.NET Install – Server and Workstation

Purpose: These instructions are intended for the person in charge of IT support. They will guide you through the process of installing SQL on your server, as well as installing the .NET programs on each workstation.

Network installations also require the creation of a Shared Program Folder.

> ***Both an orange SQL CD and a white BS&A Program CD will be installed. The orange SQL CD <u>must</u> be installed first.***

Install the Orange SQL CD

Important: If you have been installing Windows updates, you should have both "Windows Installer" and "Microsoft .NET Framework" - both are prerequisites for the installation of SQL. <u>These instructions assume you do not</u>.

1. Go to the **Server**.

2. Insert the orange SQL CD.

    The CD automatically runs and presents the InstallShield Wizard (if it detects that "Windows Installer" and/or "Microsoft .NET Framework" have been installed, they will not appear in the list).

3. Click [Install] .

4. After "Windows Installer" has installed, you are prompted to reboot. Click [Yes] .
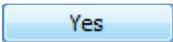
5. After the reboot, the InstallShield Wizard reappears. Click [Install] .

6. After "Microsoft .NET Framework" has installed, you are prompted to reboot. Click [Yes] .
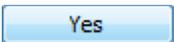
7. After the reboot, the InstallShield Wizard reappears. Click [Install] to install "Microsoft SQL Server 2008".

    As it begins to install, you will see several screens, among them the two pictured. **DO NOT CLOSE ANY OF THE SCREENS**.
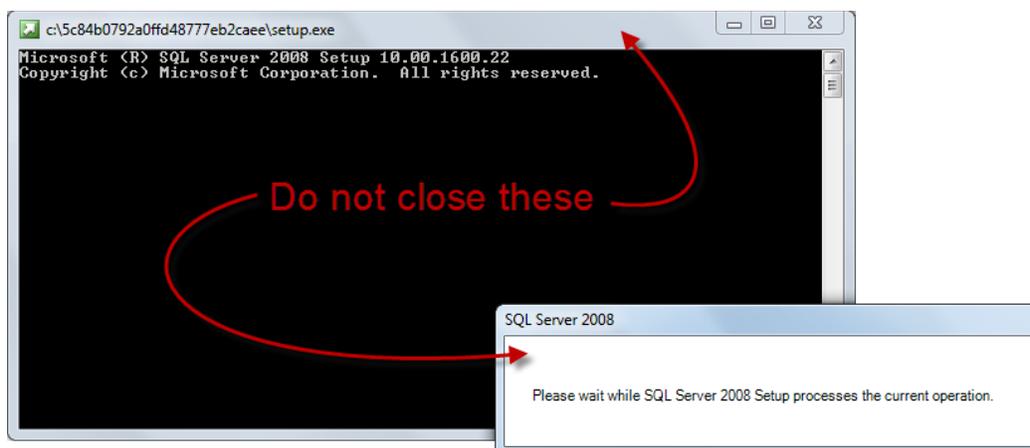
8. After several more screens, "Welcome to the InstallShield Wizard for BS&A SQL 2008" appears. Click Next > .
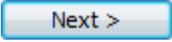
9. The "Database Server" screen appears and defaults to the proper configuration; please do not change it:
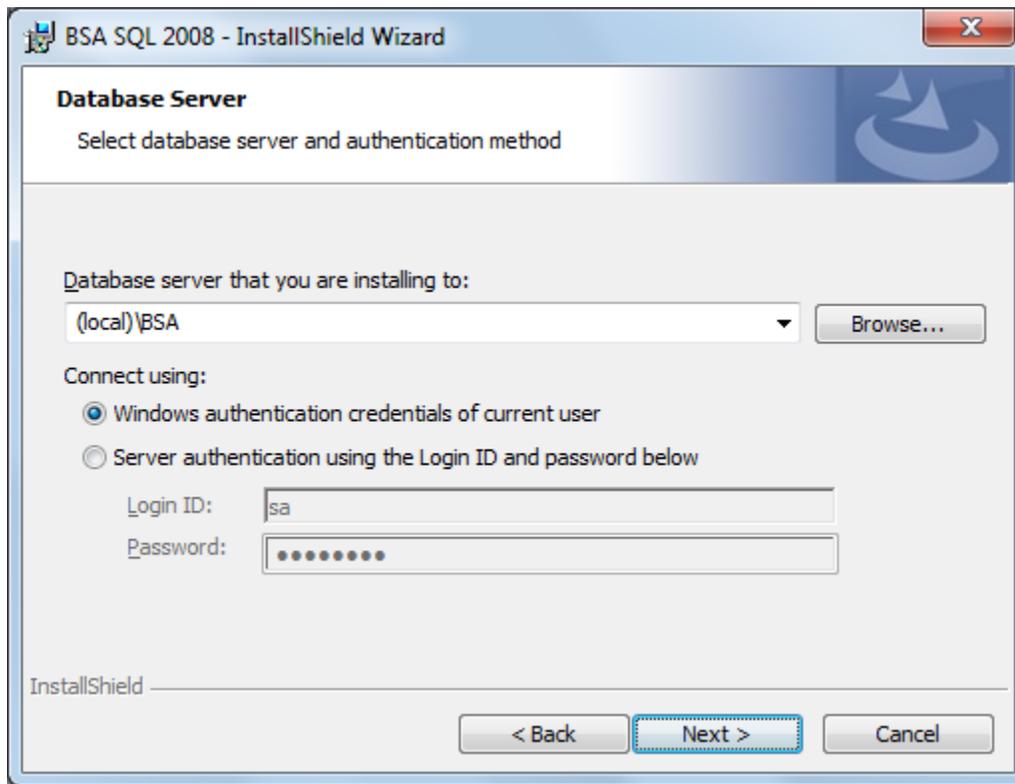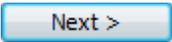
10. Click Next > .

11. The "Ready to Install the Program" screen appears. Click Install .

12. The "InstallShield Wizard Completed" screen appears. Click Finish .

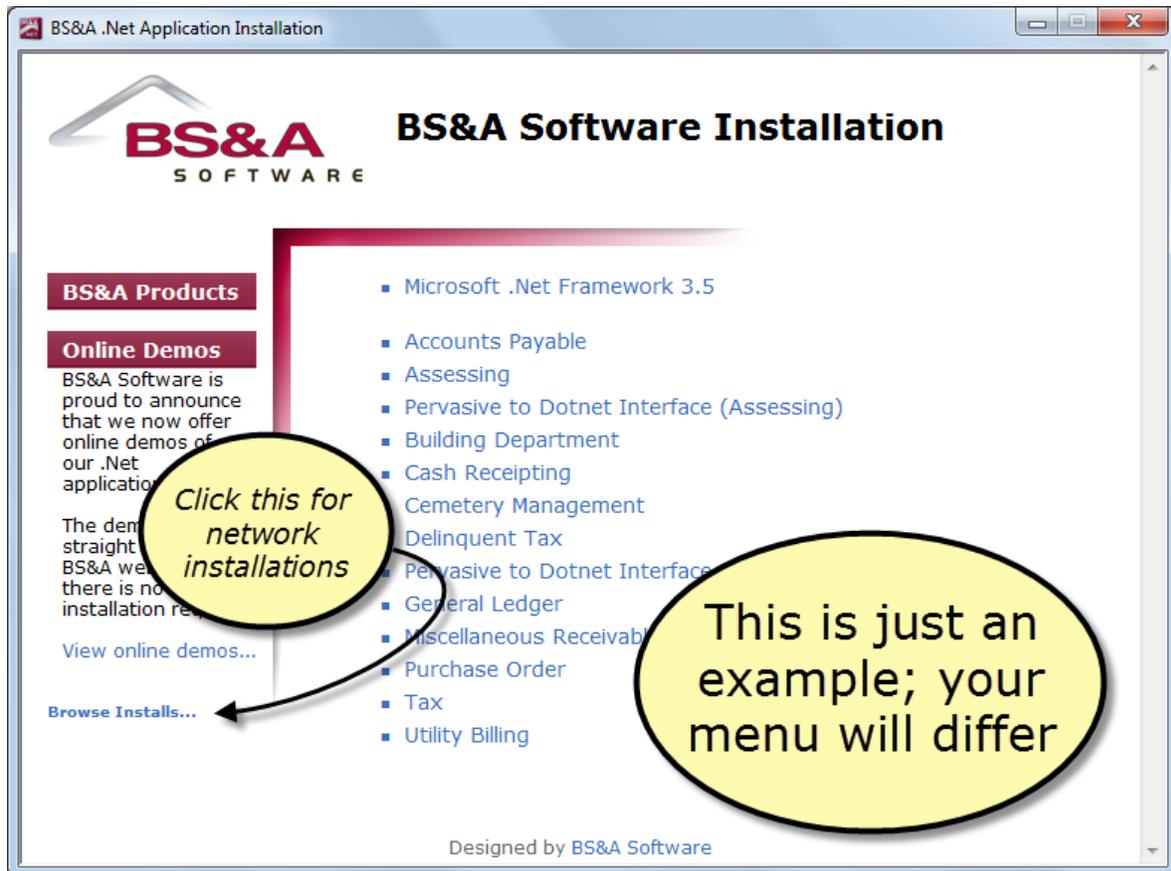13. Move on to "Create the Shared Program Folder".

Create the Shared Program Folder

1. Go to a network drive.

2. Create a new folder and call it **BSA**.

3. Right-click and go to **Sharing and Security**.

4. Click **Share this folder**.

5. Click **Permissions**.

6. Check - ☑ - the **Allow** box to grant "Full Control" to everyone.

7. Click **Ok**.

8. Click the **Security** tab.

9. Select the "Group or User Name" who will need access to the BS&A .NET programs.

10. Check - ☑ - the **Allow** box for "Modify".

11. Click **Ok**. During installation (see below), this is the folder that will be selected as the Share.

12. Move on to "Install the White Program CD".

Install the White Program CD

It is recommended you make use of the **Default Program Settings XML** file. This is an optional setup tool that allows you to configure specific program-wide settings once, rather than having to visit each machine; instructions are provided at the end of this document.

1. Verify you've created the Shared Program Folder called "BSA".

2. Insert the white Program CD. The BS&A Software Installation menu appears:

3. Click **Browse Installs...** .

4. Copy the contents of the CD to your Shared Program Folder.

5. **Only if** you will be configuring the Default Program Settings .XML file (see the paragraph above), stop these instructions now and move on to the "Configure the Default Program Settings.XML" instructions at the end of this document.

6. Go to a PC that will have the BS&A program(s) installed.

7. Browse to your Shared Program Folder.

8. Double-click **Install.exe**. This launches the BS&A installation menu.

9. When the installation menu appears, click **Microsoft .NET Framework**.

10. Several dialogs appear. When the .NET Framework has completed installation, you are returned to the menu.
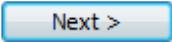
11. Click the program you are installing.

      i. <u>If the selected program is the first one being installed on the machine</u>, you will receive the following screen:
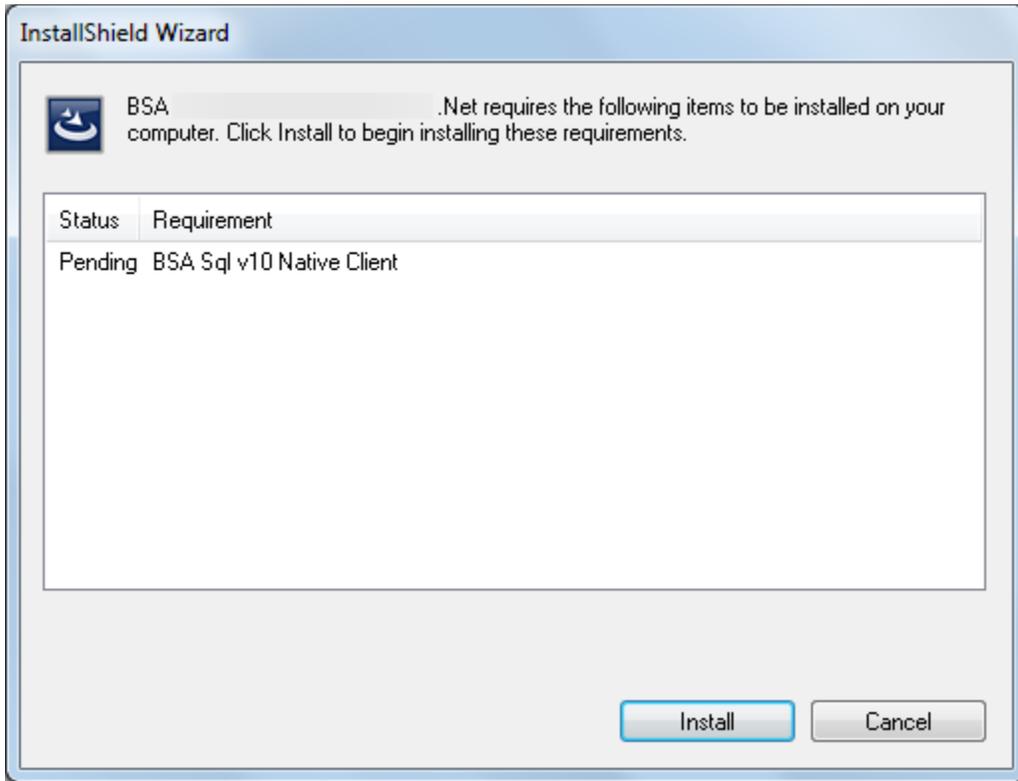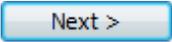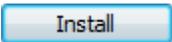

    ii. Click [Install].

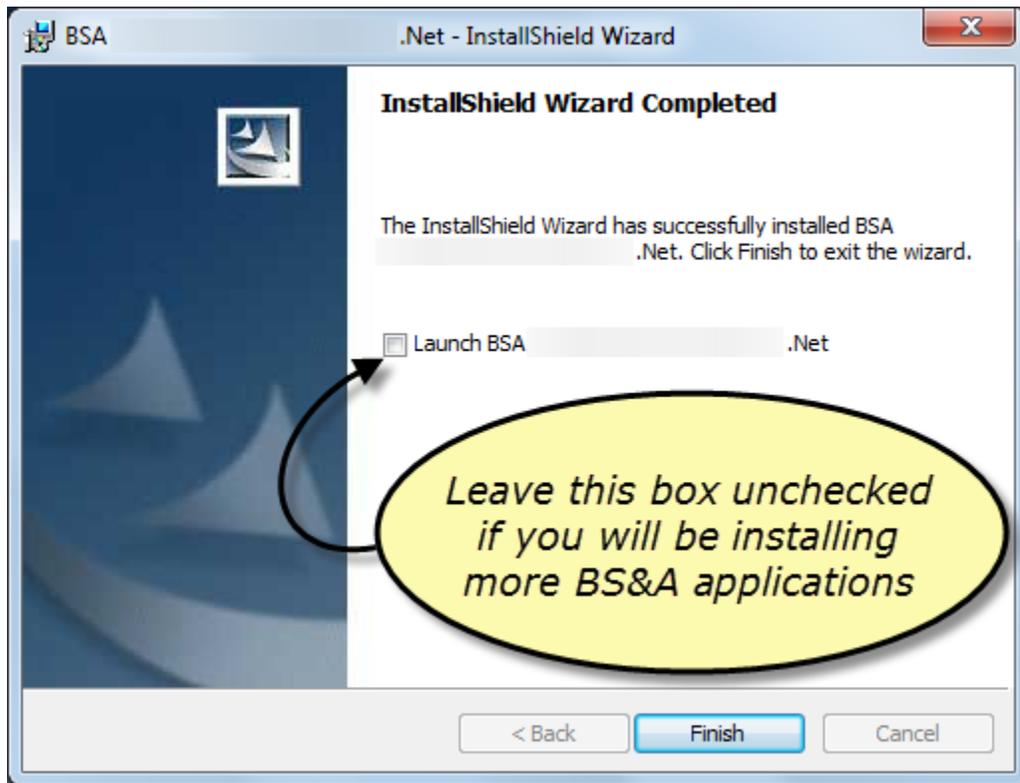12. The "Welcome to the InstallShield Wizard for BSA [program name]" screen appears. Click [Next >].

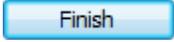13. The "Destination Folder" screen appears. Click [Next >].

14. The "Ready to Install the Program" screen appears. Click [Install].

15. When the program is finished installing, you are presented with the "InstallShield Wizard Completed" screen:

16. Click Finish .

17. When you return to the menu, install any remaining programs.

18. When you return to the menu, click **Pervasive to Dotnet Interface** (this will display "Assessing" or "General Ledger" in parentheses, depending on your menu) and follow the screens (there are three: "Next"; "Install"; Finish"). This allows your Pervasive programs (Assessing, Tax, Building) to interface with GL .NET, AP .NET, and MR .NET (instructions are in the appropriate User Manuals).

    Please note: the "Pervasive to Dotnet Interface" will need to be installed on all machines* that have a Pervasive version of a BS&A program. For example, if your unit has set aside a PC for the Pervasive version of BS&A Building Department.

    *The "Pervasive to Dotnet Interface" will not run on Windows 2000.

19. Click ✕ to close the menu.

20. Proceed with the instructions immediately following. You will be repeating these instructions for each program installed on the machine.

     i. Open one of the BS&A programs.

PLEASE NOTE: If you are using the **Default Program Settings.XML** file, **skip to step vi**.

     ii. On the Login screen, click the Click to Setup link.

     iii. Click ⦿ **Network Server**.

     iv. Type in your server and SQL instance name.
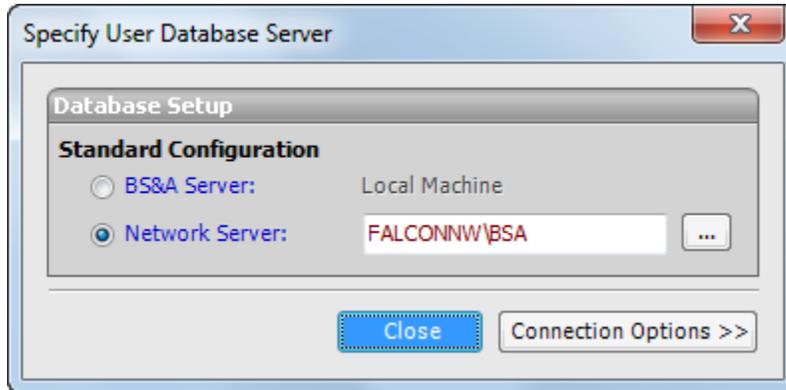
     v. Click **Close**.

     vi. Login as **BSA** (no password). You are prompted:

     vii. Click **Ok**. Your screen should resemble the picture:

     viii. Click **Advanced**.

     ix. Click **Shared Folder**.

     x. Click Edit, then **Yes**.

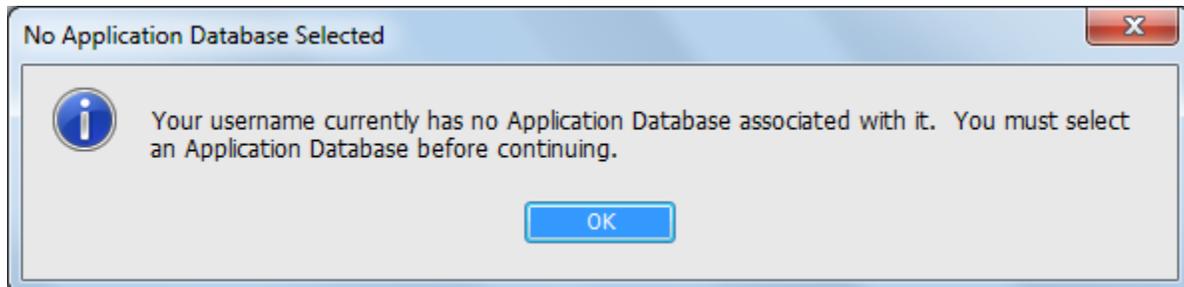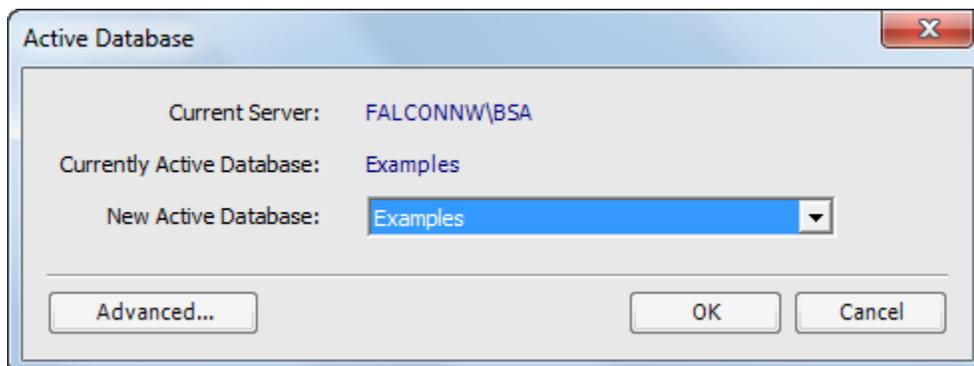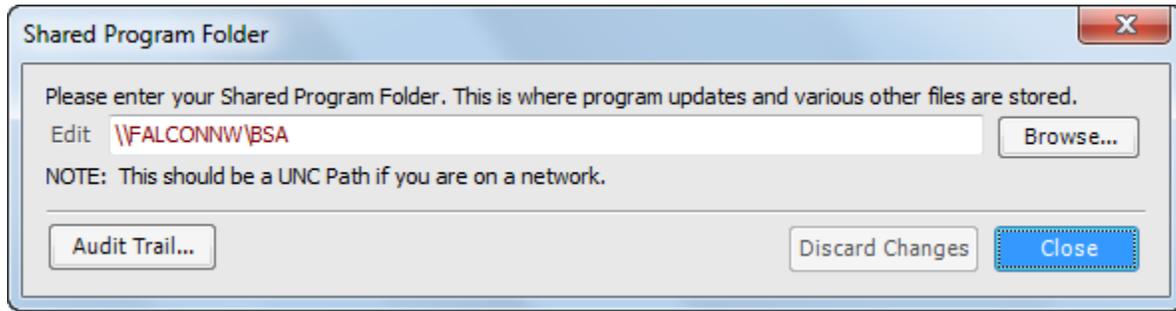xi. Browse to the location of your Shared Program Folder ("BSA").

Shared Program Folder

Please enter your Shared Program Folder. This is where program updates and various other files are stored.

Edit \\FALCONNW\BSA Browse...

NOTE: This should be a UNC Path if you are on a network.

Audit Trail... Discard Changes Close

xii. Click **Close** to return to the Manage Databases dialog.

xiii. Click **Close** to return to the Active Database dialog.

xiv. Click **Ok**. Your screen should resemble the picture in step vii.

xv. Click **Ok**. The program opens to the Examples database.

xvi. Repeat for each program you installed on this machine.

21. Go to the next machine that will use the BS&A programs and repeat steps 7 through 20-vii*, then skip ahead to 20-xv.

*Keep in mind steps **ii - v** are to be skipped if you are using the Default Program Settings.XML file.*

Configure the Default Program Settings .XML File

These instructions are only to be followed if you were directed here during step 5 of the "Install the White Program CD" instructions.

1. While in your Shared Program Folder, right-click **Default Program Settings.XML** and select **Edit**.

2. Replace "server" (where highlighted in the picture) with <u>your</u> server name.

```
DefaultProgramSettings.XML - Notepad

File  Edit  Format  View  Help
<?xml version="1.0" standalone="yes"?>
<DefaultProgramSettingsDataSet xmlns="http://tempuri.org/DefaultProgramSettingsDataSet.xsd">
    <DatabaseSettings>
        <AdminDatabaseServer>SERVER\bsa</AdminDatabaseServer>
    </DatabaseSettings>
</DefaultProgramSettingsDataSet>
```

3. Exit and save the XML file.

4. Right-click **Default Program Settings.XML** and select **Copy**.

5. Right-click <u>each</u> BS&A program folder and select **Paste**.

6. Return to the "Install the White Program CD" instructions and resume with step 6.