STANDALONE INSTALLATION

for Relate Accounts Production

Version 2.1

relate software

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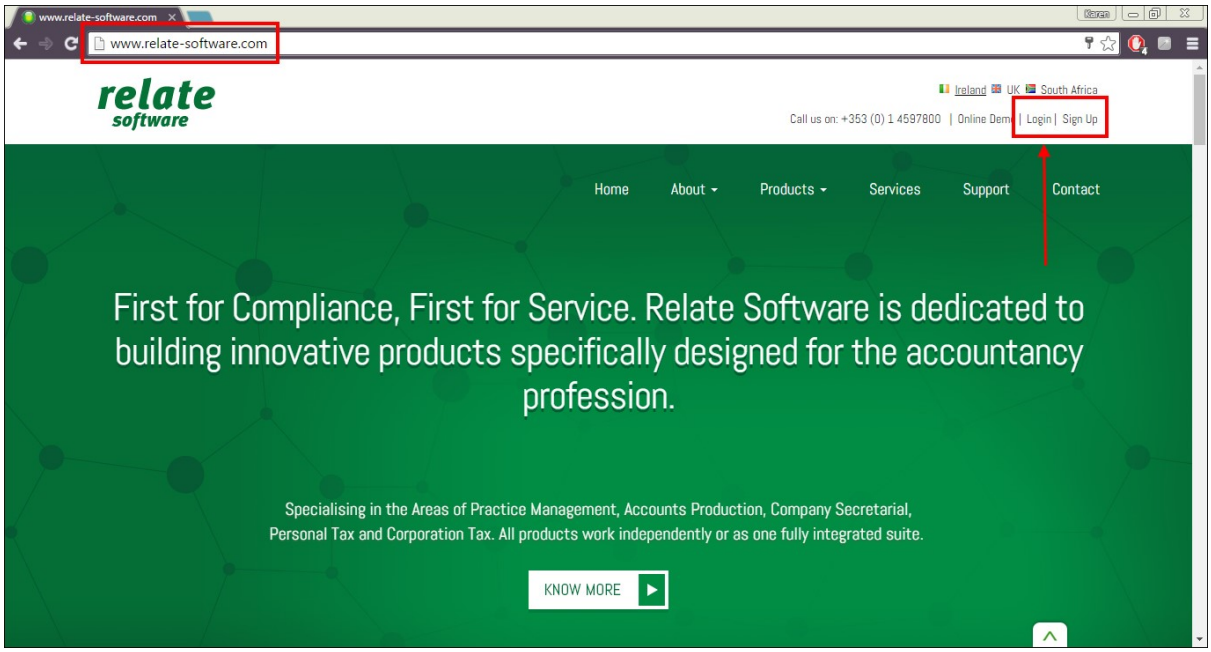
OVERVIEW

Relate Accounts Production can be installed as a standalone setup on a laptop. This will allow the user to work on accounts while they are out of the office. The user can 'Check Out' the accounts from the live database and 'Restore' them onto the standalone setup. When the work has been completed on the accounts, the user can 'Backup' the dataset from the standalone setup and 'Check In' to the live database.

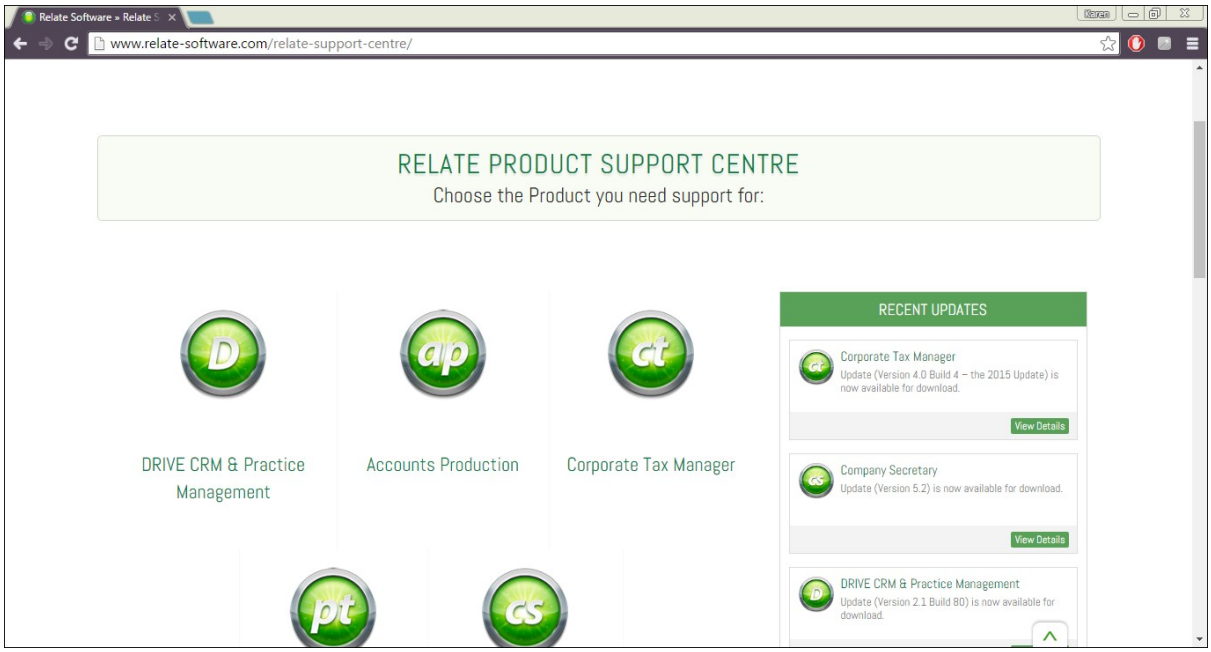
To use this functionality you must have the standalone machine installed with both Microsoft SQL Server and Relate Accounts Production. This document will guide you through the installation for the Relate Accounts Production standalone setup (including Microsoft SQL Server).

INSTALLATION FILES

The required installation file are available to download from the Relate Software website, www.relate-software.com. You must login to the Support centre using the 'Login' option in the top right corner. If you do not have a log in then you can choose to 'Sign Up'. This is a quick five minute process.

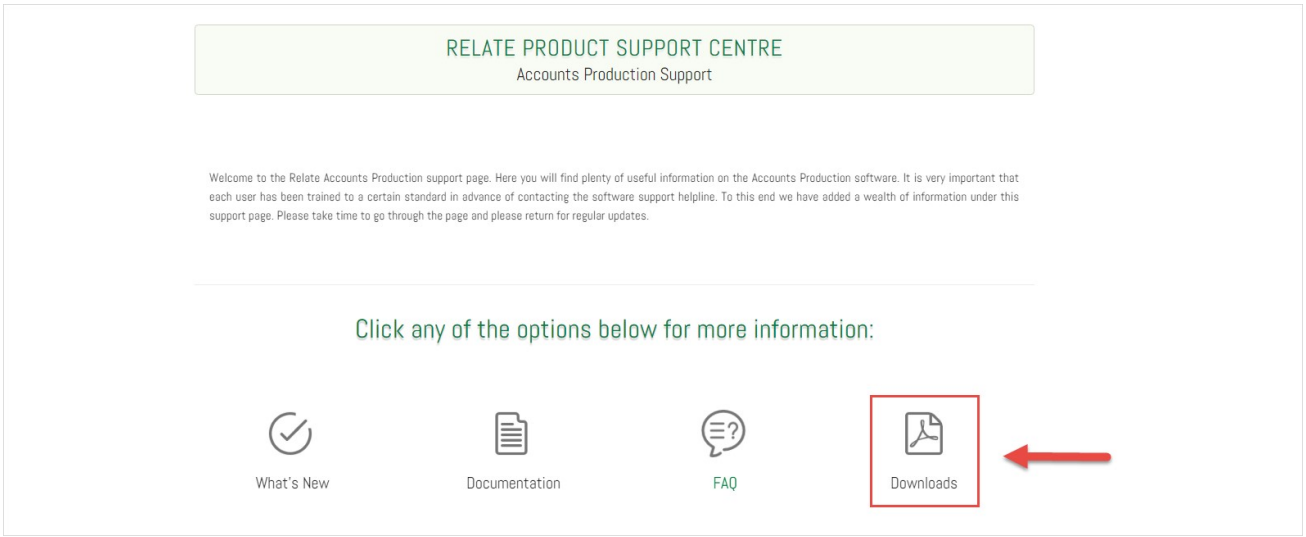


When you have logged in to the Support centre you will be presented with the list of Relate Software products.

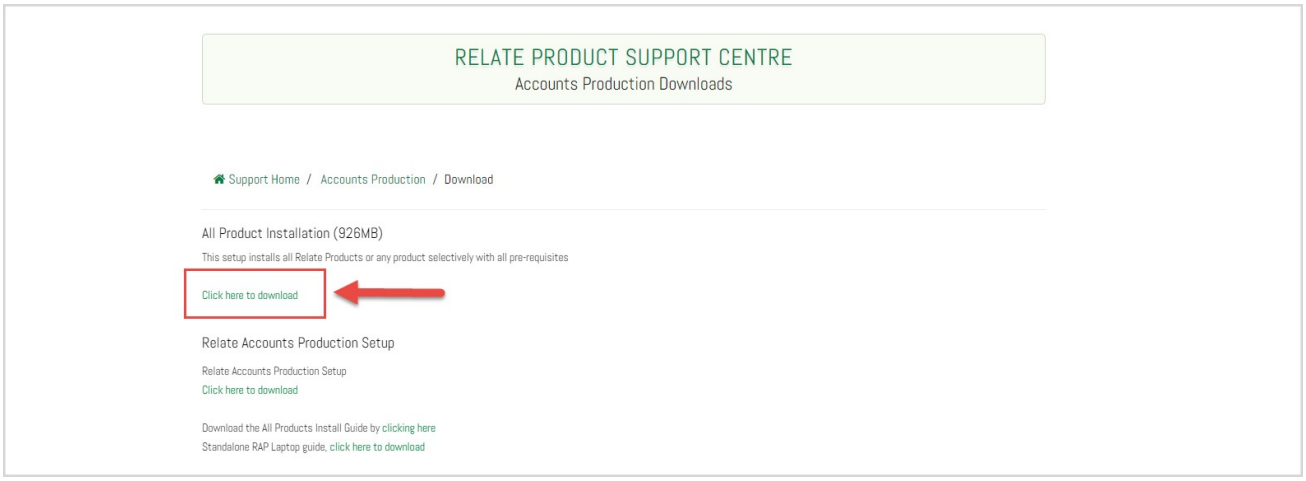


Select the Accounts Production icon from the list of products.

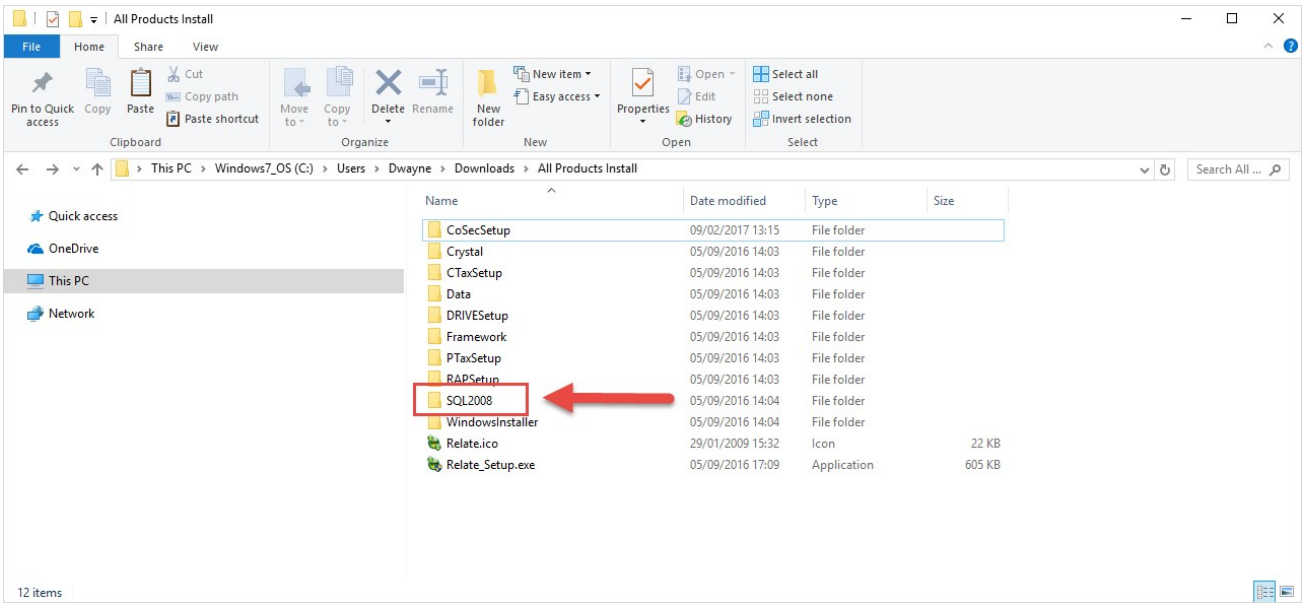
From the following screen select the Downloads icon .



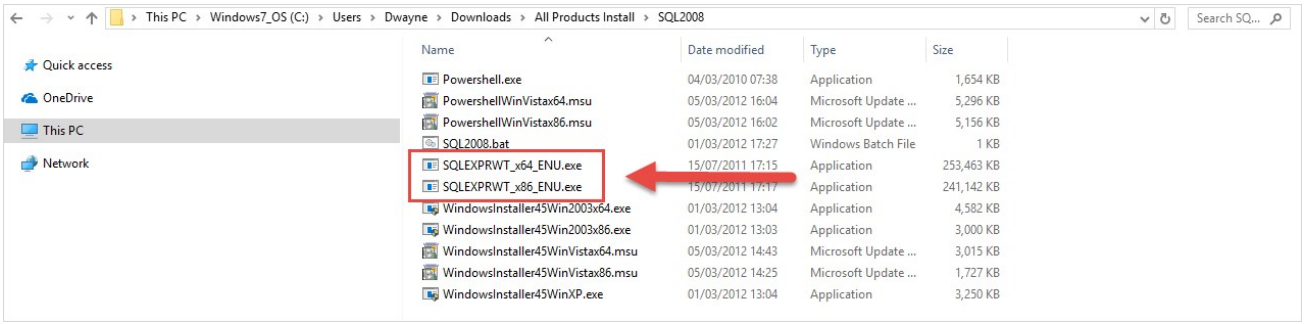
The Relate Accounts Production download list will be displayed. Under the 'All Product Installation' option select the 'Click Here to download' to begin the download of the installation files.



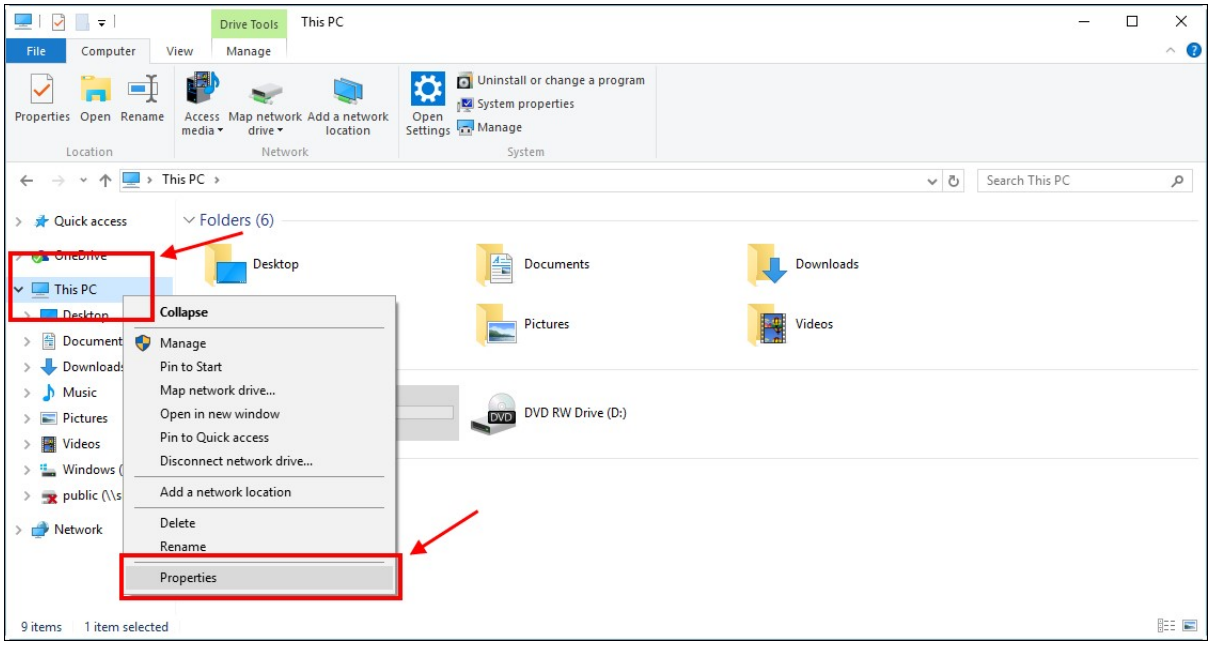
The All Products Installation file is a zipped file so must be extracted before use. To do this browse to the location of the downloaded file, right click on it and select 'Extract to All Product Install'. All files will be extracted to an All Products Install folder. Double click to open the folder and browse to the SQL2008 folder.

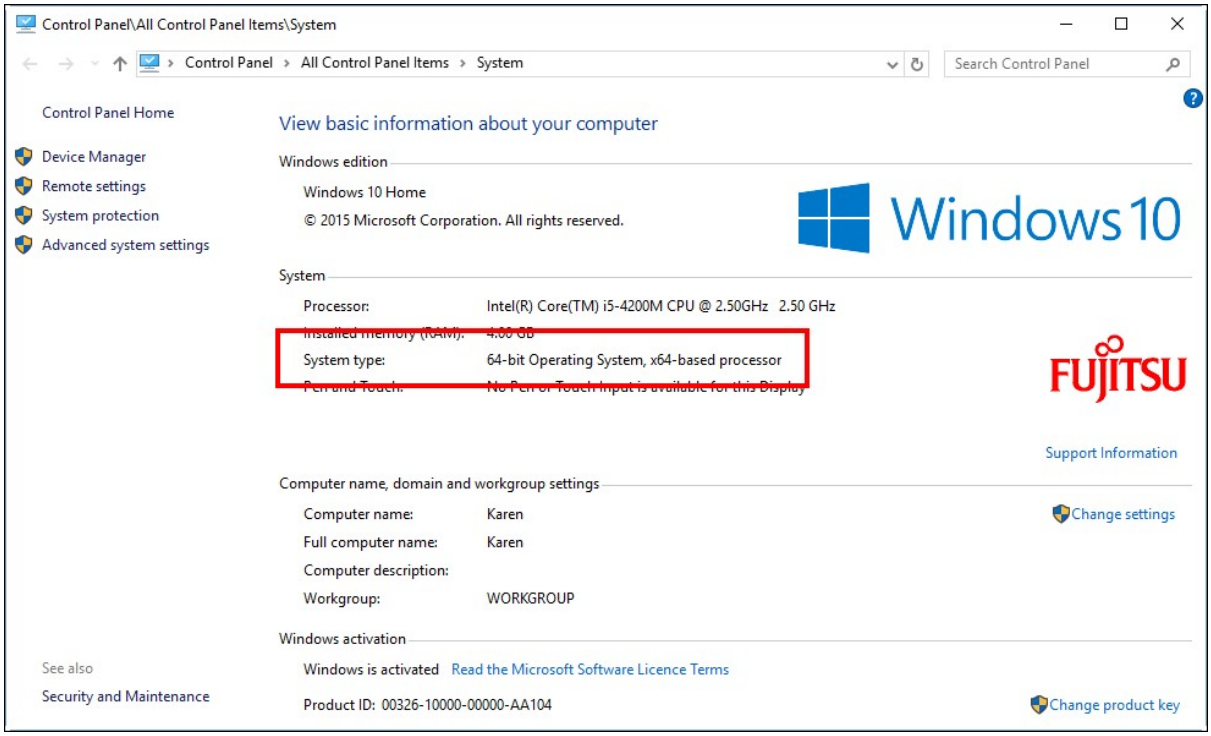


In the SQL2008 folder you will find a number of installation files. Depending on your machine specification you will need to run the SQLEXPRWT_x64_ENU.exe for a 64-bit machine or SQLEXPRWT_x86_ENU.exe for a 32 bit machine.



You can find out whether your machine is 32 bit or 64 bit by right clicking on ‘Computer’ from the start menu or desktop, or ‘This PC’ from file explorer, as below, and selecting Properties.





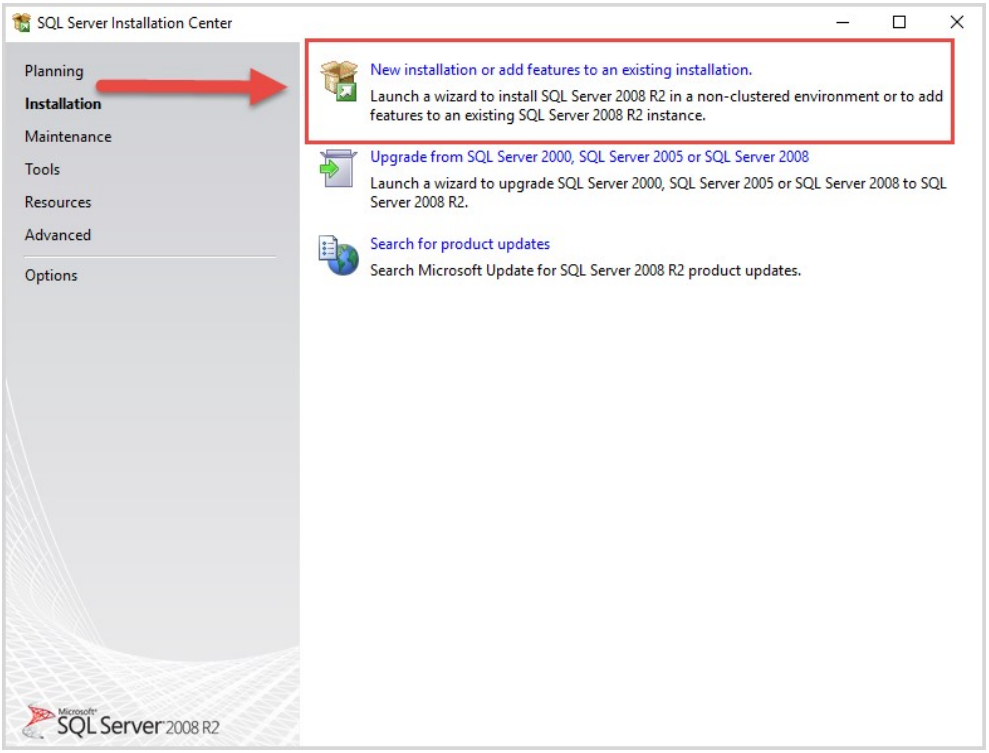
In above screen shot you can see the System Type is 64 -bit Operating System.

For any machine with 64-bit OS you will need to run SQLEXPRWT_x64_ENU

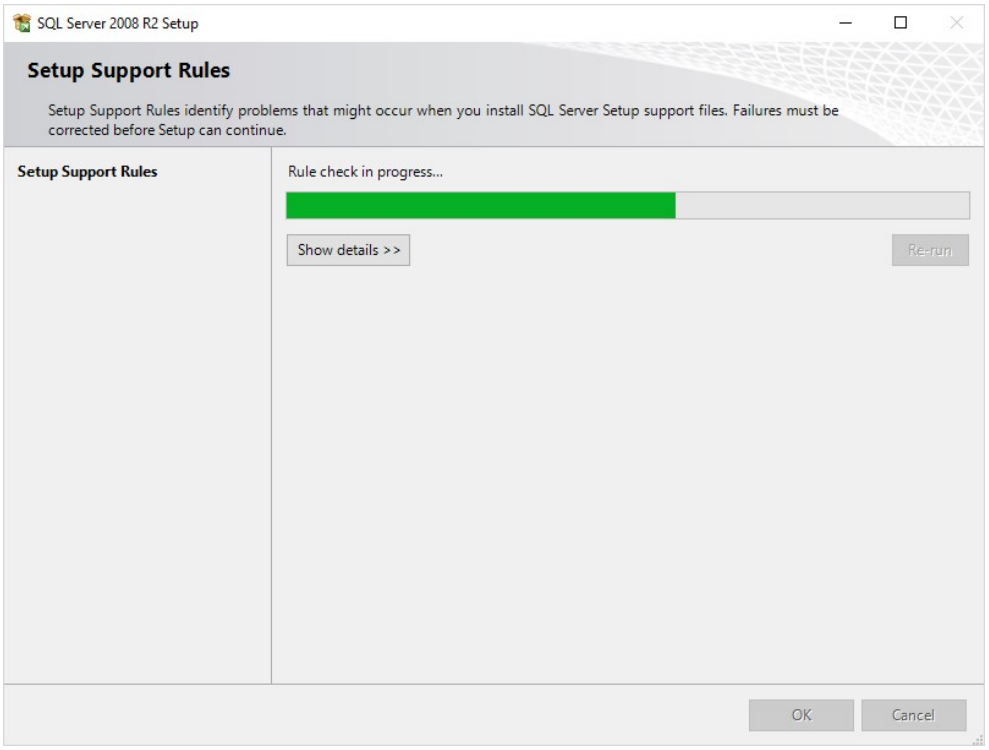
If your machine has a 32-bit OS you will need to run SQLEXPRWT_x86_ENU.

INSTALLING MICROSOFT SQL SERVER

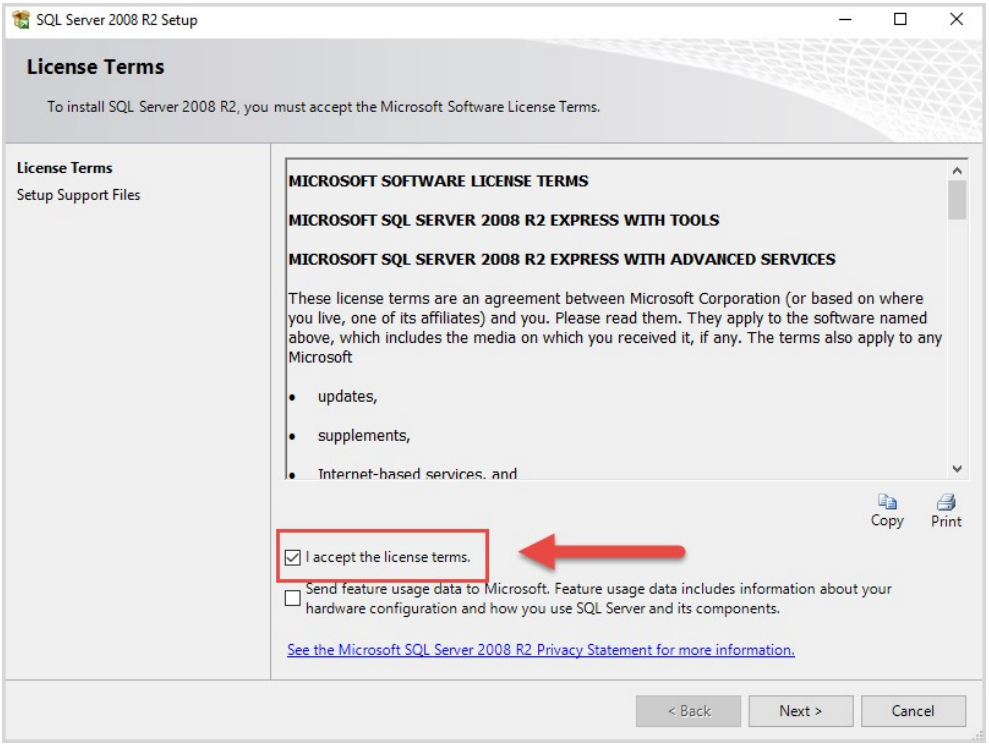
To install Microsoft SQL Server double click the SQLEXPRWT file. The installer will load and the SQL Server Installation Center dialog will be displayed. From the Installation menu select 'New installation or add features to an existing installation.



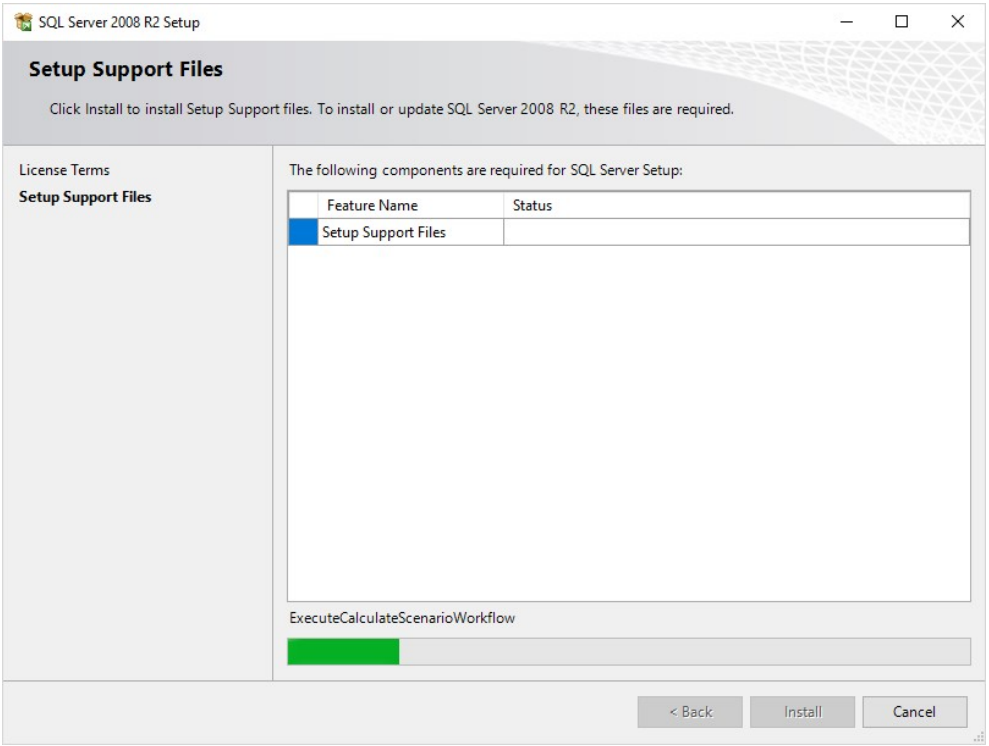
The Setup Support Rules dialog will load and run through.



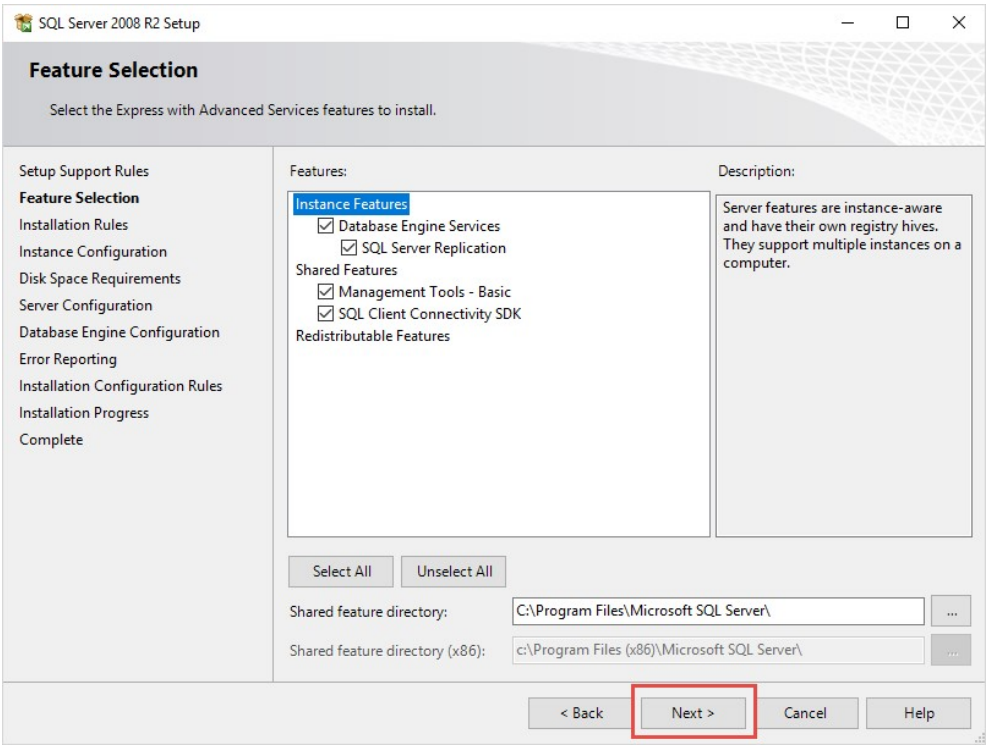
Select 'I accept the license terms' as shown below. Then select the Next button.



The Setup Support Files dialog will be displayed.



Once the Setup dialog has successfully run through the Feature Selection dialog will be displayed.



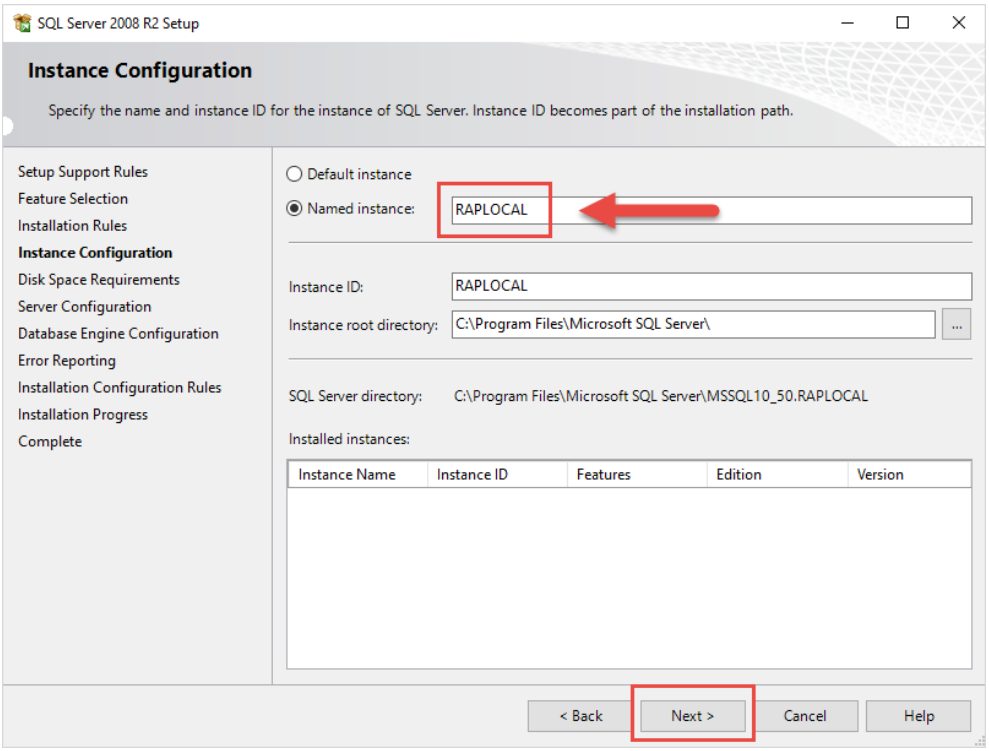
Under Instance Features check the tick box for

- Database Engine Service
- SQL Server Replication.

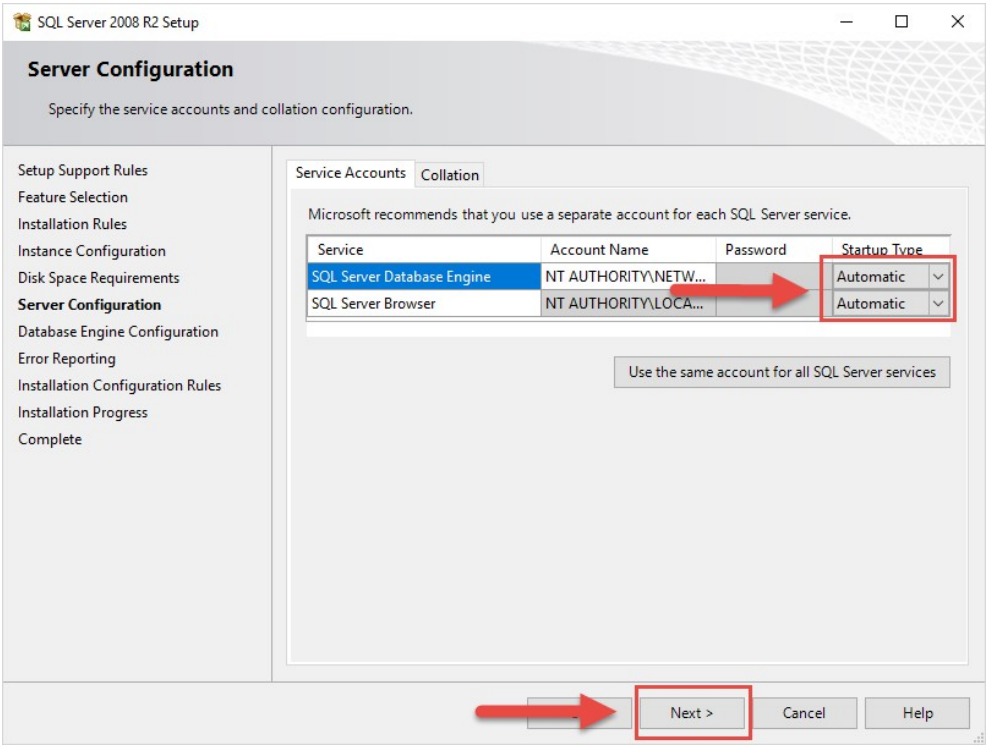
Under Shared Features check the tick box for

- Management Toos - Basic
- SQL Client Connectivity SDK.

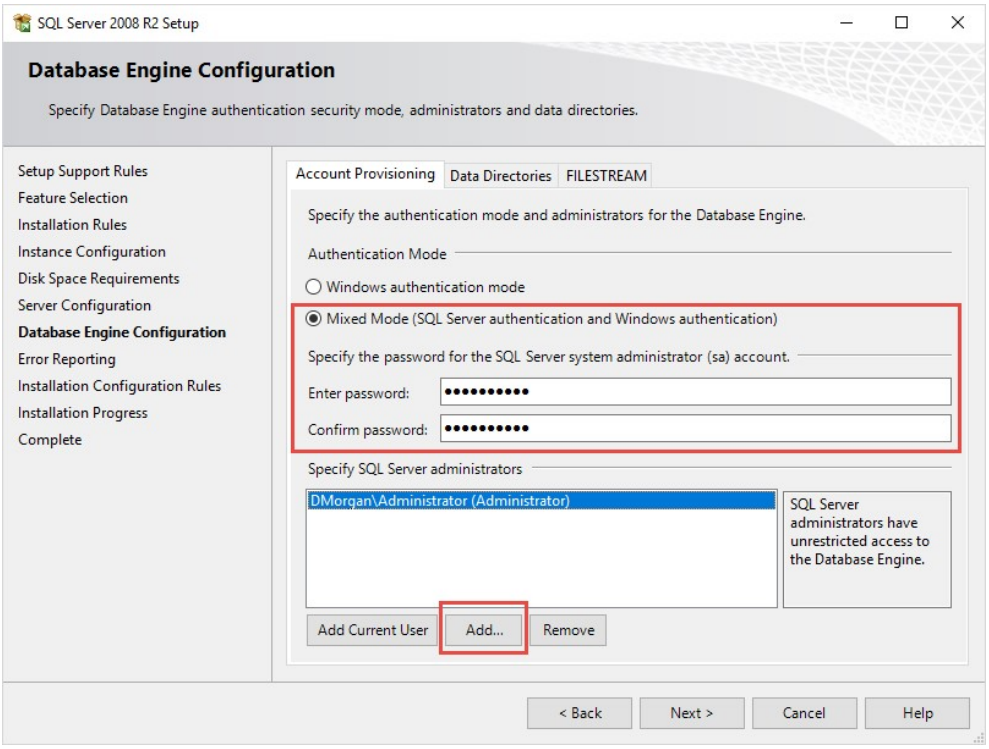
Select the Next button to proceed to the Instance Configuration dialog.



Select Named Instance and enter RAPLOCAL as the instance name. Select the Next button to proceed to the Server Configuration dialog.



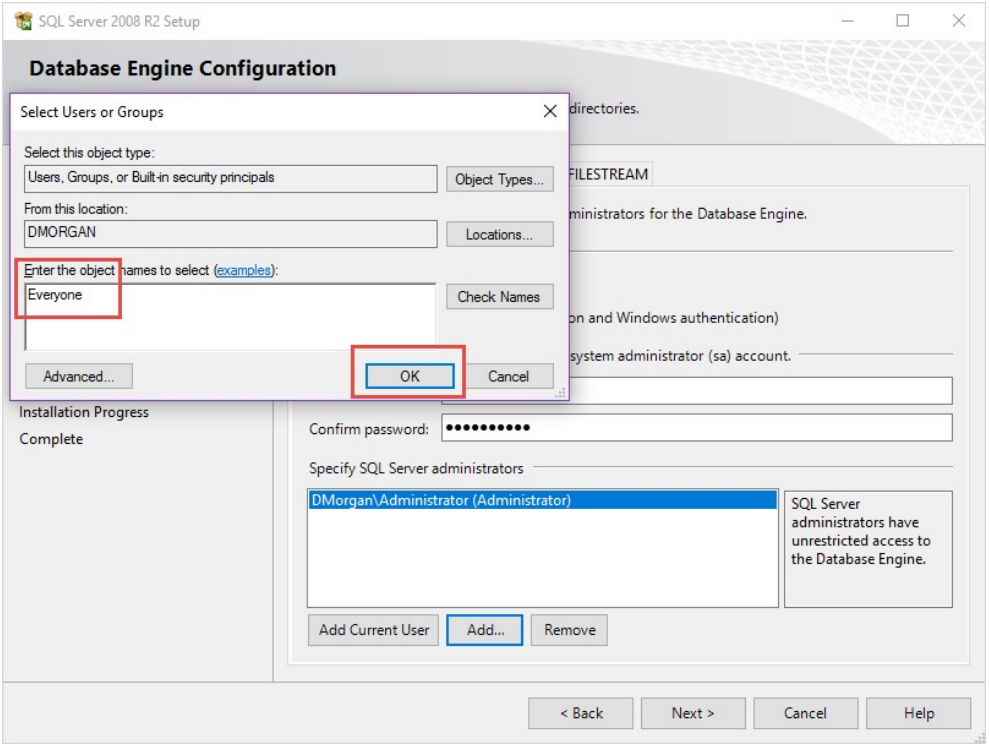
Under Service Accounts, change the 'Startup Type' from Disabled to Automatic. Select the Next button to proceed to the Database Engine Configuration dialog.



Under Account Provisioning select 'Mixed Mode (SQL Server authentication and Windows authentication) as the Authentication Mode. You will need to set the password for Mixed Mode. Enter the following password,

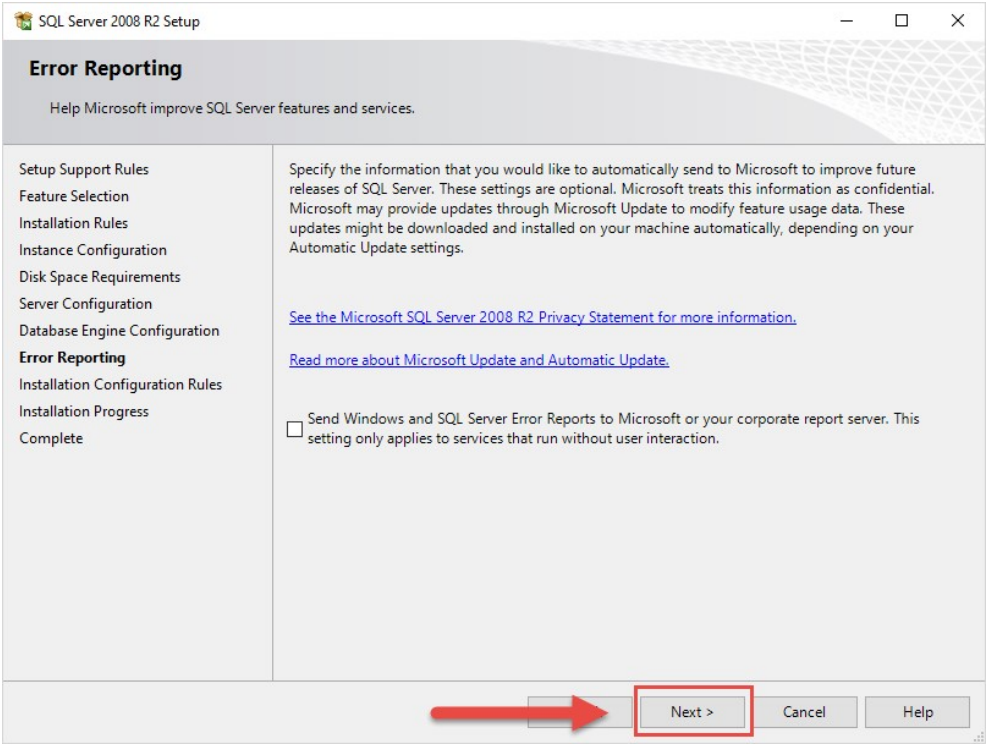
!!R4p10c41!!

Within the 'Specify SQL Server Administrators' you will need to add the users who will have access to the database. The default user should already be added. It is best to add the 'Administrator' and 'Everyone' profiles also.

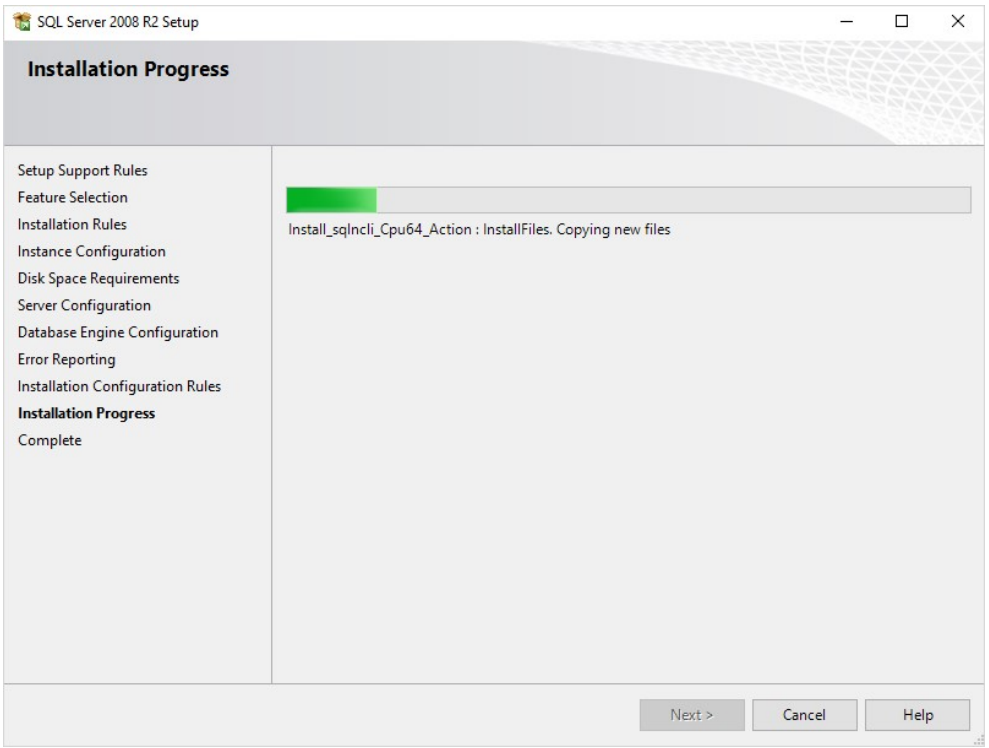


Select the Add button. The 'Select Users or Groups' dialog will be displayed. Within the 'Enter the object names to select' enter 'Everyone' and select OK. Repeat the process to add the 'Administrator'. Everyone and Administrator will now be displayed in the SQL Server administrators box.

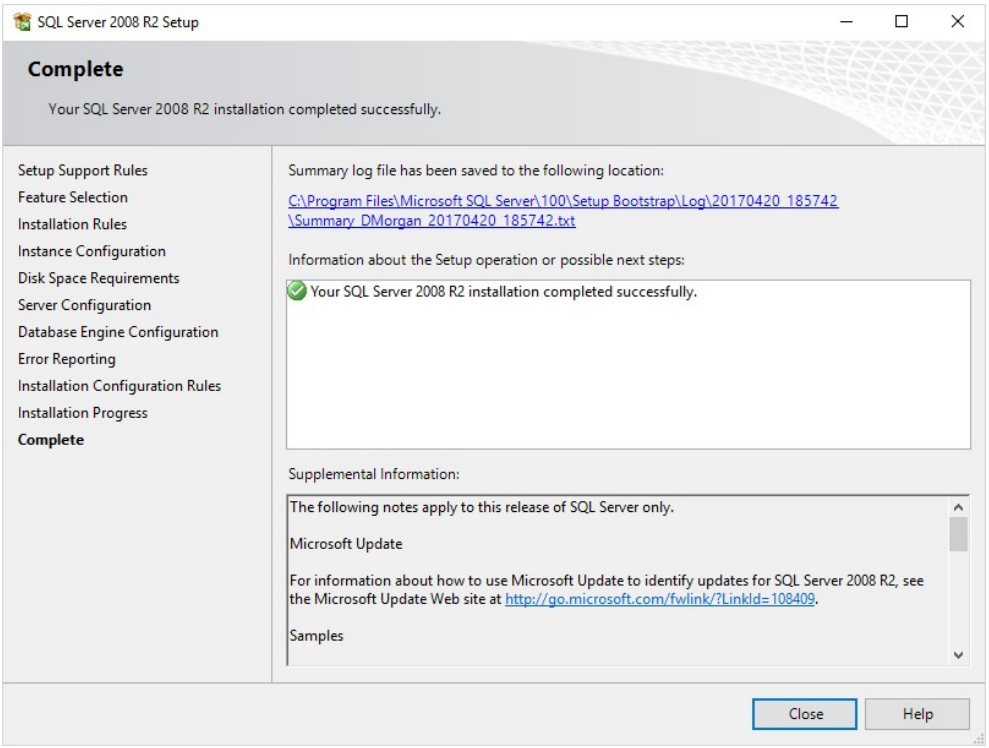
Select the Next button to proceed to the Error Reporting dialog.



No changes are required here. Select the Next button to start the installation process.



The Installation Progress dialog will progress as above. Please note this can take up to one hour to complete, depending on the performance of the machine.



When the installation has completed, select the Close button to exit the installation.

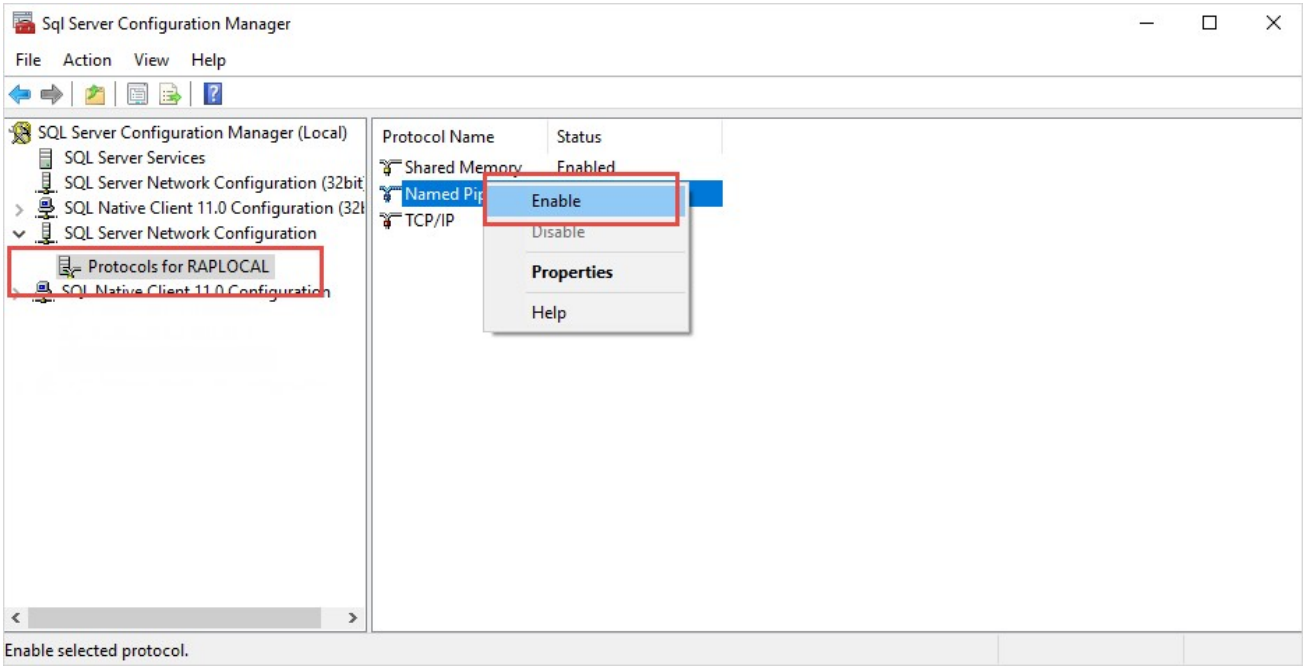
CONFIGURING MICROSOFT SQL

Once Microsoft SQL Server has been installed you must then complete the configuration. There is two steps to this process;

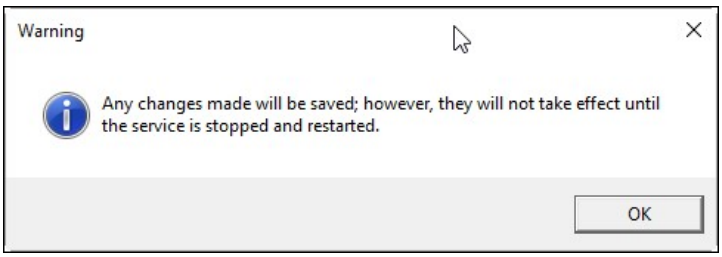
1. SQL Server Configuration Manager
2. Microsoft SQL Server Management Studio

SQL SERVER CONFIGURATION MANAGER

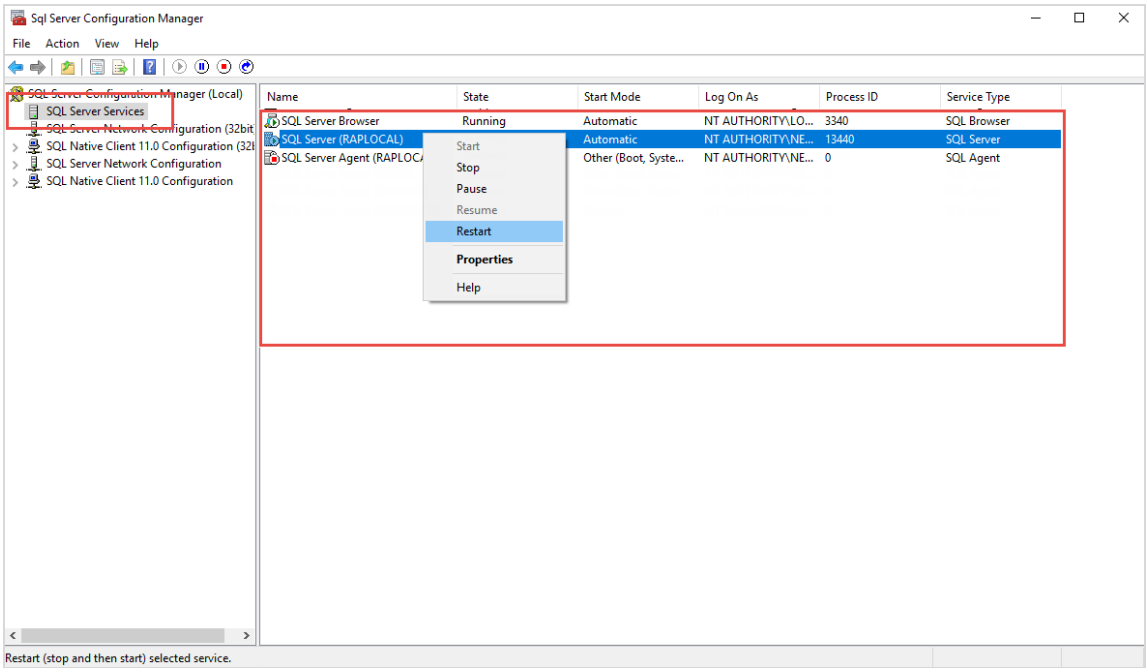
To launch the SQL Server Configuration Manager, select the Windows/Start button > All Programmes >, Microsoft SQL Server 2008 R2 > SQL Server Configuration Manager. The SQL Server Configuration Manager dialog will be displayed.



From the menu on the left hand side select 'SQL Server Network Configuration', which will expand to show the protocols. Select the 'Protocols for RAPLOCAL'. The right hand side will change to show the available protocols. Ensure that the Protocols for **both** Named Pipes and TCP/IP are enabled. To do this right click on the protocol and select 'Enable'.



Select 'OK' when the warning message appears.



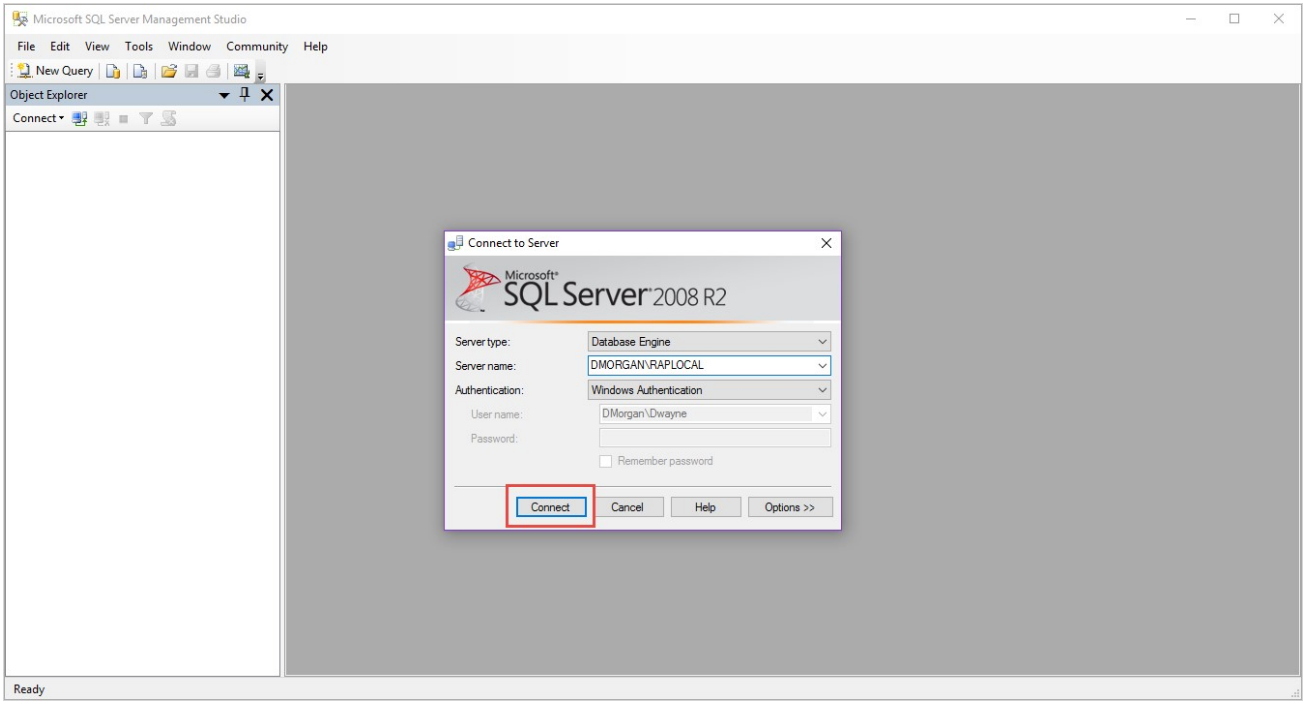
Once the protocols have been enabled, select 'SQL Server Services' from the left panel. You will need to restart the RAPLOCAL instance. To do this right click on the instance and select restart.

Note: The 'SQL Server Browser' should also have be 'Running'. If it is not, right click on the browser and select Start.

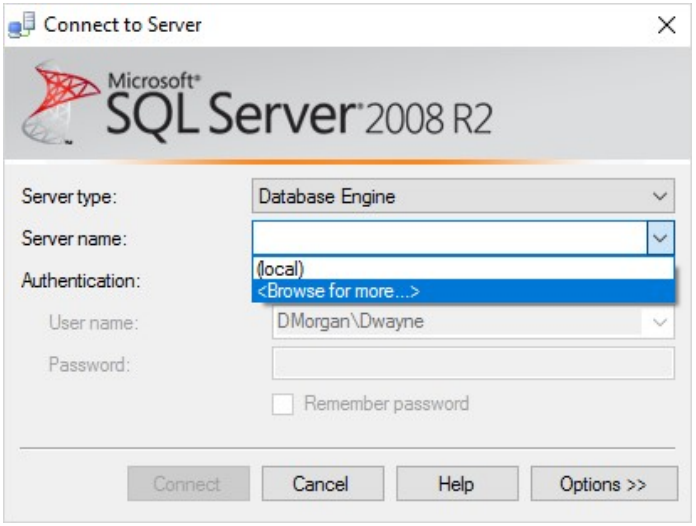
You can now close and exit the SQL Server Configuration Manager'

MICROSOFT SQL SERVER MANAGEMENT STUDIO

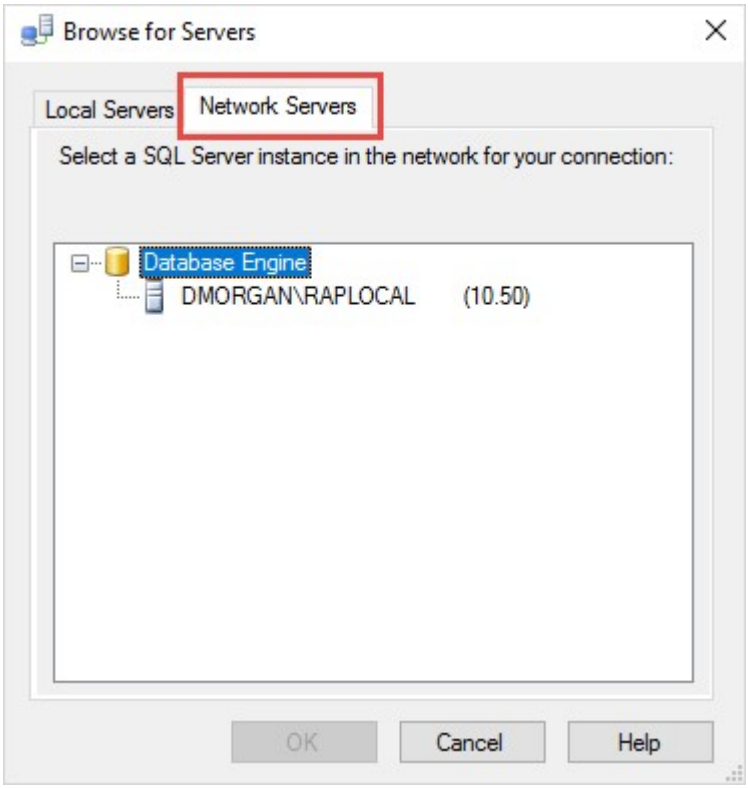
To launch the Microsoft SQL Server Management Studio, select the Windows/Start button > All Programmes >, Microsoft SQL Server 2008 R2 > SQL Server Management Studio. The Microsoft SQL Server Management Studio dialog will be displayed.



When the SQL Management Studio launches the 'Server name' may be filled with the details you set up during the installation. If this is the case select the Connect button. If the 'Server name' field is blank select the drop down arrow beside Server name and select <Browse for more>.



The Browse for Servers dialog will be displayed.



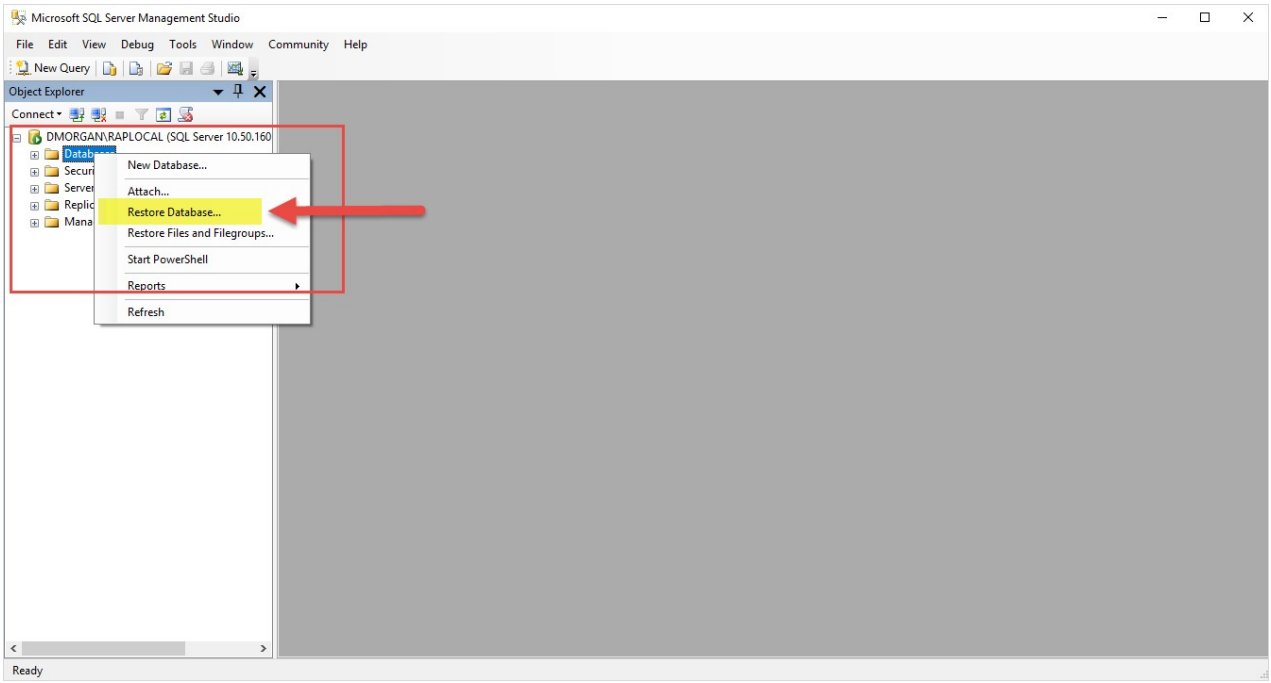
From the Network Servers select the 'Database Engine'. This will expand to show you the RAPLOCAL instance you created during the installation of Microsoft SQL. Select the RAPLOCAL instance and click the OK button. This will return you to the 'Connect to Server' dialog.

Select the Connect button to access the SQL Management Studio.

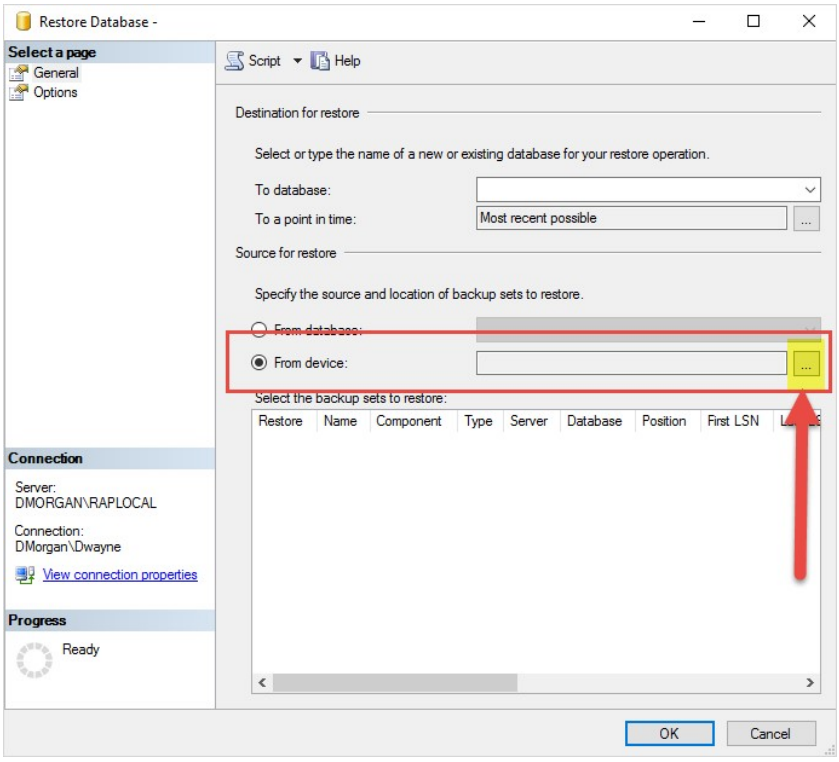
Note: ***Document the server name details as you will require these later to connect Accounts Production (see 'Connecting to the Blank database' section at the end of this document)***

RESTORE THE BLANK DATABASE

After you connect to the RAPLOCAL instance of the Microsoft SQL Server Database Engine, in Object Explorer, click the server name to expand the server tree.

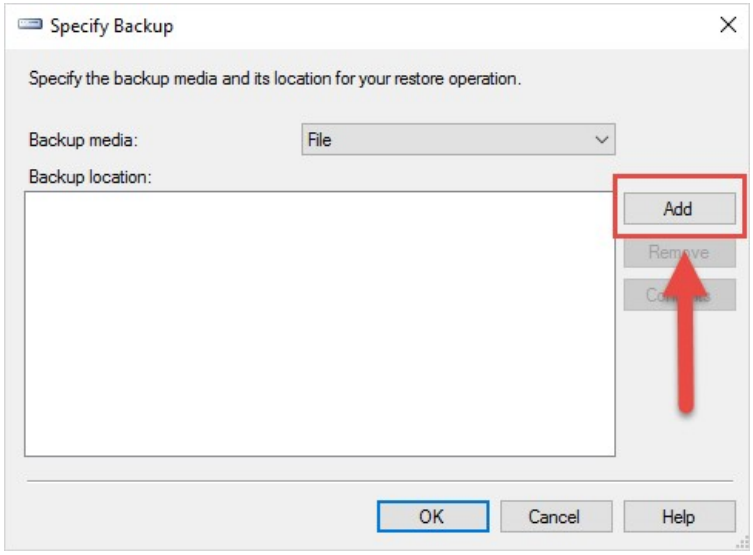


Right-click on Database and select 'Restore Database' from the menu. The Restore database dialog will be displayed.

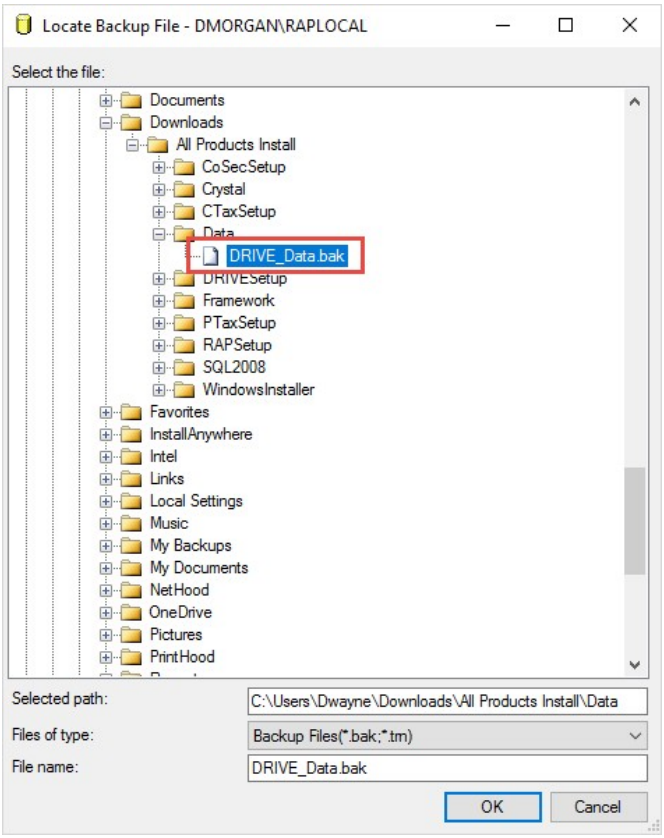


Select 'From Device' under the Source for restore and click the ellipse button

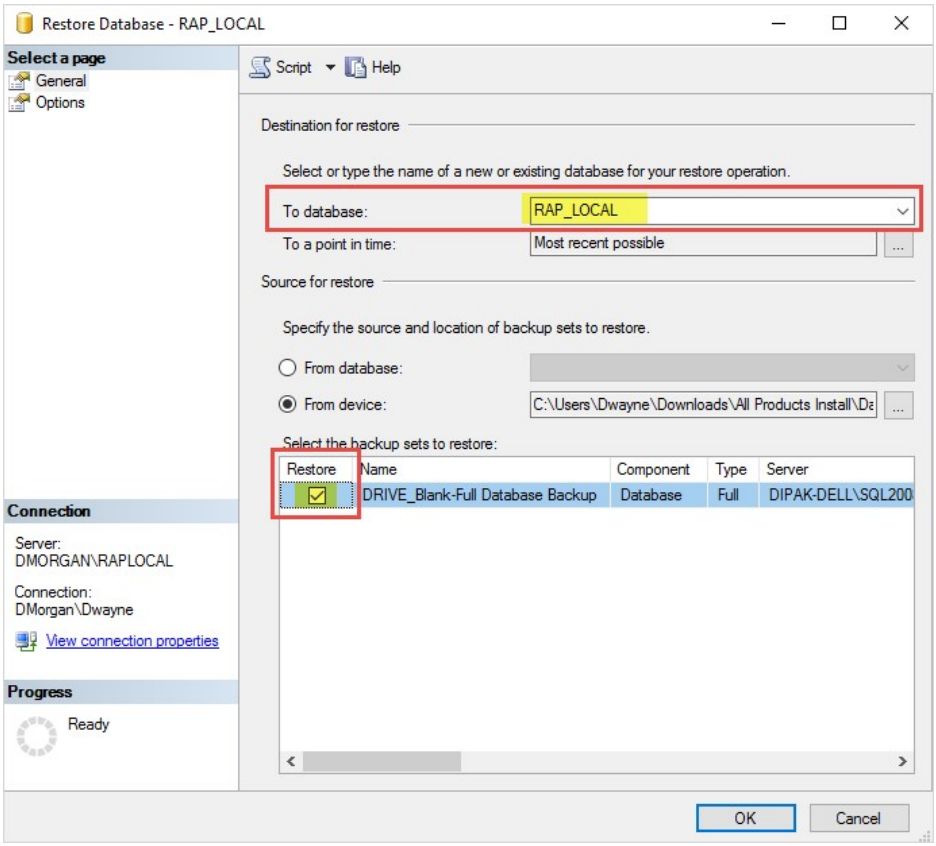
. The 'Specify Backup' dialog will be displayed.



Select the Add button to open the 'Locate Backup File' dialog. Within the 'All Products Installation' folder you download there is a folder called Data. Browse to this folder and select the DRIVE_data.bak backup file and click the OK button.

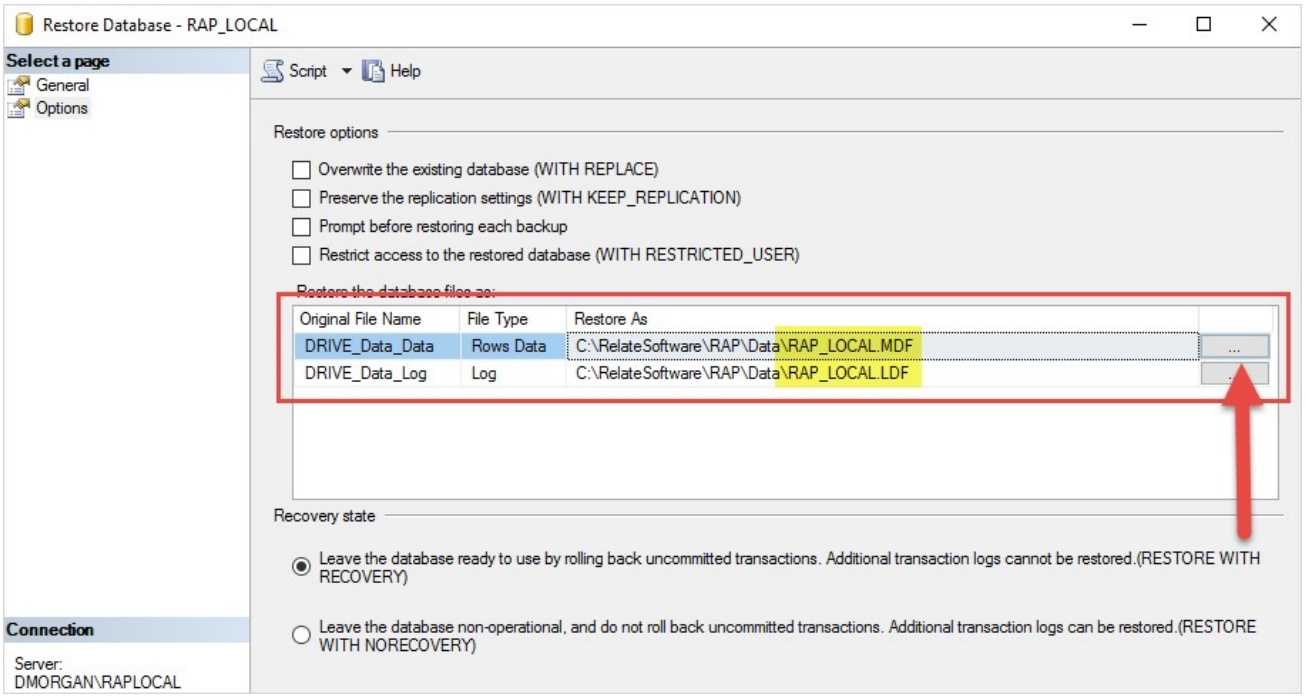


You will return to the 'Specify Backup' dialog and the backup location will now be populated with the selected database file. Click the OK button to continue. The 'Restore Database' dialog will be displayed.



General Page

- In the 'To database:' field enter the database name as RAP_LOCAL.
- Under the 'Select the backup sets to restore:' tick the 'Restore' check box.



Options Page

Under 'Restore the database files as' we have locations for the MDF (Rows Data) and the LDF (Log).

- For the Rows data (MDF), select the ellipse button ... . The 'Locate Database Files' dialog will be displayed. Browse to C:\RelateSoftware\RAP\DATA (if the folder structure does not exist, create it through Windows explorer) and in the 'File name' field enter RAP_LOCAL.MDF. Select the OK button.

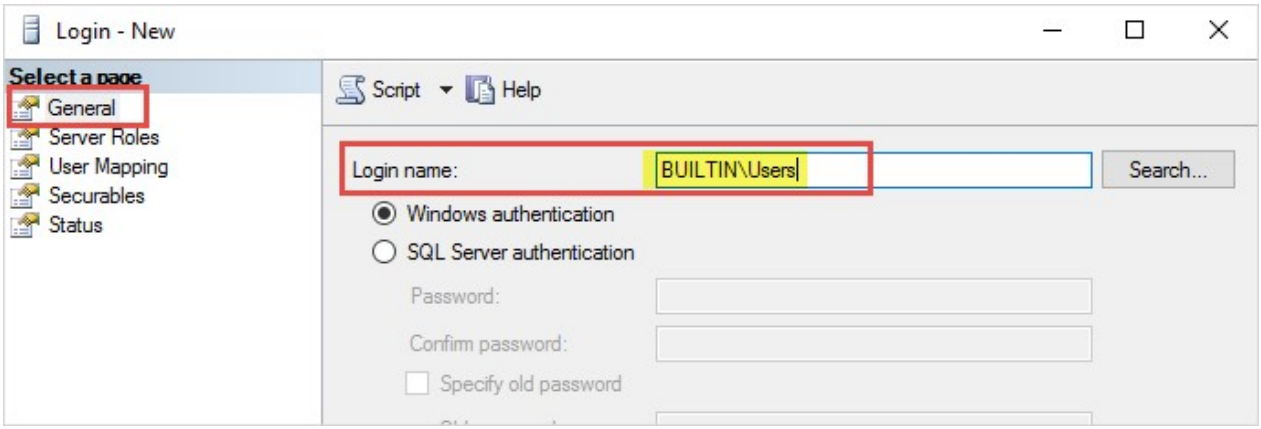
- For the Log (LDF), select the ellipse button ... . The 'Locate Database Files' dialog will be displayed. Browse to C:\RelateSoftware\RAP\DATA (if the folder structure does not exist, create it through Windows explorer) and in the 'File name' field enter RAP_LOCAL.LDF. Select the OK button.

Select the OK button to restore the database. An alert will be displayed to say, 'The restore of database 'RAP_LOCAL' completed successfully'. Select the OK button.

BUILTIN\ADMINISTRATORS & BUILTIN\USERS

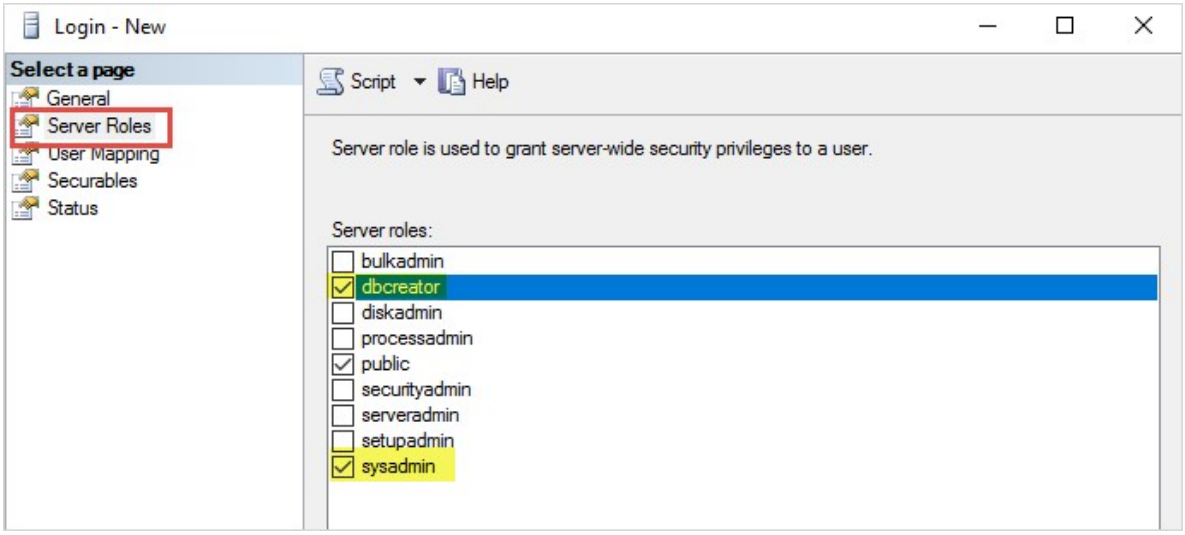
After you connect to the RAPLOCAL instance of the Microsoft SQL Server Database Engine, in Object Explorer, click the server name to expand the server tree.

Right-click on Security and select New ▸ Login from the menu. The Login dialog will be displayed.



General Page

In the 'Login name:' field enter BUILTIN\Users



Server Roles

Under the 'Sever roles' select 'dbcreator' and 'sysadm'.

Select the OK button to save the login.

Repeat this process to add the BUILTIN\Administrators.

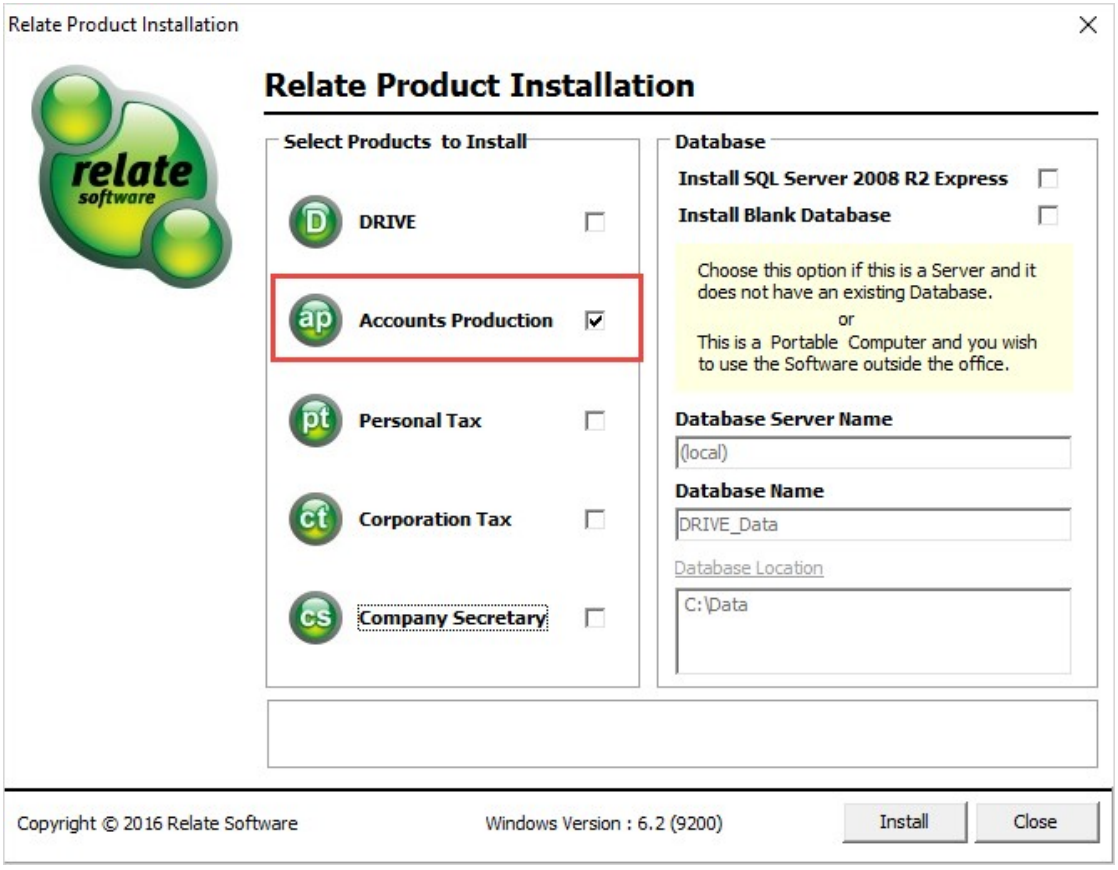
If the either the Users or Administrators already exist you will be alerted when selecting OK.

The Logins should now be visible under the Security > Logins menu.

You can now exit Microsoft SQL Server Management Studio.

INSTALLING RELATE ACCOUNTS PRODUCTION

The All Products Install folder is required to install Relate Accounts Production (see the Installation Files section of this document if you have not downloaded these files). Within the All Products Install folder double click the Relate_Setup.exe.



Select Accounts Production and click the Install button to begin the installation. You will see an alert on screen once the installation process is completed. Click OK.

The Accounts Production icon should now be visible on the desktop.

CONNECTING TO THE BLANK DATABASE

Double click the Accounts Production Icon on the desktop. The Change Database dialog will be displayed.

- Select Server: enter the server name details you documented during the Microsoft SQL Server Management Studio configuration.
- Select Database: Click the ellipse button ... and select the drop down arrow to the left of this. You should now be able to select the RAP_LOCAL database from this list.
- Authentication: Set this to Windows Authentication
- Network Protocol: Set this to Named Pipes

Select the OK button. The login screen will be displayed. The default username for the blank database is sysadm. There is no password.

To complete the setup you must contact the Accounts team to register the database. The accounts team are available by Phone or Email.

- Phone: 353 1 4597800 (Option 2)
- Email: accounts@relate-software.com

Note: ***If you are prompted to update Relate Accounts Production. Please check our website www.relate-software.com > Support > Accounts Production > Downloads, for all of the latest updates.***