Relate Software Product

Installation

SUPPORT SERVICES

Relate is committed to our strong customer service and satisfaction. At all times you will be able to make contact with our company and technical services teams.

You can make contact with our support department in the following ways:

Telephone: (IRL) +353 (0)1 4597800   (UK) +44 8712843446

Email: support@relate-software.com

Opening Times for Support: 09:00 – 13.00 and 14.00 - 17.30

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Contents

SELECTING THE RIGHT INSTALLATION OPTION

The installation CD allows you to install DRIVE, Relate Accounts Production, Personal Tax, Corporation Tax in a number of different ways. It is **very important** that you read the instructions completely in order to understand which option is the right one to take.

Effectively there are three options:

1. Install the program and the database
2. Install the program only
3. Install the database only

INSTALLING THE PROGRAM AND THE BLANK DATABASE

This option is used in the following situations:

1. **Server Installation**: New installation. You are installing on a server, and there is no existing Relate Software database already on the server (DRIVE, Relate Accounts Production, Personal Tax, and Corporation Tax). If there is no previous Relate product installed then there is no central database available. The central DRIVE database must be available to operate the software.

2. **Standalone Installation:** New Installation. You do not have a server but have a standalone PC. This will install the software and database as if the PC was a server.

3. **Portable Installation:** You are installing on a portable computer on which you want to use one of the Relate Products (RAP, PT or CT) outside the office. This means that the portable has to have its own local database available.

INSTALL THE PROGRAM ONLY

This option is used in the following situation:

Local installation: You are installing on a PC attached to the network server which has the database already installed. This PC is not used outside the office therefore the database is not needed. This is the most widely used option on a network.

INSTALL THE DATABASE ONLY

This option is used in the following situations:

1. Local installation: The program is already installed on this PC and you now want to use the product outside the office (RAP, PT and CT only). This PC will need to have the database installed. This option will not be used that often.

2. Local installation: You have a separate Database Server where you want to place the database without the program. In this case you should use the Advanced options to untick SQL Express database engine install as it is not needed. This option will not be used often.

INSTALLING THE PROGRAM AND THE BLANK DATABASE

The installation wizard makes the process of installing DRIVE, Relate Accounts Production, Personal Tax and Corporation Tax an easy and straightforward exercise.

1. Place the program CD into the CD-ROM drive. If you have auto run enabled on your CD-ROM drive, the installation wizard will automatically appear. If it does, skip to step 4.

2. From your Windows Desktop, click on the Start Button and the start menu will appear. From the Start Menu choose Run. The Run window appears as follows:
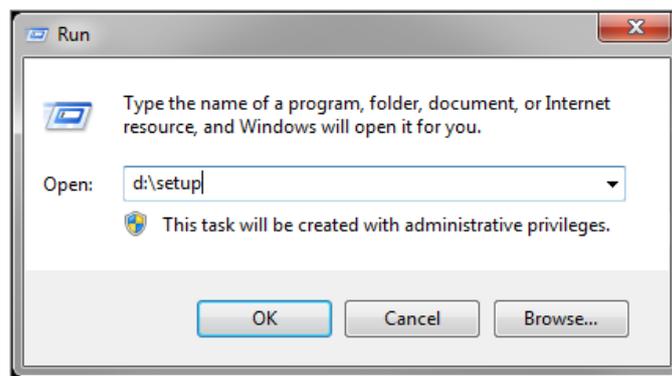

Figure 1

3. When you press OK the standard installation wizard will appear

4. The installation wizard begins and the setup program will display the first screen. Select the Program and Blank Database install as follows:
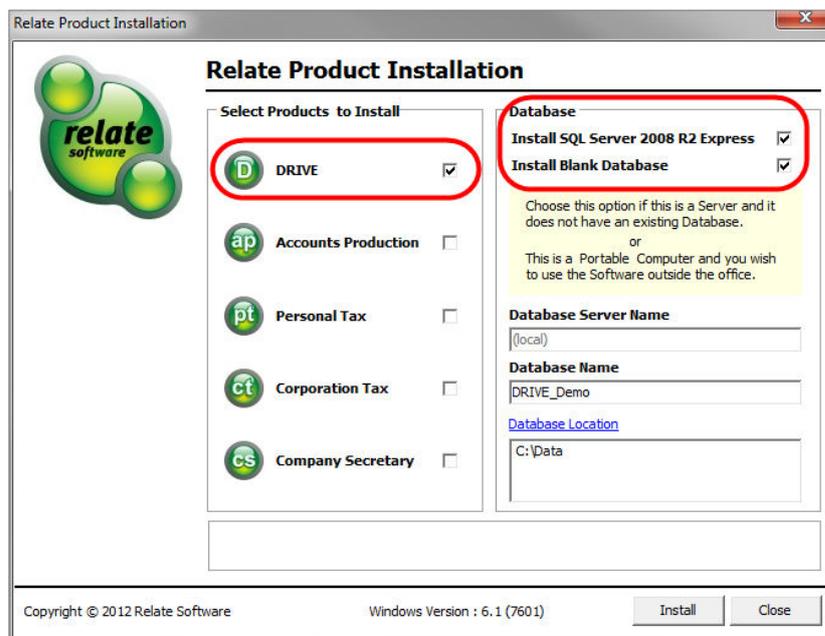

Figure 2

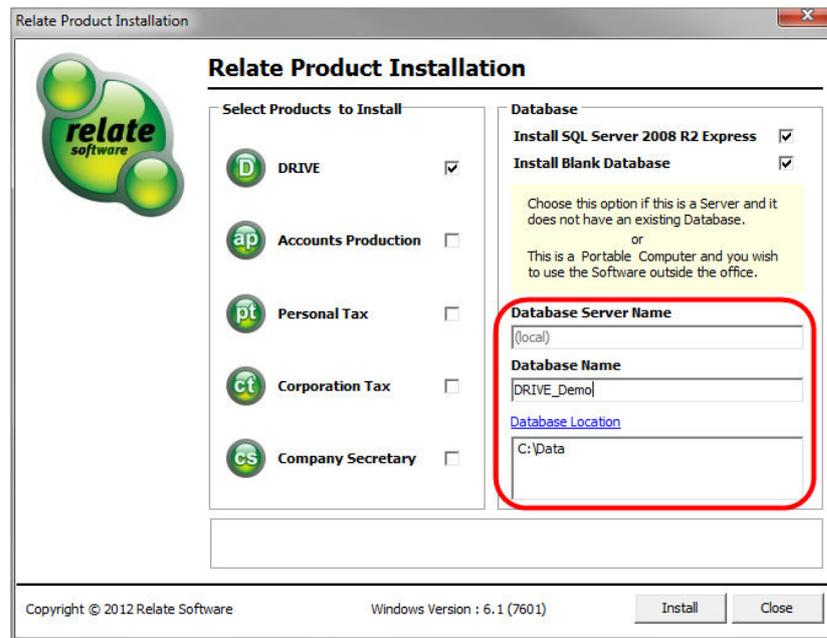5. You will then need to select a database name and location for the database files as follows:

6. Type a suitable database name in the Database Name field. This should begin with "DRIVE" and should only contain letters, numbers or "_" characters. This database will be created in a new SQL Server instance, named as follows:

    {your server's name}\RELATE   Example: SBS2008\RELATE

7. Select a suitable location for the SQL Server database files.
    Note: depending on usage these files may grow to several gigabytes, so select a drive which is adequately large.

8. Click the "Install" button, and the installation will begin. Each of the products you ticked will be installed. The following will also be installed.
    - Windows Installer
    - Dot Net Framework 1.1
    - Dot Net Framework 2.0
    - SQL Server 2008 R2 Express
    - SQL Server Management Studio
    - Restore Blank Database

Once the installation is complete you will get an alert. Click OK to complete the Installation. The product icon will now be displayed on the desktop.

DRIVE   Relate Accounts Production

Relate Personal Tax   Relate Corporation Tax

9. Double click the icon to run the program. You will be presented with a request for connection details as below;

Figure 4

10. Enter the Server name as {your server's name}/RELATE.

11. Enter the database name as you entered during the installation process. E.G DRIVE_Demo

12. Preferred authentication is "Windows Authentication" (Username and password are not required for this selection).

13. Preferred protocol is "Named Pipes"

14. When you click OK you will be prompted to update the database and then brought to the database registration screen. Please contact accounts@relate-software.com to get your registration details.

Figure 5

15. Congratulations, you are now ready to begin using your Relate Product.

INSTALLING THE PROGRAM ONLY

The installation wizard makes the process of installing DRIVE, Relate Accounts Production, Personal Tax and Corporation Tax an easy and straightforward exercise.

1. Place the program CD into the CD-ROM drive. If you have auto run enabled on your CD-ROM drive, the installation wizard will automatically appear. If it does, skip to step 4.

2. From your Windows Desktop, click on the Start Button and the start menu will appear. From the Start Menu choose Run. The Run window appears as follows:
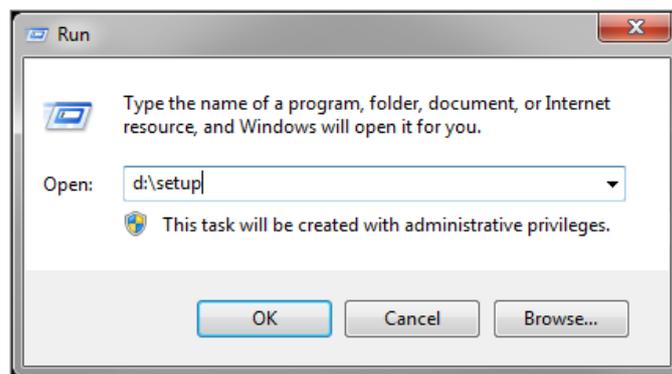

Figure 6

3. When you press OK the standard installation wizard will appear

4. The installation wizard begins and the setup program will display the first screen. Select the program you want to install, as follows:
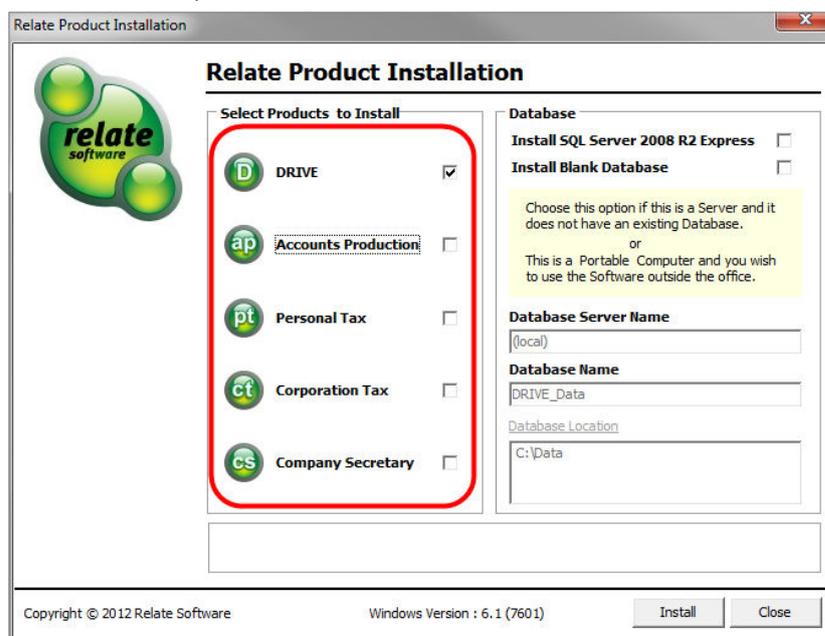

Figure 7

5. Click "Install "button, and the installation will begin. What product is installed will depend on the selection you have made. The following will also be installed.
    - Windows Installer
    - Dot Net Framework 1.1
    - Dot Net Framework 2.0

Once the installation is complete you will get an alert. Click OK to complete the Installation. The product icon will now be displayed on the desktop.

DRIVE   Relate Accounts Production

Relate Personal Tax   Relate Corporation Tax

6. Double click the icon to run the program. You will be presented with a request for connection details as below;
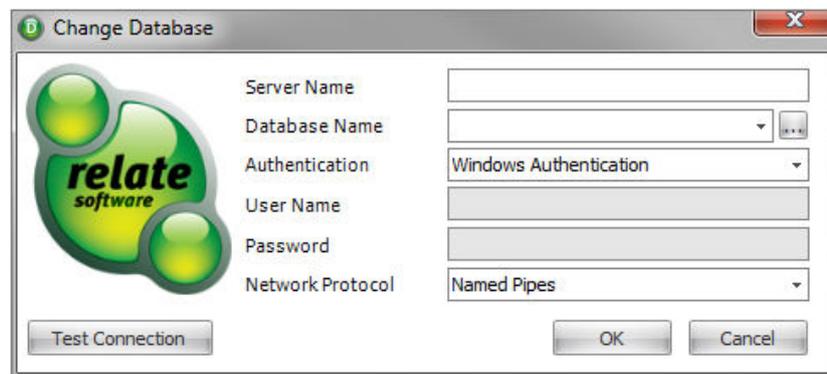

Figure 8

7. Enter the Server name as {your server's name}/RELATE.

8. Enter the database name as you entered during the installation process.

9. Preferred authentication is "Windows Authentication" (Username and password are not required for this selection).

10. Preferred protocol is "Named Pipes"

11. When you click OK, you are now ready to begin using your Relate product.

INSTALLING THE BLANK DATABASE ONLY

The installation wizard makes the process of installing DRIVE, Relate Accounts Production, Personal Tax and Corporation Tax an easy and straightforward exercise.

1. Place the program CD into the CD-ROM drive. If you have auto run enabled on your CD-ROM drive, the installation wizard will automatically appear. If it does, skip to step 4.

2. From your Windows Desktop, click on the Start Button and the start menu will appear. From the Start Menu choose Run. The Run window appears as follows:
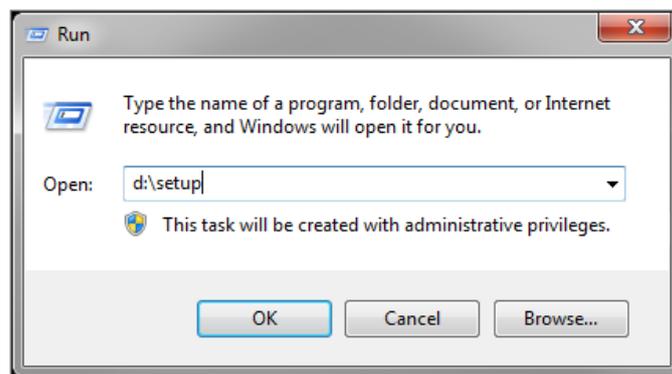

<div align="center">**Figure 9**</div>

3. When you press OK the standard installation wizard will appear

4. The installation wizard begins and the setup program will display the first screen. Select the Install Blank Database option, as follows:
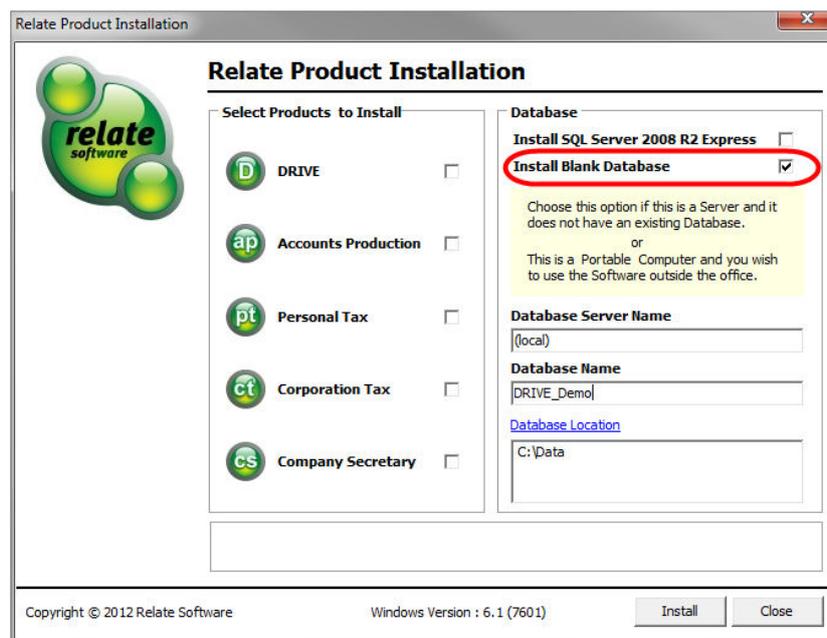

<div align="center">**Figure 10**</div>

5   You will then need to select a database name and location for the database files as follows:
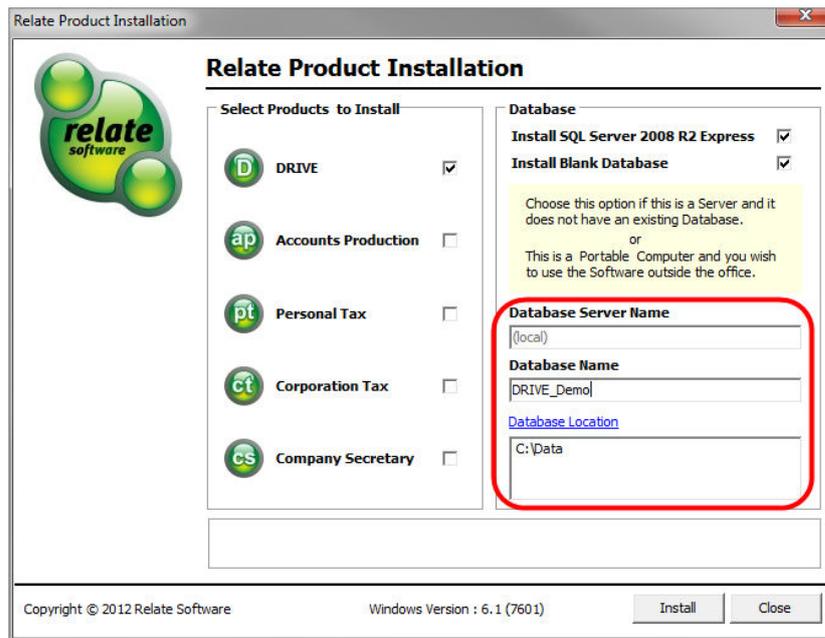

Figure 11

6   Type a suitable database name in the Database Name field. This should begin with "DRIVE" and should only contain letters, numbers or "_" characters. This database will be created in a new SQL Server instance, named as follows:
{your server's name}\RELATE   Example: DRIVE_Demo

7   Select a suitable location for the SQL Server database files.
Note: depending on usage these files may grow to several gigabytes, so select a drive which is adequately large.

8   Click the "Install" button, and the installation will begin. Each of the products ticked will be installed. The following will also be installed.
   - Windows Installer
   - Dot Net Framework 1.1
   - Dot Net Framework 2.0
   - Restore Blank Database

9.   Once the installation is complete you will get an alert. Click OK to complete the Installation. The database is now installed and ready to use. When you first connect to this database you will be prompted to update the database and then brought to the database registration screen. Please contact accounts@relate-software.com to get your registration details.