Client Care Desktop

4.50 Installation and Upgrade Guide (4.x > 4.50)

Contents

Introduction

This multi-purpose guide has been created to assist in;

- Providing a high level overview of Client Care Desktop components
- Provide an understanding of installation types
- 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 this Installation is performed by your internal or external I.T. department.
If you have opted for an un-assisted installation and encounter a problem or are not confident regarding the install, we would recommend contacting our support department on 0800 028 0033.
Please be aware that Synaptic Support Team can only advise you regarding the installation procedure and if you require us to perform the install, then this will need to be scheduled for availability and may incur a charge.

We also advise that all database files are manually backed up prior to any upgrade.

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

Minimum specification

The most recent minimum specification document can be found by clicking here or visiting 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 support team on 0800 028 00 33 or email support@synaptic.co.uk

Components

FileMaker Server

Ports 80, 443, 2399, 5003, and 16000 must be open.
Ports 9090, 16001, and 50003 must be available.
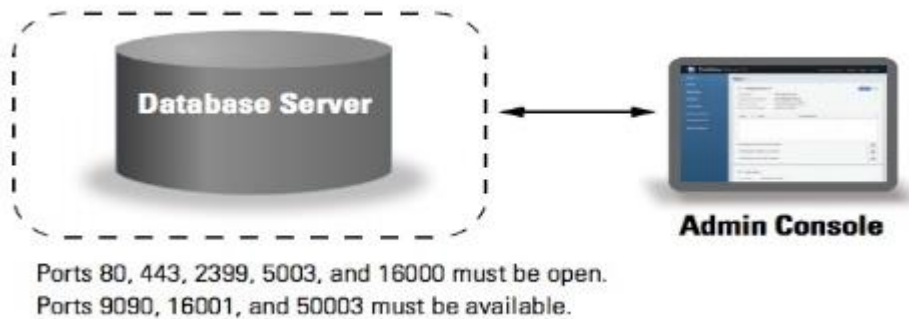
FileMaker Server is a dedicated database server that publishes FileMaker databases and makes them available over a network.

It hosts the database files that make up Client Care Desktop (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
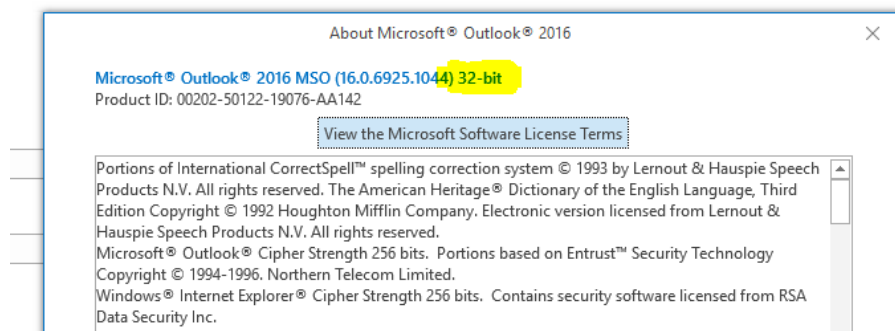
Databases
Client Care Desktop is made up of many different FileMaker databases. These databases may be hosted via FileMaker Server or reside locally on your PC.

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.
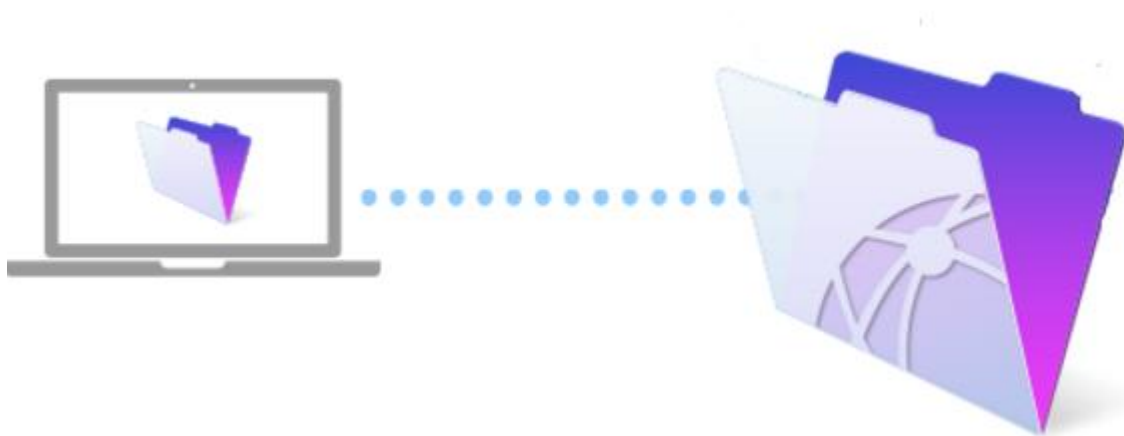
Installation Types

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.
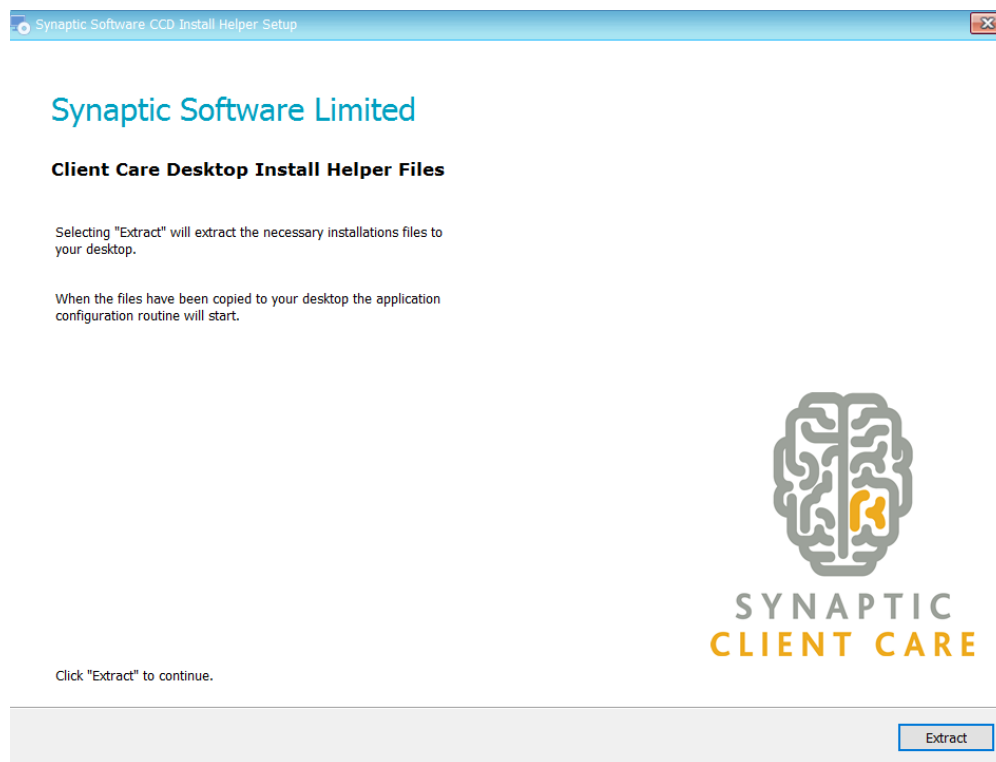
New Installs

Solo

Setup Requirements

Before Client Care Desktop can be installed you will need to ensure you have;

- CCD v4.50 Installation File - **SSL_CCD_InstallHelper_4.50.xxxx.exe**
- Noted the architecture of your installed Office application – 32 or 64 bit

Installation Procedure

Double click the **SSL_CCD_InstallHelper_4.50.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'
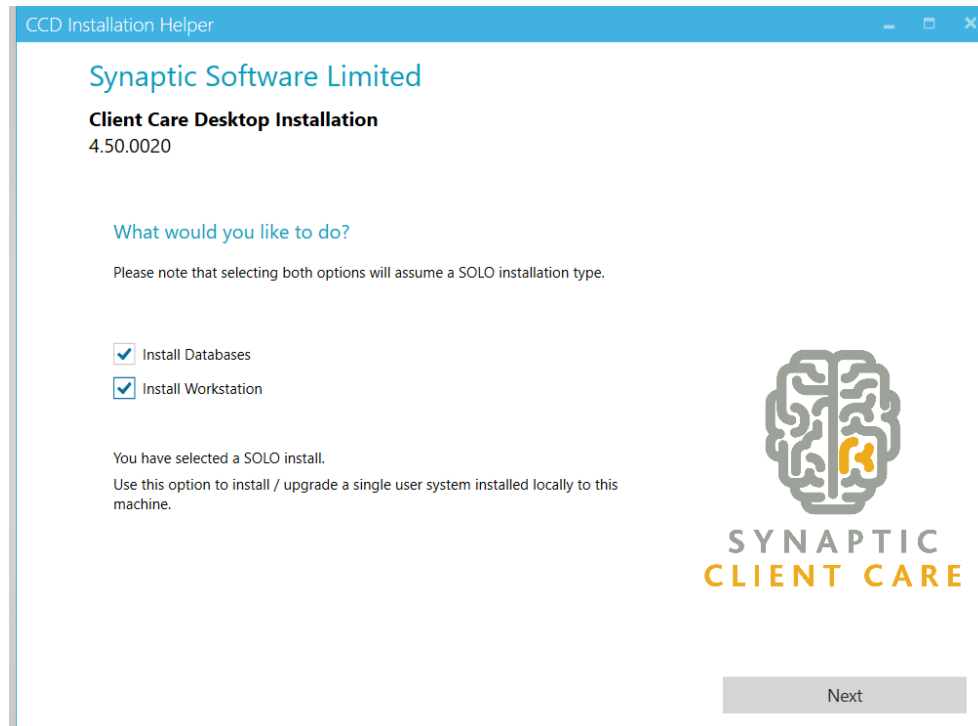
Click Next

If an appropriate version of FileMaker is not installed on your machine you will be prompted to confirm the architecture of Microsoft Office.
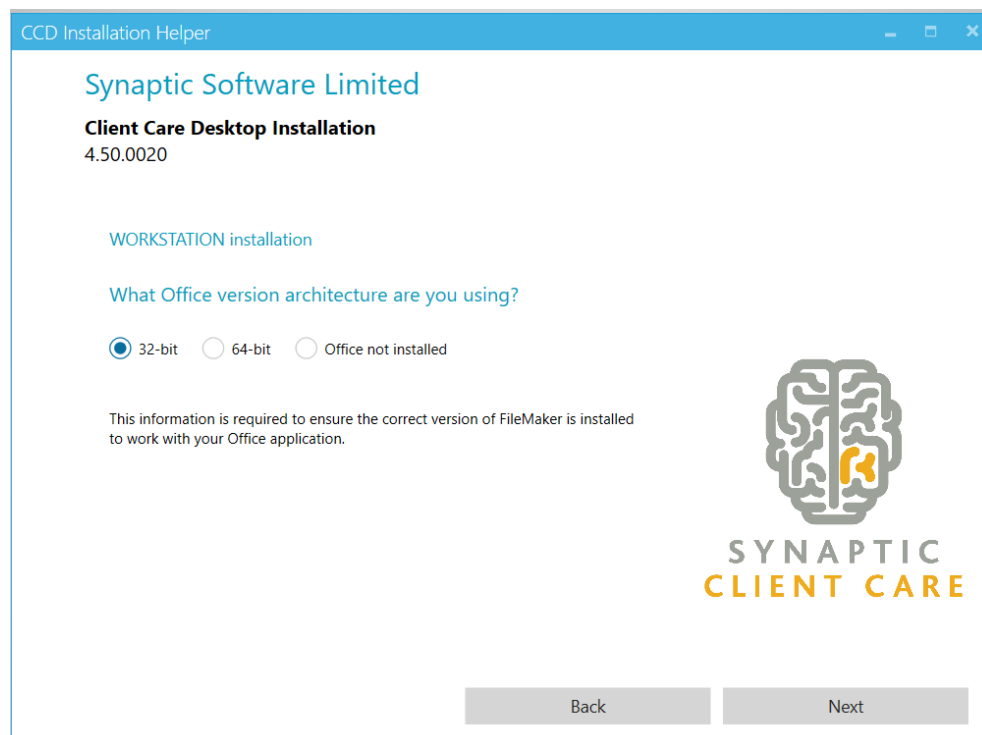
Click Next
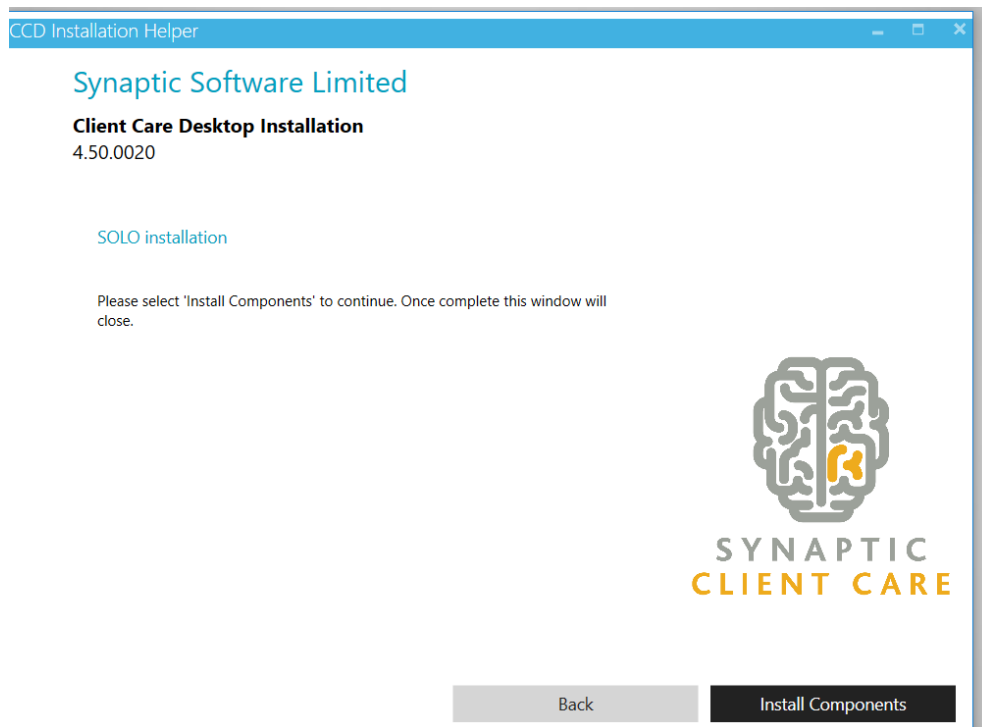
Click install components to start the installation process. Click next to any on-screen dialogs.

N.B. **Bonjour Installation** is not required and if seen can be cancelled.

Once the process is complete, your Installation is finished, and you will be asked to finish the wizard, a new CCD Icon will be available on the desktop for you to use to open the software with

The install will have created a set of blank databases in C:/Link. If this is a data transfer, then you should replace these databases with those populated with your data.

Server

Obtaining Client Care Desktop Databases

Setup Requirements

Before Client Care Desktop can be installed you will need to ensure you have;

- CCD v4.50 Installation File - **SSL_CCD_InstallHelper_4.50.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_4.50.xxxx.exe** file

Select 'Install Databases'
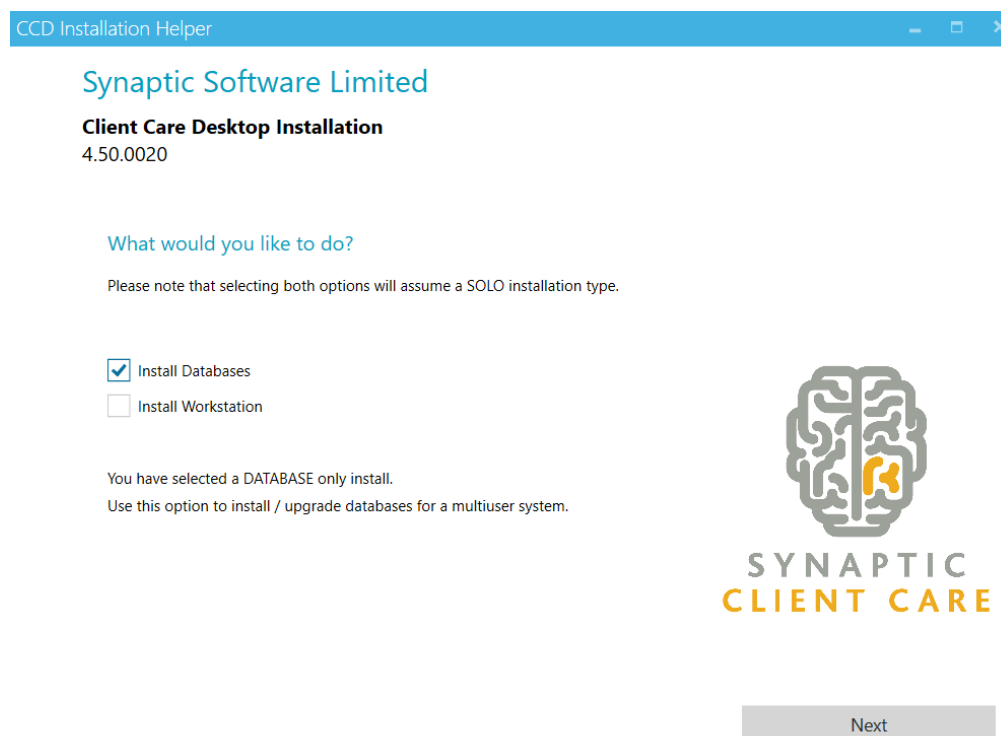
Select 'Next'

At the next dialog select the new directory you created to hold the clean databases
Then select the default settings to install clean databases and FileMaker Pro on the server.

N.B. **Bonjour Installation** is not required and if seen can be cancelled.

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 support team.

Double click the **fms_14.0.x.xxx.exe** file
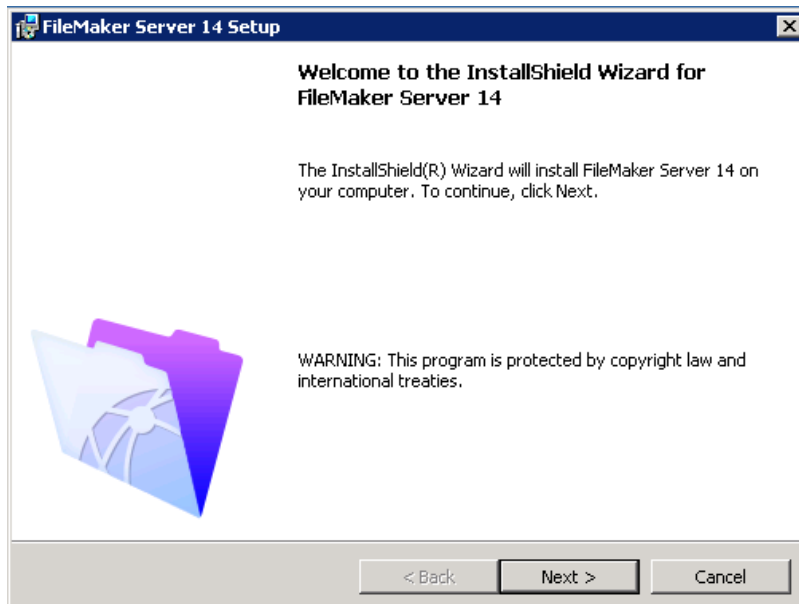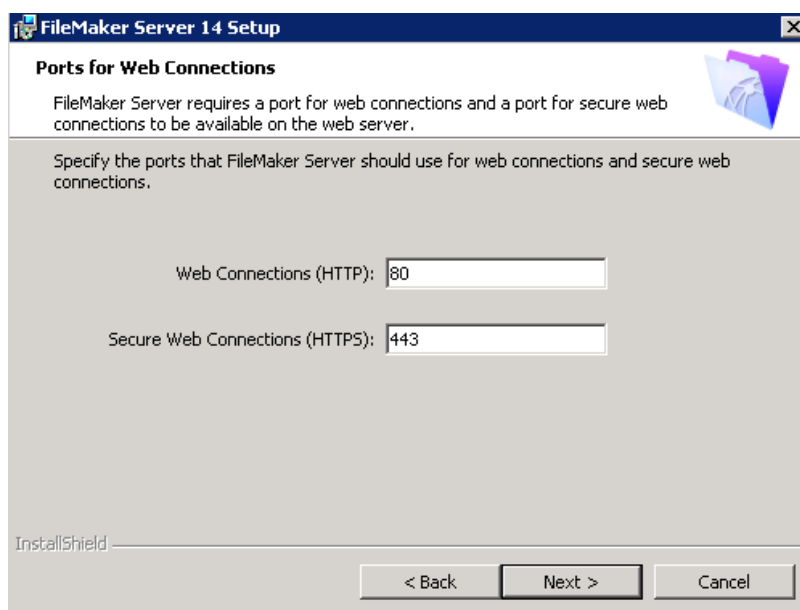
Follow the on-screen dialogs selecting a Single Machine installation (we will not be enabling any Web components).
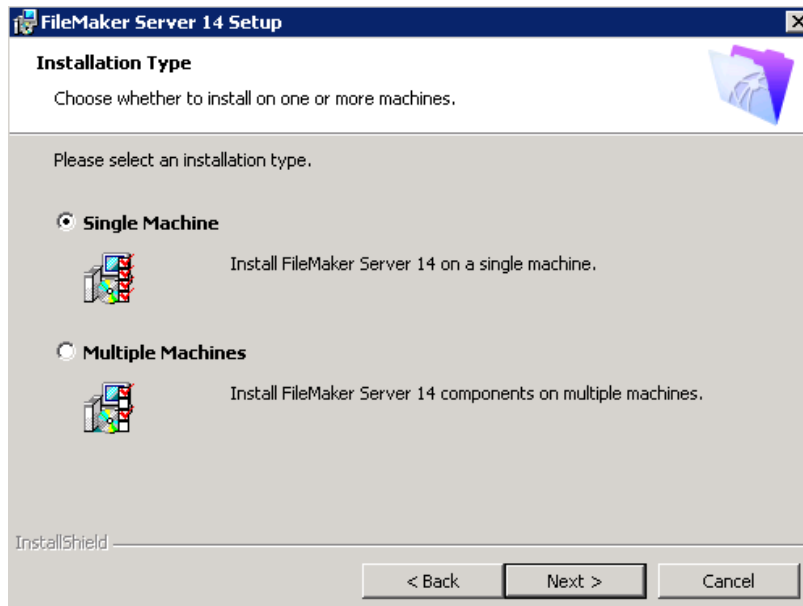
Choose Local System Account
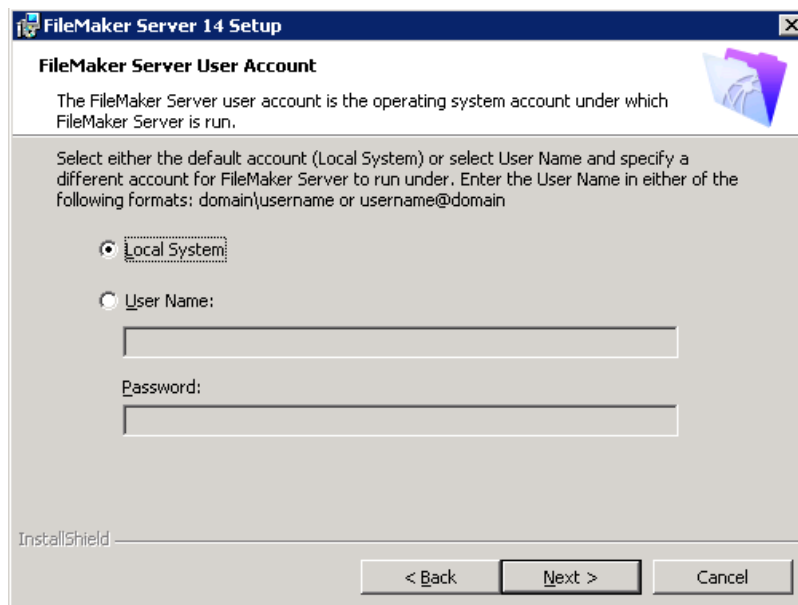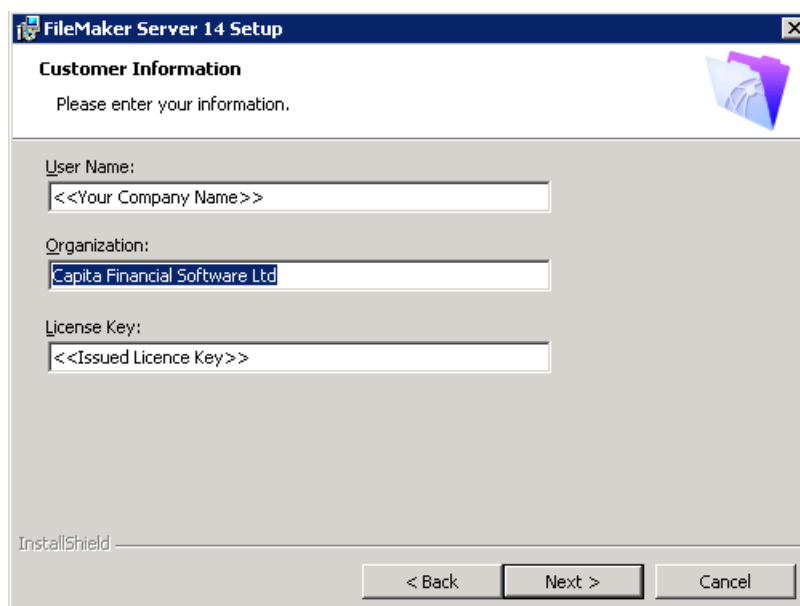
If the default ports for Web Connections are not available, please assign new ports

Enter Licence details supplied
N.B Organization should be set to **Capita Financial Software Ltd**

Bonjour is not required – Please select **No**
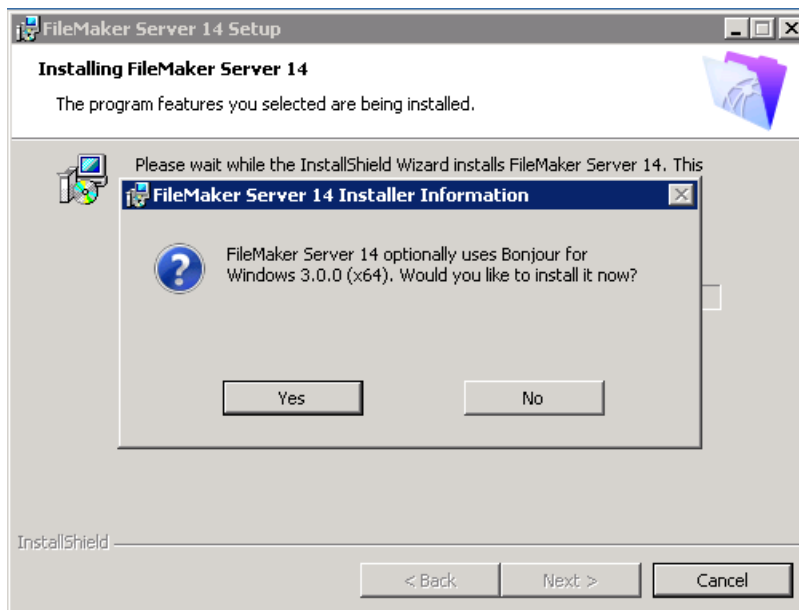
Start the Deployment Assistant
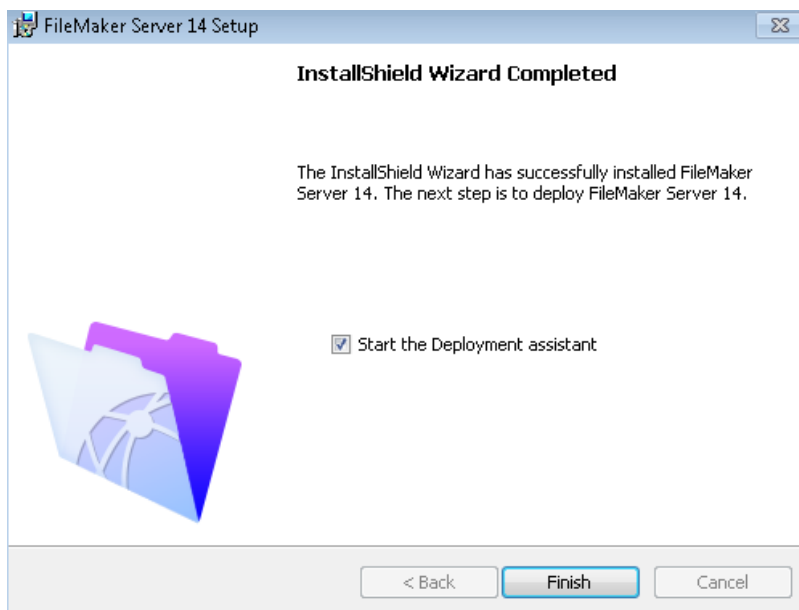
The first stage of the deployment assistant asks you to set user credentials.

Please ensure you safeguard the user credentials entered below as these will be needed by the Synaptic 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:
Company ID:
User name:
Password:
Password PIN:

N.B. 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 – 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 **'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

Schedules ⊘

☑ Allow enabled schedules to run

ENABLED	NAME ▲	TYPE	LAST COMPLETED	STATUS	NEXT RUN	GROUP NAME
☑	Daily	Backup			23-Dec-2016 23:00:00	
☐	Hourly	Backup			Disabled	
☐	Weekly	Backup			Disabled	

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 Client Care Desktop 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.
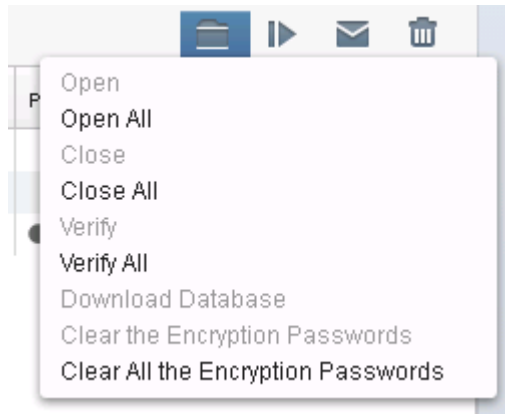
Open **Explorer** and navigate to the default database folder

Remove the **Sample** folder

Create a new folder called **CCD**

Copy the *.scc14 files created in the **Obtaining Client Care Desktop Databases** section into this new folder.
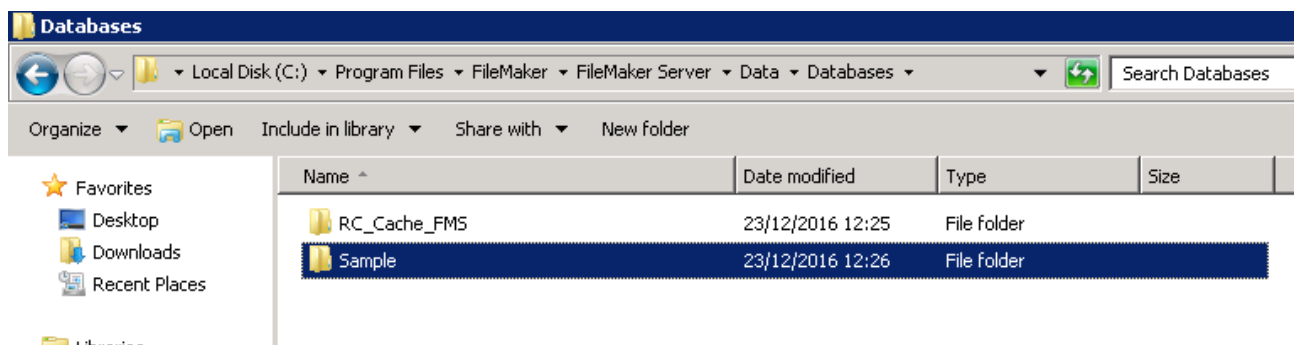
Back in **FileMaker Server** select the **Folder** icon again and select 'Open All'

You should now see the Client Care Desktop files listed in the CCD folder.

The server configuration is now complete.

Workstation

Setup Requirements

Before Client Care Desktop can be installed you will need to ensure you have;

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- Noted the architecture of your installed Office application – 32 or 64 bit

Installation Procedure

Double click the **SSL_CCD_InstallHelper_4.50.xxxx.exe** file
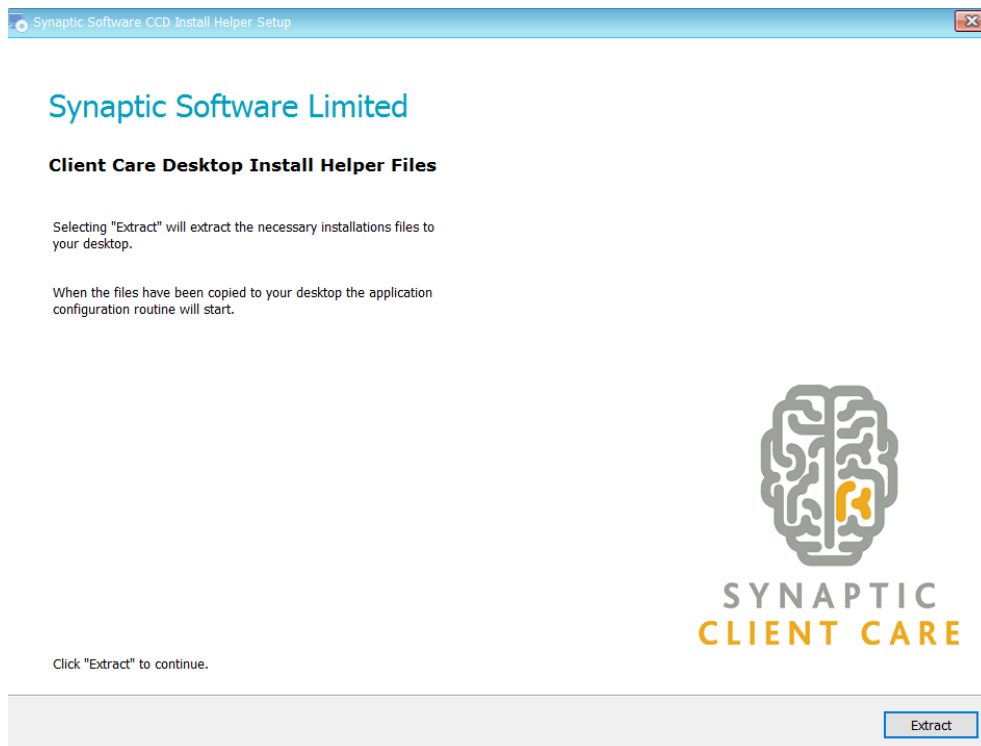
Click extract which will copy the installation files to your desktop and launch the installation wizard.

This will then allow you to select the installation type you require, as this is a workstation guide we would select workstation.
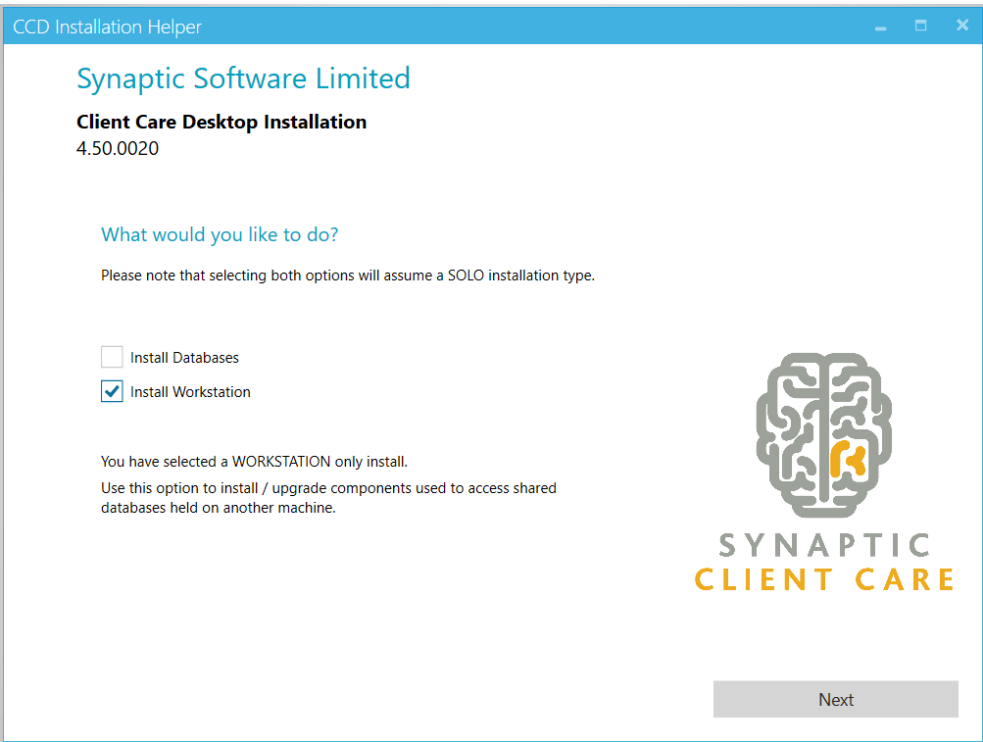
If an appropriate version of FileMaker is not installed on your machine you will be prompted to confirm the architecture of your Microsoft Office architecture.

Select 'Next'

Click 'Install Components' to start the installation process. Click next to any on-screen dialogs.

N.B. **Bonjour Installation** is not required and if seen can be cancelled.
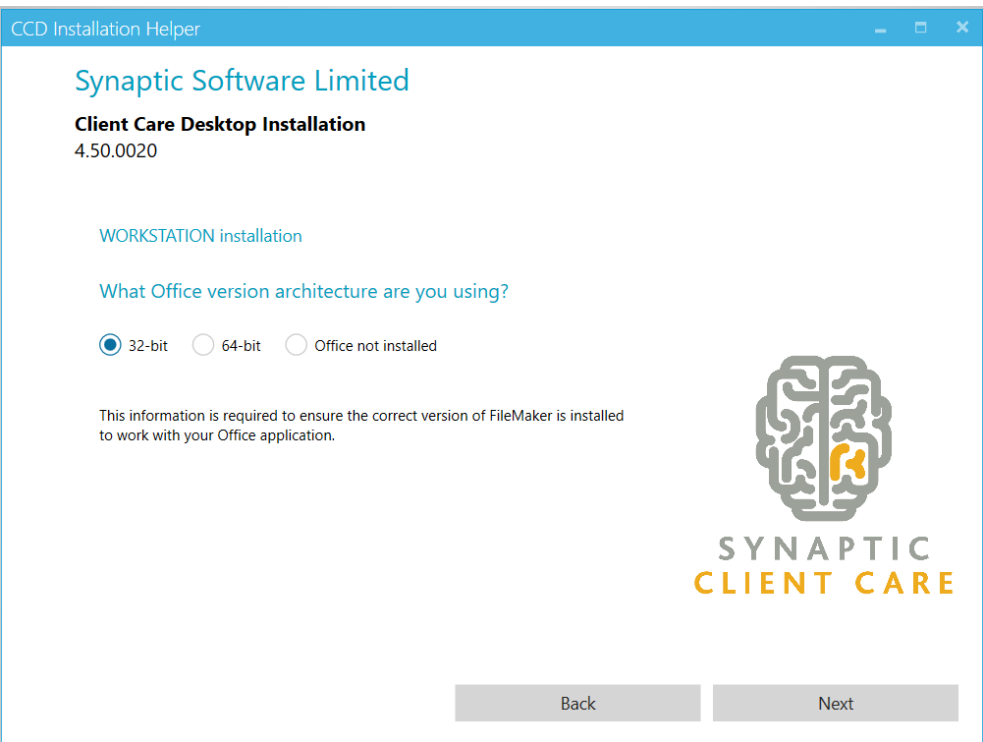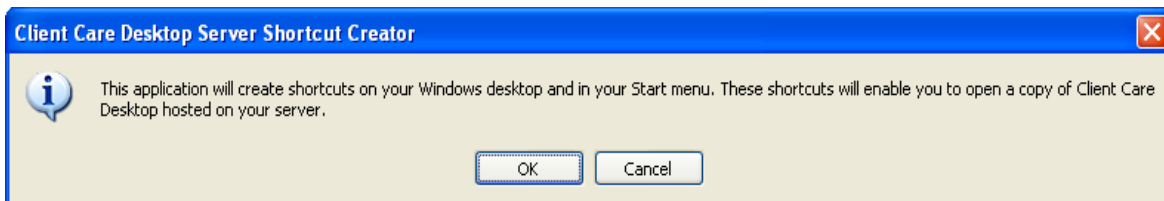
Once this is complete you will be asked to create a desktop shortcut (please note you must be logged on with administrator privileges to create the shortcut. Click 'OK'

To create a shortcut, select the server on which the databases are stored.
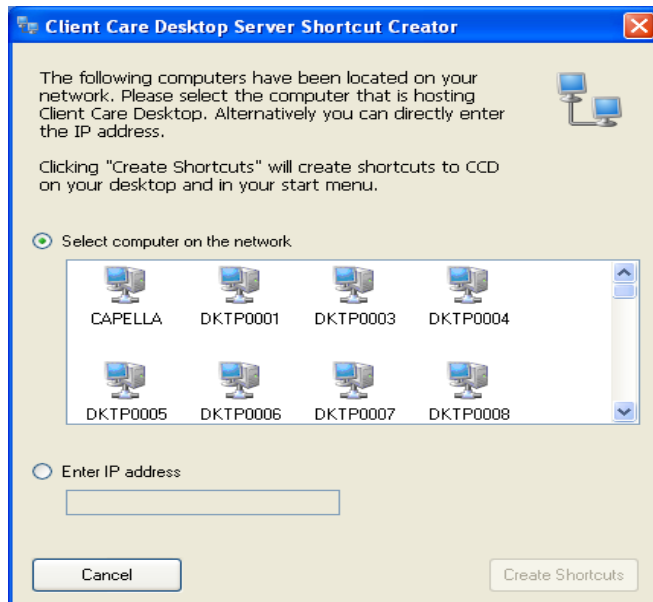
Once you have selected the machine Click on 'Create Shortcuts', then click 'OK'

This will complete the installation leaving you with an icon on the desktop to connect to the hosted databases on the server.

Initial Setup

Licenses

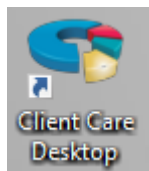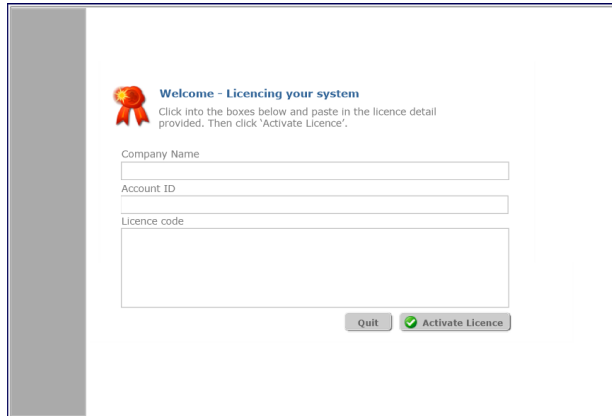The first time you launch CCD v4.50, you will be asked to licence your software. Here you will need to enter your licence codes. Your licences will have been sent to you via email (If for whatever reason you are without a working license please contact our support staff on 0800 028 0033).

Enter the details and select 'Activate Licence'

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

> User- superuser
> Pass- 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 a member of staff into the system. This will take you to 'Set-up the System Administrator Account' where you will need to enter the users name and make a note of the 'Login ID'

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.
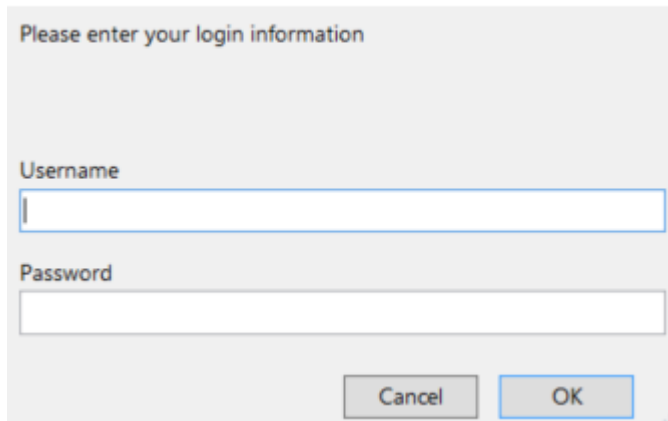
Upon clicking 'Finish' the following message will be displayed.
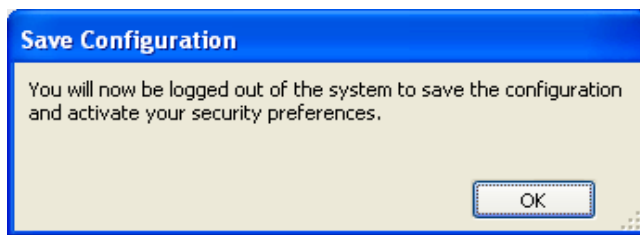
Clicking "OK" will log you out and take you to the login screen

Now enter the User Name that you have created in the staff list (Login ID). You will be asked to set this as your User Name. Click 'OK' and you will need to enter the Login ID into the 'User name' box

Please note: By default, all user passwords are set to 'password'
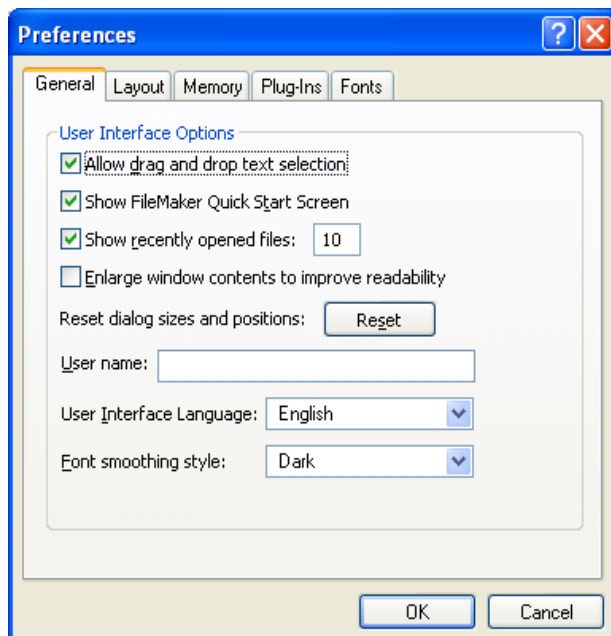
Upon clicking 'OK' you will be asked to change your password. Once you have changed your password you will be logged into the system for the first time and taken to the Main Menu.

<u>Setting the territory</u>

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 Helpdesk (0800 028 0033) for further advice.

<u>Setting up Word store</u>

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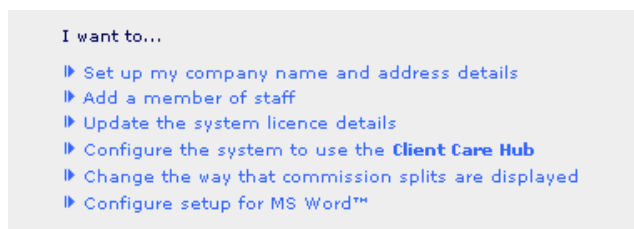
This will launch the 'Word Exporter Configuration' where you can change the location for the 'Template file' and the 'Document Store' if you need to.
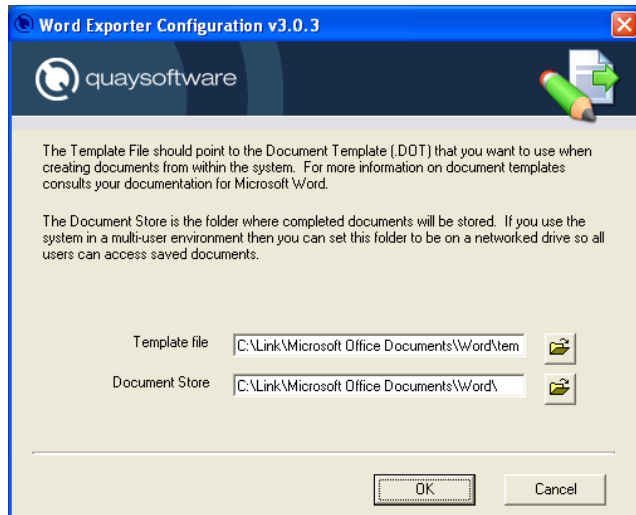
Software Updater

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 CCD screen and select the first option in the list to update components.

This will display a User Name and Password box. If you do not have these details, please contact the Helpdesk (0800 028 0033).

Welcome to the Capita Software Updater

The Updater is an online service to ensure your Capita Software products are personalised and kept up-to-date. Use the Updater on a regular basis to ensure that relevant software updates are delivered to your computer.
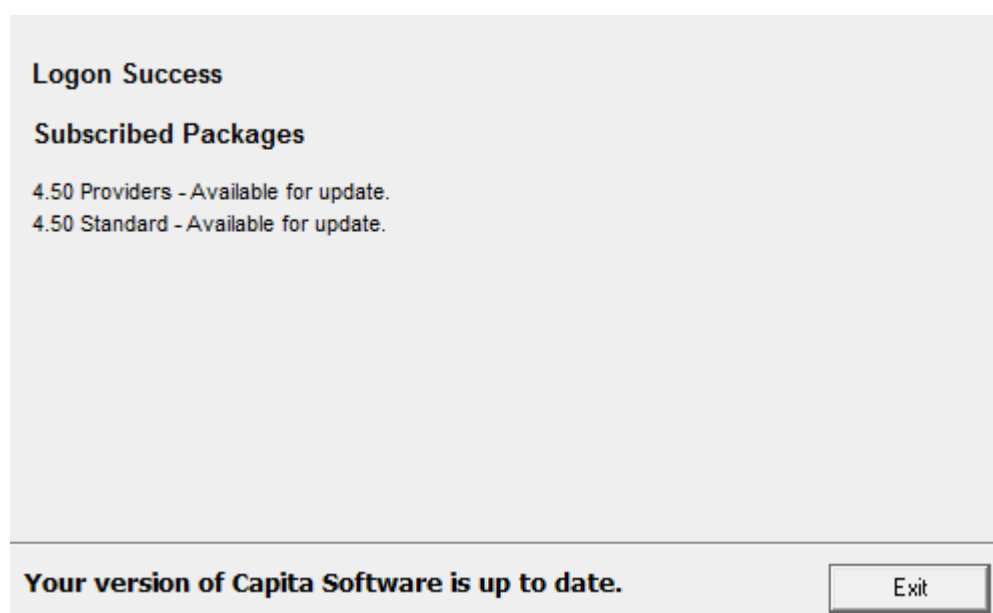
User Name: [   ]

Password: [   ]

If you do not have a username and password to logon to the Software Updater or require any assistance, please contact our Customer Support team on 01279 756061 or email financialsoftwaresupport@capita.co.uk

Ensure you are connected to the internet before continuing

[Settings] [Logon] [Cancel]

You should be subscribed to the 4.50 packages – if not please contact support.

Logon Success

Subscribed Packages

4.50 Providers - Available for update.
4.50 Standard - Available for update.

Your version of Capita Software is up to date. [Exit]

If there are files to be updated Click 'Update Now!'.

Upgrades

Solo

Follow the installation steps for new installs Solo.

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

The summary screen below should be displayed and will show record counts between the two systems.

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 will first need to 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.
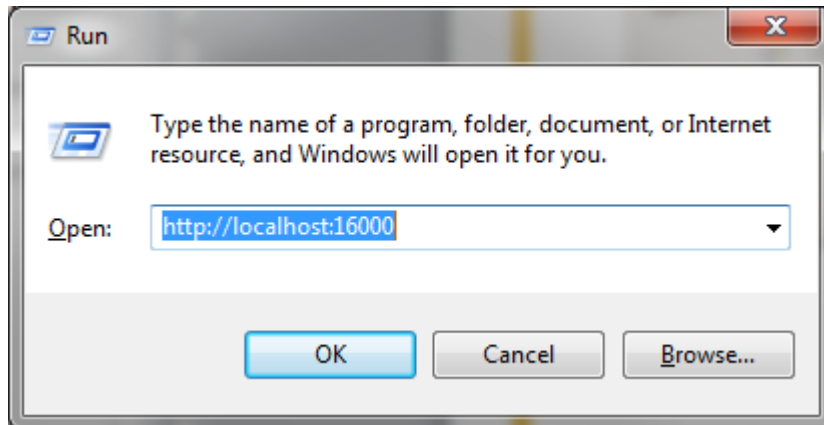
Enter the logon details – typically User Name: 'Admin' and Password: 'june256'
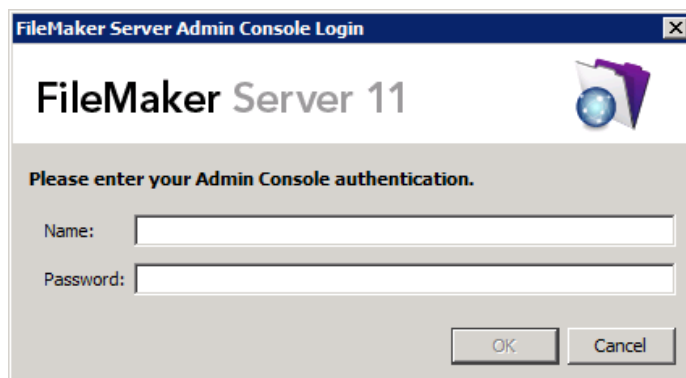
Once the FileMaker Server Admin Console has loaded, you will need to go to the 'Clients' option on the left hand side under 'Administration'.
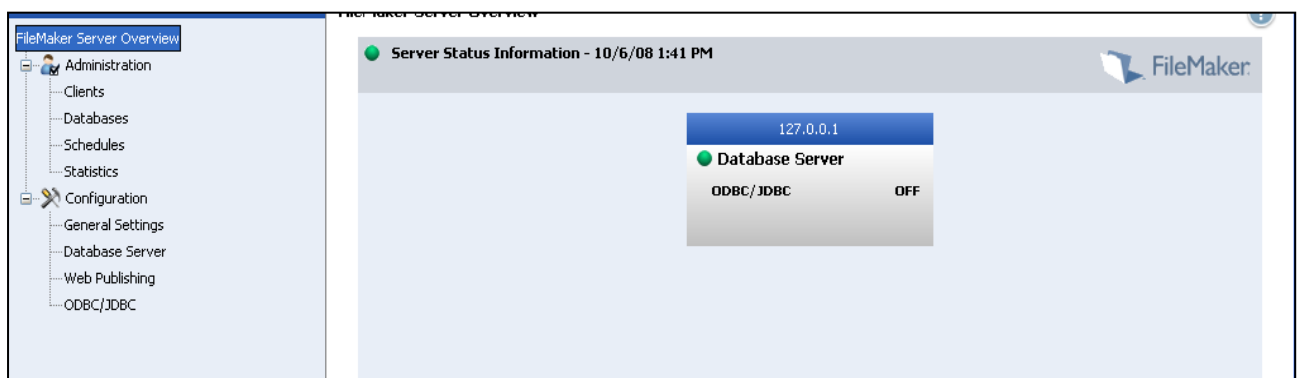
Here you can see all the users currently logged into the system and disconnect them should anyone still be logged in.
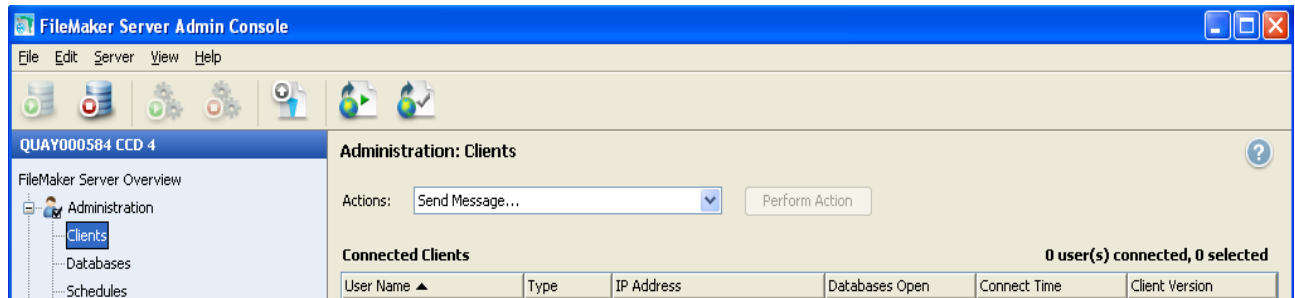
If you need to disconnect any users from the system you would need to click on the 'Actions' dropdown menu and select 'Disconnect All Clients' and then click 'Perform Action'.
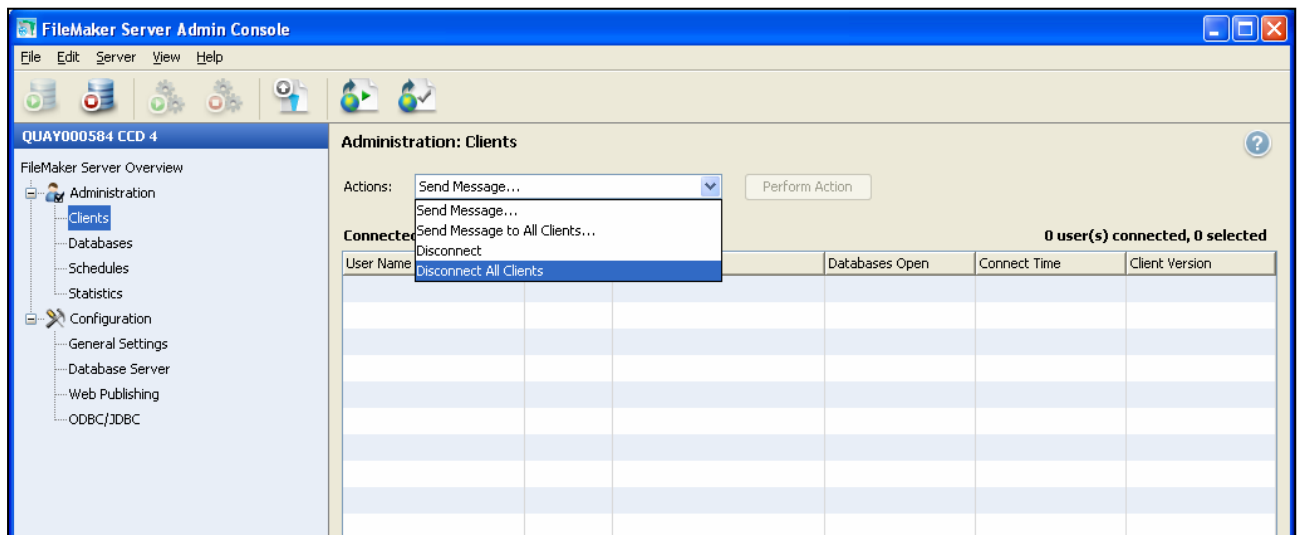
Now that all the users have been disconnected from the system you can stop hosting the databases so it can be backed up. To stop hosting the databases, go to the left hand menu and select 'Databases' from the 'Administration' menu this will take you to 'Administration: Databases' screen
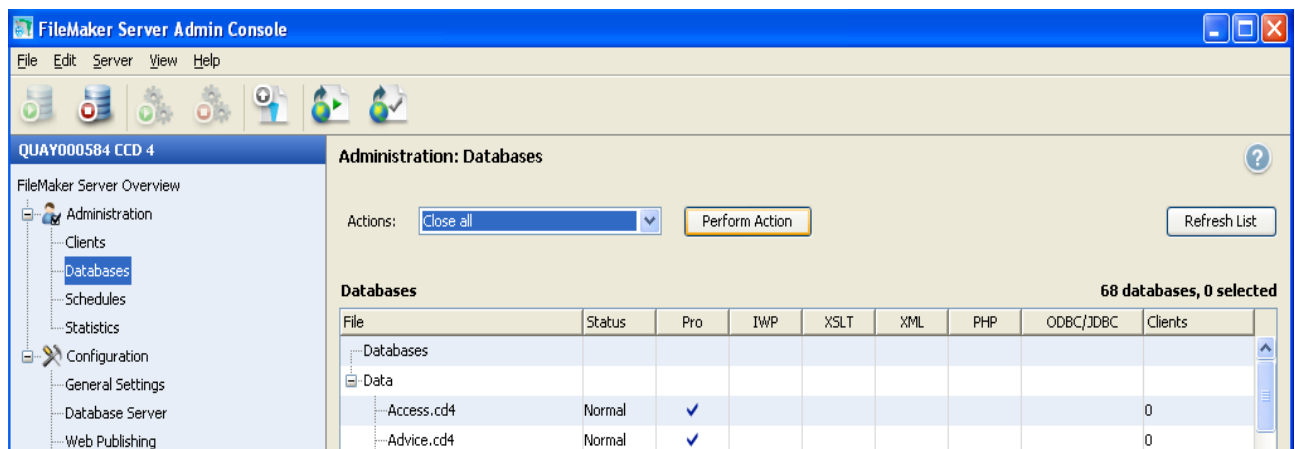
To close the databases you will need to click the 'Actions' dropdown menu and select 'Close all', click 'Perform Action'
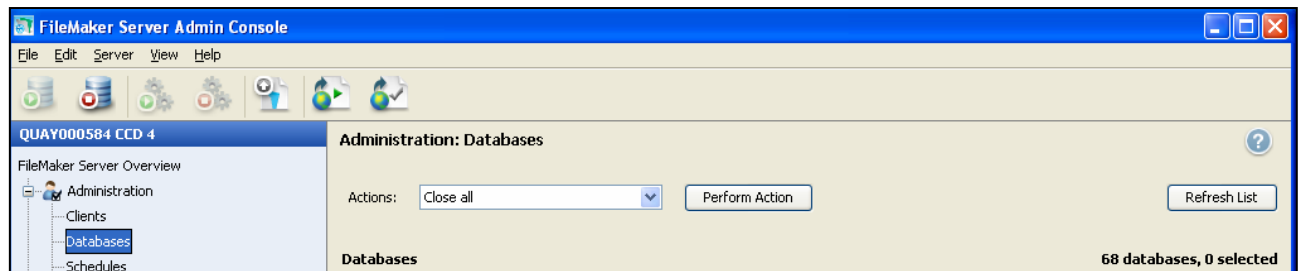
Now stop the **FileMaker Server** service under Services tab in task Manager.
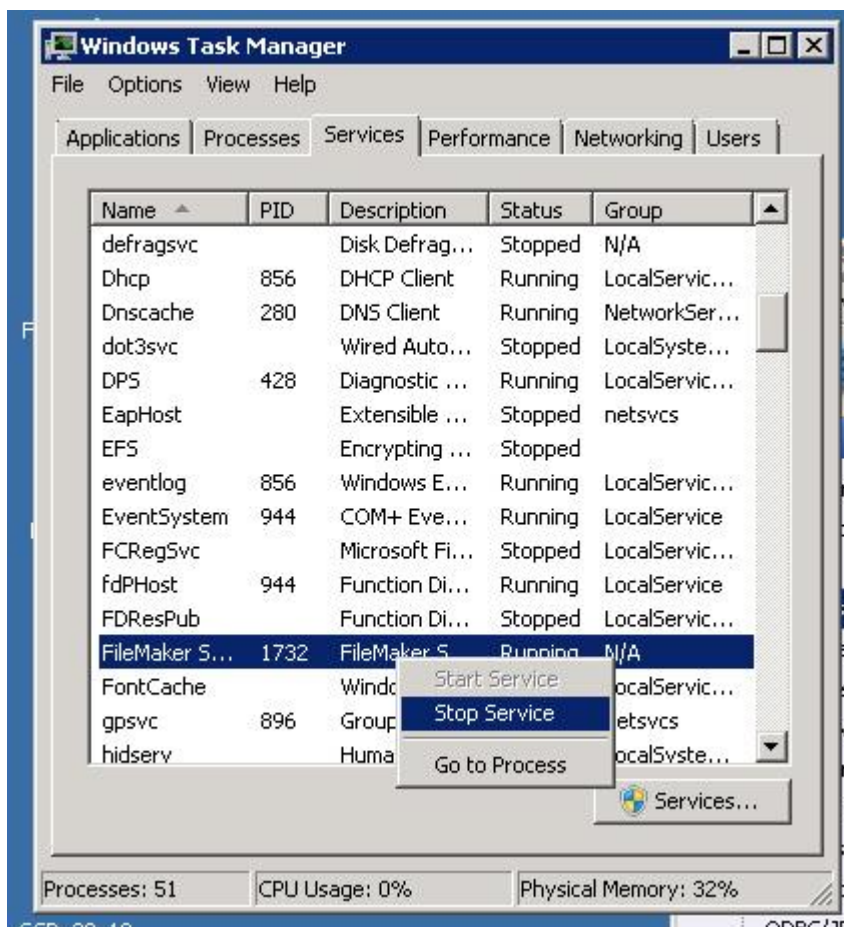
Upgrading the Database Files

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

Follow the installation steps for new installs Obtaining Client Care Desktop Databases

Point the installer to the databases to be upgraded. The installer will detect if the directory already contains Client Care Desktop files and will update the files and launch the data migration process.

The summary screen below should be displayed and will show record counts between the two systems.

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 into this folder.

Upgrading the Workstation files

You will now need to upgrade the Workstations to ensure full compatibility with the upgraded databases.

Follow the steps in Workstation Installation Procedure

The installer will automatically upgrade the local components.

Trouble Shooting

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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SYNAPTIC **COMPARATOR**

SYNAPTIC **MODELLER**

SYNAPTIC **PRODUCT & FUND**

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