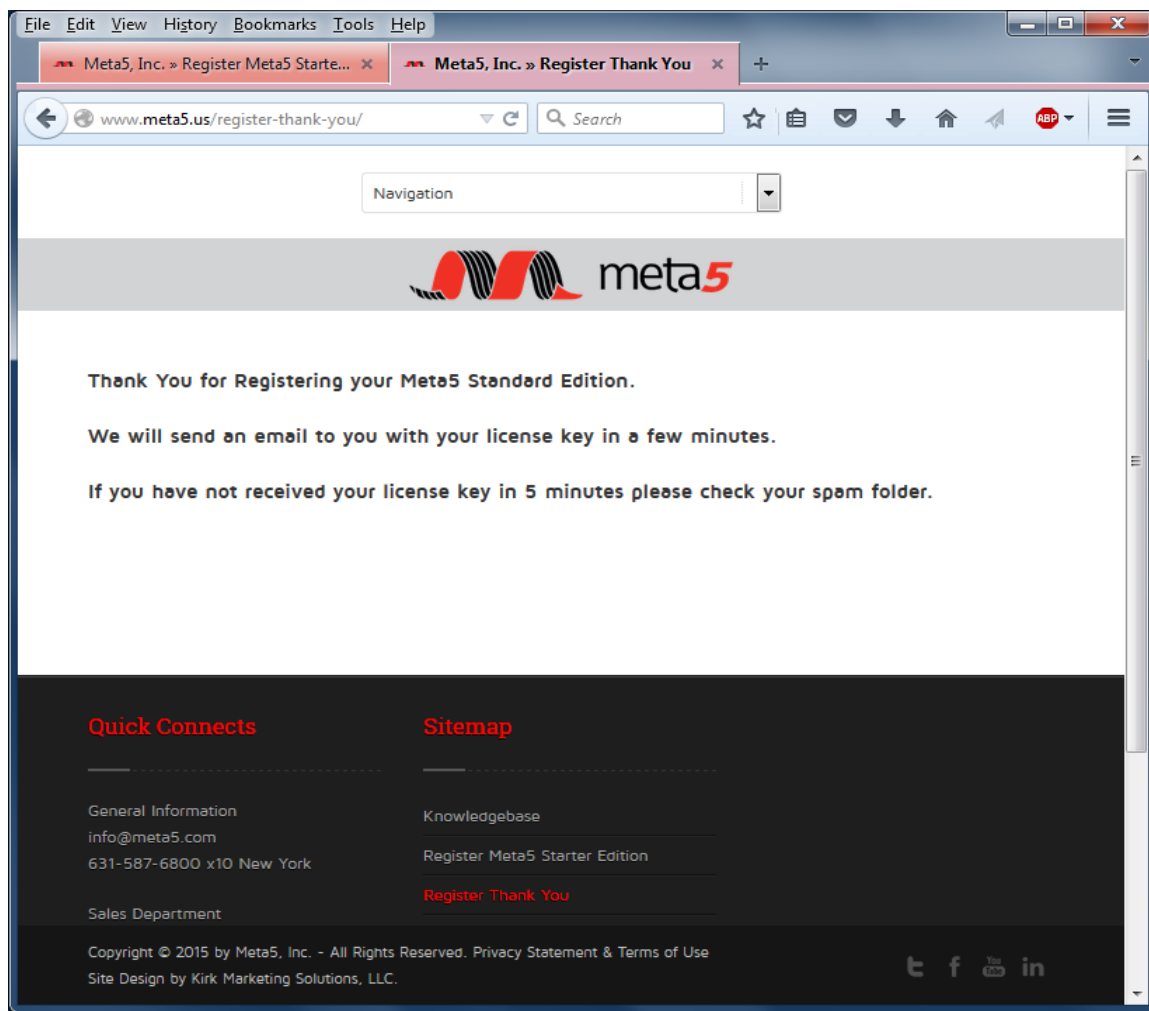
Enter your information into the registration form. The only required fields are your *First Name*, *Last Name*, *Registration Key* and *Email*, but we would appreciate if you would fill in the entire form.

NOTE: The Registration Key will be automatically populated in the form from the installation process, if it is not present then please type it in.

For Meta5 Pro Edition be sure to also include your PayPal Transaction ID otherwise the Pro Edition will not validate and create a License Key.

Starter Edition Trials do not require a PayPal Transaction ID.

Once you click to *Get Your License Key* a web page confirmation will follow like the one on the next page. Then within a few minutes an email will be sent to the email address you supplied here during the registration process along with your new License Key.



You can now close this web browser and return to your Windows desktop.

Check your email and you should receive an email from Meta5 verifying that your registration request has been entered and is processing. The subject of the email will be 'Meta5 Registration and License Key Generation'. The email will confirm all of the information you entered in the Registration Form on our website.

After your request has been processed, you will receive a second email that contains your license key. Copy the License Key and paste it into the *Meta5 Product Registration* window as shown below.

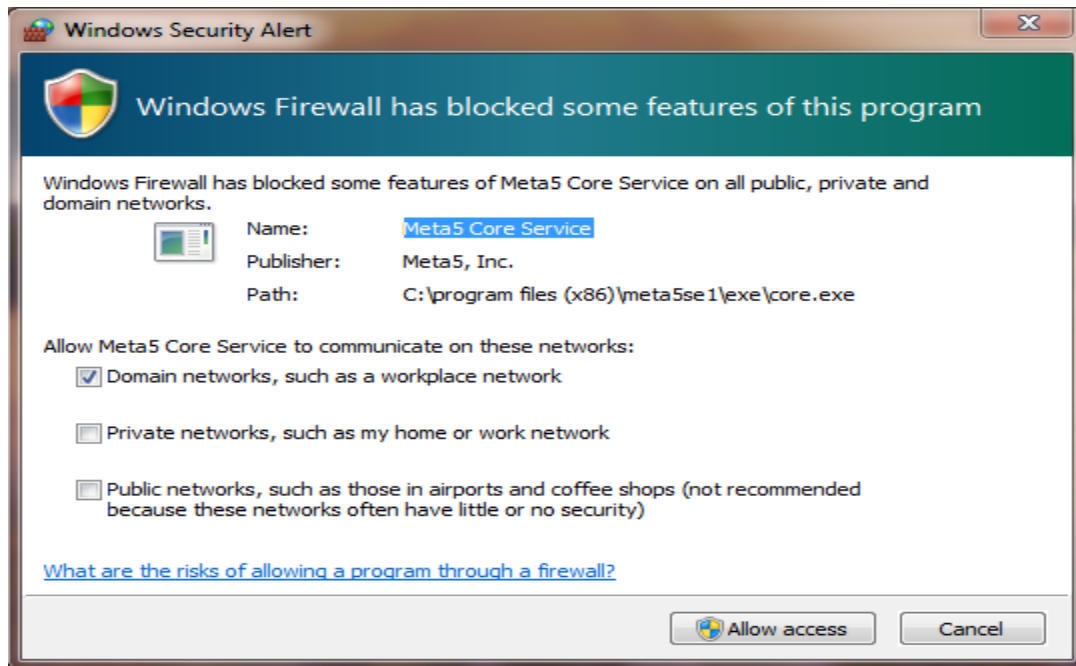


NOTE: If, for any reason, you closed this window or stopped the Meta5 initialization process you can easily start it again by using the *Meta5 Starter Edition* shortcut on your desktop. When you restart Meta5, it will start from where it left off and present the *Meta5 Product Registration* window again.

****NOTE:** The Registration ID and License Key will only work with your computer and cannot be shared across computers. If you have another computer you would like to install Meta5 on, you will need to go through another registration process to obtain a License key for that computer.

Once a valid License key is entered, click OK, and the Meta5 initialization process will now continue. This may take several minutes, so be patient, during the initialization you will get a series of Windows Security Alert messages like the one shown on the next page. You must 'Allow access' for every Alert displayed in order for your Meta5 Starter Edition software to run properly.

During initialization you will also see messages that Meta5 is restarting, you may see this message several times, this is normal so do not be alarmed.



Please allow access to all of the Meta5 firewall messages so that the Meta5 software will continue to initialize.

The initialization process should take no more than 5 minutes to complete, depending upon the speed of your PC. When the initialization is complete, the Meta5 black icon in your Windows notification area will turn white and the Meta5 Starter Edition Desktop will launch.

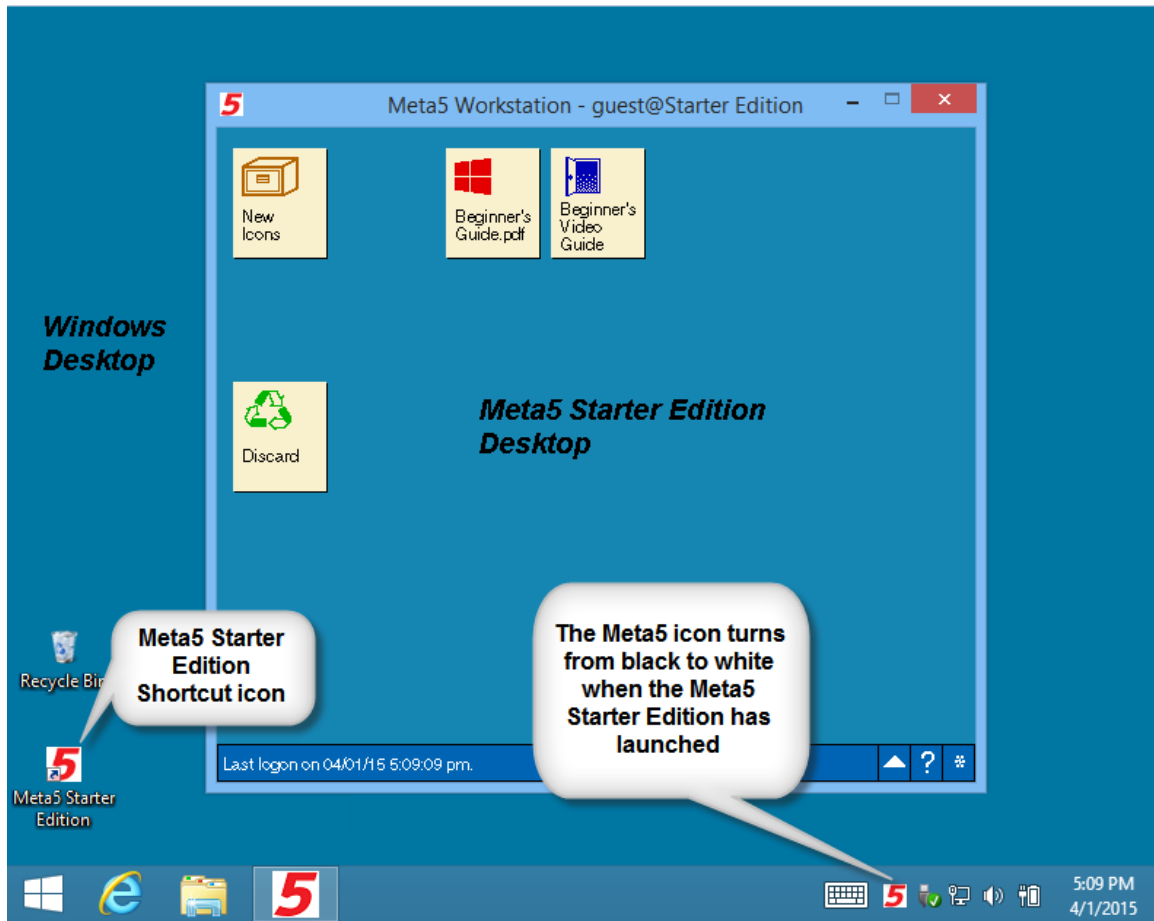
You may continue to see some additional firewall messages even after the *Meta5 Desktop* has started, please 'Allow access' to all Meta5 firewall messages to enable Meta5 to operate successfully.

NOTE: If after 10 minutes, the software does not start up and the Meta5 icon in your Windows notification area remains black, then perform the following;

- Right click the Meta5 black icon located in your Window notification area
- Select *Stop Meta5 Starter Edition*
- Restart Meta5 by double clicking the Meta5 Starter Edition Icon (shortcut) on your desktop
- Wait a few minutes and the initialization process will continue from the point of where it left off, the initialization process will then finish and start Meta5 normally.

If you are still have problems with your installation, please call Meta5 at (888)META555 or (888)638-2555 and we will be happy to assist you.

Below is a picture of Meta5 successfully being initialized and started, showing the Meta5 Starter Edition desktop.

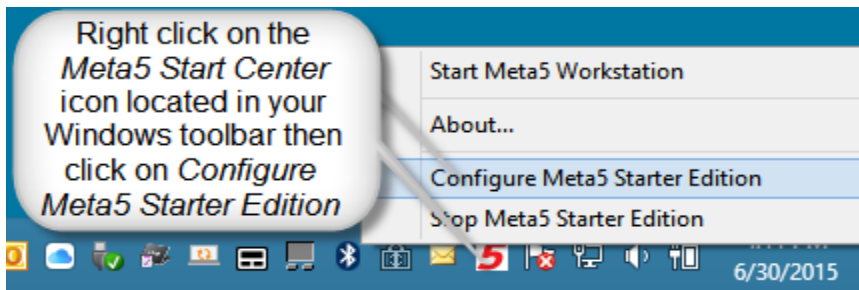


Configuring other Meta5 features after installing Meta5

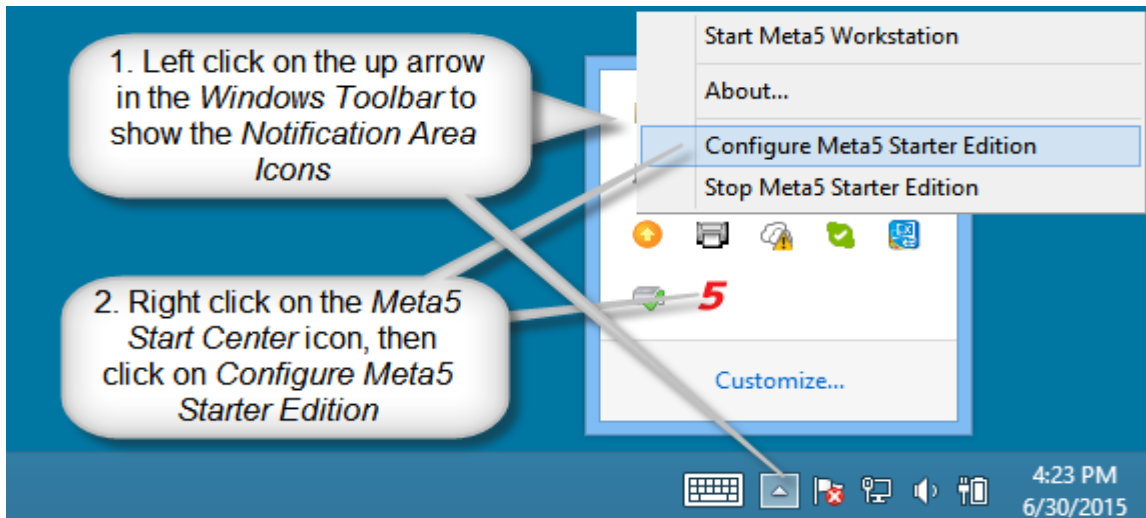
For the purposes of the initial installation of Meta5, there are only two of the configurations items that are worth noting at this time, they are; configuring Email and showing you how to size your Meta5 desktop window. Details of the other configuration options can be found in our full documentation.

To setup and enable email to work within Meta5 you must start the *Meta5 Configuration tool*. To start the *Meta5 Configuration tool* you need to right click the *Meta5 Start Center* icon located in the lower right corner of your Windows Toolbar, then click on *Configure Meta5 Starter Edition*.

For example, your Windows toolbar may be setup like one of the following ways;

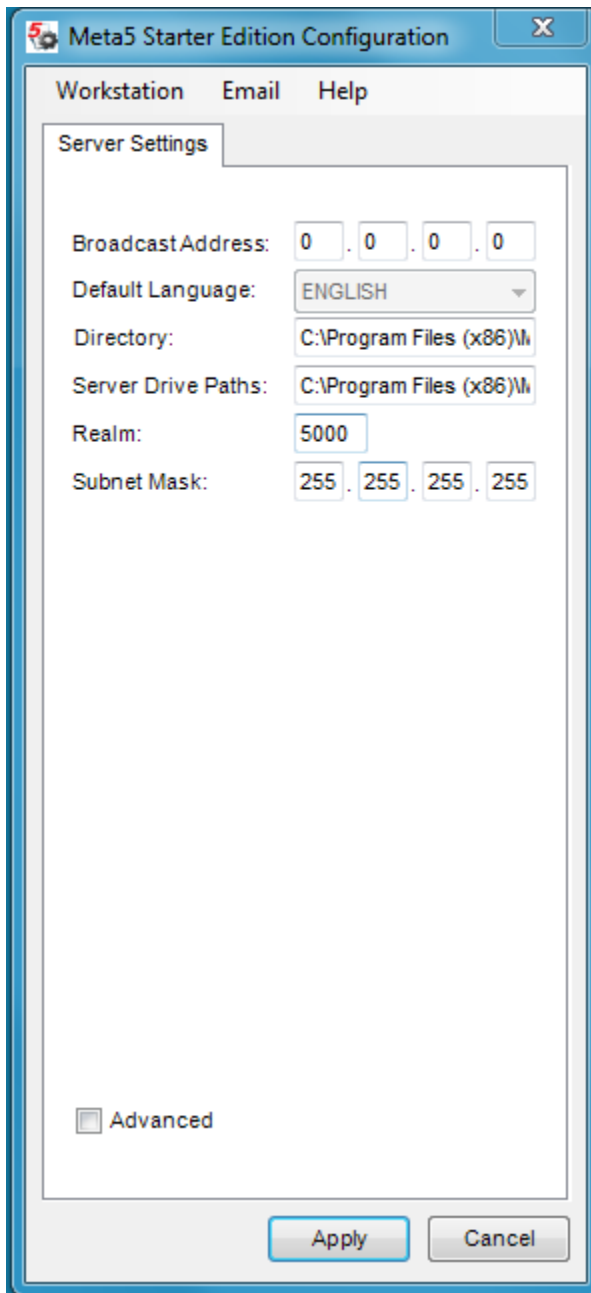


Windows Notification Area being shown



Windows Toolbar with Notification Icons being hidden

Click on *Configure Meta5 Starter Edition* to invoke the *Meta5 Starter Edition Configuration Tool* shown below;



Meta5 Starter Edition Configuration tool

VIDEO NOTE: A Video of configuring email can be found in the * *New Icons/Getting Started/Video Links* folder, called [Capsule Step 4 \(Using Email\)](#). double-click this icon to see a video on how this is done.

Configuring Meta5 to use Email with your SMTP server

You can send emails using Meta5, but first we need to configure Email to work within Meta5. Meta5 uses *Simple Mail Transfer Protocol* (SMTP) and is the standard protocol for sending emails across the Internet. Configuring Meta5 Email is started by opening the Meta5 Starter Edition configuration tool as described above. Then click the 'Email' button located on the top of the configuration screen as shown below.

1. Click *Email* to bring up the *Meta5 Mail Setup* Window

2. Fill in the five Email settings, read below to find out the purpose of each field or ask your email administrator if you need some help.

3. If you like, input your email address to verify that your settings are correct, then press the *Test* button to send a test email to yourself. If everything is correct you will shortly receive a test email.

4. Be sure to click *Apply* in **both** the *Meta5 Mail Setup* window and then in the *Meta5 Starter Edition Configuration* window even after Testing the email

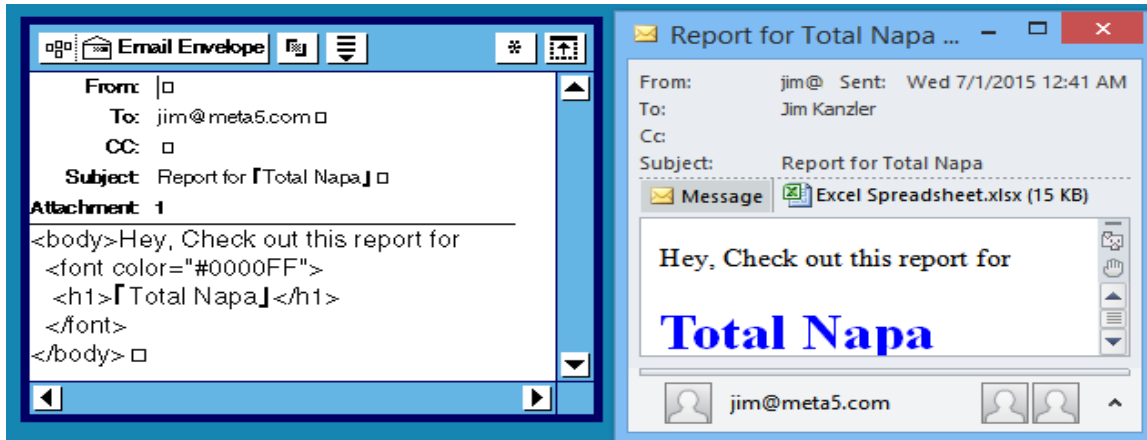
This shows the *Meta5 Starter Edition Configuration* window and the *Meta5 Mail Setup* window, Meta5 Mail Settings are described below. For information on additional Meta5 Starter Edition Configuration settings please refer to the *Meta5 Getting Started Manual*. NOTE: Once your email settings are entered make sure to click *Apply* on both the *Meta5 Mail Setup* window and the *Meta5 Starter Edition Configuration* window in order to save your configuration.

Meta5 Mail Settings

Meta5 uses the *Simple Mail Transfer Protocol* (SMTP). Below are the descriptions of the settings that need to be configured in order to enable Email to work within Meta5.

- SMTP Server: and Port
This is the mail server address, it can be an IP address or a host name the format is **server:port** Port refers to the port number on the server which is used to send out the email. Typically Port 25 is the default SMTP non-encrypted port. Port 465 is typically used if you want to send messages using SMTP securely. Check with your ISP provider or system administrator for the port used for your SMTP email.
Example: mail.example.com:25 (*this example will used port 25*)
- Email address:
This is the default **From:** email address used when you do not specify a **From:** in your Meta5 Envelope. Typically you will enter your normal email address, but you might want to use an alias **From:** email address.
Example: joe@example.com (*this uses a normal email address for From:*)
Example: Meta5Capsule@example.com (*this uses an alias email From: address*) Note: your SMTP mail system may require this to be a valid email address for it to work properly.
- Username:
This is the email username that is used to connect to the SMTP mail server. Typically it will be your email address, but you may use an alternative format of the username if your server allows or requires it.
Example: joe@example.com
Example: [joe](#)
- Password:
This is the password that is used in conjunction with the *Username* fields above and is masked and encrypted. **Note** if you should change the email password you will need to change this field too.

- Enable SSL:
This is a checkbox that will turn on or off Secure Sockets Layer (SSL) if this is required for your SMTP email system.
- HTML Formated Messages:
This is a checkbox that will allow you to create very rich HTML type email messages in the body of the Meta5 Envelope. If you enable this feature you should use HTML within the body of the emails you are sending.



Meta5 Email Envelope using HTML within the body of the email message. This requires the HTML Formated Messages checkbox enabled. Also shown is the resultant email as it would appear in Outlook.

Testing your email configuration

If you like, you can test the email configuration you've entered to make sure the email settings are correct. First type in all of the required fields, then to test the configuration put your email address in the **To Address:** field then click the **Test** button. Meta5 will then attempt to send a test email to your address and if configured properly you should receive an email shortly.

This is a typical email settings that we've tested to work with Gmail.

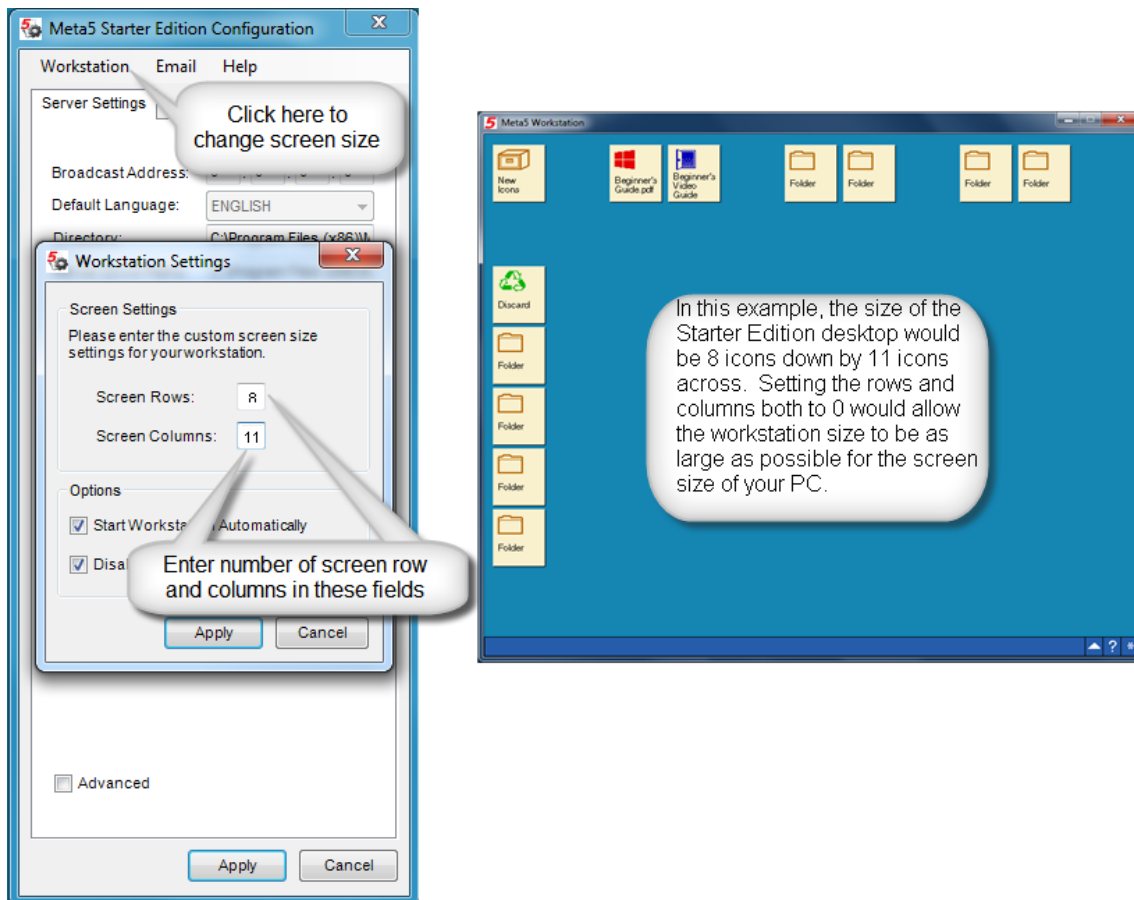
SMTP Server: smtp.gmail.com:587
 Email Address: your_gmail_address@gmail.com
 Username: your_gmail_address@gmail.com
 Password: *****
 Enable SSL: **YES**

NOTE: you may have to change some of your security settings in gmail to *allow outside applications* such as Meta5 to send mail.

Configuring the window size of your Meta5 Desktop on your PC

You can change the default window screen size of your Meta5 desktop as you like. To change the screen size you must use the *Meta5 configuration tool*. You can access the Meta5 configuration tool by right clicking the *Meta5 Start Center* white icon in the Windows notification area in the lower right hand corner of your Windows task bar and choosing *Configure Meta5 Start Center*.

After the Meta5 Starter Edition Configuration tool launches select the *Workstation* tab.



Enter the number of screen columns and rows that you would want your Meta5 desktop to occupy.

The number of screen rows is represented by the number of icons that can fit within the Meta5 window vertically (up and down) and the number of columns are represented by the number of icons that can fit horizontally (side to side).

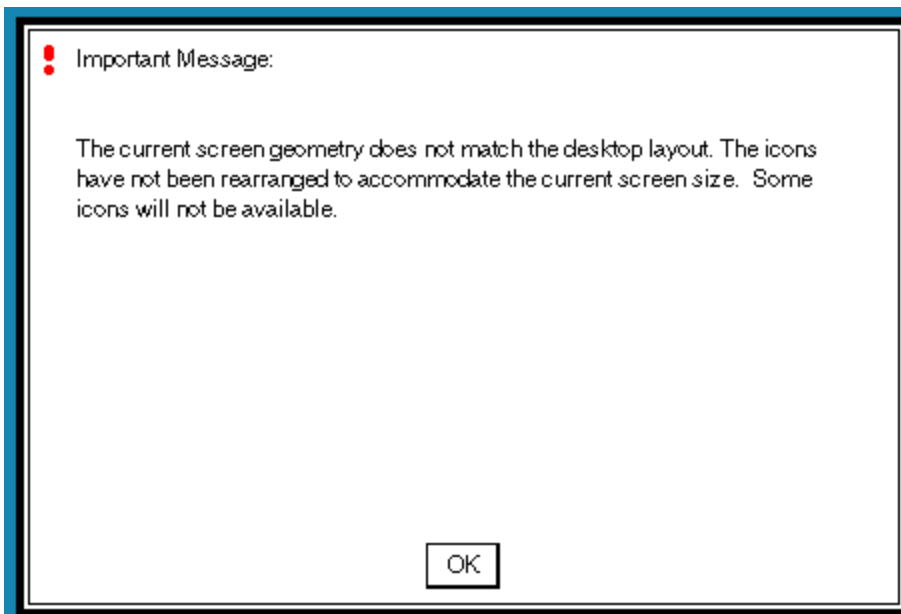
By default you will see the Meta5 rows and columns being set to 0. This configuration will give you the maximum amount of rows and columns to fit within the screen size of your PC. For example a PC screen size of 1920 x 1080 resolution will show 11 rows and 25 columns of Meta5 Icons; whereas a PC screen size set to 1024 x 768 resolution will show 8 rows and 13 columns of Meta5 icons.

If you like the Meta5 screen size to always maximize, then keep the setting of rows and columns to 0, but if you want more control of how your meta5 desktop appears select a row and column setting that works for you.

Click 'Apply' in the *Screen Settings* window as well as clicking 'Apply' in the *Meta5 Configuration* window.

NOTE: The Meta5 Starter Edition will need to be restarted for the size change to take effect.

****NOTE:** If you are working on a larger screen and utilize the full Meta5 desktop by placing icons throughout the desktop you may run into some trouble if you then decide to shrink your desktop size. You may see a message that all of your icons cannot be shown.



To correct this go back to your original large screen size and move all your icons to the top left corner of the desktop by the number of rows and columns you will be shrinking to, leaving the excess Meta5 desktop area void of icons. Now, if you shrink your screen size all icons will be visible again.