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Pension System/Windows

Installation Guide

Updated for Microsoft SQL Server 2014 & MS SQL Express 2014

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PE/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 Microsoft SQL Server database.

SQL Server vs. Access

We strongly recommend using SQL Server as your database choice. 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 2014 in this document. DATAIR continues to support SQL 2000, MSDE, SQL 2005, SQL 2008, and SQL 2012, however we highly recommend SQL 2014 for new installations. As of the publication of this document, Microsoft only supports SQL 2008 and later versions. Keep in mind that DATAIR may end support for any operating system or SQL Server version no longer supported by Microsoft, with limited advance notice.

Choosing between Express and MS SQL

Feature	MS SQL 2014 Express	MS SQL 2014 Standard Edition
Maximum Database Size	10 GB	No Limit
Number of Processors Supported	1	4
RAM Memory (Maximum used)	1 GB	No Limit
Cost	Included free of charge	Must be licensed from Microsoft
		separately

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

In essence, the limitations placed on the free Express version of the database include limiting the maximum size of a database to 10 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 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.

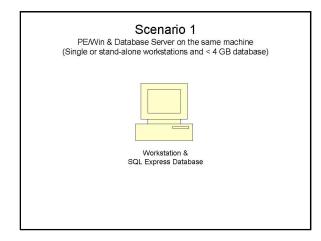
Each scenario includes a description and visual representation of the configuration, a listing of what's needed, and a brief description of the installation steps.

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

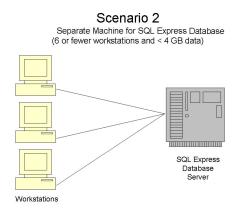
Notebook computer or stand-alone computer where each user has their own database. The database may not exceed 10 GB in size.

What's Needed

- > PE/Win Full Version Download File
- > DATAIR SQL Server Installer Download File
- > Workstation that meets the Stand-alone Workstation requirements.

Installation Steps

Step 1: Install Express Server on Workstation Step 2: Install PE/Win Application Software on Workstation



Typical Uses

Recommended for six or fewer networked workstations sharing a database with less than 10 GB of data.

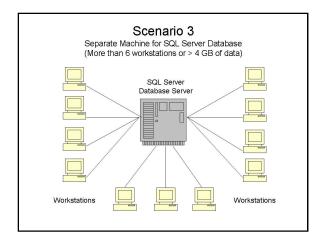
What's Needed

- > PE/Win Full Version Download File
- > DATAIR SQL Server Installer Download File
- > 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 PE/Win application software on each of the workstations

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



Typical Uses

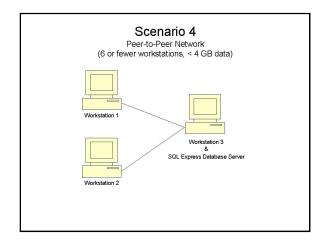
More than 6 simultaneous users sharing a database, OR more than 10 GB of data.

What's Needed

- > PE/Win Full Version Download File
- Microsoft SQL Server (Licensed separately from Microsoft)
- Microsoft SQL Server Client Access Licenses (CALs) for each workstation (Licensed 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 PE/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.

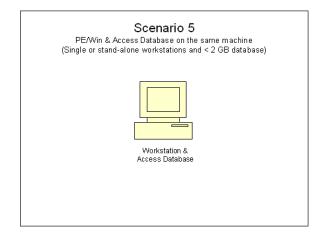
What's Needed

- > PE/Win Full Version Download File
- > DATAIR SQL Server Installer Download File
- > 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 PE/Win application software on the machine that will act as the database server Step 3: Install the PE/Win application software on each of the remaining workstations

Scenario #5 – Standalone Workstation with Access database



Description

This scenario is an alternative to Scenario #1, employing a local Access-based database. Access supports a maximum of 2 GB of data, and is recommended for very limited usage. SQL Server is a much more robust data storage technology.

What's Needed

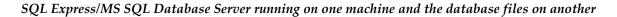
- > PE/Win Full Version Download File
- > Workstation that meets the Stand-alone Workstation requirements.

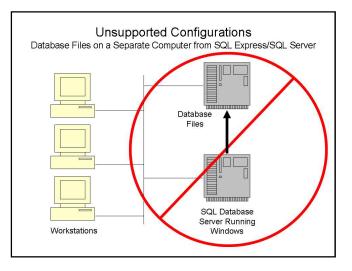
Installation Steps

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

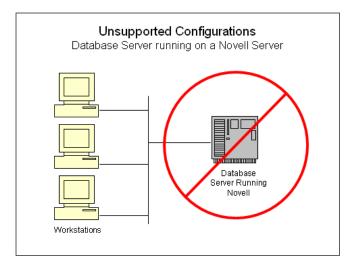
Unsupported Configurations

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



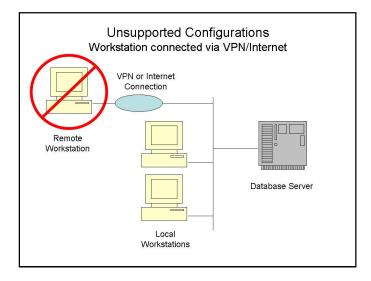


SQL Express/MS SQL Server requires that the database files be located on the same physical computer as where the database server software is running. You may not, for example, install the database server software on one machine and place the database files on another.



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/Remote Desktop 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. Unless specified otherwise, DATAIR supports both 32 and 64 bit versions of Windows and SQL Server.

Workstation-only:

Applies to: Scenario 2 – Workstations Scenario 3 – Workstations Scenario 4 – Workstations Scenario 5

Feature	Minimum	Recommended
Processor	2 GHz Single Core	2.4 GHz Dual or Quad Core
RAM Memory	1 GB XP/4 GB Other OS	4 GB or more
Disk Space (excludes data)	250 MB	250 MB
Video	800x600 SVGA	1024x768 XGA or better
Windows OS	Windows XP (32-bit only)	Windows 8.1
	Windows Vista	Windows 10
	Windows 7	Windows 2008 R2 Server
	Windows 8	Windows 2012 R2 Server
	Windows 8.1	
	Windows 10	
	Windows 2003 Server	
	Windows 2008 Server	
	Windows 2008 R2 Server	
	Windows 2012 Server	
	Windows 2012 R2 Server	
Other	Windows-compatible pointing device	
	Windows-compatible printer	
	Windows-compatible network (optional for Scenario 5)	
	Internet Access	

Applies to: Scenario 1 Scenario 4 – Server

Feature	Minimum	Recommended
Processor	2 GHz Single Core	2.6 GHz Quad Core
RAM Memory	2 GB	4 GB or more
Disk Space (excludes data)	2.0 GB	2.0 GB
Video	800x600 SVGA	1024x768 XGA or better
Windows OS	Windows 7	Windows 8.1
	Windows 8	Windows 10
	Windows 8.1	Windows 2008 R2 Server
	Windows 10	Windows 2012 R2 Server
	Windows 2008 Server	
	Windows 2008 R2 Server	
	Windows 2012 Server	
	Windows 2012 R2 Server	
Other Windows-compatible pointing device		ce
	Windows-compatible printer	
Windows-compatible network (optional		ional for Scenario 1)

SQL Express Server Only

Applies to: Scenario 2 – Server

Feature	Minimum	Recommended
Processor	2 GHz Single Core	2.6 GHz Quad Core
RAM Memory	1 GB	4 GB or more
Disk Space (excludes data)	5 GB	5 GB
Video	800x600 SVGA	1024x768 XGA
Windows OS	Windows 7	Windows 8.1
	Windows 8	Windows 10
	Windows 8.1	Windows 2008 R2 Server
	Windows 10	Windows 2012 R2 Server
	Windows 2008 Server	
	Windows 2008 R2 Server	
	Windows 2012 Server	
	Windows 2012 R2 Server	
Other Windows-compatible pointing device		ce
	Windows-compatible network	
Internet Access		

Microsoft MS SQL Server

Applies to: Scenario 3 – Server

Feature	Minimum	Recommended ***
Processor	2 GHz Dual or Quad Core	2.8 GHz Quad Core/Xeon
	Processor	Multi-Processor
RAM Memory	2 GB	16 GB or more
Disk Space (excludes data)	5 GB	5 GB
Video	800x600 SVGA	1024x768 XGA
Windows OS	Windows 2008 Server	Windows 2008 R2 Server
	Windows 2008 R2 Server	Windows 2012 R2 Server
	Windows 2012 Server	
	Windows 2012 R2 Server	
Other	Windows-compatible pointing device	
	Windows-compatible network	
	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.

SQL Server 2014 requires .**NET Framework 3.5 SP1** and **Windows installer 4.5**. The latest Windows Operating System and SQL Server Service Packs/Updates are required.

Also, see Microsoft's website: <u>Hardware and Software Requirements for Installing SQL Server 2014</u> for additional guidance.

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 90 GB of disk space for plan data and database backups. This is based on the SQL Express maximum database size of 10 GB, 70 GB of daily database backups (seven backups of 10 GB each), and 10 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

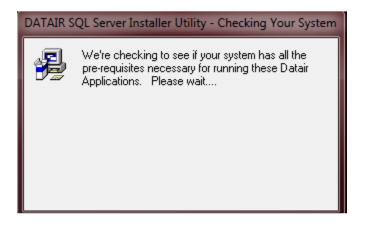
Before you Begin....

- 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...

- > Download the DATAIR SQL Server Installer File from DATAIR's web site
- > Double-click the downloaded file to begin

The first screen you will see will indicate it is checking your computer for pre-requisites necessary to install.



You will need Microsoft Dot Net Framework Version 3.5 to continue. If it is not enabled on this computer, you will get the message:

Prerequisite not found!	×	
Microsft Dot Net Framework Version 3.5 is required to to run this program.		
You must enable Dot Net 3.5 on this computer to proceed.		
This installer will close and instructions will display on how to enable Dot Net 3.5.		
Restart after successfully installing Dot Net Framework.		
End Install		

If this check passes, you will see the welcome dialogue. Click [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. Optionally, a backup job can be created to perform 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.

When you click "Install" you will be prompted for an administrative account name. This should be a login that has administrative rights on this computer. The example below uses : BUILTIN\ADMINISTRATORS. Another choice might be: MyDomain\Administrators.

SQL Administrative Account			
SQL Server 2008 Express requires an account name which has administrative rights in SQL Server. This should be a login that has administrative rights on this computer.			
Try the default value 'Builtin\Administrators' first. If SQL Server installation fails, you will need to supply another login.			
Admin Account: BUILTIN\ADMINISTRATORS			
 Include your login as a SQL System Administrator Show full Microsoft SQL Server Install Interface 			
<u> </u>			

It is recommended you keep checked the option to include yourself as a SQL Administrator.

If you wish to enable the Microsoft SQL Server Install interface, you can check that option. (For advanced users only). Normally, no interaction with Microsoft's install screens is needed.

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 glternate location	
Available Fixed Drives : C Browse Folders	
<u></u> K	

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.

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!
(OK)

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 : Si this computer:	QL 2008 Express - R2 🔍
DATAIR Server and DB Installed Successfully!	
The DATAIR instance of SQI Server 2008 Express is running and a Datair	database has been installed.
C This installer will now close.	
ОК	
	E <u>x</u> it

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

Installing Microsoft SQL Server

DATAIR includes a copy of Microsoft SQL Server Express 2014 free of charge with the DATAIR Pension System. The Express version is limited in the size of database you can have and how much memory it will utilize.

This section will cover the installation of a fully licensed Microsoft SQL Database Server as an addendum to Microsoft's instructions. Specific settings must be used during the install for SQL Server to work with DATAIR applications.

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 due to non-standard configurations.
- 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.

Step-by-Step Instructions SQL Server 2014

Insert the SQL Server CD or DVD

SQL Server Installation Center	
Planning nstallation Maintenance Fools Resources Options	New SQL Server stand-alone installation or add features to an existing installation Launch a wizard to install SQL Server 2014 in a non-clustered environment or to add features to an existing SQL Server 2014 instance. Image: SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012 Launch a wizard to upgrade SQL Server 2005, SQL Server 2008, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012 to SQL Server 2014.
Microsoft SQL Server 2014	

Accept the license terms, then click Next.

SQL Server Installer analyzes your system. If you get a "Fail" status on "Restart Computer", restart your computer manually, and restart the SQL install process.

Feature Selection Select the Express features to	install.	
Shared feature directory: C:\Program F		Feature description: The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on Prerequisites for selected features: Already installed: Windows PowerShell 2.0 Microsoft .NET Framework 3.5 Image: Construction of the selected features Disk Space Requirements Drive C: 1058 MB required, 620582 MB available
		Program Files\Microsoft SQL Server\ Program Files\Microsoft SQL Server\ Program Files (x86)\Microsoft SQL Server\

Select Database Engine Services, then click Next.

icense Terms	O Default instance				
Global Rules Product Updates	Named instance:	DATAIR			
nstall Setup Files nstall Rules Feature Selection	Instance ID:	DATAIR			
Feature Rules I nstance Configuration Server Configuration Database Engine Configuration	SQL Server directory: Installed instances:	C:\Program Files\	Microsoft SQL Server	MSSQL12.DATAIR	
Feature Configuration Rules	Instance Name	Instance ID	Features	Edition	Version
nstallation Progress	<shared compone<="" td=""><td></td><td>SSMS</td><td></td><td>11.0.2100.60</td></shared>		SSMS		11.0.2100.60
Complete	<shared compone<="" td=""><td></td><td>LocalDB</td><td></td><td>11.2.5343.0</td></shared>		LocalDB		11.2.5343.0
Jompiere	<shared compone<="" td=""><td></td><td>SSMS</td><td></td><td>10.0.1600.22</td></shared>		SSMS		10.0.1600.22

It is recommended you always use the name "DATAIR" for the instance name when installing an instance of SQL Server for Datair applications.

Server Configuration Specify the service accounts an	d collation configuration.				
License Terms Global Rules Product Updates	Service Accounts Collation Microsoft recommends that you	use a separate account for each	SQL Server serv	ice.	
Install Setup Files	Service	Account Name	Password	Startup Type	
Install Rules	SQL Server Database Engine	NT Service\MSSQL\$DAT		Automatic	-
Feature Selection	SQL Server Browser	NT AUTHORITY\LOCAL		Disabled	-
Instance Configuration Server Configuration Database Engine Configuration					
Server Configuration					

You need to supply account names for this SQL Server instance and SQL Browser to run under. Take the default if you are not sure.

Depending on whether you are installing a fully licensed version of SQL Server, you may be asked to enter the product key. SQL Express does not require a product key as it is a free license from Microsoft.

Specify Database Engine authe	ntication security mode, administrators and data directories.
License Terms Global Rules Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress	Server Configuration Data Directories User Instances FILESTREAM Specify the authentication mode and administrators for the Database Engine. Authentication Mode Windows authentication mode Windows authentication mode Mixed Mode (SQL Server authentication and Windows authentication) Specify the password for the SQL Server system administrator (sa) account. Enter password: •••••••• Confirm password: •••••••• Specify SQL Server administrators
Complete	DATAIR\jerryj SQL Server administrators have unrestricted access to the Database Engine. Add Current User Add

Database Engine Configuration

For DATAIR software to run properly, you **must** select "Mixed Mode" authentication, then enter a password for the "sa" login (system administrator). You should remember this password and you may want to store it in a safe place. Without this password, you may lose all access to the database.

Specify SQL Server administrators. You will need to select a login(s) from your Domain (or the Administrator of this computer) to be a SQL Server Admin. Please consult Microsoft instructions for more information on this subject.

It is recommended you should "Add Current User". Clicking that button will add you to the list of SQL Server Administrators.

The installation will now proceed and display a progress.

If successful, you will see a screen similar to the one below.

		dates.	
License Terms	Information about the Setup operation of	or possible next steps:	
Global Rules	Feature	Status	
Product Updates	Database Engine Services	Succeeded	
nstall Setup Files	SQL Browser	Succeeded	
nstall Rules	SQL Writer	Succeeded	
eature Selection	Setup Support Files	Succeeded	
eature Rules			
nstance Configuration			-
Server Configuration			
Database Engine Configuration	Details:		
eature Configuration Rules	Viewing Product Documentation	for SOL Sopror	
nstallation Progress	viewing Product Documentation	IOI SQL Server	'n
-		o view and manage the documentation for SQL Server have /iewer component uses the online library. After installing brary Manager component to download documentation to	
Complete		ation, see Use Microsoft Books Online for SQL Server kID=299578>).	
omplete	your local computer. For more inform (<http: ?lin<="" fwlink="" go.microsoft.com="" td=""><td>klD=299578≥).</td><td></td></http:>	klD=299578≥).	
Lomplete	your local computer. For more inform (<http: ?lin<br="" fwlink="" go.microsoft.com="">Summary log file has been saved to the f</http:>	klD=299578≥).	

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

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

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 PE/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 Connections Database Settings Advanced Permissions	Server authentication ^C Windows Authentication mode ^C SQL Server and Windows Authentication mode Login auditing ^C None ^C Failed logins only ^C Successful logins only ^C Successful logins only ^C Both failed and successful logins Server proxy account ^C Enable server proxy account ^C Proxy account ^C Proxy account ^C None ^C Successful logins ^C Successful logins ^C Server proxy account ^C Successful logins ^C Server proxy account ^C Successful logins ^C Successful logins ^C Server proxy account ^C Successful logins
Connection	Password: Discussion
Server: TEST2K3SP1\DATAIR Connection: DATAIRNadministrator View connection properties Progress Ready	C Enable C2 audit tracing ☐ £ross database ownership chaining
	OK Cancel

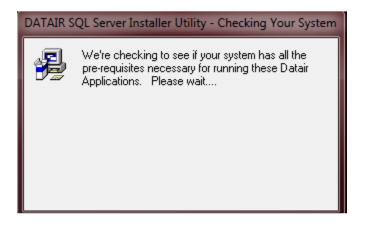
Note: It is imperative that "Server Authentication" be set to "SQL Server and Windows Authentication mode". You cannot load a DATAIR database on a SQL Server set to "Windows Authentication only".

Method 1 – Database installation using the DATAIR SQL Server Installer (preferred method)

After you are logged into the server as an administrator, do the following:

- > Download the DATAIR SQL Server Installer File from DATAIR's web site
- Double-click the downloaded file to begin

The first screen you will see will indicate it is checking your computer for pre-requisites necessary to install.



You will need Microsoft Dot Net Framework Version 3.5 to continue. If it is not enabled on this computer, you will get the message:

Prerequisite not found!	x
Microsft Dot Net Framework Version 3.5 is required to to run this program. You must enable Dot Net 3.5 on this computer to proceed. This installer will close and instructions will display on how to enable Dot Net 3.5. Restart after successfully installing Dot Net Framework.	
End Install	

If this check passes, you will see the welcome dialogue. Click [Next >] to continue.

DATAIR Database and SQL Express Installation

Welcome!

This installation program will install DATAIR Database and SQL Express.

You can press the Cancel button now if you do not want to install DATAIR Database and SQL Express at this time.

Press the Next button to start the installation.

Help

<</td>

<</td>

<</td>

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

PE/Win Installation Guide

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.

S. DATAIR SQL Express Installation Utility	
Computer Name: TEST2K3SP1	
Servers found on TEST2K3SP1\DATAIR - Version : SQL Server 2005 - RTM this computer:	•
C 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	
	E <u>x</u> it

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 giternate location	
Available Fixed Drives : C Browse Folders	
QK	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.

Click [OK] to return to the setup screen

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

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.

dbInstal 🗙
Datair database successfully created!
ОК

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

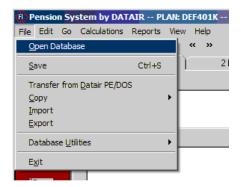
Method 2 – Installation using the PE/Win application

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

Installing the Database

You will install the database by first launching the PE/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 PE/Win application and select "Open Database" from the "File" menu.



You will see the screen below:

Select Database		_ D ×
Main Database C SQL Server Server-Database	,	
 Access database Database File 		
D'atabase rile	C:\My Documents\Datair\m2k.MDB	
Alternate Database		
Server - Database		
C Access database		
Database File		
		<u>OK</u> <u>C</u> ancel

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

This action will cause PE/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.

🐂 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	
Use a specific user name and password	
User Name : sa	
Password : Test Connection	
New Database Create New Datair Database : DATAIR (Enter a name for your new database)	
Create <u>D</u> atabase <u>C</u> ancel	
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 X
Done! New Datair database created!
ОК

Click OK to finish and end the DB Installer. Restart PE/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 PE/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 or 	n your computer or network
C Install a new Datair database on a	server
	<u>O</u> K <u>C</u> ancel

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

🖷, Connect to D	ATAIR SQL Server Data	base		- D ×
SQL Server	My SQL Server		•	Refresh
Existing Databa	ses			
DATAIR DAT	AIR			
Select an existir	ng SQL server, then select th	e database to connec Select <u>D</u> atabase	t to on that se <u>C</u> ance	
Select A Server.	Then, select a database fro	m the list.		1

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 X
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

What's Needed

> PE/Win Full Version Download File (PEWinXXXSetup.exe)

Download the Full Version of PE/Win from the DATAIR Web site. Double-click the file to begin.

You will see a welcome dialog and then a licensing dialog. 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.		
\$.*			
Ť			
	C:\My Documents\Datair\ Browse		
Help	< <u>B</u> ack <u>Next</u> > <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.

월 DATAIR Pension Syst	em 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>Next></u> <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 PE/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 PE/Win currently uses a separate Access database from those systems. Data from those systems will be merged with your PE/Win SQL database at a later date.

The overall process consists of the following steps:

- Export the data from your PE/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 🔼	BC Sample Company	SAMPLE
C Compan	y and <u>a</u> ll plans and all employee records	Find
<u> Plan dat</u>	a only, for this system only	
🔿 All Comp	panies	
Output File	C:\My Documents\Datair\PEPlan_SAMPLE.txt	Browse
	☐ Worksheet output ☐ .csv output	Show [D values
	Copy Out Status	□ ⊻iew Worksheet
		<u>O</u> k
		<u> </u>
Database:	SQL DB 'DATAIR_PE' on 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	I		
From File	C:\My Documents\Datair*.txt		<u>B</u> rowse
C Create N	Existing Plan, Create New If Not ew Plan or Company xists, <u>M</u> erge Data, Create New If Not		
<u> </u>	xisting Company or Plan Before Copying In		
		🔲 Ignore Plan and (Company Idents
	Copy In Status		k
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 older versions of SQL Express 2005, SQL Express 2008 or SQL Express 2012 to SQL Express 2014 Express. As Microsoft support for older versions of SQL Express comes to an end, it is recommended that users of those database engines upgrade to SQL Express 2014. Upgrading an existing SQL Server to a newer version may have advantages and disadvantages depending on the server's application load, free disk space, and especially available memory. Please review the requirements for SQL Express 2014 to make sure the host machine has the minimum resources. If you would like to discuss these, please call DATAIR Technical Support after you have gathered the hardware information about your server.