

PDS Server Installation Checklist

Use this installation checklist to minimize installation and configuration problems. Note: Your program CD also includes several videos that review important installation concepts. The User's Guide also includes a chapter on installation.

On the Server (whichever computer will host the data).

- Ensure you have the latest operating system and network driver updates. For Microsoft servers visit <http://windowsupdate.microsoft.com/>. Windows 2000 servers MUST be at Service Pack 3 or higher. For Novell servers visit <http://support.novell.com/filefinder/6385/index.html>. Note: The server MUST be up-to-date even if you DO NOT plan to run the program from the server. Linux servers must be running Samba 3.x or higher <http://samba.org>. Note: Linux is NOT a supported environment for PDS.
- The server must be configured to support long file names. As a test, create a small file in Windows Notepad. Save the file somewhere on the server as "ThisIsALongFileNameTest.txt". Update the server if this test fails.
- Create a folder on the server. Use an appropriate name such as \PDSOffice, \PDSChurch, \PDSLedger, etc.
- Share the folder you just created so workstations can access it. Authorized users must have complete user access rights to the folder (Full Control, Modify, Read & Execute, List Folder Contents, Read Write, etc.)

If you are using Windows XP, and the server is part of a Workgroup, disable the simple file sharing. From Windows Explorer, select Tools, File Options, on the View Tab uncheck "Use Simple File Sharing".

If your operating system has both a Sharing and a Security tab, you may need to setup access on both tabs.

- On the Workstation Installation Checklist, write down the UNC path to the shared folder. For example: \\Servername\PDSOffice This is the path to the folder as explored through Network Neighborhood or My Network Places. After writing down the UNC path to the database, make one copy of the Workstation Installation Checklist for each workstation.
- If you setup the programs on the server, use the UNC path to the database. DO NOT use the local path to the database. i.e. C:\PDSOffice.
- Disable Opportunistic Locking (or File Caching) on the server.

Opportunistic Locking - Windows

For Windows 2000, XP, and 2003 see Microsoft Knowledge Base Article 296264
<http://support.microsoft.com/default.aspx?scid=kb:en-us:296264>

For Windows NT see Microsoft Knowledge Base Article 129202
<http://support.microsoft.com/default.aspx?scid=kb:en-us:129202>

Opportunistic Locking - Novell

Some versions of Novell refer to Opportunistic Locking as File Caching.
<http://support.novell.com/cgi-bin/search/searchtid.cgi?/10085899.htm>

From the Novell Technical Information Document:
File Caching and Opportunistic Locking - TID10071902

To disable op-locking in the client, perform the following:

Right click on the N in the System Tray. On Windows 9x workstations go to the advanced client settings and turn off the setting for op-locking. On Windows NT/2000/XP workstations go to the advanced client settings and turn off the setting for File Caching.

Also a new feature in NetWare 5 SP5 or greater allows us to turn off op-locking at the server console.
?set client file caching enabled = on/off?

Opportunistic Locking – Linux (Samba)

For Linux Servers running Samba (3.x or higher) see the How-To Collection (*Linux is an unsupported environment*)
<http://samba.org/samba/docs/man/Samba-HOWTO-Collection/locking.html>

PDS Workstation Installation Checklist

Use this installation checklist to minimize installation and configuration problems. Make one copy of this page for each workstation. Note: Your program CD also includes several videos that review important installation concepts. The User's Guide also includes a chapter on installation.

Computer Name (on network)

Computer Location

UNC Path to Database (from step 3 of Server Installation Checklist)

On the Workstation (each computer that will run the program – Note: this may include the server if you intend to run the program from the server too.)

- For Windows NT, 2000, and XP, log on as a user with Administrative Privileges on the local PC.
- Ensure you have the latest operating system updates. Visit <http://windowsupdate.microsoft.com/>. If you use the Novell Client Access software to access Novell servers, ensure you have the latest updates. For example, at the time of this writing for NT, 2000, and XP Novell Client version 4.83 Service Pack 2 was available. Visit <http://support.novell.com/filefinder/14232/index.html>. Search the Novell web site for updates for other operating systems.
- Disable Opportunistic Locking (or File Caching) on the workstation. See the links below.
- Disable Anti-Virus program.
- Close all running programs, including those running in System Tray.
- Run Setup from your program CD. Select the default installation location for the program files.
- When setup asks for the Database Destination, enter the UNC Path to Database from the top of this worksheet. Tip: Navigate to the folder using Network Neighborhood or My Network Places. Copy (CTRL+C) the UNC path from the address bar in Explorer so you can paste it (CTRL+V) as the Database Destination.

Every computer that accesses the data must do so using the EXACT SAME path, otherwise the program may generate an error that "Directory is controlled by another .net file". If you setup the programs on the server, use the UNC path to the database. DO NOT use the local path to the database. i.e. C:\PDSOffice.

- Complete the setup wizard and re-enable your Anti-Virus program.
- Review the Increasing Performance FAQ at http://www.parishdatainc.com/com_faq/ntwrkperform.htm

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