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# Defined Contribution System/Windows

# Installation Guide

(Updated for SQL 2005 & SQL Express)

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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 in the future. Access is only supported for stand-alone single-user installations. 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 Server Express (Express) which is limited capacity version of MS SQL that is included free of charge with DATAIR applications.

**Note:** We will only discuss editions of SQL 2005 in this document. The system continues to support SQL 2000 and MSDE, however we highly recommend SQL 2005 for new installations. The SQL 2000/MSDE version of this document may be found on our web site in the Technology Publications section.

## Choosing between Express and MS SQL

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

Feature	MS SQL 2005 Express	MS SQL 2005 Standard Edition
Maximum Database Size	4 GB	No Limit
Number of Processors Supported	1	4
RAM Memory (Maximum used)	1 GB	No Limit
Cost	Included free of charge	Must be purchased separately

In essence, the limitations placed on the free Express version of the database include limiting the maximum size of a database to 4 gigabytes, which is actually a tremendous amount of data, a single processor, and will not use more than 1 GB of RAM.

The limit on the number of processors and amount of memory supported has a limiting effect on the number of simultaneous users that can be supported, but there is no magic formula that can predict a maximum number of users in practical terms.

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 users since the chances of them 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 a varying number of simultaneous users, but it is difficult to predict the exact number.

The bottom line is this... If you wish to be very conservative, you may want to limit the number of users to no more than six simultaneous users. More realistic is that Express would support 10 or more simultaneous users using a mix of DATAIR applications. If you outgrow the free Express version, upgrading to MS SQL is quite easy so we recommend starting with Express unless you are already using the full version of SQL Server for other software.

For additional information on SQL Server, 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.

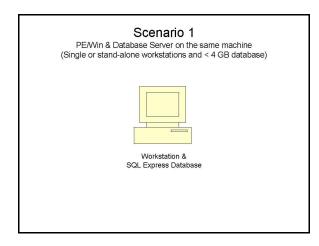
Each scenario includes a description and visual representation of the configuration, a listing of what's needed, and a brief description of the installation steps.

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 6 users as the division between Express and MS SQL, use the guidelines provided in "Choosing between Express and MS SQL" when considering the actual number of users each configuration will support.

## Scenario #1 - Software and SQL Express Database on the same machine



## Typical Uses

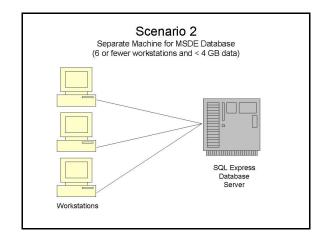
Notebook computer or stand-alone computer where each user has their own database. The database may not exceed 4 GB in size.

#### What's Needed

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

## **Installation Steps**

Step 1: Install Express 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**

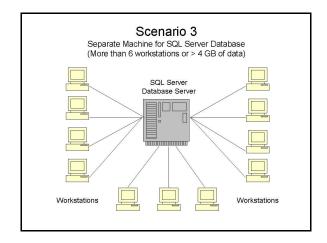
Six or fewer networked workstations sharing a database with less than 4 GB of data.

## 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 SQL Express & 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



## **Typical Uses**

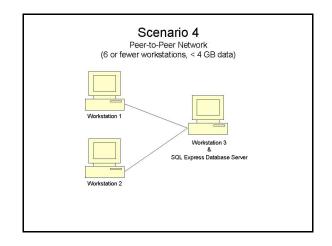
More than 6 simultaneous users sharing a database, or more than 4 GB of data.

## 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



## Description

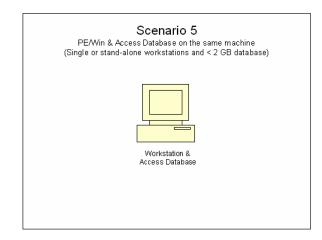
While we strongly recommend having a machine to specifically be used as a server for the database, there are situations when having a workstation also serve as the database server is acceptable. Appropriate situations include where there are only two or three computers, or where there is a little-used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

## What's Needed

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

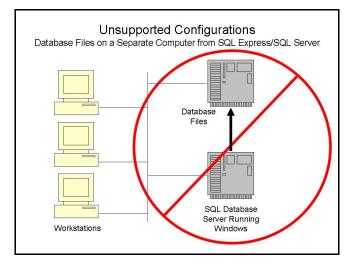
## Installation Steps

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

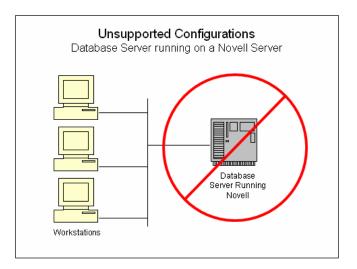
## **Unsupported Configurations**

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

SQL Express/MS SQL Database Server running on one machine and the database files on another

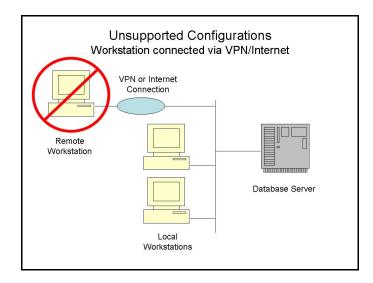


SQL Express/MS SQL Server requires that the database files be located on the same physical computer as where the database server software is running. You may not, for example, install the database server software on one machine and place the database files on another.



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

SQL Express/MS 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.

NOTE:

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	256 MB 2000/XP 512 MB Vista	768 MB or more	
Disk Space (excludes data)	250 MB	250 MB	
Video	800x600 SVGA	1024x768 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	Windows Vista Business	
	Windows Vista Business	Windows Vista Ultimate	
	Windows Vista Ultimate		
Other	Windows-compatible pointing device		
	Windows-compatible printer		
	Windows-compatible network (optional)		
	CD-ROM or DVD drive		
	3.5" Floppy Disk Drive or Internet 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	784 MB Vista/ 512 MB Other	1 GB or more	
Disk Space (excludes data)	350 MB	350 MB	
Video	800x600 SVGA	1024x768 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	Windows Vista Business	
	Windows Vista Business	Windows Vista Ultimate	
	Windows Vista Ultimate		
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 Access		

## SQL Express Server Only

Feature	Minimum	Recommended	
Processor	2 GHz Pentium	3 GHz Pentium	
RAM Memory	768 MB Vista/512 MB other	1 GB or more	
Disk Space (excludes data)	100 MB	100 MB	
Video	800x600 SVGA	1024x768 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	Windows Vista Business	
	Windows Vista Business	Windows Vista Ultimate	
	Windows Vista Ultimate		
Other	Windows-compatible pointing device		
	Windows-compatible printer		
	Windows-compatible network (optional)		
	CD-ROM or DVD drive		
	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	1024x768 XGA	
Windows OS	Windows 2000 Server	Windows 2000 Server	
	Windows 2003 Server	Windows 2003 Server	
Other	Windows-compatible pointing device		
	Windows-compatible printer		
	Windows-compatible network (optional)		
	CD-ROM or DVD drive		
	Internet 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 SQL Express, we recommend allocating up to 36 GB of disk space for plan data and database backups. This is based on the SQL Express maximum database size of 4 GB, 28 GB of daily database backups (seven backups of 4 GB each), and 4 GB of temporary data storage.

For SQL Server, the amount of data space required would need to be calculated based on the amount of data, types and number of backup, etc.

## **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.

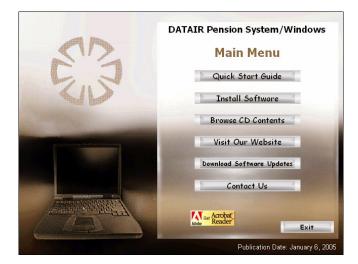
## Installing the SQL Express Database Server

## Before you Begin....

- Installation of the SQL Express database server 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.
- You only need to install SQL Express on one machine. All workstations will connect to this single installation of SQL Express.
- You will need to login to the machine with full administrative rights and full access to install SQL Express. 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 SQL Express 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 may be altered through the Advanced options tab while installing.
- 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".

DATAIR Pension Syste Install Soft Workstation Install Database Server Install	
Please choose one of the ap to install, or to view the re Adobe Acrobat is required t release notes	elease notes.
Acrobat Reader	Main Menu

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

You will see the welcome dialogue. Click [Next >] to continue.

Next, you are asked to provide a Shared File Directory. Make sure if this is a network installation that the directory selected is accessible to all users who will be accessing DATAIR applications.

🔏 DATAIR Database and SQL Express 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 when asked for a shared file directory. Note: This is the same common directory where your datair.mdb database file resides that is used by other Datair systems.			
	C:\My Documents\Datair Browse			
Help	< <u>B</u> ack <u>Next&gt;</u> Cancel			

Note! 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.

Press [ Next > ] to continue.

The installer will now install a few utilities and then analyze your system, looking for previously installed database servers and databases.

Depending on what components the installer found already installed on your computer, the screen choices will be different. Presuming that you don't have SQL Server, MSDE, or SQL Express installed currently on this machine, the screen will appear as follows...

DATAIR SQL Express Installation Utility	
Computer Name: JERRY1	
Servers found on None found! this computer:	
Install Datair instance of SQL Server	
✓         Install database at the same time	<u>I</u> nstall
C Install Datair database on selected server above	
C Upgrade DATAIR MSDE SQL Server to SQL 2005 Express	
	(Exit

By default, when the database is installed, it will be placed in the default data location as defined by Microsoft. Additionally, a backup job will be created to create a local disk-based backup of the database every morning at 1:00 am. This type of backup is merely intended to allow restoration of a plan that was incorrectly altered within the past seven days, not prevention against hardware failure or changes that occurred more than a week ago . See the technical document "Backing-up your SQL Database" for additional information on backup strategies.

If you wish to disable or alter the time of the backups, or change the directory where the SQL database is installed, press the [ Advanced ] button to access the Advanced Features dialog

S Database Installer - Advanced Features				
Database Location :				
Install Database in default SQL Server folder				
C Install to an <u>a</u> lternate location				
Available Fixed Drives : C:\ 💌 <u>B</u> rowse Folders				
Maintenance Plan :				
🔽 Set up a maintenance plan to back up data nightly				
Schedule daily at: 01 × 00 × am × 0K Cancel				

On this dialog you can choose the default database location, or another folder located physically on the same machine. SQL Server does not allow databases to be installed on network drives.

You can also choose to enable/disable the maintenance plan or alter the time of day it is backed-up. We recommend setting the time to when the machine is turned on, but there wouldn't be any users in the DATAIR systems.

Click [ OK ] to return to the setup screen, then click the "Install" button to perform the selected installation. Several Microsoft SQL Express screens will appear as the installation proceeds.

After a successful installation of the database you will see this dialogue:

dbinstal 🛛 🔀
Datair database successfully created!
ОК

Press [ OK ].

The system will then be reanalyzed to verify the SQL Express server and DATAIR database were installed properly. If so, the following dialog will appear...

DATAIR SQL Express Installation Utility	×			
Computer Name: TESTXPPROSP2				
Servers found on TESTXPPROSP2\DATAIR - DATAIR DB installed - Version : SQL 2005 Express - SP2				
C DATAIR Server and DB Installed Successfully!				
The DATAIR instance of SQI Server 2005 Express is running and a Datair database has been installed.				
C This installer will now close.				
ОК				
Exit				

Press [ OK ]. This completes the installation of the Express database server and DATAIR Database. You may now install the DATAIR DC/Win workstation software.

## 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, you will need to 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. NOTE: Use of a non-DATAIR instance of SQL Server may result in additional fees for technical support.
- > SQL Server 2005 Service Pack 2 or later is recommended.
- 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.

## Ste-by-Step Instructions SQL 2005 Server

Insert the SQL Server CD or DVD



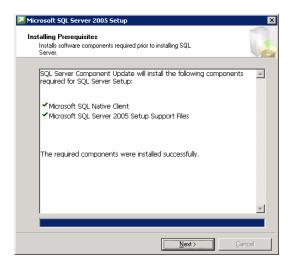
Choose "Install Server components, tools..."



Check the "I agree..." box and press [Next >]

Installing Prerequisites Installing SQL Server. SQL Server Component Update will install the following components required for SQL Server Setup:	
Installs software components required prior to installing SQL Server. SQL Server Component Update will install the following components	
	-
	<b></b>
Microsoft SQL Native Client	
Microsoft SQL Server 2005 Setup Support Files	
Click Install to continue.	
	-
Install Cance	-1

You may or may not see the above screen depending on previous installations of SQL 2005 on this machine. Press [Install] to continue.



If the Installing Prerequisites screen appeared, this screen will also appear after required components are installed. Press [ Next > ] to continue



Click [Next >] on the welcome screen.

	-		
V	Success	14 Total 12 Success	0 Error 2 Warning
		12 5000033	2 waning
eta	ils:		
	Action	Status	Message 4
0	Operating System Service Pack Level	Success	
0	SQL Server Edition Operating System	Success	
1	Minimum Hardware Requirement	Warning	Messages
1	IIS Feature Requirement	Warning	Messages
0	Pending Reboot Requirement	Success	
	Performance Monitor Counter Require	Success	
0	Default Installation Path Permission Re	Success	-
	Internet Explorer Requirement	Success	
	COM Plus Catalog Requirement	Success	

The setup will examine your system to verify it has the necessary hardware and software. Review the list carefully for any Error or Warning notices. The warning for "IIS Feature Requirement" can be ignored if it appears.

1icrosoft SQL Server 20	05 Setup	
e <b>gistration Informat</b> The following information	<b>ion</b> will personalize your installation.	
The Name field must be fi	lled in prior to proceeding. The Company field is	optional.
Name:		
Your Name		
Company:		
Your Company		
Please enter your 25 cha sticker in the CD liner not	racter Product Key. You can find this number or as or the CD sleeve.	n the yellow
	271022 - 272723 - 878082	
	and Units	Cancel
Help	< Back <u>N</u> ext >	Cancel

Enter you name, company and Microsoft SQL Product Key and press [ Next > ]

Hicrosoft SQL Server 2005 Setup
Components to Install Select the components to install or upgrade.
QL Server Database Services
Create a SQL Server failover cluster
Analysis Services
Create an Analysis Server failover cluster
<u>Reporting Services</u>
Ngtification Services
V Integration Services
Vorkstation components, Books Online and development tools
For more options, click Advanced.
Help < Back Next > Cancel

Check the boxes "SQL Server Database Services", "Integration Services", and "Workstation Components..." and press [Next > ] to continue.

🖶 Microsoft SQL Server 2005 Setup
Instance Name You can install a default instance or you can specify a named instance.
Provide a name for the instance. For a default installation, click Default instance and click Next. To upgrade an existing default instance, click Default instance. To upgrade an existing named instance select Named instance and specify the instance name.
Default instance     Named instance     DATAIR
Help Cancel

Choose "Named Instance" and enter "DATAIR" and press [Next > ] to continue.

🙀 Microsoft SQL Server 2005 Setup	×
Service Account Service accounts define which accounts to	log in.
Customize for each service account	
	<b>Y</b>
○ Use the built-in System account	Local system
Use a domain user account	
Username:	SQLServices
Password:	*****
Domain:	YourDomain
Start services at the end of setup	
SQL Server	
SQL Server Agent	
SQL Browser	
<u>H</u> elp < <u>E</u>	Back Next > Cancel

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

🛱 Microsoft SQL Server 2005 Setup
Authentication Mode The authentication mode specifies the security used when connecting to SQL Server.
Select the authentication mode to use for this installation.
<u>Wi</u> ndows Authentication Mode <u>Mixed Mode (Windows Authentication and SQL Server Authentication) </u>
Specify the sa logon password below: Enter password:
Help < Back Next > 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 > to continue]

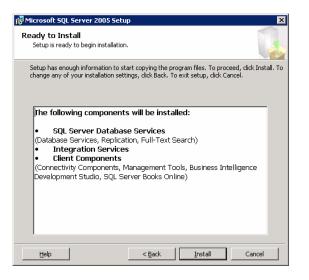
ollation settings for service: SQL Serve	er 💦
C Collation designator and sort order	n:1
Latin1_General	<u> </u>
E Binary	Binary - code point
Case - sensitive	🕅 Kana - sensitive
🗖 Accent - sensitive	Width - sensitive
Strict compatibility with version 1.x Dictionary order, case-sensitive, for Dictionary order, case-insensitive, f Dictionary order, case-insensitive, u	

Choose "Dictionary order, case-insensitive, for use with 1252 Character Set" and press [ Next > ] to continue.

Microsoft SQL Server 2005 Setup
Error and Usage Report Settings Help Microsoft improve some of the SQL Server 2005 components and services.
Automatically send Error reports for SQL Server 2005 to Microsoft or your corporate error reporting server. Error reports include information regarding the condition of SQL Server 2005 when an error occurred, your hardware configuration and other data. Error reports may unintentionally include personal information, which will not be used by Microsoft.
Automatically send Feature Usage data for SQL Server 2005 to Microsoft. Usage data includes anonymous information about your hardware configuration and how you use our software and services.
For more information on the error reporting feature and the type of information sent, click Help.
Help < Back Next > Cancel

Press [ Next > ] to continue.

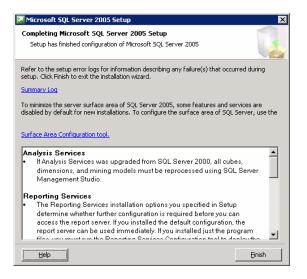
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Review the confirmation screen and press [Next >]

Product	Status	<u> </u>
<u>OWC11</u>	Setup finished	
SQL Server Backward-Compatibility Files	Setup finished	
SQL Server Database Services	Setup finished	
Integration Services	Setup finished	_
Visual Studio Integrated Development		
SQL Server Books Online	Setup finished	_
SQLXML4	Setup finished	_
Workstation Components, Books Onlin	Setup finished	-

The SQL Server software is now being installed. Once it is completed, press [Next >]



Review any pertinent messages and press [Finish] to conclude the installation.

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

DC/Win Installation Guide

## 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 Server Management Studio and highlight the server you will use for the DATAIR database, right click, and choose Properties. Next, select "Security" from the "Select a Page" list.

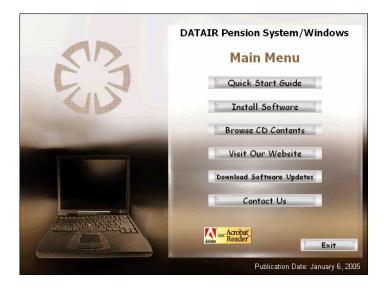
A sample is shown below:

Server Properties - TEST2K	3SP1\DATAIR
Select a page	式 Script 👻 🛐 Help
General     General     Memory     Processors     Security     Connections     Advanced     Permissions	Server authentication
Connection Server: TEST2K3SP1\DATAIR Connection: DATAIRNadministrator DATAIRNadministrator Progress Ready	
	OK Cancel

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

## 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".

SD.	DATAIR Pension System/Window Install Software	
EB	Workstation Install Database Server Install	Release Notes Release Notes
	Please choose one of the ap to install, or to view the re Adobe Acrobat is required release notes	elease notes.
	Get Acrobat Adabe	Main Menu

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



You will see a welcome dialogue. Click "Next" to continue.



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...

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.

🖷, DATAIR SQL Express Installation Utility	_ 🗆 🗵
Computer Name: TEST2K3SP1	
Servers found on TEST2K3SP1\DATAIR • Version : SQL Server 2005 • RTM this computer:	<b>_</b>
C Install Datair instance of SQL Server	
Install database at the same time	
Install Datair database on selected server above <u>A</u> dvanced	<u>I</u> nstall
C Upgrade DATAIR MSDE SQL Server to SQL 2005 Express	
	Exit

If you have multiple instances of SQL Server installed, you will need to choose the DATAIR instance in the Servers Found dropdown combo.

By default, when the database is installed, it will be placed in the default data location as defined by the installation of SQL Server. Additionally, a backup job will be created to create a disk-based backup of the database every morning at 1:00 am. This type of backup is merely intended to allow restoration of a plan that was incorrectly altered within the past 7 days, not prevention against

hardware failure or changes that occurred more than a week ago . See the technical document "Backing-up your SQL Database" for additional information on backup strategies.

If you wish to disable or alter the time of the backups, or change the directory where the SQL database is installed, press the [ Advanced ] button to access the Advanced Features dialog

🖷 Database Installer - Advanced Features	
Database Location :	
Install Database in default SQL Server folder	
C Install to an alternate location	
Available Fixed Drives : CA Browse Folders	
Maintenance Plan :	
Set up a maintenance plan to back up data nightly	
Schedule daily at: 01 🔹 00 💉 🖬 💉	<u>Q</u> K <u>C</u> ancel

On this dialog you can choose the default database location, or another folder located physically on the same machine. SQL Server does not allow databases to be installed on network drives.

You can also choose to enable/disable the maintenance plan or alter the time of day it is backed-up. We recommend setting the time to when the machine is turned on, but there wouldn't be any users in the DATAIR systems.

Click [ OK ] to return to the setup screen

🖷 DATAIR SQL Express Installation Utility	
Computer Name: TEST2K3SP1	
Servers found on TEST2K3SP1\DATAIR - Version : SQL Server 2005 - RTM this computer:	•
O Install Datair instance of SQL Server	
Install database at the same time	
Install Datair database on selected server above <u>A</u> dvanced	Install
C Upgrade DATAIR MSDE SQL Server to SQL 2005 Express	
	Exit

Click [Install] to install the DATAIR database on the server. After the database has been installed, you will se the following dialog confirming it was installed properly.

dbInstal 🗙
Datair database successfully created!
ОК

Press [ OK ]. This completes the installation of the DATAIR Database.

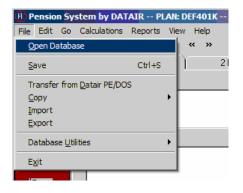
## Method 2 – Installation using the DC/Win application

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		
Main Database © SQL Server Server- Database		
<ul> <li>Access database</li> <li>Database File</li> </ul>	C:\My Documents\Datair\m2k.MDB	
Alternate Database © SQL Server Server - Database		
<ul> <li>Access database</li> <li>Database File</li> </ul>		
		el

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:

🖷, DATAIR SQL Database Manager	- 🗆 🗵	
Database Connection Options		
Connect to an existing database on your computer or network		
Install a new Datair database on a server		
<u> </u>	1	

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.

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

🖷, 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 :         [Enter a name for your new database]         Create Database         Create Database	
Please wait., Step #1 - Creating new database	

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	d!
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 netw	
Connect to an existing database on your computer of new	VOIK
C Install a new Datair database on a server	
<u>D</u> K <u>C</u> anc	el

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

💐 Connect to D	ATAIR SQL Server Data	ıbase		
SQL Server	My SQL Server		•	Refresh
Existing Databa	ses			
DATAIR DATA	AIR			
Select an existir	ng SQL server, then select t	he database to connec	ct to on that se	rver.
		Select <u>D</u> atabase	<u>C</u> ancel	
Select A Server.	Then, select a database fro	m 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.

dbInstal
Done! The next time you start the Datair application you will be connected to the SQL Server Database.
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.

	DATAIR Pension System/Windows
antifi fittere	DATAIN Pension System/ Windows
512	Main Menu
6.3	Quick Start Guide
	Install Software
A State of the second s	Browse CD Contents
Contraction of the local division of the loc	Visit Our Website
	Download Software Updates
	Contact Us
	Get Acrobat Adde Reader
	Publication Date: January 6, 2005

Select "Install Software".

	DATAIR Pension Syste	em/Windows
SD.	Install Software	
CI	Workstation Install	Release Notes
<12	Database Server Install	Release Notes
	Please choose one of the applications abo to install, or to view the release notes.	
	Adobe Acrobat is required t release notes	to view the
	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...

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.	
\$\$_\$*		
	C:\My Documents\Datair\ Browse	
		_
<u>H</u> elp	< <u>B</u> ack <u>N</u> ext > <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 SQL Express/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.

ATAIR Pension System 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	
Help	< <u>B</u> ack <u>N</u> ext> <u>C</u> ancel	

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 SQL Express/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 д	BC Sample Company		SAMPLE
C Company and all plans and all employee records		<u> </u>	
Plan data only, for this system only			
C All Comp	anies		
Output File	C:\My Documents\Data	ir\PEPIan_SAMPLE.txt	<u>B</u> rowse
	□ <u>W</u> orksheet output	.csv output	🔲 Show [D values
	Copy Out Status		☐ <u>V</u> iew Worksheet
			<u>O</u> k <u>C</u> ancel
Database:	SQL DB 'DATAIR_PE' or	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 In	
From File C:\My Documents\Datair\*.txt	Browse
Replace Existing Plan, Create New If Not	
C Create New Plan or Company	
If Plan Exists, <u>M</u> erge Data, Create New If Not	
Delete Existing Company or Plan Before Copying In	
	🔲 Ignore Plan and Company Idents
Copy In Status	
	Ok
	Cancel
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.

## Upgrading from MSDE to SQL Express

The Database Installation utility will also allow you to upgrade an instance of MSDE to SQL Express. An updated version of this document will be available shortly on the DATAIR website that documents upgrading from MSDE to SQL Express. At this time, we recommend those running MSDE to continue using it rather than upgrading.