



DATAIR

EMPLOYEE BENEFIT SYSTEMS, INC.

Serving Pension & Benefits Professionals since 1967

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 through 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.

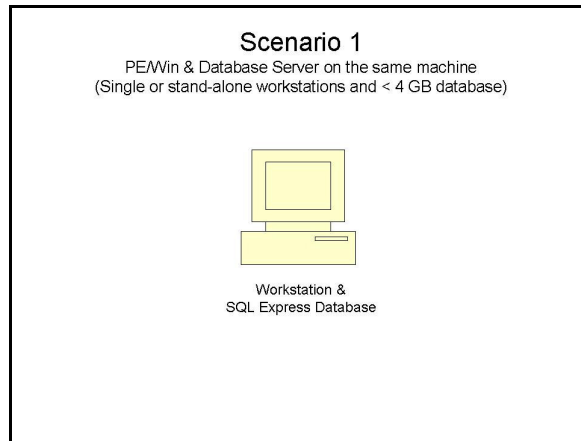
Each scenario includes a description and visual representation of the configuration, a listing of what's needed, and a brief description of the installation steps.

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

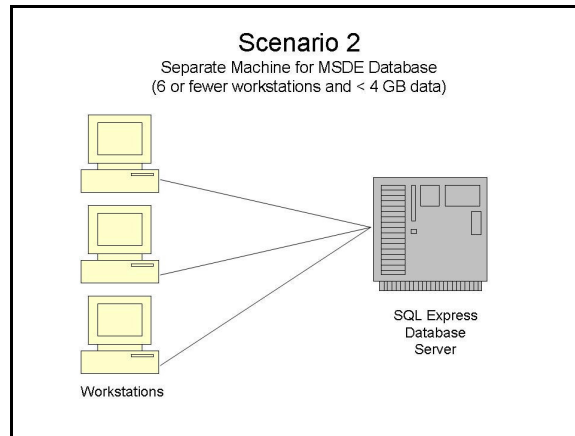
- DC/Win software CD.
- Workstation that meets the Stand-alone Workstation requirements.

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

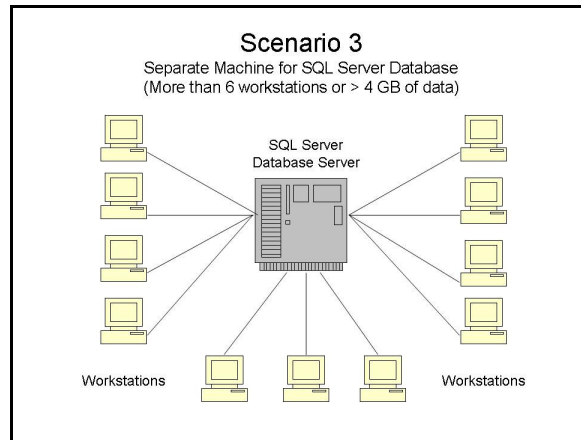
- DC/Win software CD.
- Workstations that meet the "Workstation-only" requirements
- Machine that hosts the database must meet the "Stand-alone Workstation" requirements.
- Windows-compatible network

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

Scenario #3 – Software and SQL Database on different machines (more than 6 users)



Typical Uses

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

What's Needed

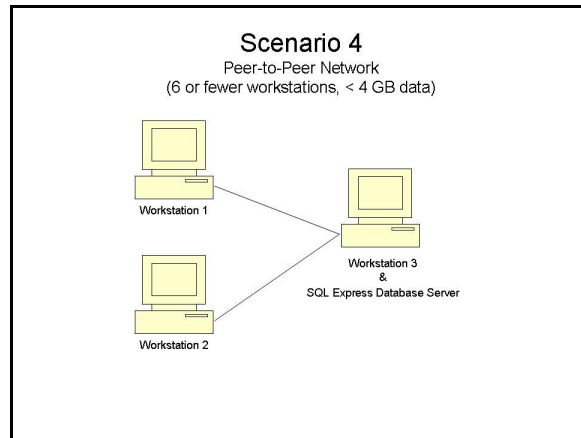
- DC/Win software CD
- Microsoft SQL Server (Purchased separately)
- Microsoft SQL Server Client Access Licenses (CALs) for each workstation (purchased separately)
- Workstations that meet the "Workstation-only" requirements
- Server that meets the Microsoft SQL Server Database Only requirements
- Windows-compatible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

Scenario #4 – 6 or fewer users, < 4 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.

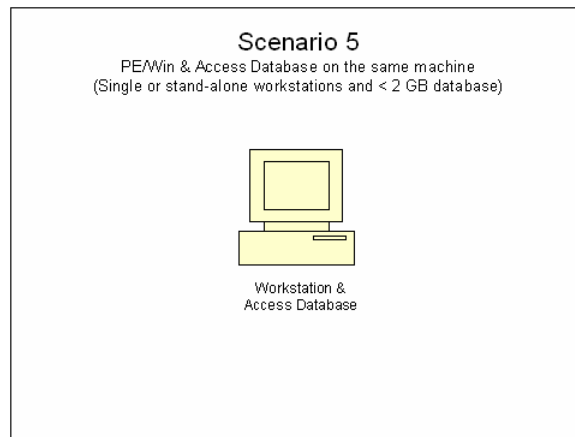
What's Needed

- 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 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

Scenario #5 – Existing User - Access database



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.

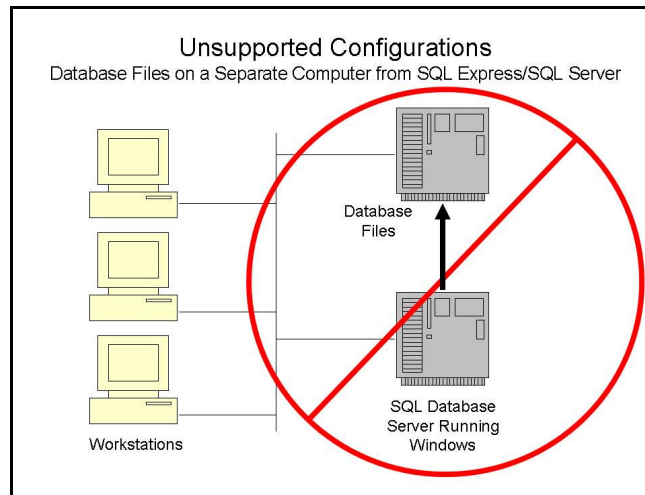
Installation Steps

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

Unsupported Configurations

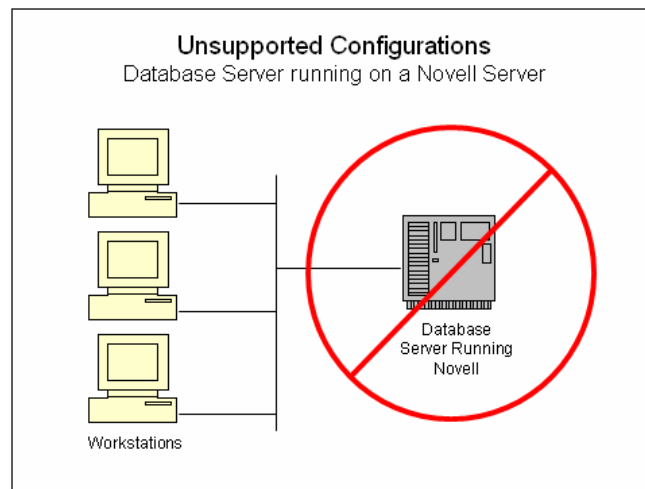
The following are examples of installation scenarios that may not be used.

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

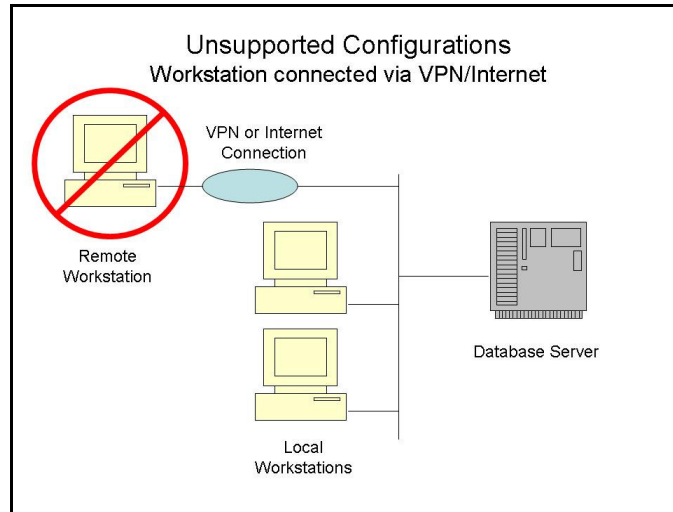


SQL Express/MS SQL Server requires that the database files be located on the same physical computer as where the database server software is running. You may not, for example, install the database server software on one machine and place the database files on another.

SQL Express/SQL Database Server running on Novell Server



SQL Express/MS SQL Server only 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 Server Windows XP Pro Windows XP Home Windows 2003 Server Windows Vista Business Windows Vista Ultimate	Windows 2000 Pro Windows 2000 Server Windows XP Pro Windows 2003 Server Windows Vista Business 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 Server Windows XP Pro Windows XP Home Windows 2003 Server Windows Vista Business Windows Vista Ultimate	Windows 2000 Pro Windows 2000 Server Windows XP Pro Windows 2003 Server Windows Vista Business 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	

SQL Express Server Only**Applies to: Scenario 2 – Server**

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 Server Windows XP Pro Windows XP Home Windows 2003 Server Windows Vista Business Windows Vista Ultimate	Windows 2000 Pro Windows 2000 Server Windows XP Pro Windows 2003 Server Windows Vista Business 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 2003 Server	Windows 2000 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.

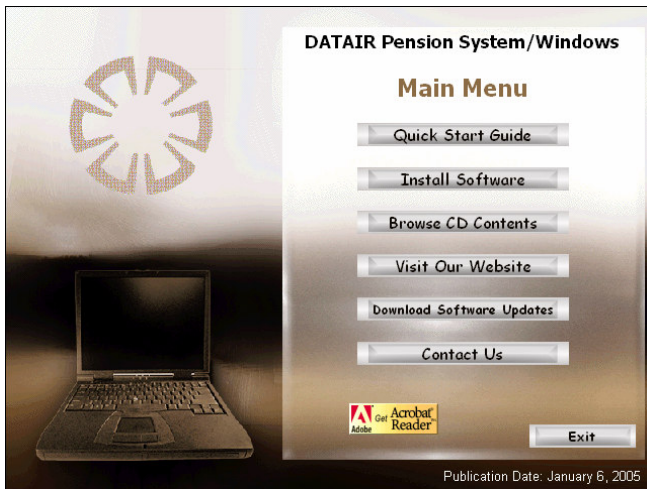
Installing the SQL Express Database Server

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.



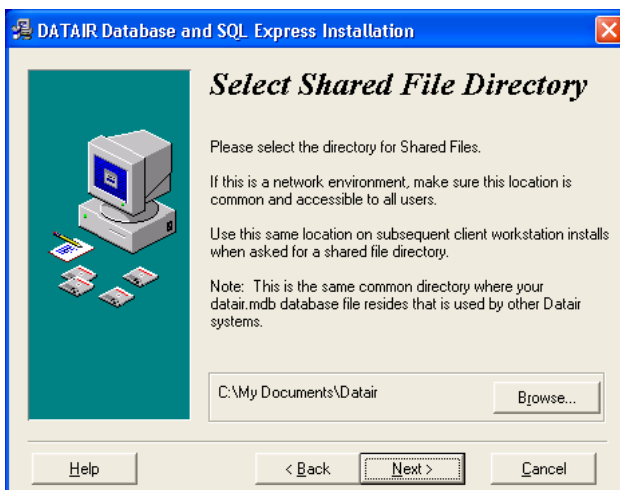
Select “Install Software”.



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.

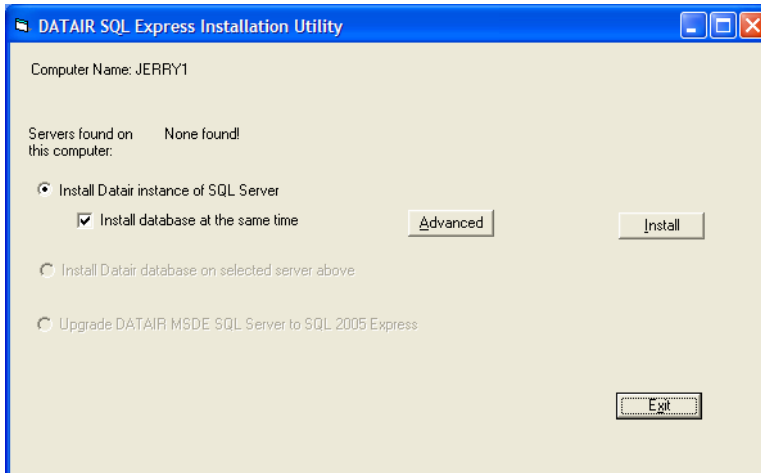


Note! This is not where your SQL Server database will be stored. This is simply a folder that will be used by DATAIR applications for shared files.

Press [Next >] to continue.

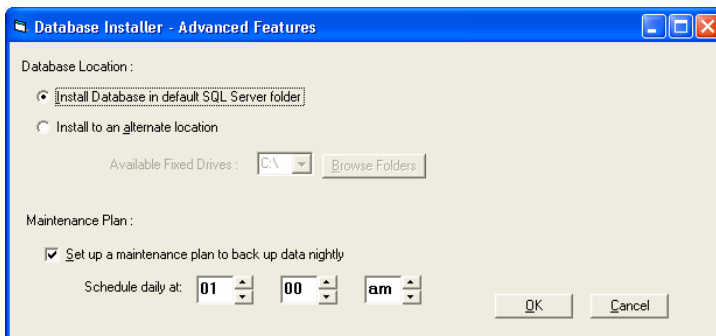
The installer will now install a few utilities and then analyze your system, looking for previously installed database servers and databases.

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...



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

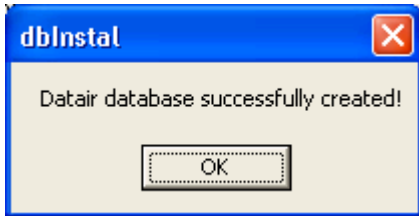


On this dialog you can choose the default database location, or another folder located physically on the same machine. SQL Server does not allow databases to be installed on network drives.

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.

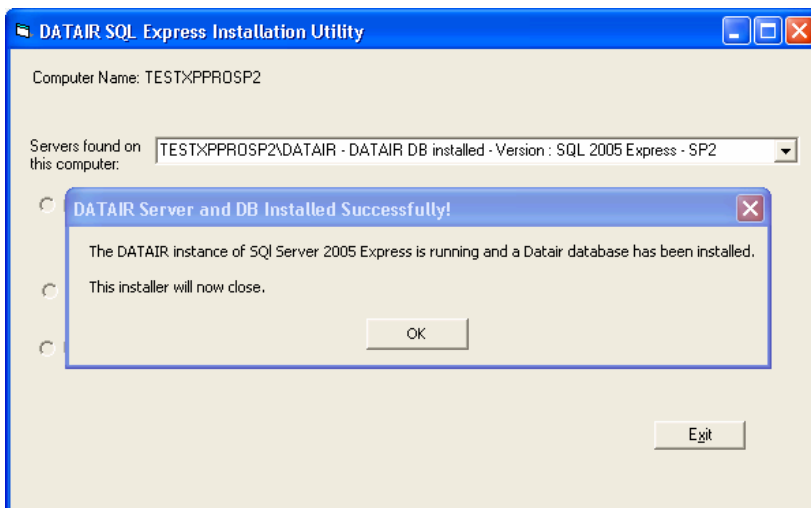
Click [OK] to return to the setup screen, then click the "Install" button to perform the selected installation. Several Microsoft SQL Express screens will appear as the installation proceeds.

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



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...



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....

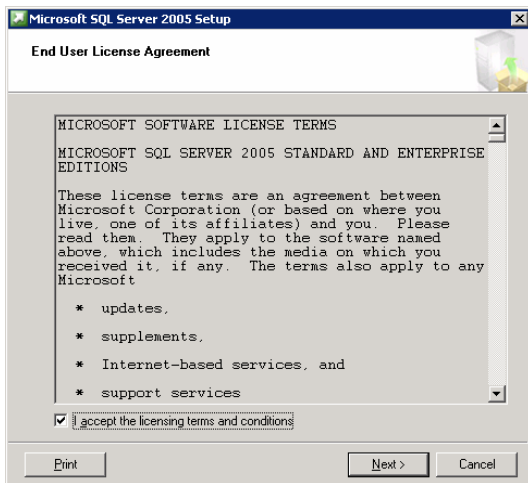
- Multiple copies, or 'instances' as they are called, of SQL Server may be installed on a single computer. Even if you have Microsoft SQL Server already running on the machine you will be server computer, you will need to install a second instance named "DATAIR". This will simplify support and eliminate 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

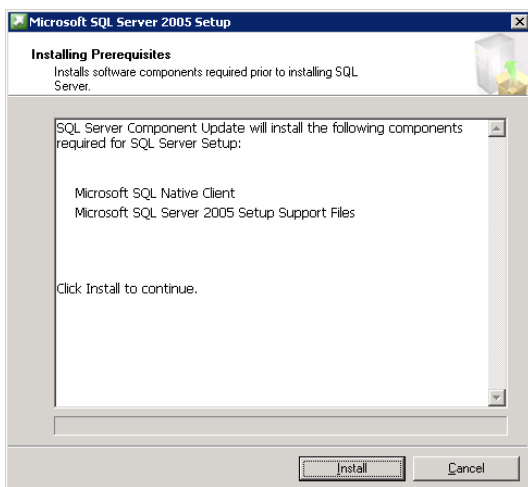
Insert the SQL Server CD or DVD



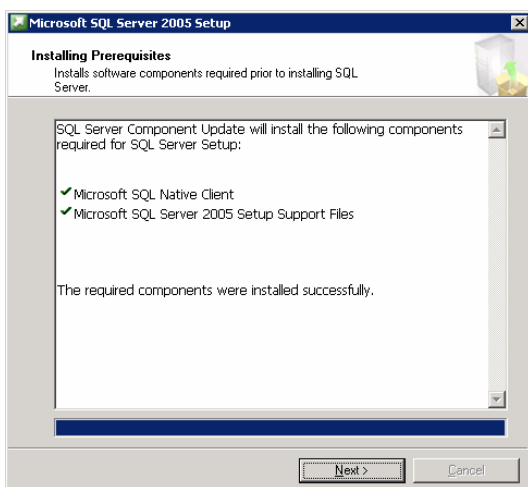
Choose "Install Server components, tools..."



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



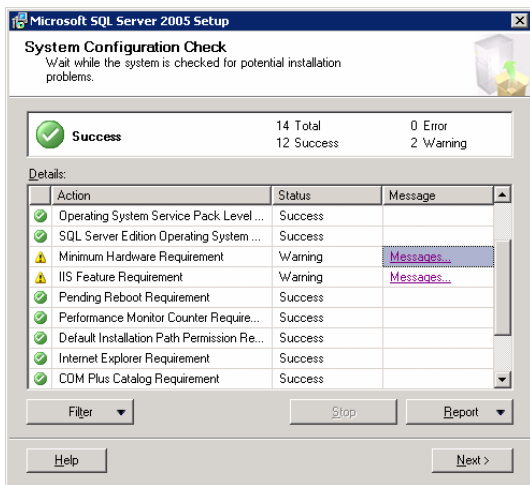
You may or may not see the above screen depending on previous installations of SQL 2005 on this machine. Press [Install] to continue.



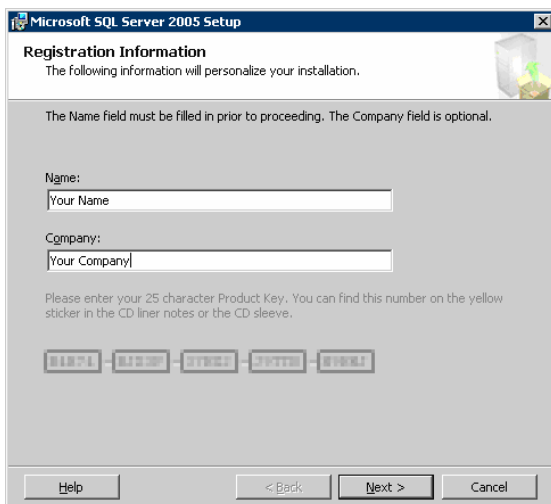
If the Installing Prerequisites screen appeared, this screen will also appear after required components are installed. Press [Next >] to continue



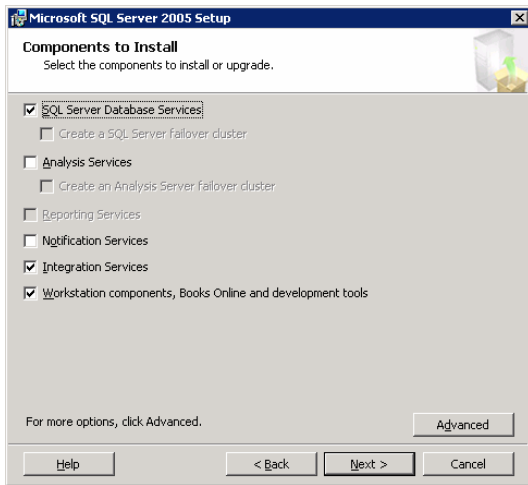
Click [Next >] on the welcome screen.



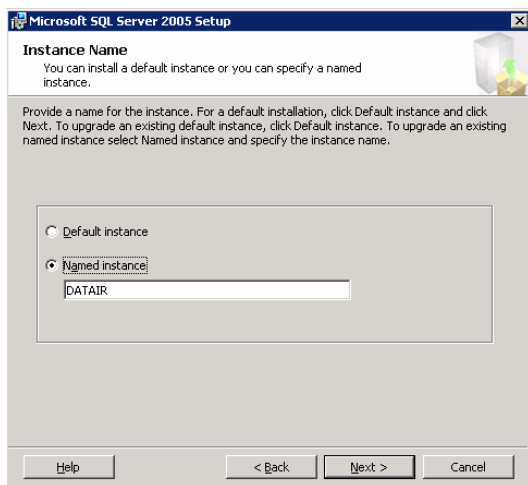
The setup will examine your system to verify it has the necessary hardware and software. Review the list carefully for any Error or Warning notices. The warning for “IIS Feature Requirement” can be ignored if it appears.



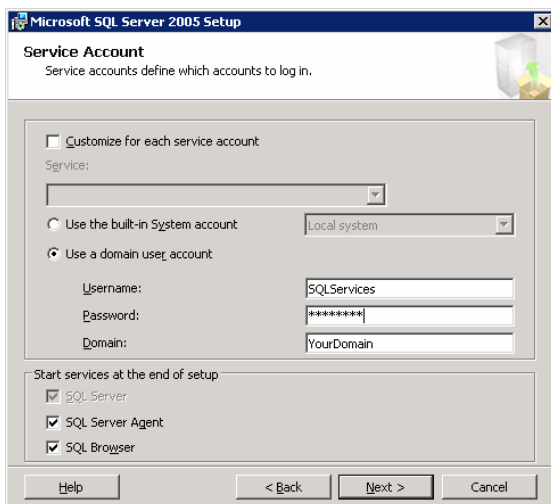
Enter you name, company and Microsoft SQL Product Key and press [Next >]



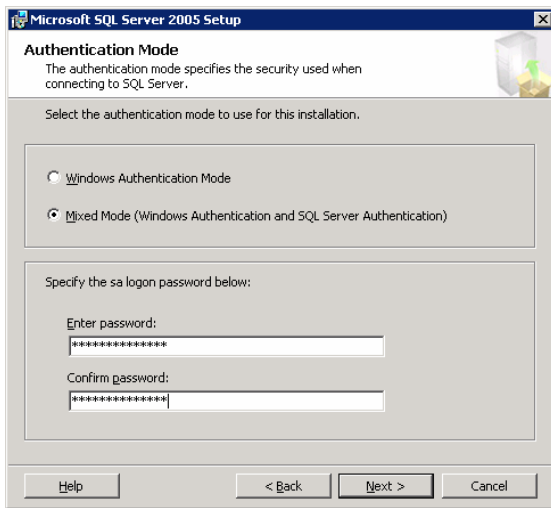
Check the boxes “SQL Server Database Services”, “Integration Services”, and “Workstation Components...” and press [Next >] to continue.



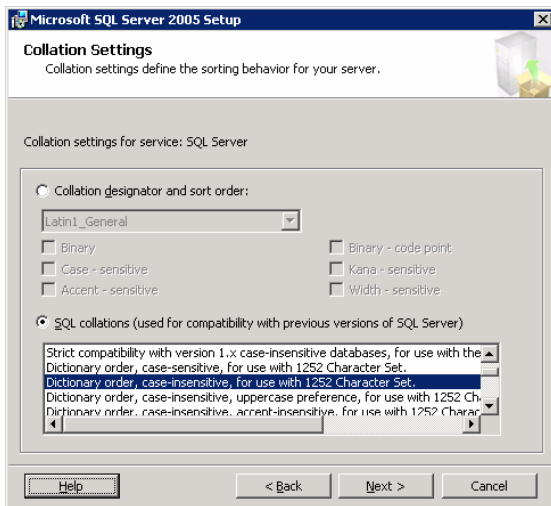
Choose “Named Instance” and enter “DATAIR” and press [Next >] to continue.



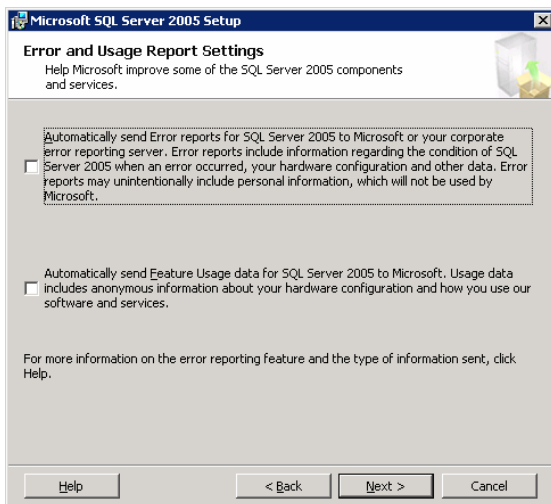
Select the options as shown, and enter the user name, password, and domain of an administrative-level account to be used. This account must exist in your domain. See Microsoft’s documentation for additional information. Press [Next >] to continue.



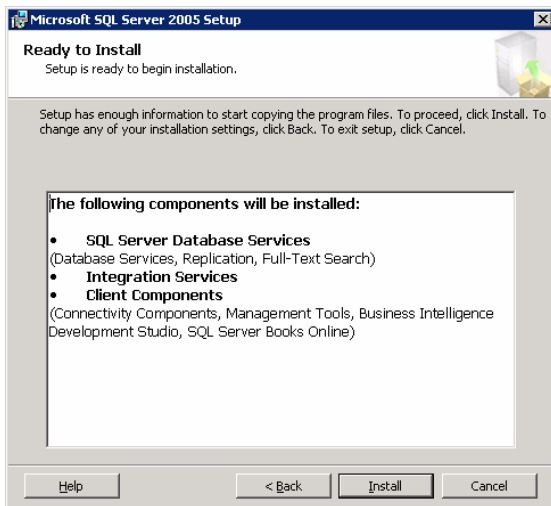
Select “Mixed Mode” and specify a password for the SA account. Be certain to choose a strong password that would not be easily guessed. Press [Next > to continue]



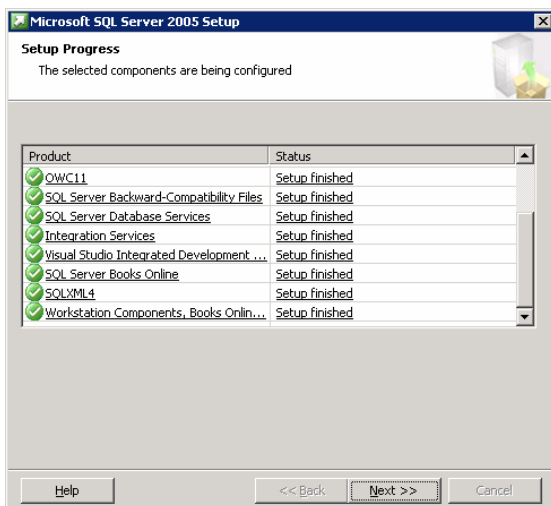
Choose “Dictionary order, case-insensitive, for use with 1252 Character Set” and press [Next >] to continue.



Press [Next >] to continue.



Review the confirmation screen and press [Next >]



Installing a DATAIR Database on your Microsoft SQL Server

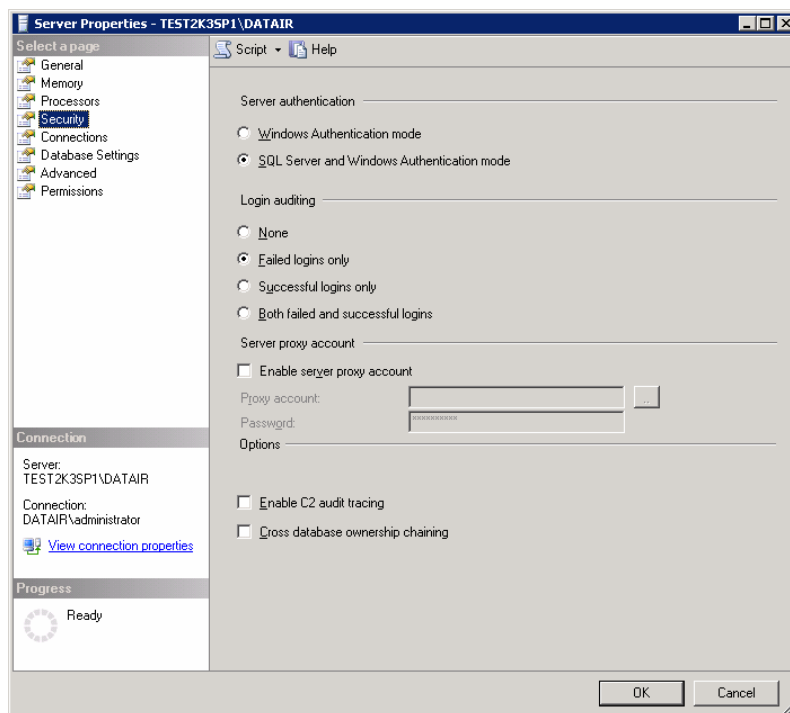
Follow the directions in this section if you want to install a DATAIR database on your own SQL Server. If you do not already have a DATAIR instance of SQL Server installed on your network, see the topic “Installing a new SQL Database Server” in this guide.

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.

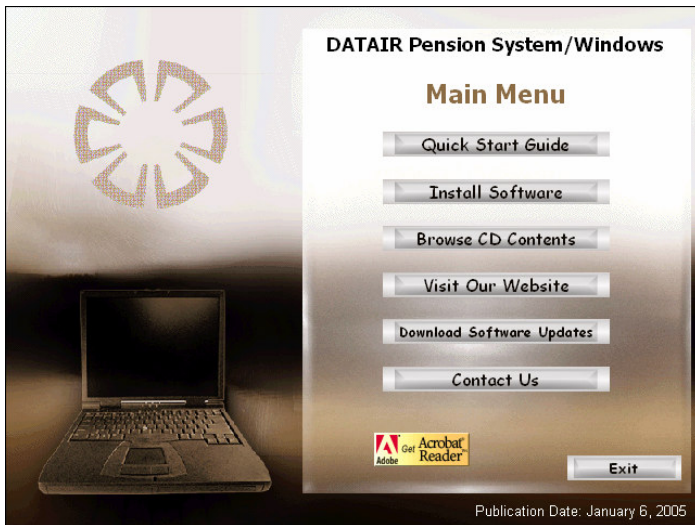
A sample is shown below:



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 Installation CD (preferred method)

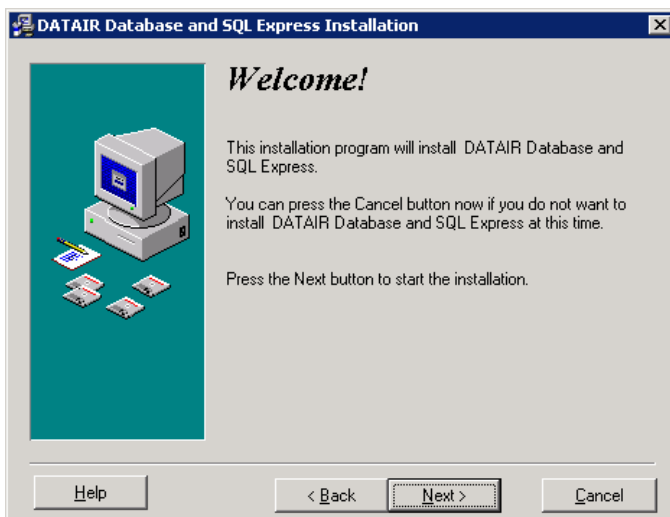
After you are logged into the server as an administrator, insert the DC/Win CD. The CD has an AutoPlay feature that should begin the installation automatically. If it does not, open "My Computer" from your desktop, open the CD drive and double click "Setup.exe" to start the installation and the following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



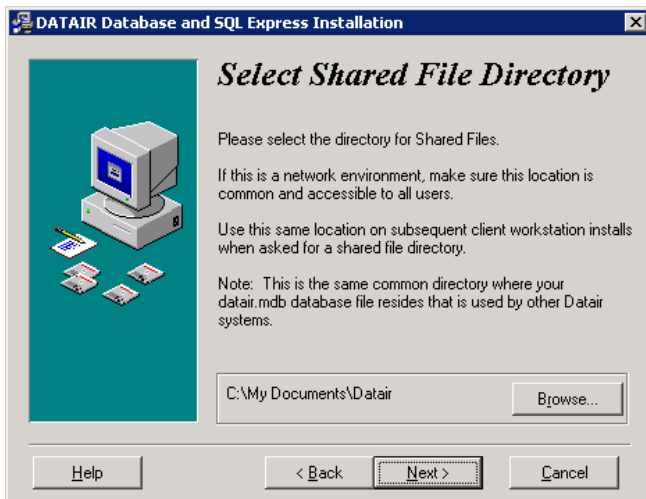
Select "Install Software".



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



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

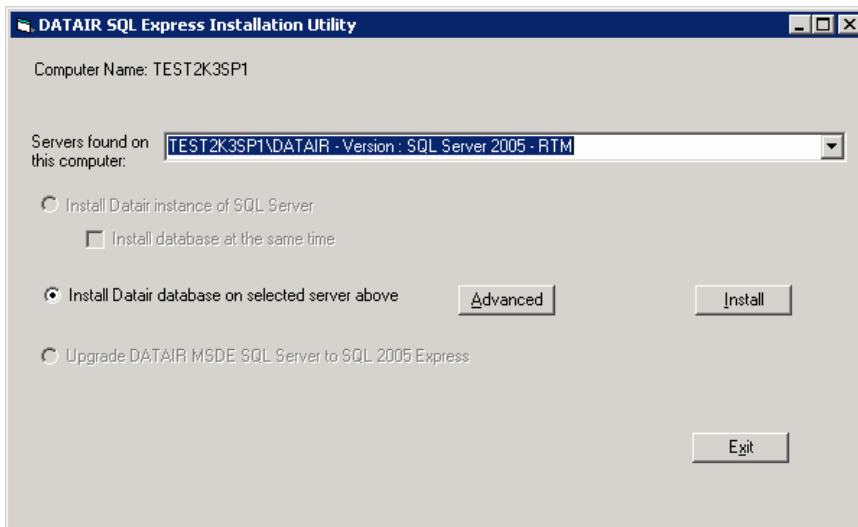


You are now being asked to provide a Shared File Directory. This is NOT where the SQL database files will be located, but rather a shared directory that is accessible to all users who will connect to this database server. The location specified need not be physically located on the same machine that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

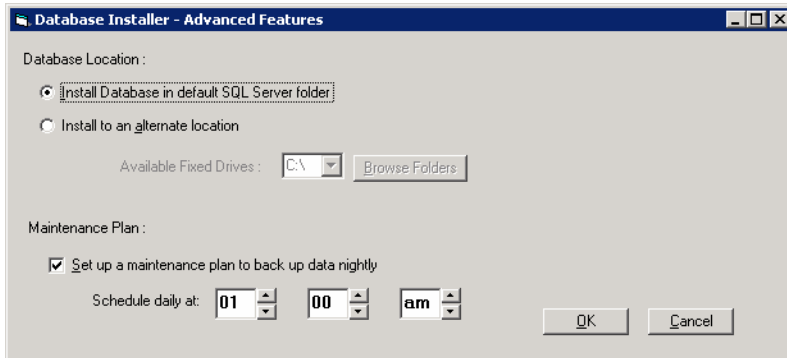


If you have multiple instances of SQL Server installed, you will need to choose the DATAIR instance in the Servers Found dropdown combo.

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.

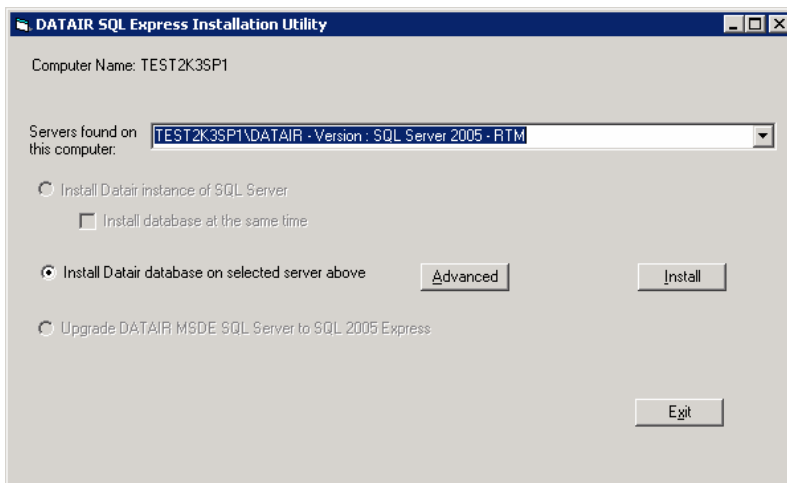
If you wish to disable or alter the time of the backups, or change the directory where the SQL database is installed, press the [Advanced] button to access the Advanced Features dialog



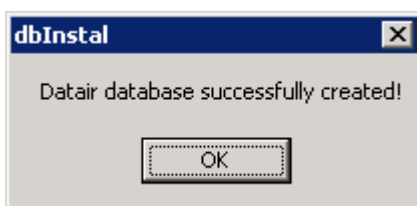
On this dialog you can choose the default database location, or another folder located physically on the same machine. SQL Server does not allow databases to be installed on network drives.

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



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



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

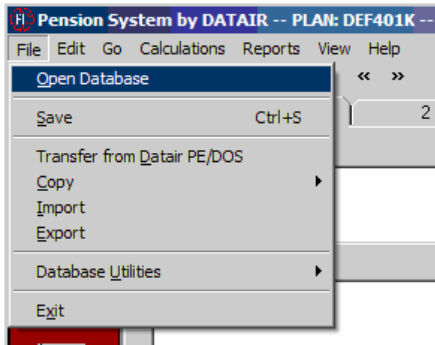
Method 2 – Installation using the DC/Win application

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

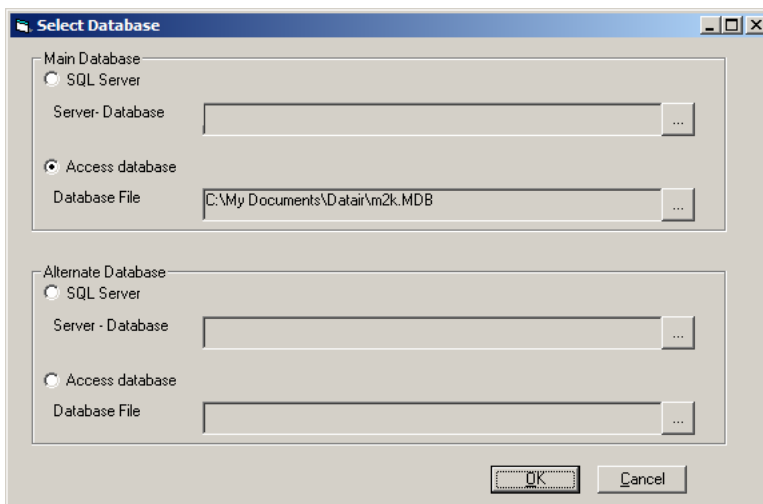
Installing the Database

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.

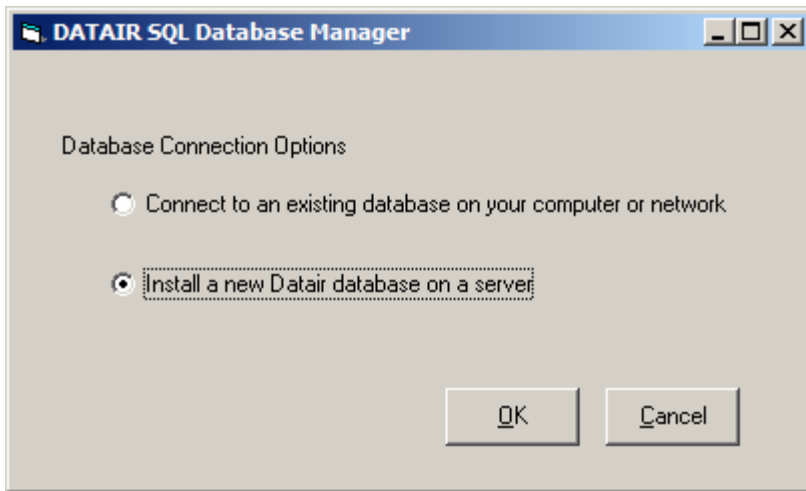


You will see the screen below:



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

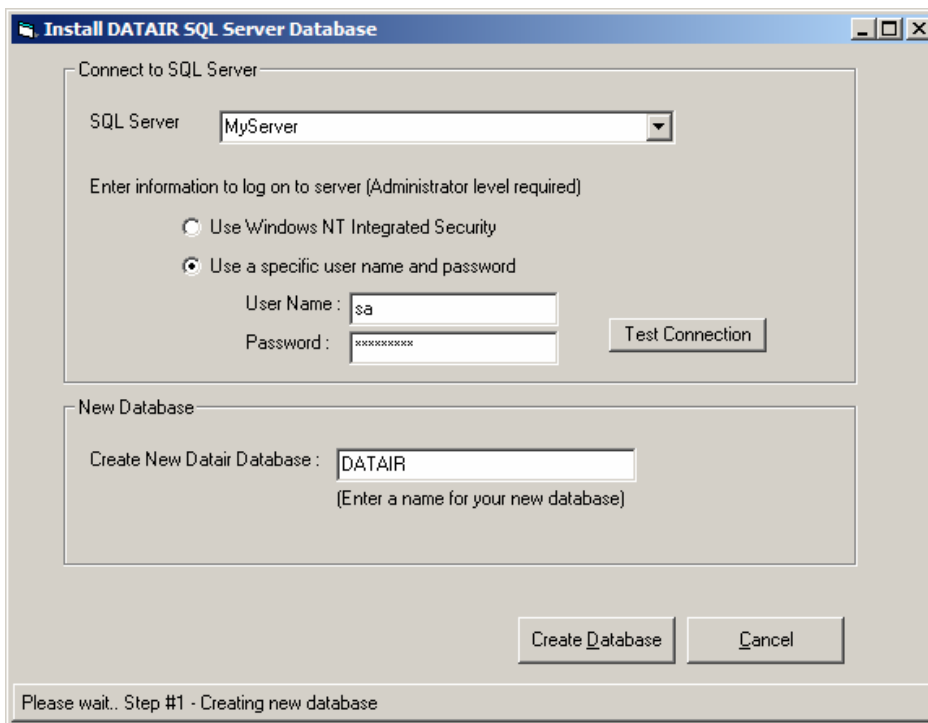
This action will cause DC/Win to shut down and launch the DATIR SQL Database Manager seen below:



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.

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

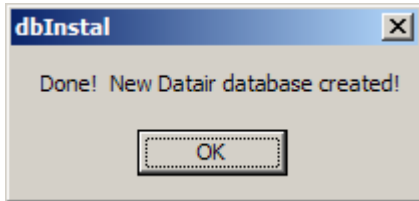


Select a Server from the list of Servers. You will have to supply a SQL username/password that allows owner access to this Server, or select "Use Windows NT integrated security" if your network login has administrative rights to this server. Click Test Connection and the utility will check if you have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

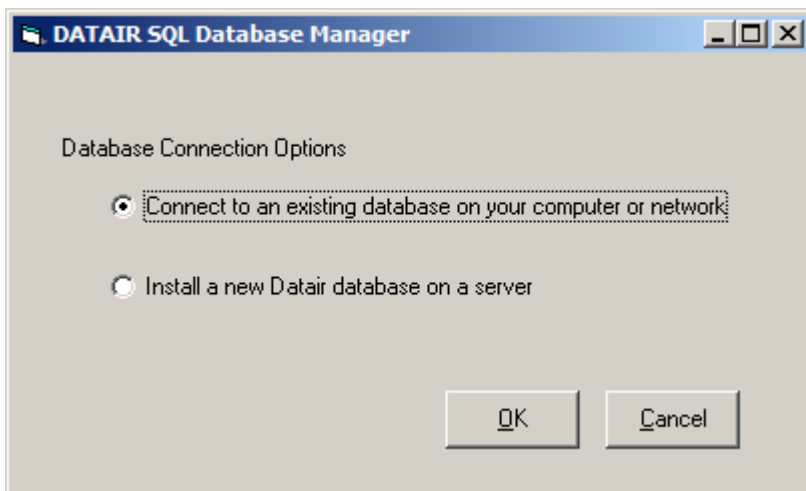
The status bar at the bottom will inform you of the progress. The entire process may take a few minutes, or more. When it is finished you will see a message:



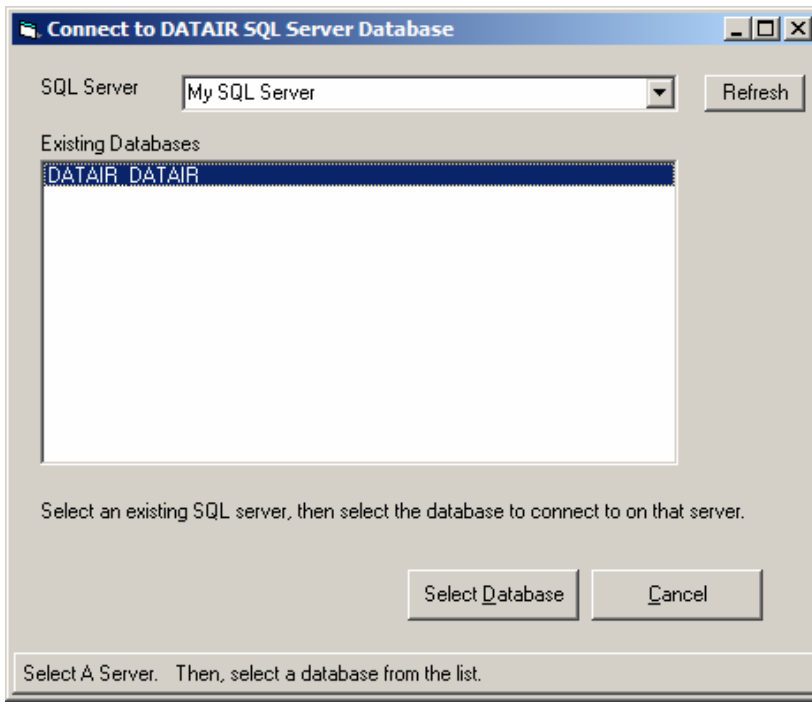
Click OK to finish and end the DB Installer. Restart DC/Win and you will be connected to the SQL Server database.

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.

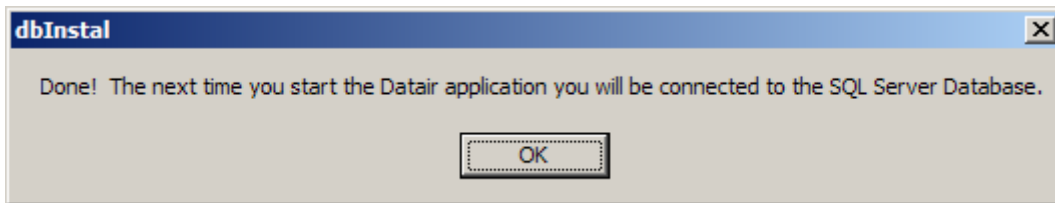


You will see the screen below after the program searches your network for SQL Servers



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.



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.



Select "Install Software".



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.

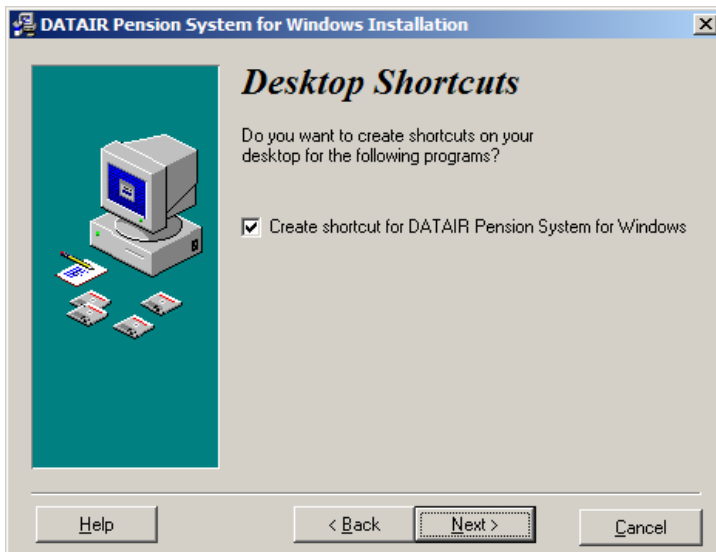
Next, you are asked for a Program Directory. We strongly recommend accepting the default installation directory. Press Next to continue...

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.



This shared directory is the same directory where the dairair.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.



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.

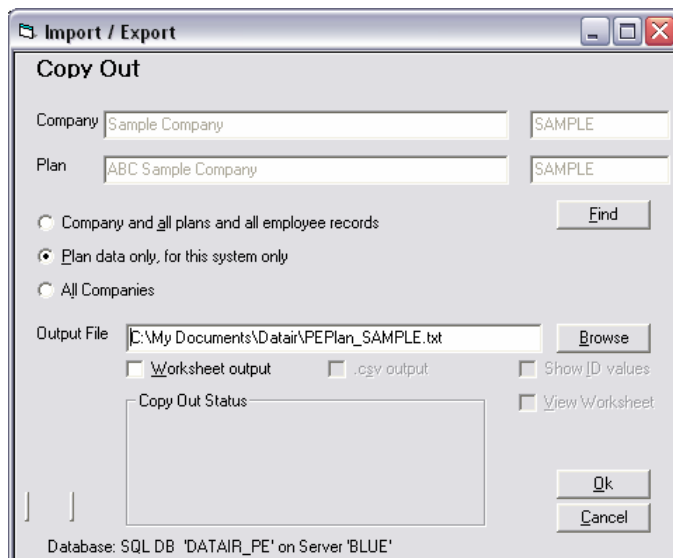
The overall process consists of the following steps:

- 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.



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 it has an extension of .txt in order to copy it back into the database.

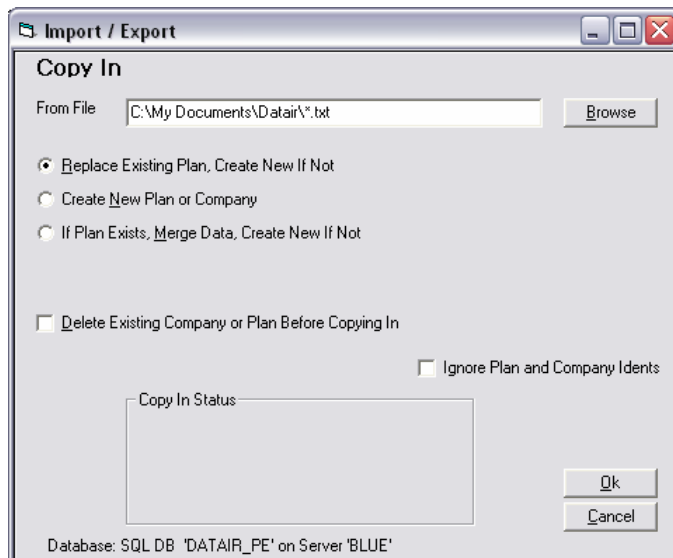
Once you install the SQL database, the system will automatically open in SQL. The only plans will be the default plans. You must select one of the defaults to open the plan level. You can then start the copy in process.

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.



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.