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# Defined Contribution System/Windows

# Installation Guide

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# DC/Win Installation Guide

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### Introduction

The guide is intended to provide you with the information necessary to choose an appropriate system configuration for your environment, then walk you though the installation steps for the database, then the workstation software. It is expected that the reader is experienced with installing software applications, has a familiarity with network administrative activities, and possesses a general knowledge of terms commonly used in Information Technology.

## **Types of Databases Supported**

This software currently supports two different database technologies; the file-based Access database and the client/server-based SQL Server database.

#### SQL Server vs. Access

For new installations, we strongly recommend using SQL Server as your database choice. The Access database option is being phased out and will be eliminated during 2006. If you are currently using the Access database, migrating to SQL Server is a simple process which is covered in the topic *"Migrating from Access to a SQL database"*. Using the Access database is covered under *"Scenario 5"*.

There are two different flavors of the SQL Database. The first is Microsoft SQL Server (MS SQL), and the second is the Microsoft SQL Desktop Engine (MSDE) which is limited capacity version of MS SQL that is included free of charge with DATAIR applications.

#### Choosing between MSDE and MS SQL

Feature	MSDE	MS SQL
Maximum Database Size	2 GB	32 TB
Number of Simultaneous Operations	5	Unlimited
Enterprise Manager Server Utilities	Not included	Included
Cost	Included free of charge	Must be purchased separately

The differences between the two versions are detailed in the following table:

In essence, the limitations placed on the free MSDE version of the database include limiting the maximum size of a database to 2 gigabytes, which is actually a tremendous amount of data, and limiting the number of simultaneous 'operations' to 5. There is a loose correlation of 'simultaneous operations' to maximum users; however it is not a direct relationship. An 'operation' can be thought of as data being read or written to the database.

When more than 5 simultaneous operations take place, the database server will process all the requests to read or write data, but it will slow each of them down proportionally. The more pending simultaneous operations there are, the slower it will process each operation.

When doing data entry, data is only read or written as you move from record to record or when changes are saved. Each of these database accesses take only a split second, thus it is possible to support many more than 5 users doing data entry since the chances of 5 users pressing Save or moving to a new record at the exact same instant is very low. However, when you are running calculations, the system will be continually reading and writing data during the entire time the calculations are running and the chances of simultaneous database accesses is much higher.

More realistic is that you will have a mix of users doing data entry and calculations at the same time. Depending on their usage patterns, you will be able to support well in excess of 5 simultaneous users, but it is difficult to predict the exact number. Keep in mind that if you exceed the number of simultaneous operations, the system will continue to operate, just slow down temporarily.

The bottom line is this... If you wish to be very conservative, you may want to limit the number of users to no more that 5 users. More realistic is that MSDE would support 10 or more simultaneous users using a mix of DATAIR applications. If you outgrow the free MSDE version, upgrading to MS SQL is quite easy.

For additional information on MSDE and MS SQL, please see the Technology Publications section of the DATAIR web site.

#### **Choosing your Installation Type**

Now that you have some insight into the differences between the various database options, we will present a number of 'scenarios' that represent the most common situations. These are general in nature, and you should select the one that most closely fits your situation.

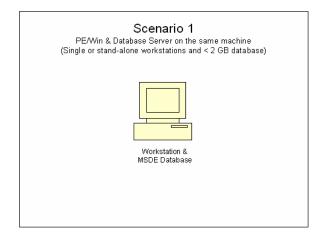
Each scenario includes a description and visual representation of the configuration, a listing of what's needed, and a brief description of the installation steps.

We also have included some example scenarios of configurations which are unsupported and will not work. We recommend that you review these also.

After choosing a scenario that most closely resembles your situation, proceed to the detailed installation instructions for each applicable installation step.

Note: Even though the scenarios mention 5 users as the division between MSDE and MS SQL, use the guidelines provided in "Choosing between MSDE and MS SQL" when considering the actual number of users each configuration will support.

#### Scenario #1 - Software and MSDE Database on the same machine



#### **Typical Uses**

Notebook computer or stand-alone computer where each user has their own database. The database may not exceed 2 GB in size.

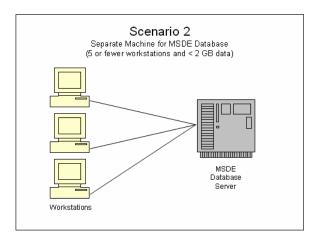
#### What's Needed

- ➢ DC/Win software CD.
- > Workstation that meets the Stand-alone Workstation requirements.

#### **Installation Steps**

Step 1: Install MSDE Server on Workstation Step 2: Install DC/Win Application Software on Workstation

#### Scenario #2 – Software and SQL Database on different machines (5 or fewer users)



#### Typical Uses

Five or fewer networked workstations sharing a database with less than 2 GB of data.

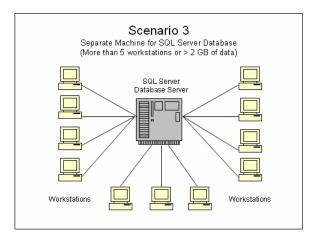
#### What's Needed

- ➢ DC/Win software CD.
- ➢ Workstations that meet the "Workstation-only" requirements
- > Machine that hosts the database must meet the "Stand-alone Workstation" requirements.
- Windows-compatible network

#### **Installation Steps**

Step 1: Install MSDE & DATAIR Database on the machine that will be used as the server Step 2: Install the DC/Win application software on each of the workstations

Scenario #3 – Software and SQL Database on different machines (more than 5 users)



#### Typical Uses

More than 5 simultaneous users sharing a database, or more than 2 GB of data.

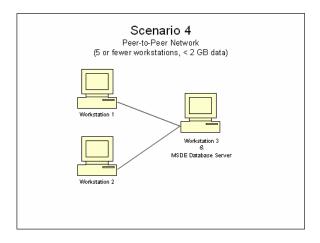
#### What's Needed

- DC/Win software CD
- Microsoft SQL Server (Purchased separately)
- Microsoft SQL Server Client Access Licenses (CALs) for each workstation (purchased separately)
- > Workstations that meet the "Workstation-only" requirements
- > Server that meets the Microsoft SQL Server Database Only requirements
- Windows-compatible network

#### **Installation Steps**

Step 1: Install Microsoft SQL Server on the Server computer Step 2: Install the DC/Win application software on each of the workstations

#### Scenario #4 – 5 or fewer users, < 2 GB data Peer-to-peer network (no dedicated server)



#### Description

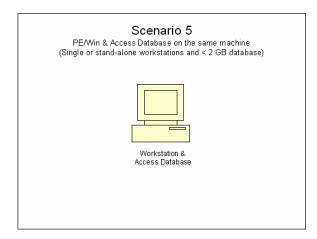
While we strongly recommend having a machine to specifically be used as a server for the database, there are situations when having a workstation also serve as the database server is acceptable. Appropriate situations include where there are only two or three computers, or where there is a little-used workstation.

#### What's Needed

- > DC/Windows software CD.
- > Workstations that meet the "Workstation-only" requirements
- > Machine that hosts the database must meet the "Stand-alone Workstation" requirements.
- Windows-compatible network

#### Installation Steps

Step 1: Run the MSDE Server Installation on the machine that will act as the database server Step 2: Install the DC/Win application software on the machine that will act as the database server Step 3: Install the DC/Win application software on each of the remaining workstations



#### Description

This scenario is intended primarily for clients that participated in the Beta and Preview Release programs that used the Access file-based database. Support for Access file-based databases will be phased out during 2006 and users will be required to migrate to MSDE or MS SQL databases.

#### What's Needed

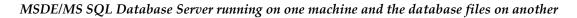
- ➢ DC/Win software CD.
- > Workstation that meets the Stand-alone Workstation requirements.

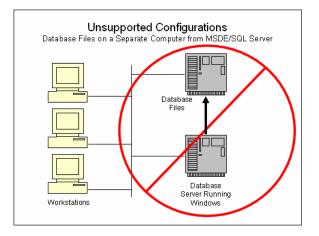
#### **Installation Steps**

Step 1: Install the DC/Win application software on the workstation

# **Unsupported Configurations**

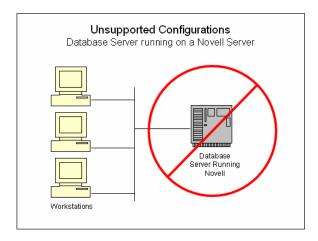
The following are examples of installation scenarios that may not be used.



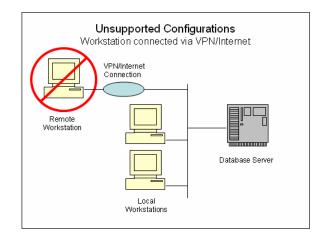


MSDE/MS SQL Server requires that the database files be located on the same physical computer as where the database server software is running. You may not, for example, install the database server software on one machine and place the database files on another.

#### MSDE/SQL Database Server running on Novell Server



MDSE/SQL Server <u>only</u> runs on Windows-based computers. You can use a Novell network to connect the workstations and database server together, and use the Novell Server as you always have, however the database server software and its database files may only reside on a Windows-based machine.



Wide Area Networks, VPNs, and Internet connections do not provide adequate bandwidth to operate software remotely. This type of configurations may result in data loss or corruption.

We recommend using Windows Terminal Server if you require remote access.

Keep in mind that use of the software by a person not physically located at the licensed site may be a violation of the software license agreement and additional software licenses may be necessary. Contact your DATAIR Sales Rep for more information.

# Hardware & Software Requirements

Hardware and software requirements vary by the configuration scenario selected.

#### Workstation-only:

#### Applies to: Scenario 2, 3, 4 - Workstations

Feature	Minimum	Recommended
Processor	1.5 GHz Pentium 3 GHz Pentium	
RAM Memory	128 MB 98/ME, 256 MB other	512 MB or more
Disk Space (excludes data)	250 MB	250 MB
Video	800x600 SVGA	1024x768 XGA
Windows OS	Windows 98 SE	Windows 2000 Pro
	Windows ME	Windows 2000 Server
	Windows 2000 Pro	Windows XP Pro
	Windows 2000 Server	Windows XP Home
	Windows XP Pro	Windows 2003 Server
	Windows XP Home	
	Windows 2003 Server	
Other	Windows-compatible pointing device	
	Windows-compatible printer	
	Windows-compatible network (optional)	
	CD-ROM or DVD drive	
	3.5" Floppy Disk Drive or Internet A	Access

#### **Stand-alone Machine (with Database)**

### Applies to: Scenario 1 – Workstations Scenario 4 – Server Scenario 5

Feature	Minimum	Recommended
Processor	2 GHz Pentium	3 GHz Pentium
RAM Memory	256 MB 98/ME, 512 MB other	512 MB or more
Disk Space (excludes data)	350 MB	350 MB
Video	800x600 SVGA	1024x768 XGA
Windows OS	Windows 98 SE **	Windows 2000 Pro
	Windows ME **	Windows 2000 Server
	Windows 2000 Pro	Windows XP Pro
	Windows 2000 Server	Windows XP Home
	Windows XP Pro	Windows 2003 Server
	Windows XP Home	
	Windows 2003 Server	
Other Windows-compatible pointing device		ce
Windows-compatible printer		
Windows-compatible network (opt		ional)
	CD-ROM or DVD drive	
	3.5" Floppy Disk Drive or Internet A	Access

\*\* Windows 98 & ME may only be used for Scenario 5

#### **MSDE Server Only**

Feature	Minimum	Recommended	
Processor	2 GHz Pentium	3 GHz Pentium	
RAM Memory	256 MB 98/ME, 512 MB other	1 GB or more	
Disk Space (excludes data)	100 MB	100 MB	
Video	800x600 SVGA	124x768 XGA	
Windows OS	Windows 2000 Pro	Windows 2000 Pro	
	Windows 2000 Server	Windows 2000 Server	
	Windows XP Pro	Windows XP Pro	
	Windows XP Home	Windows 2003 Server	
	Windows 2003 Server		
Other Windows-compatible pointing device		ice	
	Windows-compatible printer		
	Windows-compatible network (optional)		
	CD-ROM or DVD drive		
	3.5" Floppy Disk Drive or Internet Access		

#### Microsoft SQL Server Database Only

#### **Applies to:** Scenario 3 – Server

Feature	Minimum	Recommended ***	
Processor	1.5 GHz Pentium	3 GHz Pentium/Xeon	
RAM Memory	512 MB	2 GB or more	
Disk Space (excludes data)	200 MB	200 MB	
Video	800x600 SVGA	102x768 XGA	
Windows OS	Windows 2000 Server	Windows 2000 Server	
	Windows 2003 Server	Windows 2003 Server	
Other Windows-compatible pointing device		ce	
	Windows-compatible printer		
	Windows-compatible network (optional)		
	CD-ROM or DVD drive		
	3.5" Floppy Disk Drive or Internet A	Access	

\*\*\* Note: The hardware requirements are based on a server supporting a MS SQL database server for DATAIR Windows applications only. If the server is being used for other purposes, consult an IT professional for assistance in determining appropriate hardware requirements.

#### **Database Disk Space Requirements**

The actual space required for data will vary dramatically depending on the number of plans, employees, accounts, and the amount of transaction activity.

For MSDE, we recommend allocating 20 GB of disk space for plan data and database backups. This is based on MSDE's maximum database size of 2 GB, 14 GB of daily database backups, and 4 GB of temporary data storage.

For SQL Server, we recommend allocating a minimum of 20 GB of disk space for data, backup, and temporary data storage.

# **Installation Steps**

In this section of the guide we will detail each of the installation steps referred to in each of the installation scenarios.

It is assumed that the installation is being performed by a person with at least some technical knowledge regarding installation of software on computers. This installation should be performed by a computer technician or a network administrator, **especially** if this is going to be a database server accessed by multiple client workstations in a network environment.

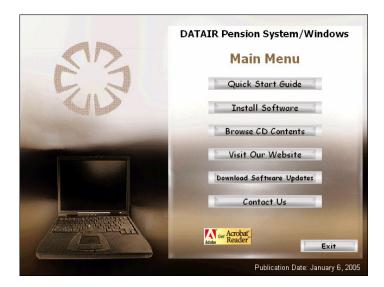
#### Installing the MSDE Database Server

#### Before you Begin....

- Installing MSDE must be done at the computer where it will reside. In other words, you cannot install this from a remote workstation over the network. You must be physically at the computer where it will reside.
- > Install MSDE only once. All workstations will connect to this single installation of MSDE.
- You will need to login to the machine with full administrative rights and full access to install SQL Server. If your login does not have these permission or you are not sure what they are, your network administrator should be performing the installation.
- You may be required to reboot the machine you are installing the MSDE server on during, or at the conclusion of, the installation process. You may want to take this into account when deciding on an appropriate time to install the server software.
- > The actual database files are installed to a default SQL Server folder. The location cannot be changed.
- When you are prompted for a "Shared/Data" directory, this is NOT where the database is installed. This is a common, shared folder on your network that all DATAIR users must have read/write access to. If you are installing this on a stand-alone PC, use the default local directory suggested during the installation.

#### Step-by-Step...

After you are logged in, insert the DC/Win CD accompanying these instructions. This CD has an AutoPlay feature that should begin the installation automatically. If it does not, open "My Computer" from your desktop, open the CD drive and double click "Setup.exe" to start the installation and the following screen will appear.



Select "Install Software".

93	DATAIR Pension Syste Install Soft	
E	Workstation Install Database Server Install	Release Notes Release Notes
	Please choose one of the ap to install, or to view the ro Adobe Acrobat is required release notes	elease notes.
		Main Menu

Then, on this screen, select "Database Server Install" to launch the installer.

You will see a welcome dialogue and then a licensing dialogue. Click "Next" to continue on these screens.

The installer will now analyze your system, looking for previously installed components or databases. When it's done you will see the screen below listing your options.

🖁 Microsoft SQL Server (MSDE) / Datair SQL Database Installation 🛛 🗙				
	Install Options			
	<ul> <li>Install Database only on default instance of SQL Serve</li> <li>Install Database only on existing DATAIR MSDE Serve</li> <li>Install both MSDE Server and Datair database</li> </ul>			
<u>H</u> elp	< <u>B</u> ack <u>Next</u> >	_		

If the installer found a DATAIR instance of MSDE already on your machine, some items may be disabled. Most likely you will want to install the MSDE server and a DATAIR database on that server. That option is selected by default.

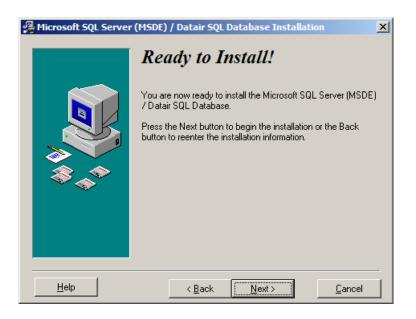
Click Next to continue.

🛿 Microsoft SQL Server Desktop Database Engine (MSDE) Installation 🛛 🔀			
	Select Shared File Directory		
	Please select the directory for Shared Files. If this is a network environment, make sure this location is common and accessible to all users.		
	Use this same location on subsequent client workstation installs.		
**			
	C:\My Documents\Datair\ Browse		
<u>H</u> elp	< Back Next > Cancel		

You are now being asked to provide a Shared File Directory. This is NOT where the database files will be located, but rather a shared directory that is accessible to all users who will connect to this database server. The location specified need not be physically located on the same machine that you are installing the MSDE Database Server on. If you are installing MSDE for a stand-alone machine, accept the default directory displayed.

Again, please note that this is not where your SQL Server database will be stored. This is simply a folder that will be used by DATAIR applications for shared files.

Click Next to continue...



You are now ready to install.

Click Next and Microsoft's MSDE installer will begin. The installation may take several minutes depending on the speeds of your CD-Rom drive and your computer.

After a successful installation you will see this dialogue:

Finished	i		×
i)	The install has finish DATAIR Databa	ied. se successfully installe	ed.
	OK	Cancel	

Press OK.

The installer attempts to start MSDE, but you may need to re-boot your computer for MSDE to start properly.

This completes the installation of the MSDE Database Server and the DATAIR Database.

#### **Troubleshooting the MSDE Installation:**

You shouldn't run into many errors installing MSDE if your machine meets the minimum requirements and you have logged on with administrative rights for this computer.

However, there are a few situations where error messages may be displayed:

If the computer you are installing the database on already points to a DATAIR SQL Server database, you will get the following warning:

🚇 Microsoft SQL Server Desktop Database Engine (MSDE) Installation 🔀				
	Install Database         This computer already points to :         Database : DATAIR_PE         On Server: TESTER         Are you sure you want to install a new instance of MSDE Server on this computer?         Install a new instance of MSDE server on this computer			
<u>H</u> elp	< <u>B</u> ack <u>Next&gt;</u>			

The other most common error you might see during installation might be:

Microsoft S	Microsoft SQL Server Desktop Engine			
1	The instance name specified is invalid.			
	OK			

This means you have already run the DATAIR installer of MSDE and that a DATAIR named instance of MSDE is already installed and running on this computer. This installation is not necessary and will be cancelled.

#### Installing Microsoft SQL Server

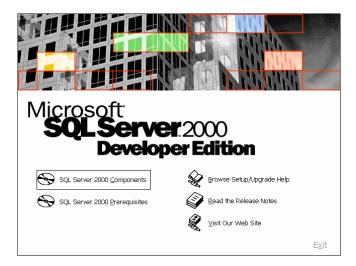
These instructions cover the installation of a Microsoft SQL Database Server as an addendum to Microsoft's instructions

#### Before you Begin....

- Multiple copies, or 'instances' as they are called, of SQL Server may be installed on a single computer. Even if you have Microsoft SQL Server already running on the machine you will be server computer, we strongly recommend that you install a second instance named "DATAIR". This will simplify support and eliminate any potential conflicts. The instructions for installing the server software on based on that configuration.
- > Microsoft SQL Server 2000 Service Pack 3 or later is required.
- You may be required to reboot the machine you are installing the SQL Server on during, or at the conclusion of, the installation process. You may want to take this into account when deciding on an appropriate time to install the server software.
- During the DATAIR portion of the installation, when you are prompted for a "Shared/Data" directory, this is NOT where the database is installed. This is a common, shared folder on your network that all DATAIR users must have read/write access to. If you are installing this on a stand-alone PC, use the default local directory suggested during the installation.

#### Step-by-Step Instructions

Insert the SQL Server CD



Choose "SQL Server 2000 Components"

Microsoft	Install Components
SQL Serve Develo	<b>er</b> :2000 <b>per Edition</b>
Install Database Server	SQL Server 2000 provides rich and robust
Install <u>A</u> nalysis Services	support for scalable database solutions.
Install English Query	
<u>B</u> ack	E <u>x</u> it

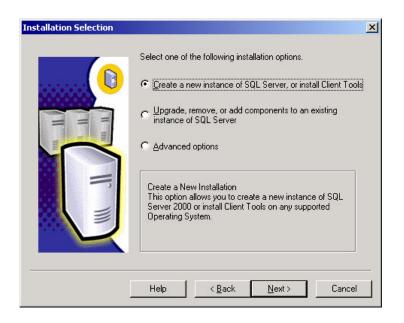
Choose "Install Database Server"

Welcome	×
Welcome to the Microsoft SQL Server Instal Wizard,	lation
The Installation Wizard allows you to install a new insta SQL Server or modify an existing instance.	nce of
( <u>Next &gt;</u> C	ancel

Press Next >

	Enter the name of the computer on which you want to create a new instance of SQL Server or modify an existing instance of SQL Server.
II III	Or, enter the name of a new or existing Virtual SQL Server to manage,
	Local Computer     Bemote Computer     Virtual Server
	Browse

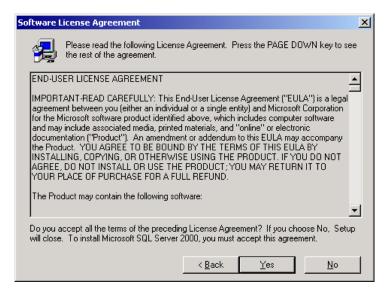
Accept the default "Local Computer" and press Next >



Accept the default "Create a new instance of SQL Server and Client Tools" an press Next >

User Information		×
	Enter your name below. It is not necessary to enter a company name.	
II II II II II	N <u>a</u> me: Your Name	
	Company: Your Company	
	< <u>B</u> ack <u>N</u> ext > Cancel	

Enter your name and company name and press Next >



Press Yes to accept the license agreement

Installation Definition		×
	You can select one of the following types of installations.	
	C Client Tools Only	
H H	C Server and Client Tools	
	C Connectivity Only	
	This option allows you to install a server and the client tools. Use this option if you want to set up a server with administration capabilities.	
	L	_
	Help < <u>B</u> ack <u>N</u> ext > Cance	

Accept the default "Server and Client Tools" and press next >

Instance Name		×
	Default     For a default installation, leave Default checked and click Next.     To install or maintain a named instance of SQL Server on this computer clear the Default checkbox and type or select an instance name.     A new name must be 16 characters or less and should start with a letter or other acceptable character. For more information, click Help.     Instance name:     DATAIR	
	Help < <u>B</u> ack <u>N</u> ext > Cancel	

Uncheck the "Default" checkbox and enter "DATAIR" as the instance name, then press Next >

Setup Type				×	
Click the type of Set	Click the type of Setup you prefer, then click Next.				
• Typical	Installed with the most	t common options	. Recommended f	or most users.	
⊙ <u>M</u> inimum	Installed with minimum	required options.			
C <u>C</u> ustom	You may choose the o advanced users.	options you want I	to install. Recomm	ended for	
Destination Folder					
Program Files	B <u>r</u> owse	C:\Program File:	s\Microsoft SQL S	erver	
Data Files	Bro <u>w</u> se	C:\Program File:	s\Microsoft SQL S	erver	
			Required:	Available:	
Space on program			34789 K	239917972 K	
Space on system o			132168 K	239917972 K	
Space on data file:	s drive:		34432 K	239917972 K	
	<u>H</u> elp	< <u>B</u> ack	<u>N</u> ext >	Cancel	

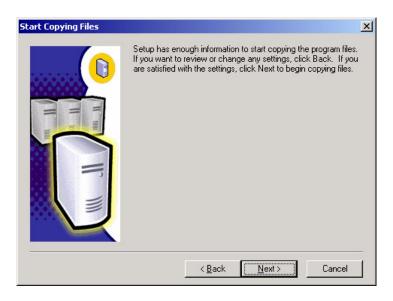
Accept the default options presented. If you wish to place the SQL database files in an alternate location, press "Browse..." in the Data Files section of the screen. Press Next > when you are ready to continue.

Services Accounts		×		
Use the same account for each service. Auto start SQL Server Service.				
C Customize the settings for eac	h service.			
Services	Service Settings			
C SQL <u>S</u> erver	C Use the <u>L</u> ocal Syste	m account		
C SQL Server Agent	O Use a Domain User account			
	<u>U</u> sername:	SQL Service		
	Password:	*******		
	<u>D</u> omain:	YOURDOMAIN		
	L Auto Start Service			
<u>H</u> elp	< <u>B</u> ack	<u>N</u> ext > Cancel		

Select the options as shown, and enter the user name, password, and domain of a administrativelevel account to be used. This account must exist in your domain. See Microsoft's documentation for additional information. Press Next >

Authentication Mode	×
Choose the authentication mode.	
O Windows Authentication Mode	
Mixed Mode (Windows Authentication and SQL Server Authentication)	
Add password for the sa login:	
Enter password:	
Confirm password:	
Blank Password (not recommended)	
Help < <u>B</u> ack <u>N</u> ext >	Cancel

Select "Mixed Mode" and specify a password for the SA account. Be certain to choose a strong password that would not be easily guessed. Press Next >



Press Next > and SQL Server will be installed.

Remember to install the latest SQL Server service pack available from www.microsoft.com/sql after installing the server software.

You may now proceed to the instructions to install a DATAIR Database on the newly-installed server.

#### Installing a DATAIR Database on your Microsoft SQL Server

Follow the directions in this section if you want to install a DATAIR database on your own SQL Server. If you do not already have a DATAIR instance of SQL Server installed on your network, see the topic "Installing a new SQL Database Server" in this guide.

There are two methods on installing the DATAIR Database. Method 1 is installing the database using the Installation CD. Method 2 is installing from a workstation using the DC/Win application software. We recommend that you use the Method 1.

#### Before you begin...

Your MS SQL Server must be set for "SQL Server and Windows" authentication, also referred to as "Mixed Security". If you are not sure, load SQL Enterprise Manager and highlight the server you will use for the DATAIR database. Next, select "SQL Server Configuration Properties" from the "Tools" menu. Go to the "Security" tab.

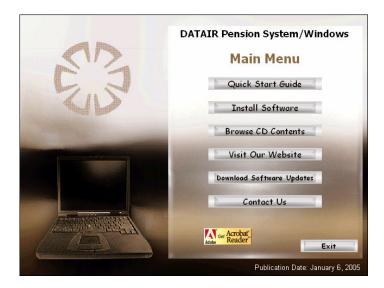
A sample is shown below:



**Note:** It is imperative that "Authentication" be set to "SQL Server and Windows". You cannot load a DATAIR database on a SQL Server set to "Windows only" authentication.

#### Method 1 – Database installation using the Instillation CD (preferred method)

After you are logged into the server as an administrator, insert the DC/Win CD. The CD has an AutoPlay feature that should begin the installation automatically. If it does not, open "My Computer" from your desktop, open the CD drive and double click "Setup.exe" to start the installation and the following screen will appear.



Select "Install Software".

93	DATAIR Pension System/Wind Install Software	
E	Workstation Install Database Server Install	Release Notes Release Notes
	Please choose one of the app to install, or to view the re Adobe Acrobat is required t release notes	lease notes.
	Get Acrobat Acobe	Main Menu

Then, on this screen, select "Database Server Install" to launch the installer.

You will see a welcome dialogue and then a licensing dialogue. Click "Next" to continue on these screens.

The installer will now analyze your system, looking for previously installed components or databases. When it's done you will see the screen below listing your options.



The "Install Database only..." option should be shown, and other options will be disabled.

Click Next to continue.

Hicrosoft SQL Server Desktop Database Engine (MSDE) Installation		
	Select Shared File Directory	
	Please select the directory for Shared Files.	
	If this is a network environment, make sure this location is common and accessible to all users.	
	Use this same location on subsequent client workstation installs.	
\$_^		
	C:\My Documents\Datair\Browse	
<u>H</u> elp	< <u>B</u> ack <u>Next&gt;</u> <u>C</u> ancel	

You are now being asked to provide a Shared File Directory. This is NOT where the SQL database files will be located, but rather a shared directory that is accessible to all users who will connect to this database server. The location specified need not be physically located on the same machine that you are installing the Database Server on.

Again, please note that this is not where your SQL Server database will be stored. This is simply a folder that will be used by DATAIR applications for shared files.

Click Next to continue...



You are now ready to install.

Click Next > and a DATAIR Database will be installed on the SQL Server database.

After a successful installation you will see this dialogue:

Finished			×
į)	The install has finishe DATAIR Databas	ed. e successfully installed.	
	OK	Cancel	

Press OK.

This completes the installation of the DATAIR Database.

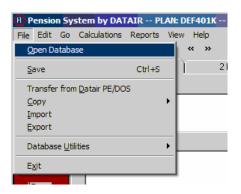
#### Method 2 – Installation using the DC/Win application

This install can be performed from any computer where you have run the workstation install of DC/Win.

#### Installing the Database

You will install the database by first launching the DC/Win system. This can be done at any computer. However, you will need to log onto that computer using an administrator-level login, or have the "sa" administrator password for your SQL Server.

Launch the DATAIR DC/Win application and select "Open Database" from the "File" menu.



You will see the screen below:

🖷, Select Database		,	<u> </u>
Main Database C SQL Server			
Server-Database			
Access database			
Database File	C:\My Documents\Datair\m2k.MDB		
Alternate Database — O SQL Server			
Server - Database			
C Access database			
Database File			
		Cancel	

Click the ellipses "..." button next to the blank "SQL Server area in the "Main Database" section above.

This action will cause DC/Win to shut down and launch the DATIR SQL Database Manager seen below:



Select "Install a new DATAIR database on a server".

Select "OK" to begin searching for SQL Servers on your machine and on your network. You will see a list of servers flashing by on your screen. Depending on the size and speed of your network, this process may take from several seconds to a few minutes.

🖷, Install DATAIR SQL Server Database	
Connect to SQL Server	
SQL Server MyServer	
Enter information to log on to server (Administrator level required)	
C Use Windows NT Integrated Security	
<ul> <li>Use a specific user name and password</li> </ul>	
User Name : sa	
Password : Test Connection	
New Database Create New Datair Database : DATAIR (Enter a name for your new database)	
Create <u>D</u> atabase <u>C</u> ancel	
Please wait., Step #1 - Creating new database	

When that is completed, you see the "Install DATAIR SQL Server Database" screen.

Select a Server from the list of Servers. You will have to supply a SQL username/password that allows owner access to this Server, or select "Use Windows NT integrated security" if your network login has administrative rights to this server. Click Test Connection and the utility will check if you have sufficient rights to install a database.

By default, the database name will be DATAIR. You may change this, but for support purposes, it is **strongly** recommended you keep the default.

Click "Create Database" and the process will begin.

The status bar at the bottom will inform you of the progress. The entire process may take a few minutes, or more. When it is finished you will see a message:

dbInstal 🔀
Done! New Datair database created!
ОК

Click OK to finish and end the DB Installer. Restart DC/Win and you will be connected to the SQL Server database.

#### Connecting Other workstations to SQL Server

To connect other workstations to this SQL Server database, use the same steps in DC/Win (File menu/Open Database/SQL Ellipses), but choose "Connect to an existing database" in the DATAIR SQL Database Manager.

🐂 DATAIR SQL Database Manager	
Database Connection Options	
Connect to an existing database on your computer or net	work
C Install a new Datair database on a server	
<u>O</u> K <u>C</u> an	cel

You will see the screen below after the program searches your network for SQL Servers

🖷, Connect to D	ATAIR SQL Server Data	abase	<u> </u>
SQL Server	My SQL Server		▼ Refresh
Existing Databa			
DATAIR DAT	AIR		
I			
Select an existir	ng SQL server, then select t	he database to connec	ct to on that server.
		Select <u>D</u> atabase	Cancel
Select A Server.	Then, select a database fro	om the list.	

After selecting a Server, a list of DATAIR databases appears in the "Existing Databases" list. Highlight one of those by clicking on it.

When your selections have been made, click the "Select Database" button" to finish.

DC/Win Installation Guide

dbInstal	×
Done! The next time you start the Datair application you will be connected to the SQL Server Datab	ase.
ОК	

The message above indicates you have successfully installed a DATAIR Database on your Microsoft SQL Server. You're done!

## Installing PE/Win Workstation Application Software

Insert the CD accompanying these instructions. This CD has an AutoPlay feature that should begin the installation automatically. If it does not, open "My Computer" from your desktop, open the CD drive and double click "Setup.exe" to start the installation.

-1115 film-	DATAIR Pension System/Windows
SID.	Main Menu
6.3	Quick Start Guide
	Install Software
	Browse CD Contents
The second s	Visit Our Website
	Download Software Updates
	Contact Us
	Mote Acrobat Mote Reader
	Publication Date: January 6, 2005

Select "Install Software".

90	DATAIR Pension System/Windows Install Software	
E	Workstation Install Database Server Install	Release Notes Release Notes
	Please choose one of the ap to install, or to view the ro Adobe Acrobat is required release notes	elease notes.
	Get Acrobat Adobe	Main Menu

Then, on this screen, select "Workstation Install" to launch the installer.

You will see a welcome dialogue and then a licensing dialogue. Click "Next" to continue on these screens.

Next, you are asked for a Program Directory. We strongly recommend accepting the default installation directory. Press Next to continue...

DC/Win Installation Guide

Next, you are asked for a Shared Files Directory. If you have installed a previous version of this software, the directory will already be filled in correctly.

🚇 Microsoft SQL Server	Desktop Database Engine (MSDE) Installation
	Select Shared File Directory
	Please select the directory for Shared Files.
	If this is a network environment, make sure this location is common and accessible to all users.
	Use this same location on subsequent client workstation installs.
\$_^	
Ť	
	C:\My Documents\Datair\ Browse
	C:\My Documents\Datair\
<u>H</u> elp	< <u>B</u> ack <u>Next &gt;</u> <u>C</u> ancel

This shared directory is the same directory where the datair.mdb database file resides that is used in other DATAIR applications. It is also the same common, networked directory that was specified during the MSDE/MS SQL database installation.

The installation may skip presenting this screen if it finds information already pointing to database/common files stored on your computer.

🗿 DATAIR Pension Syst	em for Windows Installation	×
	Desktop Shortcuts Do you want to create shortcuts on your desktop for the following programs? Create shortcut for DATAIR Pension System for Windows	_
<u>H</u> elp	< Back Next > Cancel	

Last, check the box if you would like Desktop Shortcuts created.

Click "Next" on the "Ready to Install" message and your install will begin.

The installation should finish and you will see a "What's New" list of new features.

## Migrating from Access to MSDE/MS SQL

If you have already been using DC/Win with an Access database and wish to migrate to SQL, this topic will assist you in making this transition.

NOTE: If you are using other DATAIR systems such as the Document System, Pension Reporter, Client Manager, or Cafeteria Administration, this process will not affect those systems as DC/Win currently uses a separate Access database from those systems. Data from those systems will be merged with your DC/Win SQL database at a later date.

The overall process consists of the following steps:

- Export the data from your DC/Win Access database using the Plan Copy Out feature of the system
- Switch the system to connect to the SQL database
- > Import the data exported in the first step using the Plan Copy In feature of the system

We recommend that you copy out your plans prior to installing SQL server. Copy Out prior to the installation will save a few extra steps as you will not need to switch back and forth between the access and SQL databases to retrieve the plan data. However, Plan Copy Out can be completed after the installation by switching to one database, then to the other.

#### Plan Copy Out

From the menu bar, select File | Copy | Copy Out. A new window will open for Copy Out. The current plan that is open will be listed under the Company & Plan. To change plans, click on find and select the plan.

🕏 Import /	Export		
Сору О	ut		
Company S	ample Company		SAMPLE
Plan 🛛	BC Sample Company		SAMPLE
C Compan	y and <u>a</u> ll plans and all emp	oloyee records	<u>F</u> ind
● <u>P</u> lan dat	a only, for this system only		
🔿 All Comp	oanies		
Output File	C:\My Documents\Data	air\PEPIan_SAMPLE.txt	Browse
		.c <u>s</u> v output	Show D values
	Copy Out Status		☐ ⊻iew Worksheet
			<u>O</u> k <u>C</u> ancel
Database:	SQL DB 'DATAIR_PE' o	n Server 'BLUE'	

There are three information choices for copying out plans. Choosing the "Company, and all plans and all employee records" will copy the entire company information from all systems. The "Plan data only" choice will copy the plan information along with the sponsor and employees. If you have more than one computer with the possibility of the same company or plan in more than database, you will most likely want to choose the "Plan data only" choice, which is the default. The "All Companies" choice should be used with caution. This will export all plans in your database, and you may not wish to import all of them into the new database. Or if you have multiple copies of the plan on different computers, the last copied in plan will overwrite previous Copy In operations. If you only have one computer with the Access database and wish to copy all of your plans, then this could be the option that you would choose.

Once you have made your copy out choice, enter the Output File. This is where your file will be created. The file will have the default name based on the plan and the copy out choice. It can be changed. You will need to make sure that is has an extension of .txt in order to copy it back into the database.

Once you install the SQL database, the system will automatically open in SQL. The only plans will be the default plans. You must select one of the defaults to open the plan level. You can then start the copy in process.

#### Plan Copy In

From the menu bar, select File | Copy | Copy In. A new window will open for Copy In.

*Important!* Verify that the correct database type and server/database is shown at the bottom of the screen before proceeding.

The "From File" will need to be completed with the name of the file that you wish to copy in. Currently the \*.txt will be listed. Replace the \* with the name of the file. You may use browse to select your file.

🛱 Import /	Export		
Copy Ir	ı		
From File	C:\My Documents\Datair\*.txt		Browse
	Existing Plan, Create New If Not		
C Create <u>N</u>	lew Plan or Company		
🔘 If Plan B	xists, <u>M</u> erge Data, Create New If Not		
<u> ∏</u> <u>D</u> elete B	ixisting Company or Plan Before Copying In		
	Copy In Status	Ignore Plan and C	
			<u>O</u> k <u>C</u> ancel
Database:	SQL DB 'DATAIR_PE' on Server 'BLUE'		

Leave all other options on this screen at their default settings and click Ok and the plan(s) will be copied into the new database.