Client Care Desktop

4.51 Installation and Upgrade Guide

SYNAPTIC
CLIENT CARE

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Introduction

This multi-purpose guide has been created to provide;

- A high level overview of Client Care Desktop (CCD) components
- An understanding of installation types
- A Step by Step guide to installation and upgrade

Please refer to the relevant section of the guide depending on which task you are completing.

We recommend that installations and upgrades are performed by personnel who have a good understanding of your infrastructure, such as an internal or external IT department.

If you have opted for an un-assisted installation and have questions regarding this document, please contact our application support team on 0800 028 0033 before you start the process.

Please be aware that application support team can only advise you regarding the process and if you require us to perform the install, this will need to be scheduled and may incur a charge.

NB Priority will always be given to pre-booked installations and we cannot guarantee that we will have technicians available if not pre-booked.

Minimum Specification

The most recent minimum specification document can be found by clicking here or visiting www.synaptic.co.uk/support and navigating to the Synaptic Client Care downloads section.

If your system does not meet the minimum specification, please contact the application support team on 0800 028 0033 or email support@synaptic.co.uk.

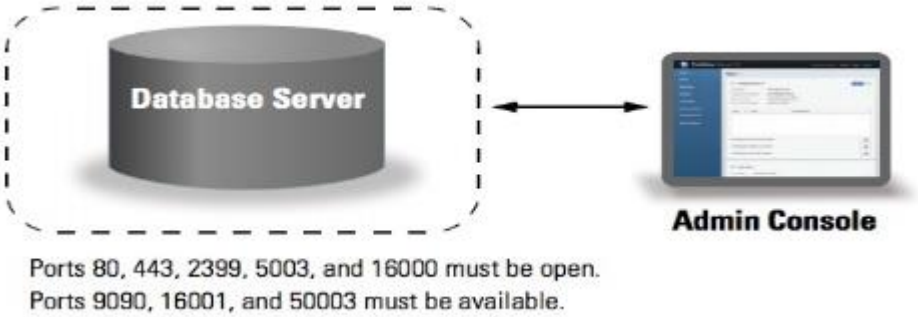
Prior to Installation

Please ensure you have;

- Read this guide fully
- Access to the installation media
- Received a new set of CCD 4.51 licences
- Determined which version of FileMaker should be installed on each of your machines
- Backed up your databases

Components

FileMaker Server



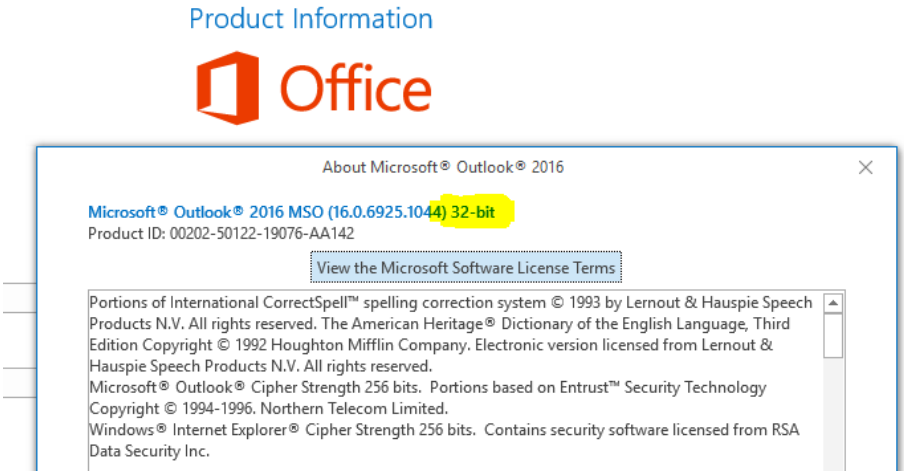
FileMaker Server is a dedicated database server that publishes FileMaker databases and makes them available over a network.

It hosts the database files that make up CCD and is used in systems where more than one person requires access to CCD.

FileMaker Pro

FileMaker Pro is the desktop client which allows you to open FileMaker databases.

FileMaker Pro comes in both 32 bit and 64 bit architectures. The version to install is dictated by the Office version you have i.e. if you have 32 bit Office then 32 bit FileMaker is required



Databases

CCD is made up of many different FileMaker databases. These databases may be hosted via FileMaker Server or reside locally on your PC.

Workstation Files

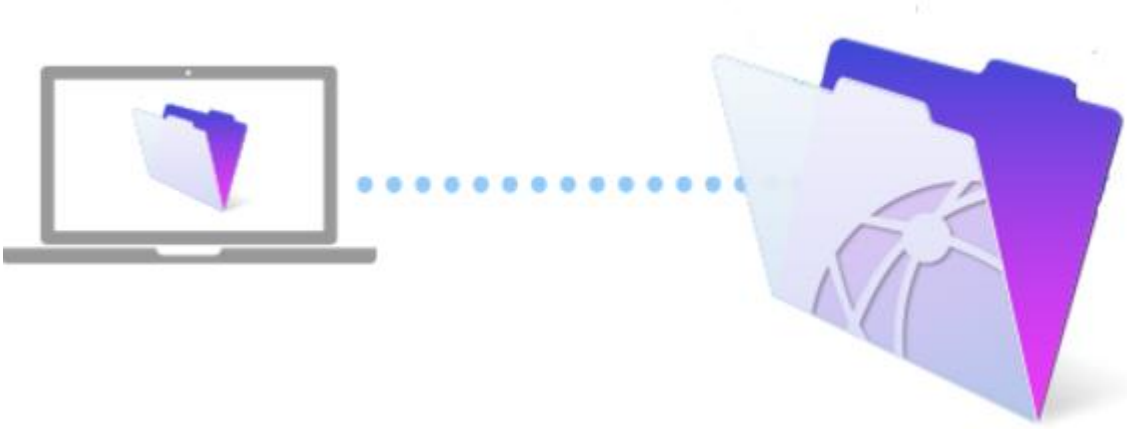
The workstation files are held in C:\Link and are required to allow CCD to interact with other software as appropriate, such as, Microsoft Word, Financial Express, Contract Enquiry etc.

Installation Types

Solo

A one user system where CCD is installed locally to a PC and can only be accessed from that PC.

Server/Workstation



FileMaker Server and CCD databases will be installed to a separate server. This will make the CCD databases available to PC's across the network with FileMaker Pro installed.

New Installs

Solo

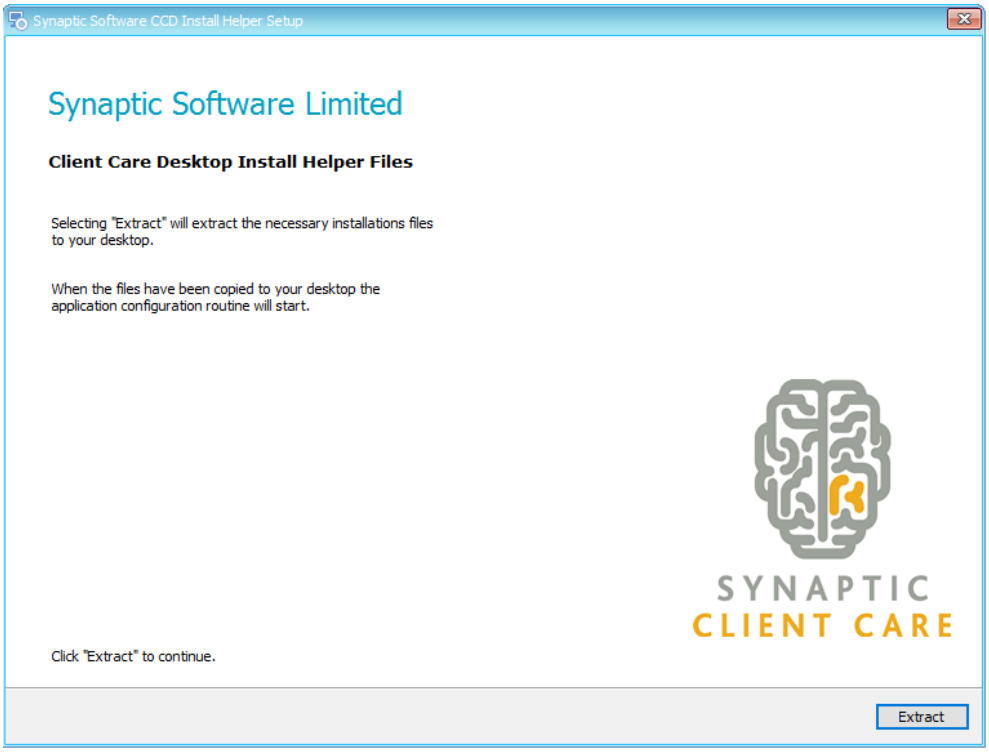
Setup Requirements

Before CCD can be installed you will need to ensure you have;

- CCD v4.51 Installation File - **SSL_CCD_InstallHelper_4.51.xxxx.exe**
- Noted the architecture of your installed Office application – 32 or 64 bit

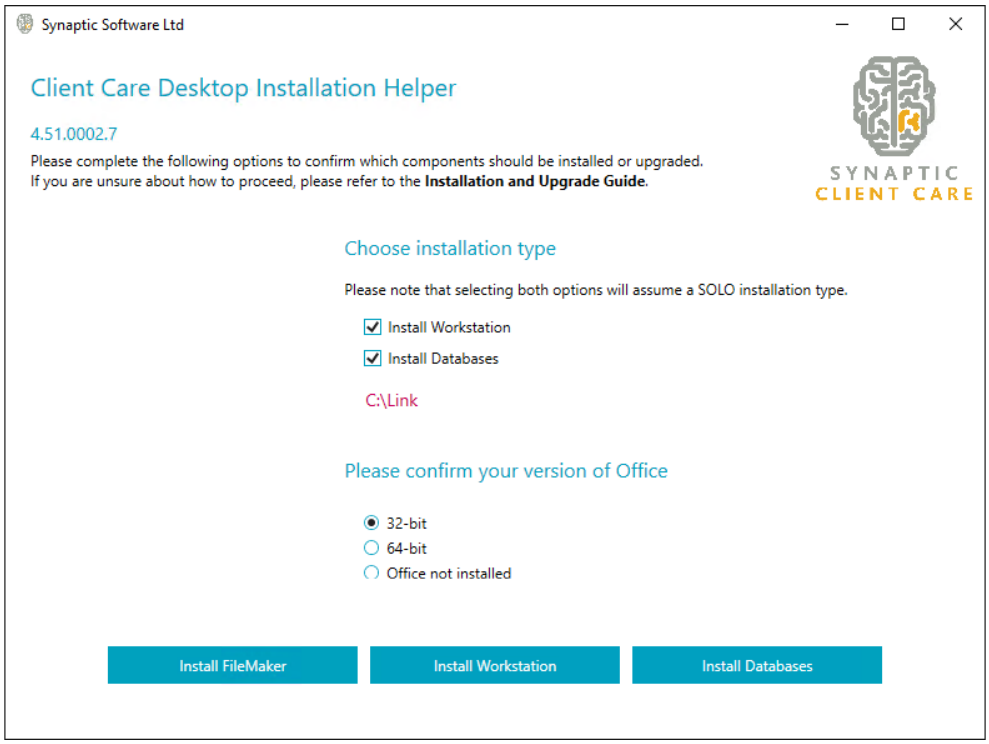
Installation Procedure

Double click the **SSL_CCD_InstallHelper_4.51.xxxx.exe** file



Click extract which will copy the installation files to your desktop and launch the installation wizard.

Due to this being a Solo install we will select both checkboxes 'Install Databases' and 'Install Workstation'



If an appropriate version of FileMaker is not installed on your machine the section entitled **'Please confirm your version of Office'** will be active**.** A selection will be required before you can progress to installing any components.

Please install each component in the following order;

1. FileMaker – if appropriate
2. Workstation
3. Databases

NB The FileMaker installer may take some time to load.

Once the installation process has finished, you should complete the setup wizard which will place a new CCD Icon on the desktop to launch the application.

Server

Obtaining CCD Databases

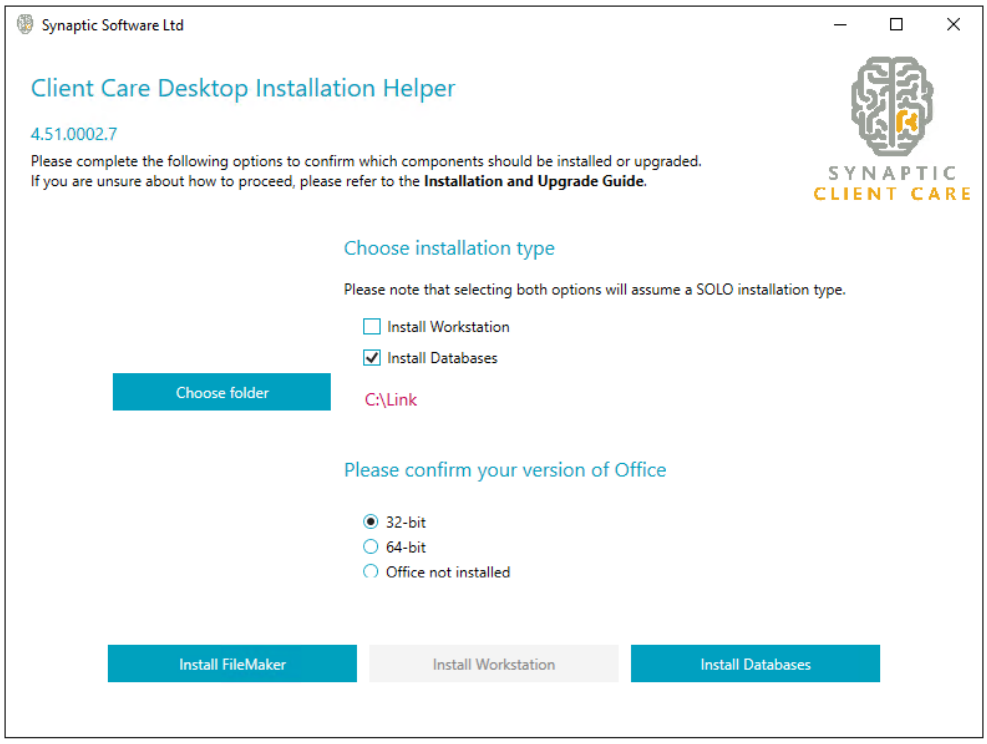
Setup Requirements

Before CCD can be installed you will need to ensure you have;

- CCD v4.51 Installation File - **SSL_CCD_InstallHelper_4.51.xxxx.exe**
- Noted the architecture of your installed Office application – 32 or 64 bit (default install 32 bit)

Create a new directory on the server to hold a clean set of CCD database files i.e. **CCD_CleanDatabases**

Double click the **SSL_CCD_InstallHelper_4.51.xxxx.exe** file



Select 'Install Databases' and choose the location of your new directory to install them to.

If an appropriate version of FileMaker is not installed on your machine the section entitled **'Please confirm your version of Office'** will be active**.** A selection will be required before you can progress to installing any components.

Please install each component in the following order;

1. FileMaker – if appropriate
2. Databases

NB The FileMaker installer may take some time to load.

Installing FileMaker Server 14

FileMaker Server 14 - Getting Started Guide

Setup Requirements

Before FileMaker Server can be installed you will need to ensure you have;

- FileMaker Server Installation File - **fms_14.0.x.xxx.exe**
- FileMaker Server Licence information
- Microsoft Application Request Routing 3.0

During installation, FileMaker Server will connect to the Internet and install Microsoft Application Request Routing (ARR) if ARR is not already installed on the machine.

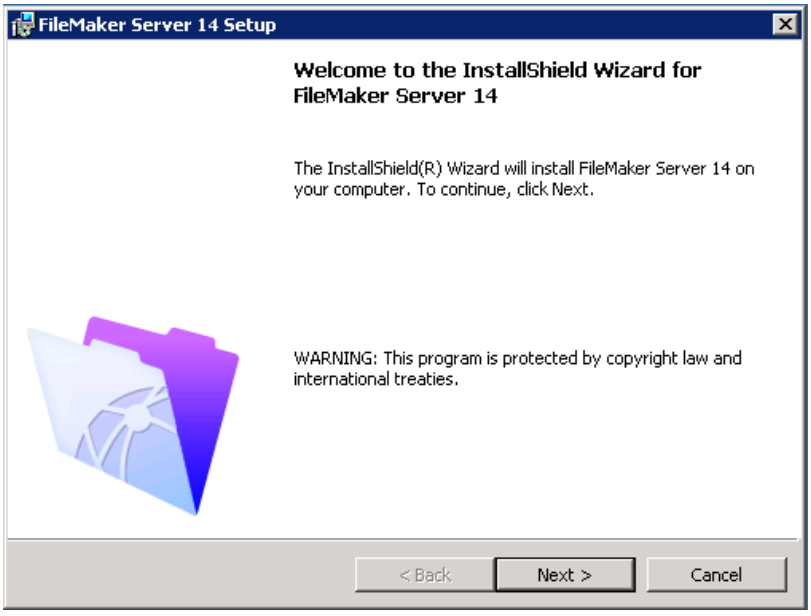
If you are installing FileMaker Server without an Internet connection, you have to manually download and install ARR following procedures in the following article;

Manually Installing Application Request Routing

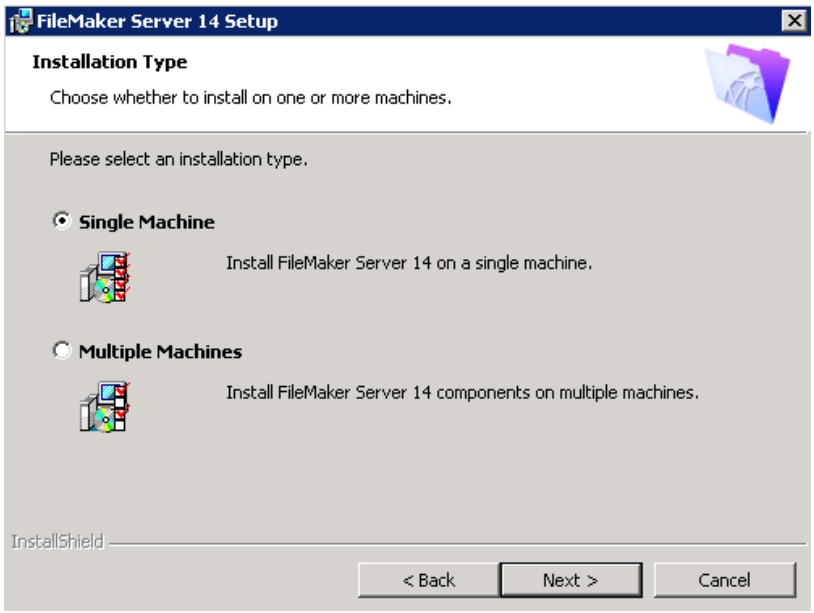
Installation

If you are not in possession of the installation medium and licence code, please contact the application support team.

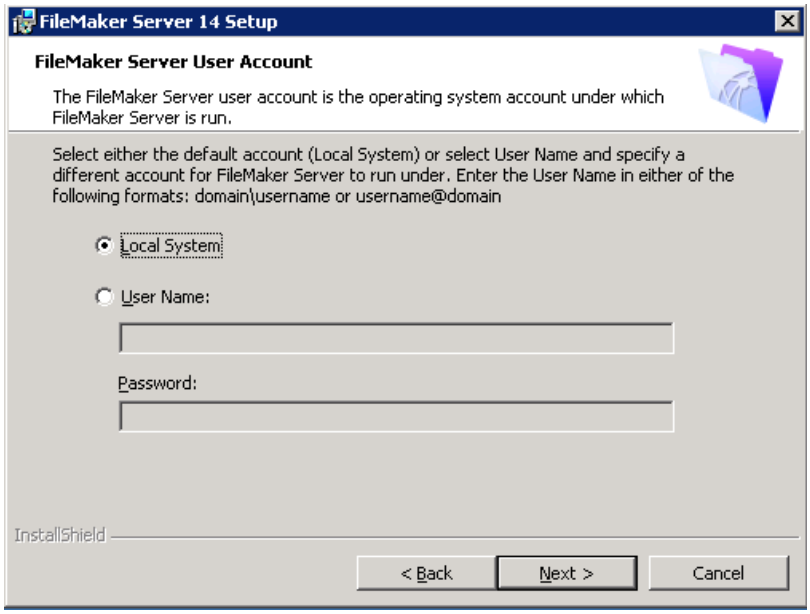
Double click the **fms_14.0.x.xxx.exe** file



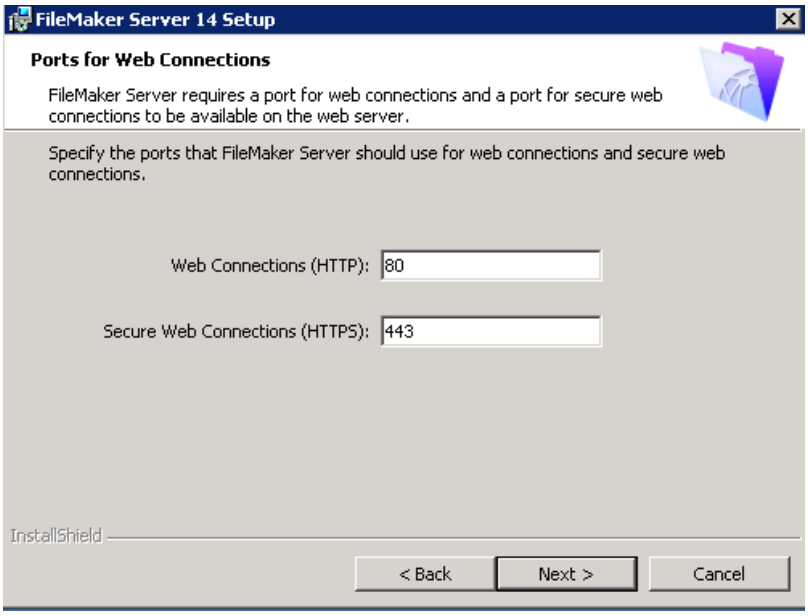
Follow the on-screen dialogs selecting a Single Machine installation (we will not be enabling any Web components).



Choose Local System Account

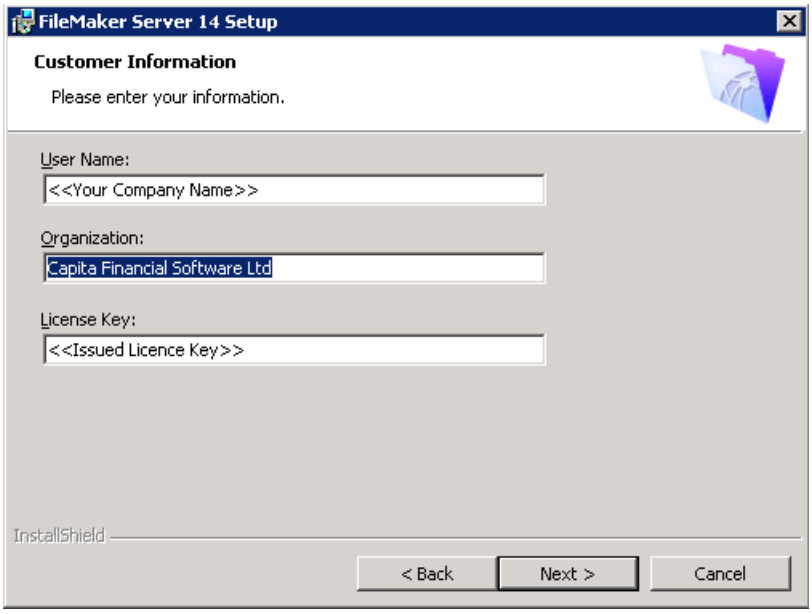


If the default ports for Web Connections are not available, please assign new ports

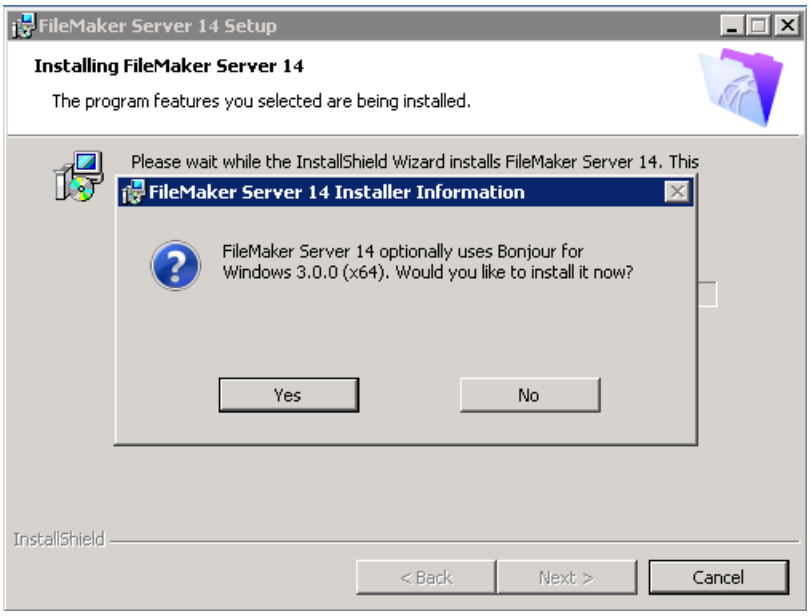


Enter Licence details supplied

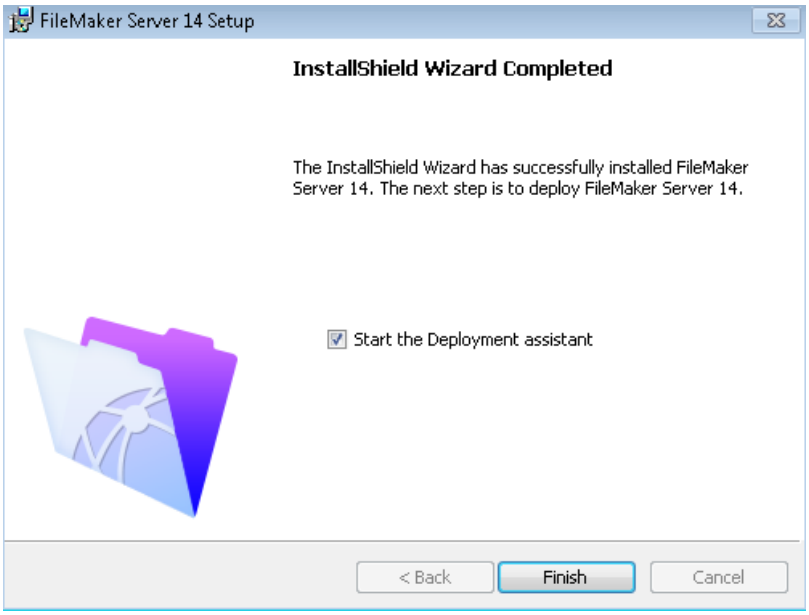
NB Organisation should be set to **Capita Financial Software Ltd**



Bonjour is not required – Please select **No**



Start the Deployment Assistant



The first stage of the deployment assistant asks you to set user credentials.

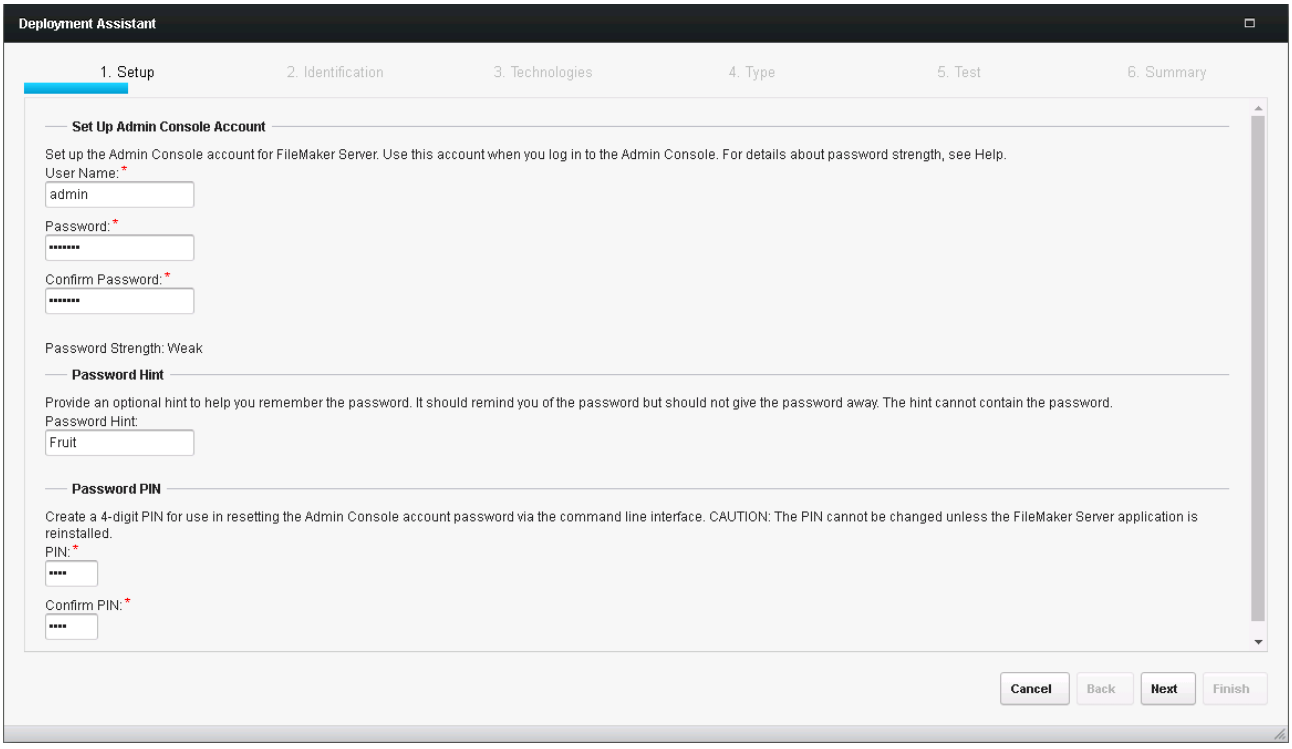
Please ensure you safeguard the user credentials entered below as these will be needed by the application support team if assistance is required in future. If these details are not available it will require a new installation FileMaker which may be chargeable.

Please email support@synaptic.co.uk with the following information

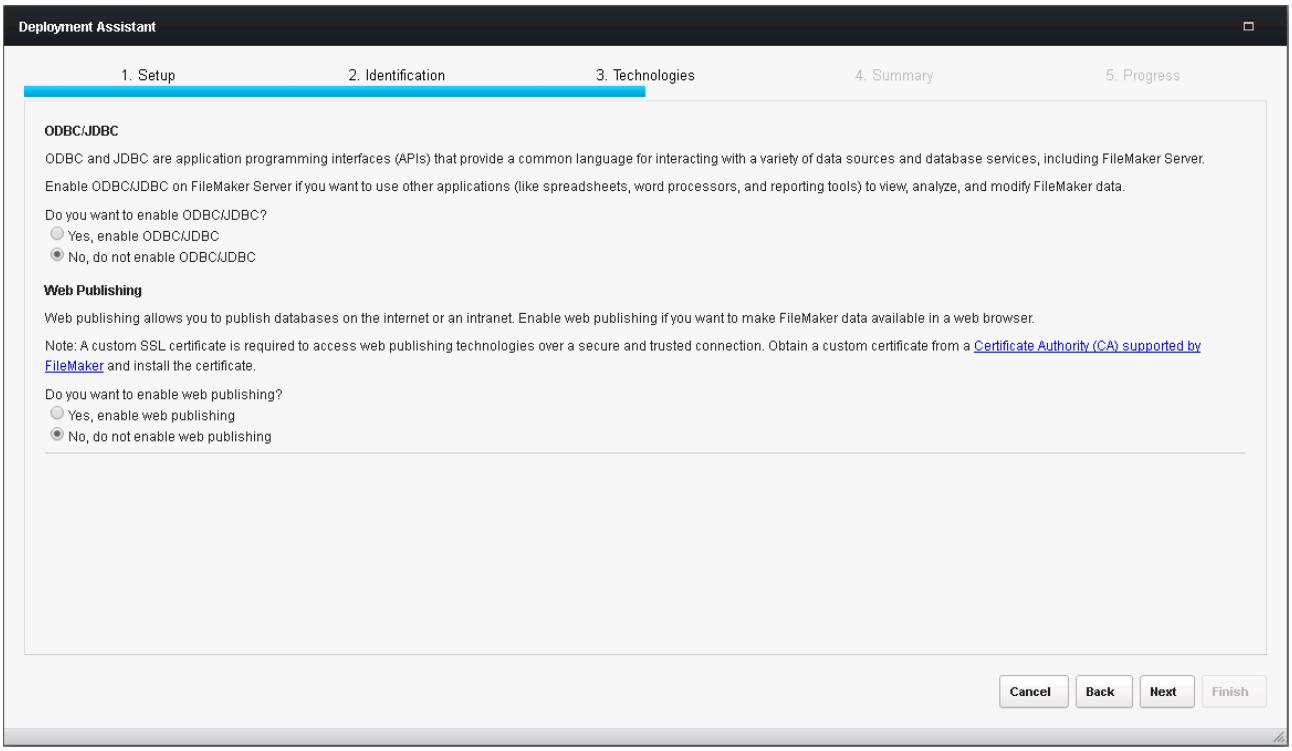
Company Name:
User Name:
Password:
Password PIN:

NB If Synaptic install the software for you we will record this data on our system and provide yourselves with a copy.

Our support response times may be impacted if this information is not readily available upon request.



Click next until you reach screen 3 ‘Technologies’.



Select 'No' to ODBC and 'No' to Web Publishing

Click 'Next' until the Admin Console is displayed.

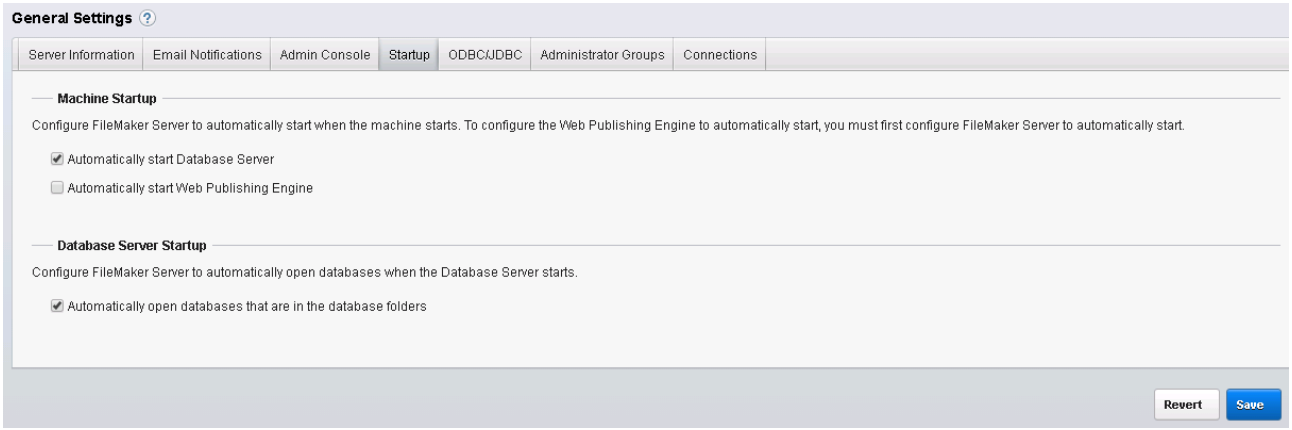
Go to **General Settings** to complete the following tabs in this section (others can be left at default)

Server Information tab

Check the server name and amend as necessary

Startup tab

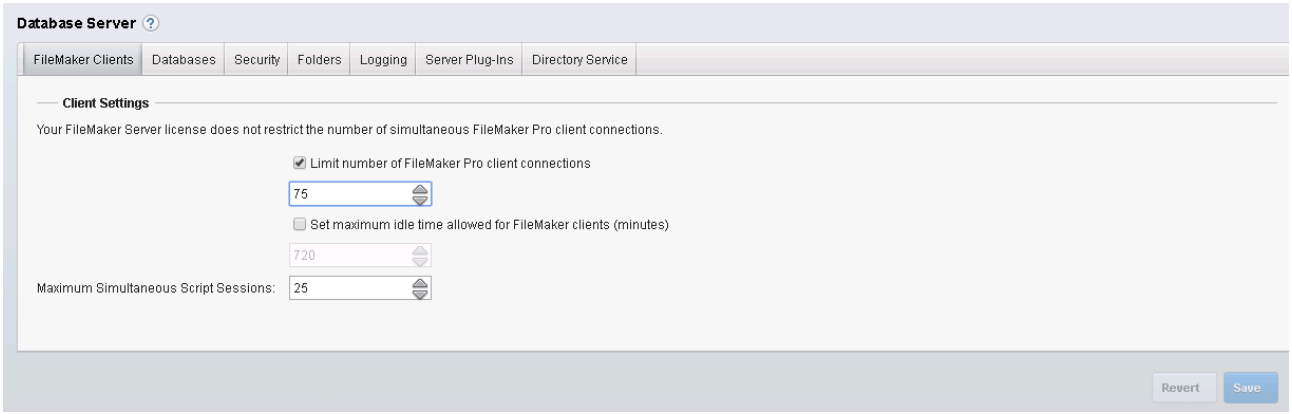
De-select 'Automatically start Web Publishing Engine'



Go to **Database Server** to complete the following tabs in this section (others can be left at default)

FileMaker Clients tab

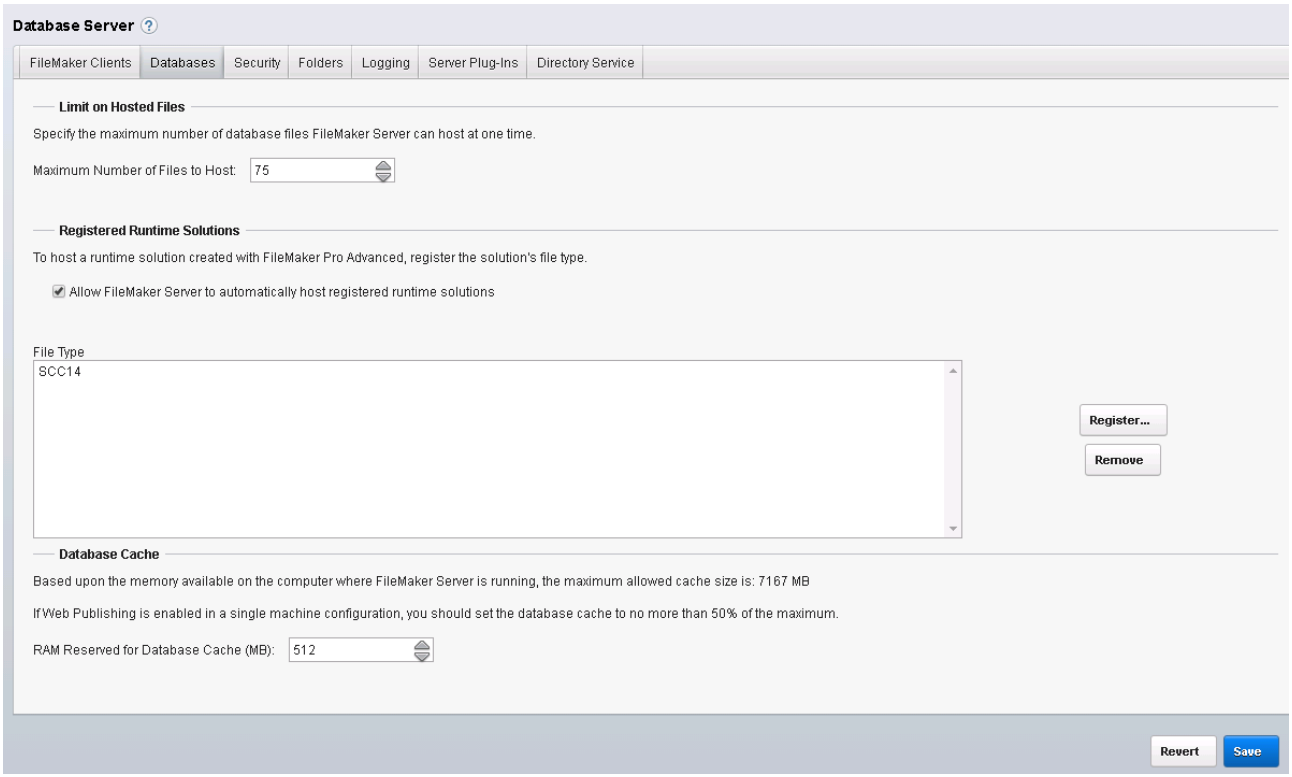
Limit number of FileMaker Pro client connections to an amount in line with the number of CCD licences required.



Databases tab

Set Maximum Number of Files to Host at **75**

Click Register and enter **'SCC14'**



Database cache should not be set to maximum capacity. If poor performance is suspected we can review this setting in line with FileMaker Server performance statistics.

Folders tab

Take a note of the default folder path and Backup location

If you need to change these locations please refer to the FileMaker **'Getting Started Guide'.**

FileMaker Server 14 - Getting Started Guide

Schedules

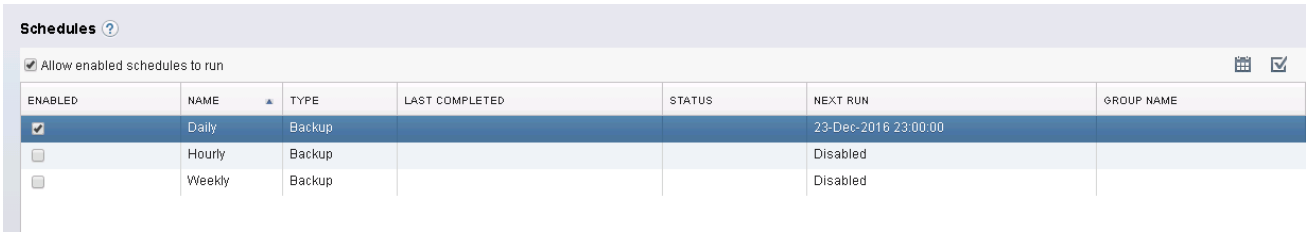
Go to **Schedules** to review the backup schedule for your databases.

FileMaker Server runs as a Windows Service and as such the databases are held open by this service to be accessible across the network.

FileMaker Server has a default backup schedule which should be reviewed for suitability.

The default schedule will;

- Run every day at 23:00
- Keep them for seven days



These backups are stored on the file system in the backup location you noted under the **Database Server > Folders** Tab

Backup software used to create off-site backups should copy the backed up databases from this schedule. Please do not configure other backup software to point at the 'Live' database files.

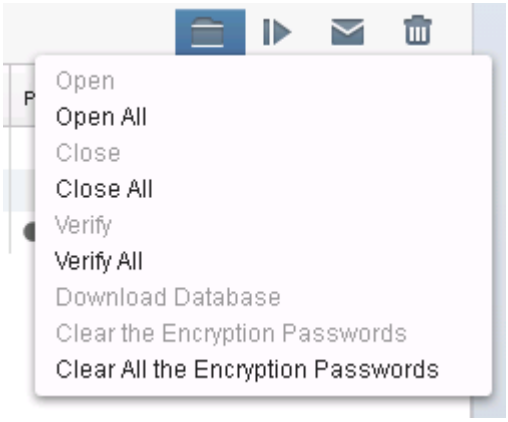
Backup procedures should be tailored to suit your business. FileMaker Server offers additional backup options which we would be happy to discuss with you.

Hosting the CCD Databases

Navigate to the **Activity** section.

Select the Folder icon on the right hand side and select 'Close All'

This ensures all databases are released by the FileMaker Server service.

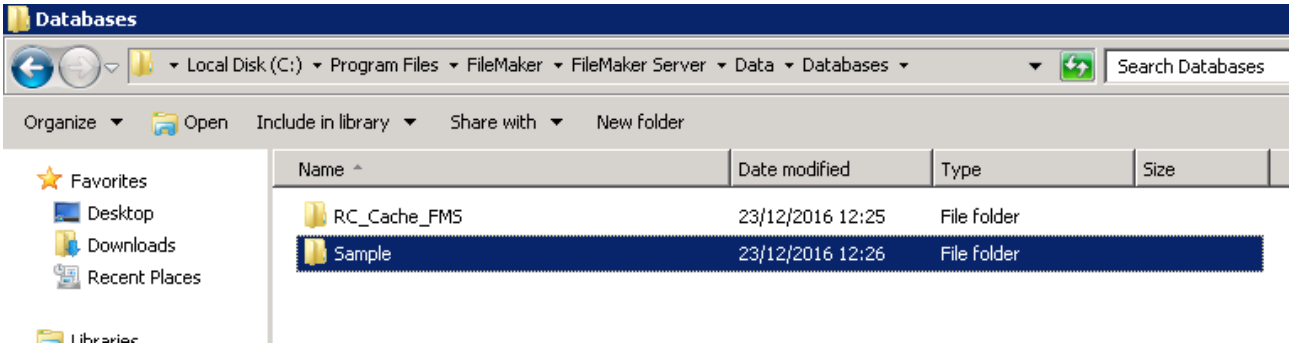


Open **Explorer** and navigate to the default database folder

Remove the **Sample** folder

Create a new folder called **CCD**

Copy the *.scc14 files created in the **Obtaining CCD Databases** section into this new folder.



Back in **FileMaker Server** select the **Folder** icon again and select 'Open All'

You should now see the CCD files listed in the CCD folder.

The server configuration is now complete.

Workstation

Setup Requirements

Before CCD can be installed you will need to ensure you have;

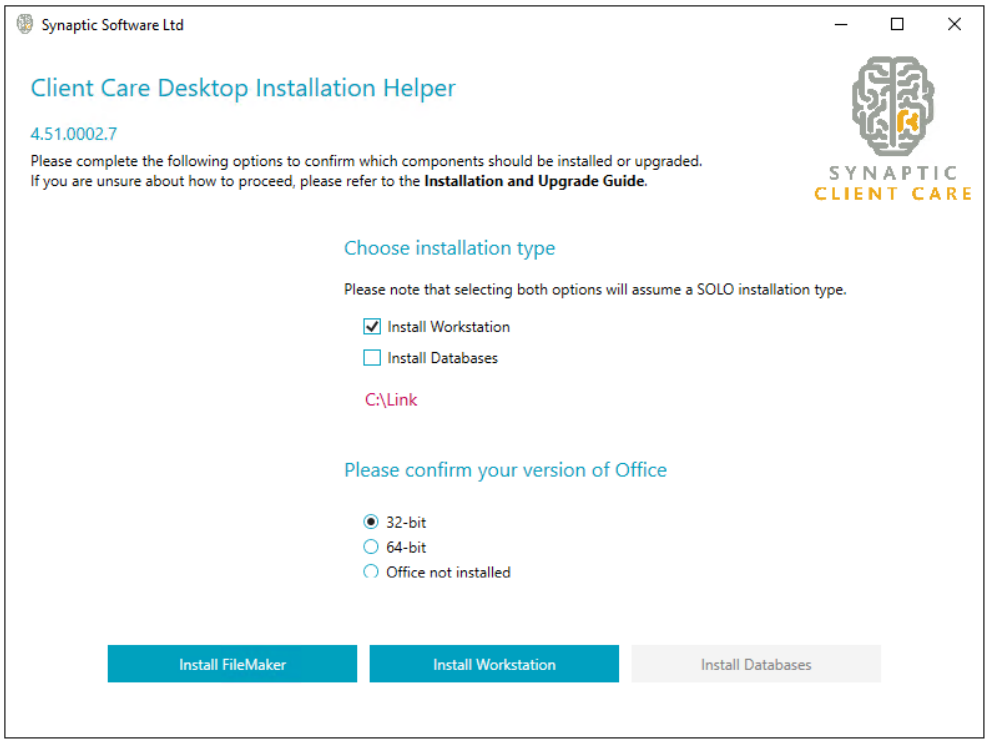
- CCD v4.51 Installation File - **SSL_CCD_InstallHelper_4.51.xxxx.exe**
- Noted the architecture of your installed Office application – 32 or 64 bit

Installation Procedure

Double click the **SSL_CCD_InstallHelper_4.51.xxxx.exe** file

Click extract which will copy the installation files to your desktop and launch the installation wizard.

This will then allow you to select the installation type you require, in this case we would select 'Install Workstation'.



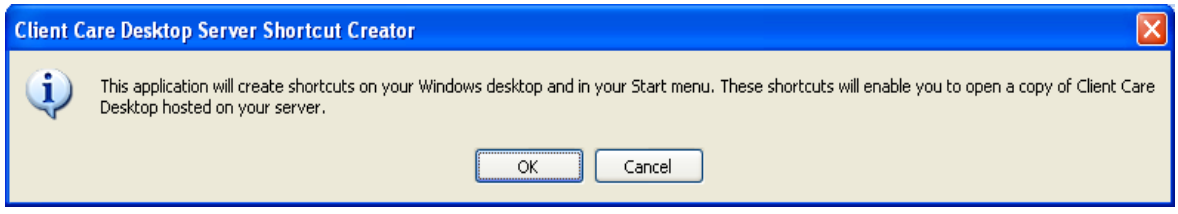
If an appropriate version of FileMaker is not installed on your machine the section entitled **'Please confirm your version of Office'** will be active**.** A selection will be required before you can progress to installing any components.

Please install each component in the following order;

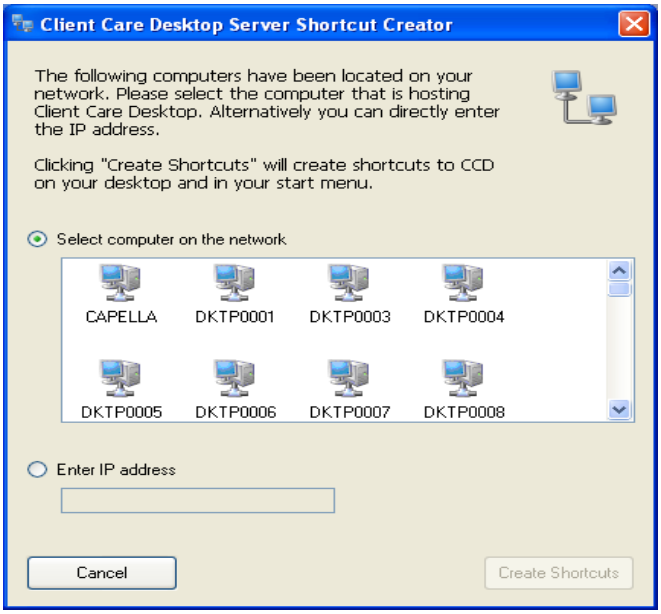
1. FileMaker – if appropriate
2. Workstation

NB The FileMaker installer may take some time to load.

Once this is complete you will be asked to create a desktop shortcut (please note you must be logged on with administrator privileges to create the shortcut. Click 'OK'



To create a shortcut, select the server on which the databases are stored.



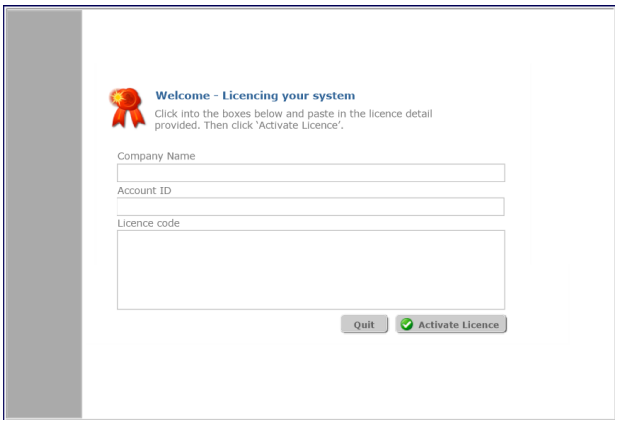
Once you have selected the machine Click on 'Create Shortcuts', then click 'OK'

This will complete the installation and place an icon on the desktop to connect to the hosted databases on the server.

Initial Setup

Licenses

The first time you launch CCD v4.51, you will be asked to licence your software. Here you will need to enter your licence codes. Your licences will have been sent to you via email. Please contact our application support team on 0800 028 0033 if you do not have a new set of licences.



Enter the details and select 'Activate Licence'

If this is a brand new system it will ask you to enter a User Name and Password but since you have not created an account to log on with yet, use;

User Name: superuser
Password: letmein

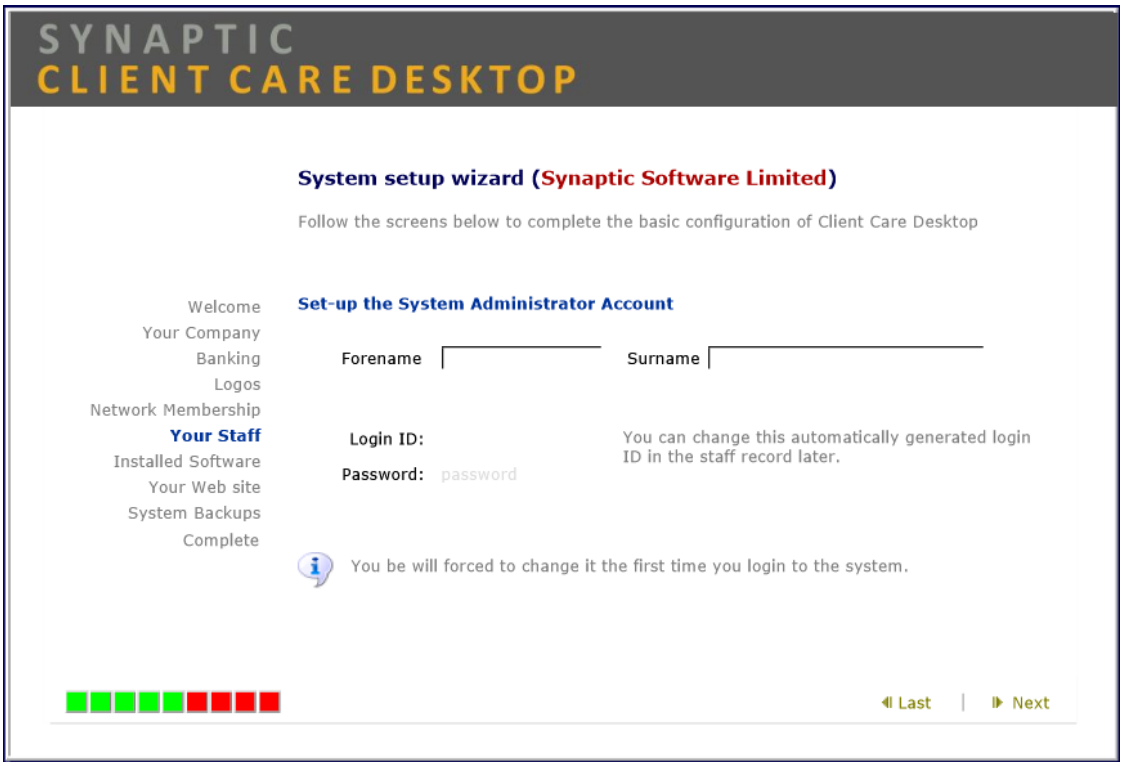
System Setup Wizard

Once the system has finished loading you will be taken to the System setup wizard. You will need to go through each section filling in the required details.

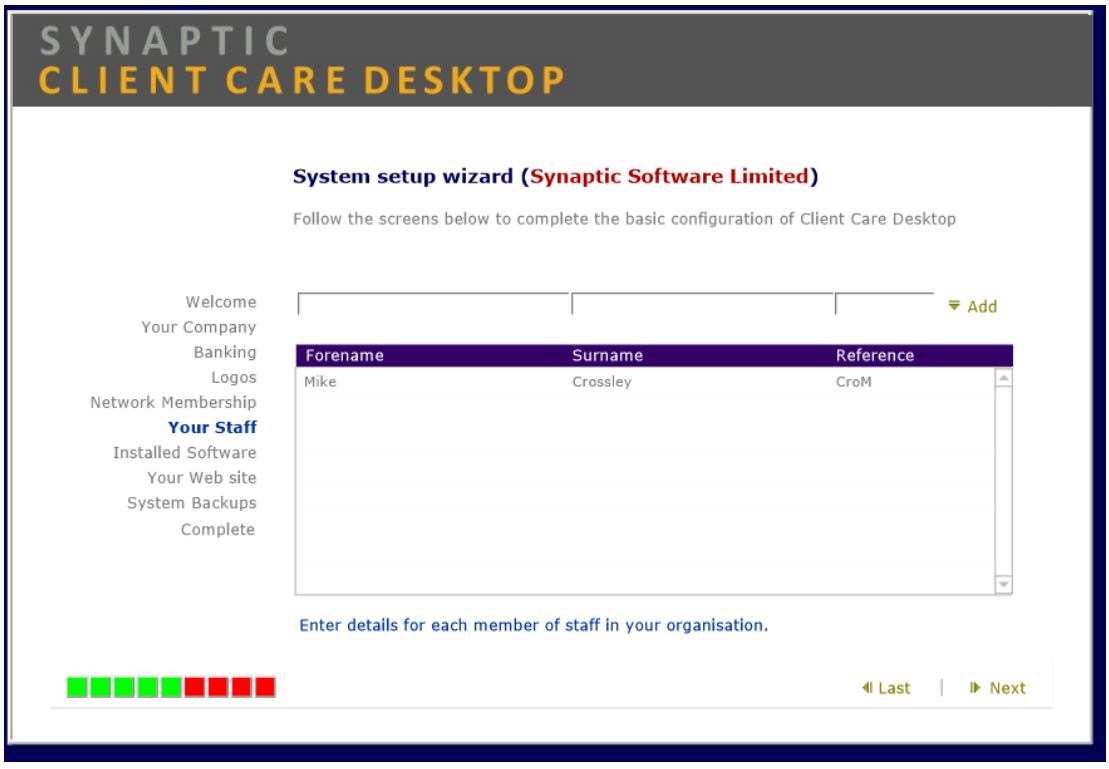
When you reach 'Your Staff' you will need to enter details for your users. At this point, you can opt to set up all users or just the main user. You can add the remaining staff when you first log into CCD to complete the setup and configure your system.

Enter the main user under the heading 'Set-up the System Administrator Account' and make a note of their details.

The 'Login ID' should be unique for each user on the system.

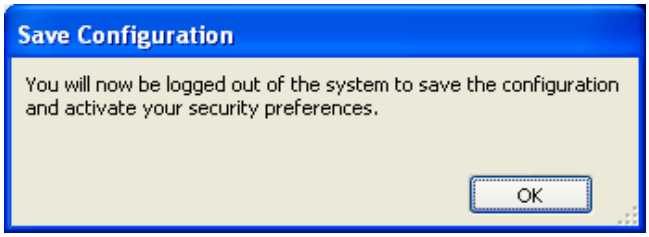


From here click on 'Next' and you will be able to add other staff members into the system

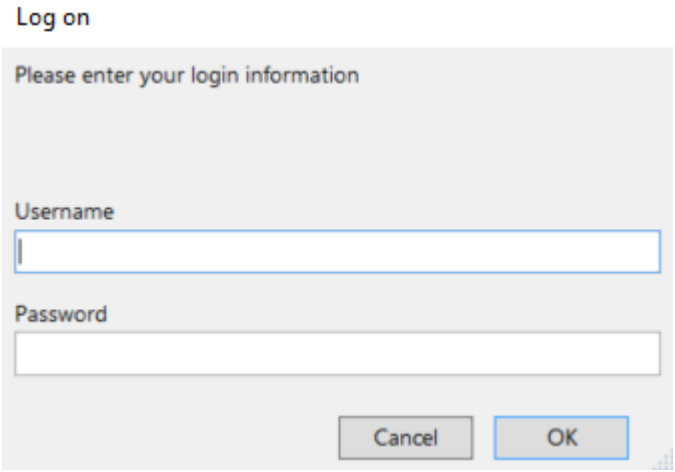


Once you have finished entering your staff members continue to go through each page until you have completed the System setup wizard.

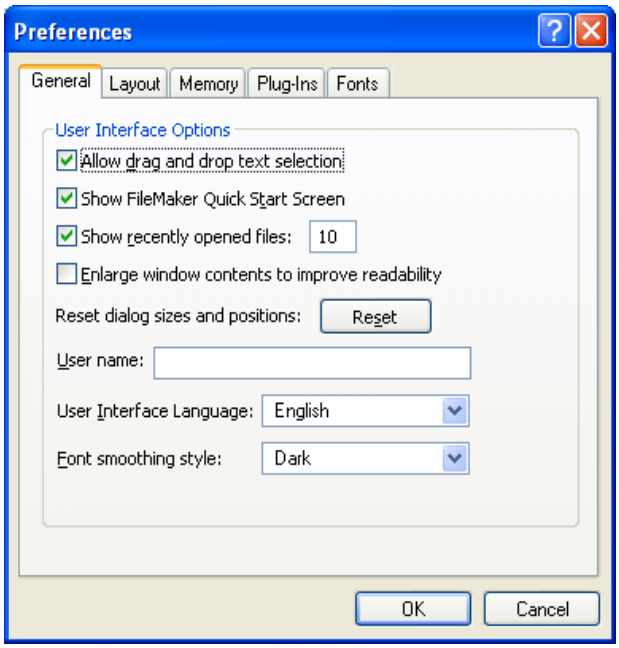
Upon clicking 'Finish' the following message will be displayed.



Clicking "OK" will log you out and take you to the login screen. Now enter the 'Login ID' that you created for the staff member in the Username field and Password. By default, all user passwords are initially set to 'password' as you will be prompted to change this.



You will be asked to set this as your User Name. Click 'OK' which will take you to the following screen where you can enter the Login ID into the 'User name' field.



Upon clicking 'OK' you will be asked to change your password. Once you have changed your password you will be logged into the system for the first time and taken to the Main Menu.

Setting the territory

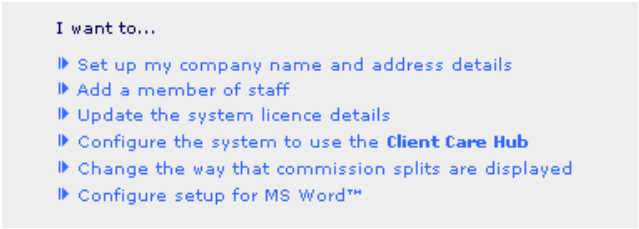
Once you have completed the installation you will need to open one of the CCD Workstations. From the Main Menu select 'Setup' then select 'Technical > Regional > Territory' to confirm you are in the correct Territory.

If you are unsure which Territory you need to select, please call the application support team on 0800 028 0033 for further advice.

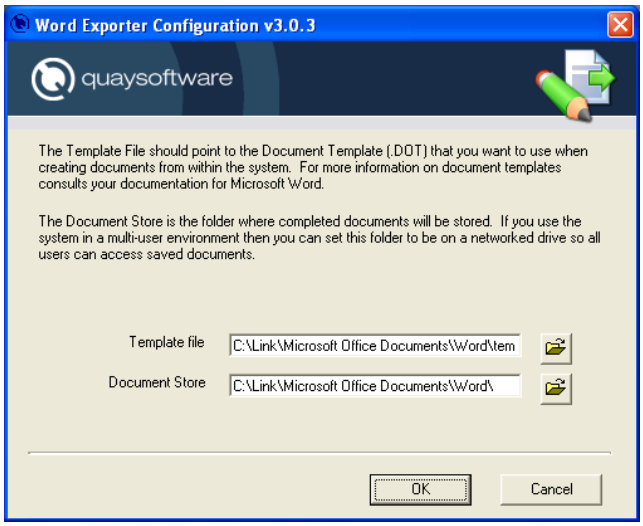
Setting up Word store

Enter 'Setup' from the main menu.

Once in the Setup menu there will be a set of Blue links, select 'Configure setup for MS Word'.



This will launch the 'Word Exporter Configuration' where you can change the location for the 'Template file' and the 'Document Store' if you need to.

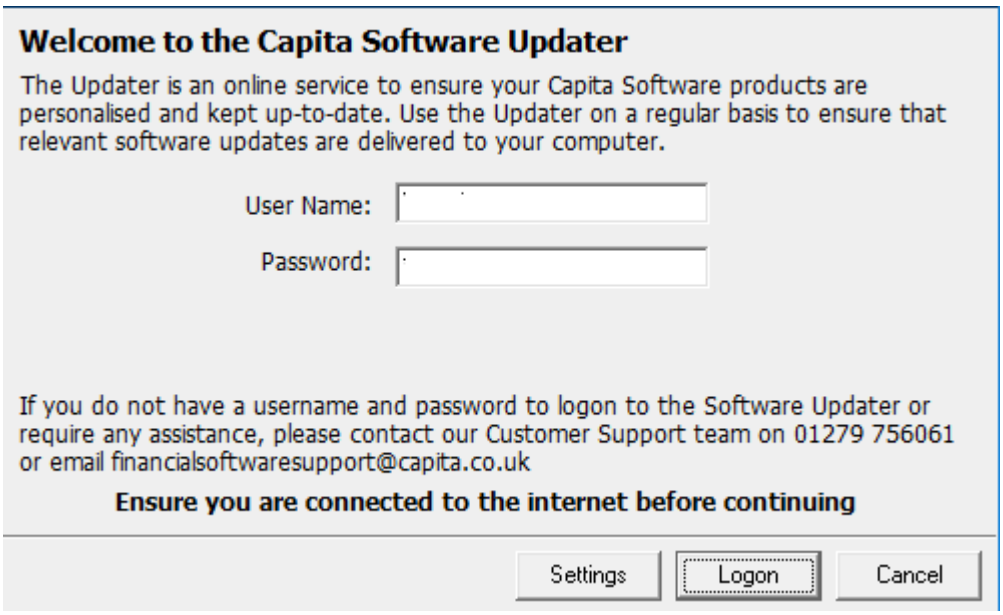


Software Updater

The Software updater helps keep the local components required for CCD up to date.

To run the updater you will need to go to 'Updates' from the main menu and select the first option in the blue links to 'Update components of the Client Care Desktop to the latest versions'.

This will display a User Name and Password field. If you do not have these details, please contact the application support team on 0800 028 0033.



You should be subscribed to the following packages;

- 4.50 Providers (system admins only)
- 4.51 Standard

Please contact the application support team if this is not the case.

If there are files to be updated and you are in the correct groups click 'Update Now!'.

Once the update has completed, click 'Exit'.

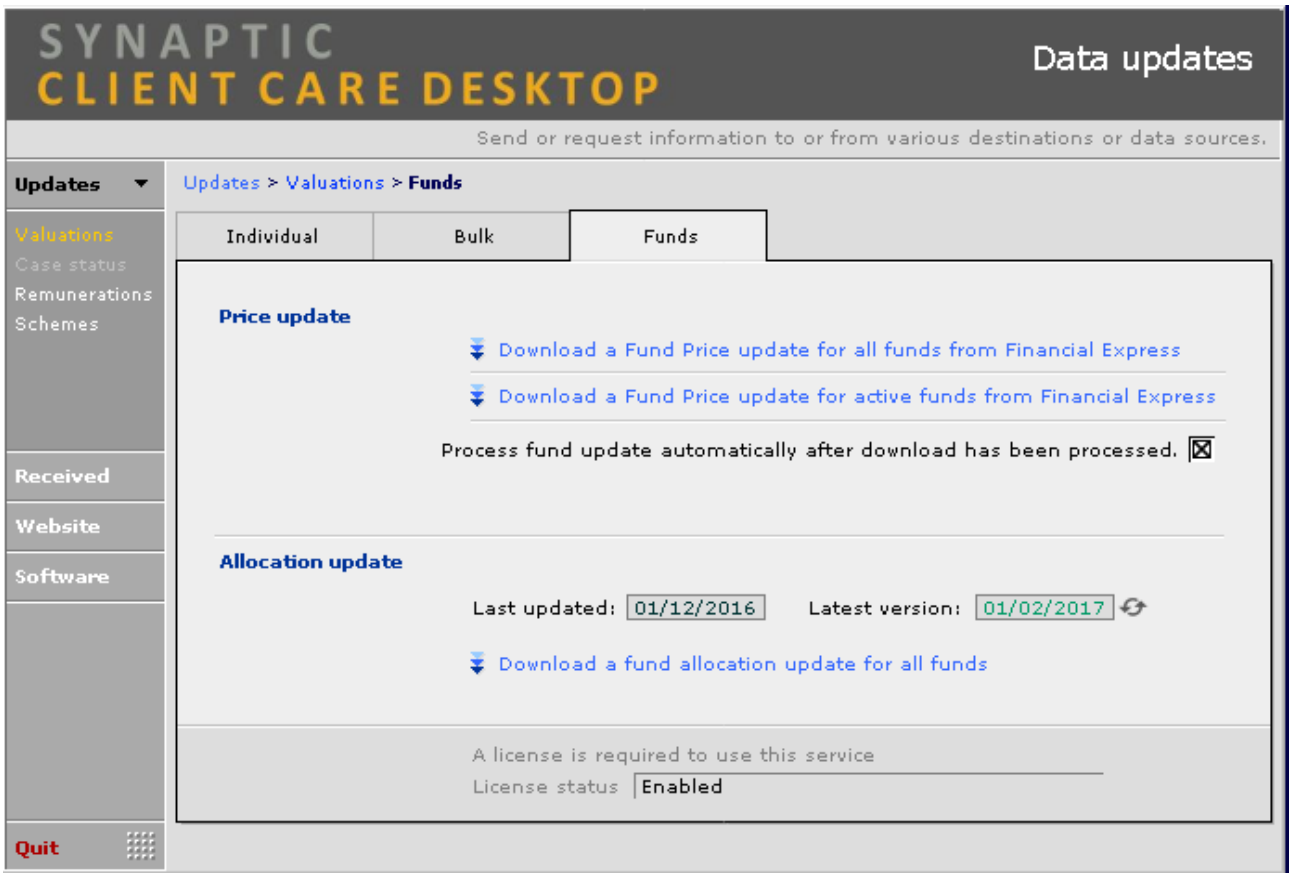
Financial Express Download

The fund prices in CCD are updated via a download from Financial Express. This download should be run as part of your installation to populate the latest funds in your system.

To run the price update you will need to go to 'Updates' from the main menu and select the third option in the list 'Download a Price update from Financial Express'.

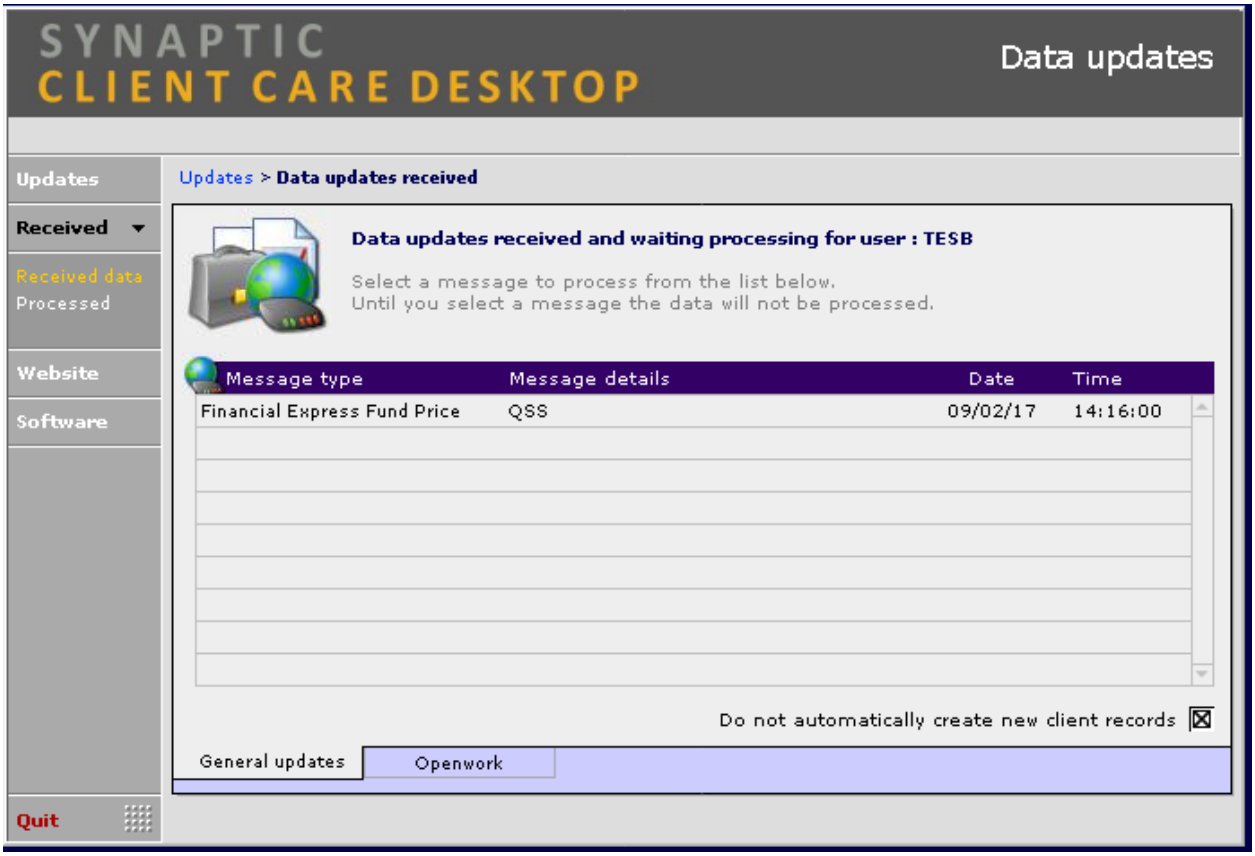
SYNAPTIC
CLIENT CARE DESKTOP
Data updates
Updates
Updates
Valuations
Case status
Remunerations
Schemes
Received
Website
Software
Quit
Updates
Data Update Manager
Send or request information electronically between data sources such as Product Providers and your website.
I want to...
Update components of the Client Care Desktop to the latest versions
Update my website with current client holding and valuation data
Download a Price update from Financial Express
Obtain bulk data to update / create client and holdings records
Obtain up to date valuations for the contracts due to be reviewed today
Import / batch update scheme membership

A full update is needed so select the first option 'Download a Fund Price update for all funds from Financial Express'.



Once downloaded, a message will pop up in the bottom right hand corner of the screen.

Navigate to ‘Updates’ and ‘Received’ and click on the message to begin the update.



NB This may take up some time to complete.

Upgrades

Before proceeding with an upgrade, we advise you to take a manual backup of your database files.

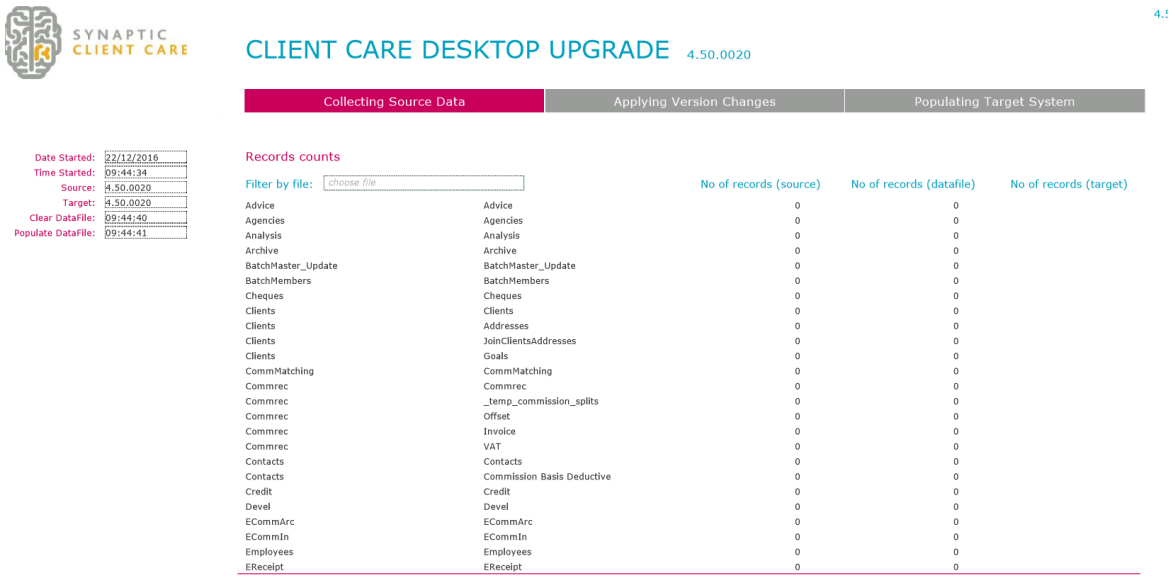
Please refer to Setting up Word store to take a note of the Template and Document Store locations as these will need to be re-entered on each PC post upgrade. Alternatively, type '**C:\Link\LnkPrint.exe Config**' into the run command to see the dialog.

Solo

Follow the installation steps for new installs Solo.

The installer will detect if a Solo version of CCD is installed and will replace the necessary components prior to launching the data migration routine seen below.

During the upgrade, the summary screen below will be displayed to show record counts between the source and target system.



Once the upgrade has completed, the upgrade report will be saved on the desktop as a PDF. This will show record counts in the original tables, the data file and the target tables. If these record counts do not match, they will be highlighted in red.

The following tables will either match or increase in the target tables;

File	Table
Clients	Addresses
Clients	JoinClientsAddresses
Insurer	Insurer
Manager	Manager
Manager	Licencing
Preferences	Cabinets
Preferences	InvuIntegration
Preferences	Sections
Preferences	valueListMembers

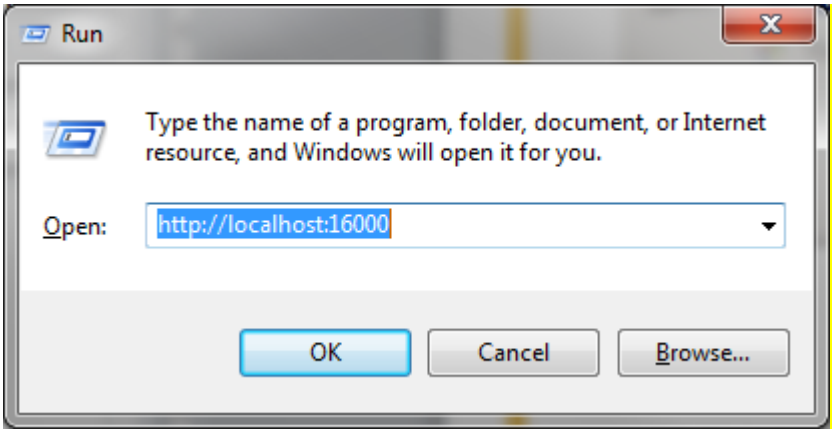
This routine will not uninstall FileMaker 11 which should be removed manually using the Add/Remove programs procedure applicable to the operating system.

Server

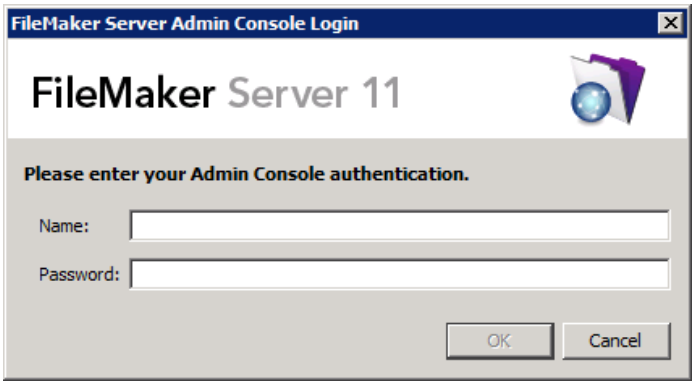
Preparing to Upgrade the Database

Before you start the upgrade you should ask all users to log out of the system then stop the current CCD data from being hosted out. To do this you will need to load the FileMaker Server Admin Console.

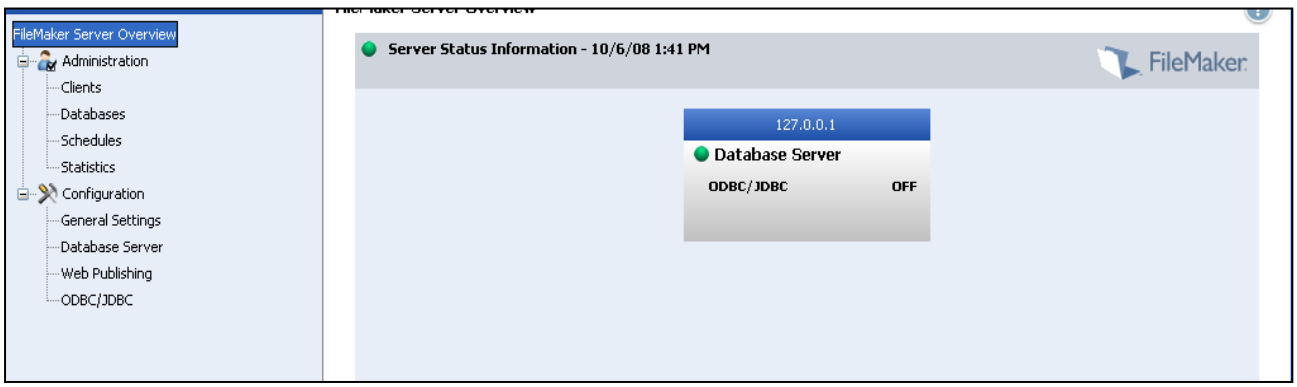
To access the FileMaker Server Console go to 'Start > Run' Type Http://localhost:16000 on the server.



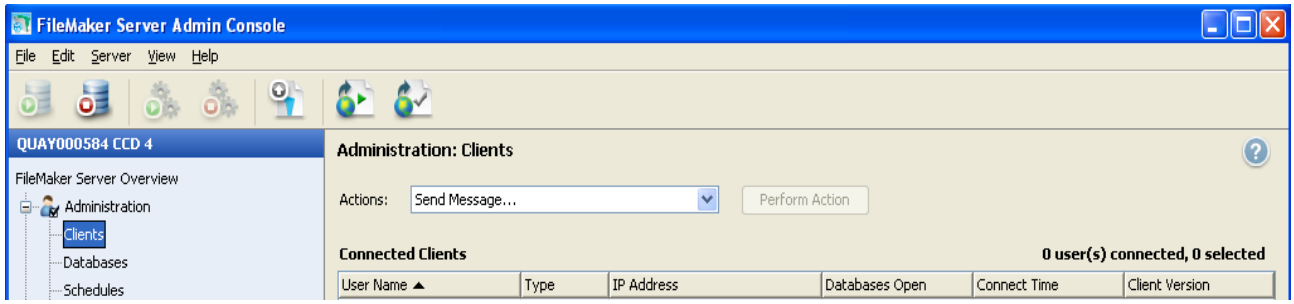
Enter the logon details – typically Name: 'Admin' and Password: 'june256'



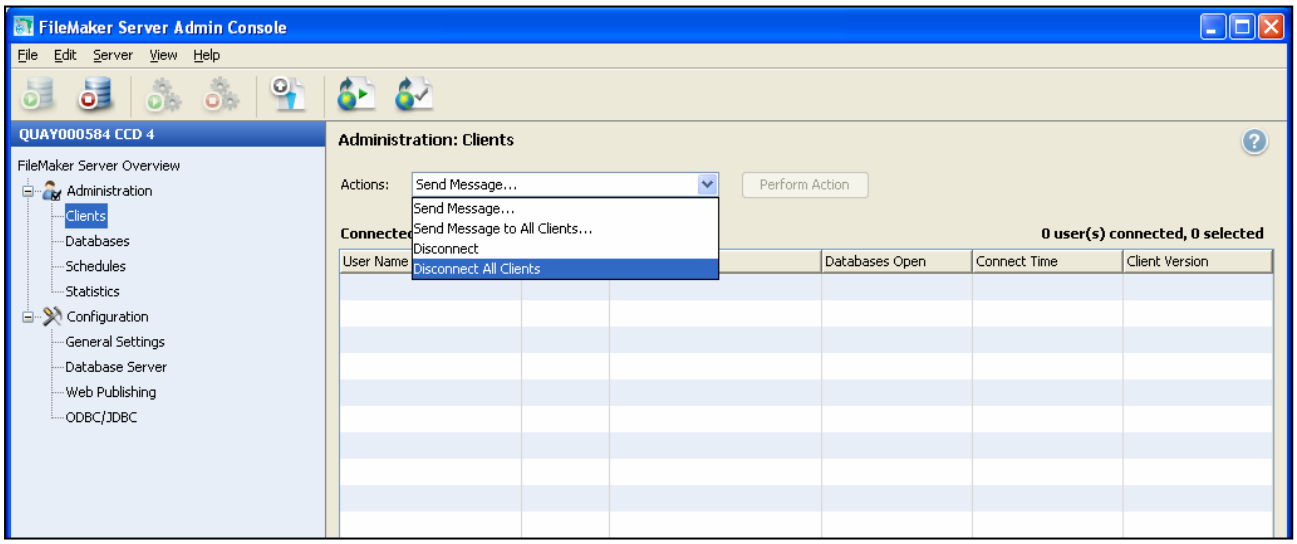
Once the FileMaker Server Admin Console has loaded, you will need to go to the 'Clients' option on the left hand side under 'Administration'.



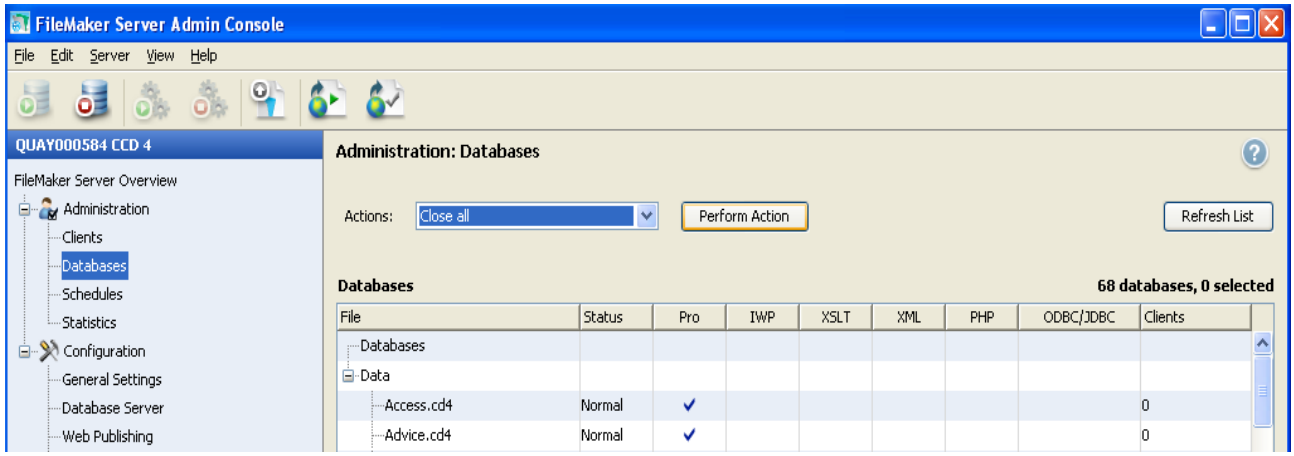
Here you can see all the users currently logged into the system and disconnect them should anyone still be logged in.



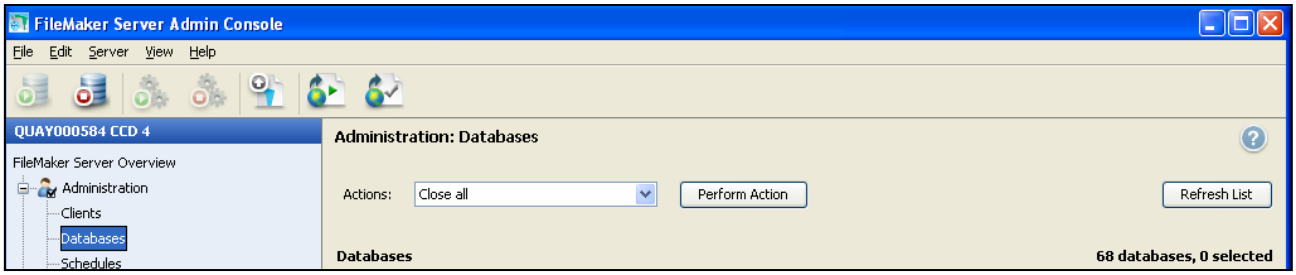
If you need to disconnect any users from the system you would need to click on the 'Actions' dropdown menu and select 'Disconnect All Clients' and then click 'Perform Action'.



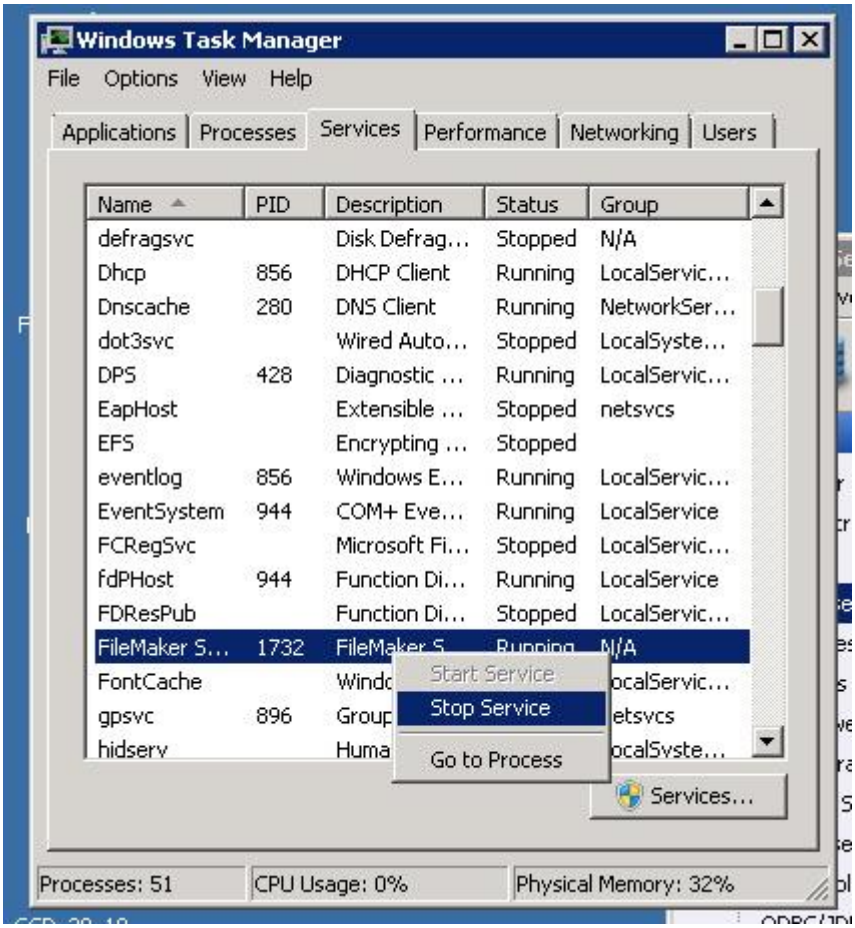
Now that all the users have been disconnected from the system you can stop hosting the databases so it can be backed up. To stop hosting the databases, go to the left hand menu and select 'Databases' from the 'Administration' menu this will take you to 'Administration: Databases' screen



To close the databases you will need to click the ‘Actions’ dropdown menu and select ‘Close all’, click ’Perform Action’



Now stop the **FileMaker Server** service under Services tab in Task Manager.



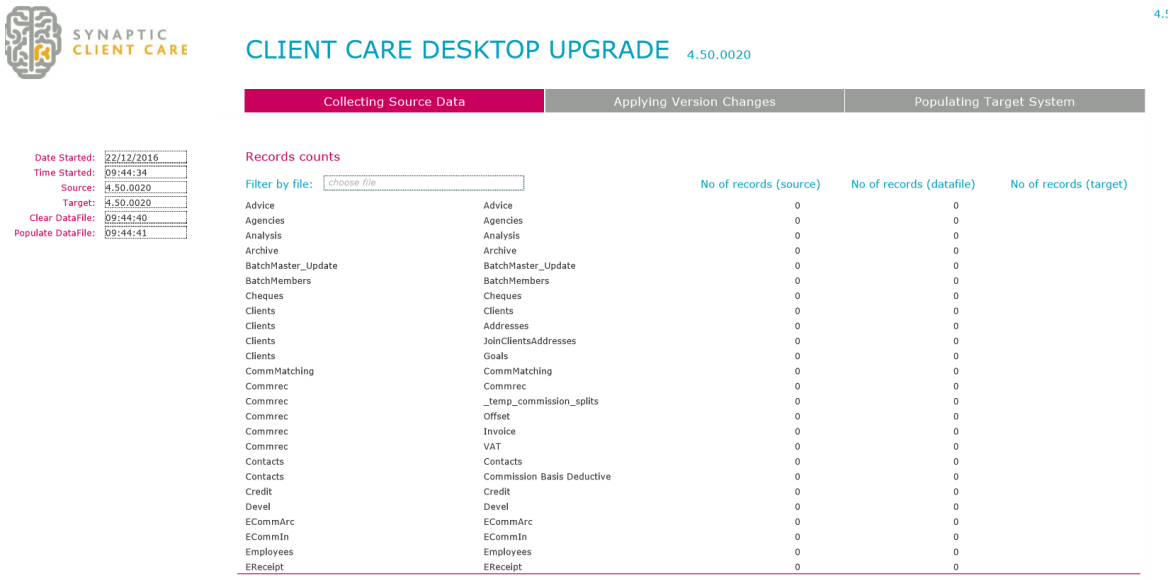
Upgrading the Database Files

Create a directory on your desktop called 'CCDUpgrade'. Move the database files from the Live directory into this folder.

Follow the installation steps for new installs Obtaining CCD Databases

Point the installer to the databases to be upgraded within the 'CCDUpgrade' directory. The installer will detect if the directory already contains CCD files and will update the files and launch the data migration process.

During the upgrade, the summary screen below will be displayed to show record counts between the source and target system.



Once the upgrade has completed, the upgrade report will be saved on the desktop as a PDF. This will show record counts in the original tables, the data file and the target tables. If these record counts do not match, they will be highlighted in red.

The following tables will either match or increase in the target tables;

File	Table
Clients	Addresses
Clients	JoinClientsAddresses
Insurer	Insurer
Manager	Manager
Manager	Licencing
Preferences	Cabinets
Preferences	InvuIntegration
Preferences	Sections
Preferences	valueListMembers

This routine will not uninstall FileMaker 11 which should be removed manually using the Add/Remove programs procedure applicable to the operating system.This routine will not uninstall FileMaker Server 9, 10 or 11 which should be removed manually using the Add/Remove programs procedure applicable to the operating system.

Once uninstalled we are now ready to install the new **FileMaker Server 14**.

Installing FileMaker Server 14

Once installed, instead of copying blank CCD databases into the FileMaker Server CCD directory, move your upgraded databases held in the 'CCDUpgrade' directory into this folder.

Upgrading the Workstation files

You will now need to upgrade the Workstations to ensure full compatibility with the upgraded databases. The installer will automatically upgrade the local components, but before running the installer please ensure you take a note of the local Word repository settings as these will need to be re-entered post upgrade.

Type '**C:\Link\LnkPrint.exe Config**' into the run command on the PC to be updated. This will display a dialog with the current settings.

Follow the steps in Workstation Installation Procedure

Once the system has been upgraded, follow the steps in the section Financial Express Download to populate your fund database.

Troubleshooting

Check Network Access
Confirm that the host computer and client computer(s) have network access. If you are unable to see other network resources like a shared printer or other computers on your network or are receiving network errors, it is likely that you are having a general networking issue on your computer that needs to be addressed first before trying to share files with FileMaker Pro.

Internet Protocol Versions
FileMaker Pro supports both Internet Protocol version 4 (IPv4) and version 6 (IPv6). If your host system is setup to use IPv6 but other systems that are trying to access your system are not, revert back to using an IPv4 address on the host system. Host and client computers must be using FileMaker Pro 7.0 or later to use IPv4 and FileMaker Pro 10.0 or later to use IPv6.

TCP/IP Subnets
FileMaker Pro shows only the databases hosted on your local TCP/IP subnet in the Open Remote dialog box. A subnet is used to determine whether a host is on the local subnet (network) or on a remote network. If you want to open a shared FileMaker Pro file that is on a different subnet, consider adding it to the FAVORITE HOSTS by specifying the IP address of the machine that is hosting the file(s).

Blocked Ports / Firewall Settings
If the client machine is outside your LANs firewall, a network administrator must remove blocking from port 5003.

Port 5003 is the port that FileMaker Pro uses to share databases across a network.

Unique IP Address
The IP address that is assigned to your computer might be in conflict with another computer on your local area network. In a typical network configuration, each computer needs to have a unique IP address.

FileMaker Pro and FileMaker Server Installed
Running FileMaker Pro and FileMaker Server on the same computer is not a supported configuration. If you see a message like, “FileMaker cannot share files because another user is already sharing files using FileMaker Pro on this computer, “you need to quit both FileMaker Pro and FileMaker Server and then re-start the one you want to use for sharing files.

Check your DHCP settings
Your computer might be setup to use Dynamic Host Configuration Protocol (DHCP) when no DHCP server is available on the network. A DHCP server is used to help assign IP addresses to computers on the network. If a DHCP server is not present on a network, IP addresses can be manually configured on those computers that need one. A DHCP server is not required for FileMaker Pro Network Sharing to work properly.

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