



Installation Guide

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Single-User CharterLog

Installation Overview

1. Install and initialize Single-User CharterLog on your workstation. See the Program Setup section of this guide for detailed instructions.
2. Install the sample data (optional). See the Sample Data Setup section of this guide for detailed instructions.

Program Setup

1- Installing the CharterLog Program Files

- Insert the CD into the workstation's CD ROM drive. The CD will auto-start and display the Product Suite window. If the CD does not auto-start, select *Start>Run...* to open the Run dialog. Click **Browse** and locate CDROM.EXE on the CD drive. With this file selected in the Run dialog box, click **OK**.
- Click the **Single-User CharterLog** icon on the left, then click **Install..**
- Step through the install screens. If you are unsure about the install options presented on a screen, accept the preset options and click **Next >** to proceed to the next screen. When you get to the last screen, click **Finish** to complete the installation.
- Click **Exit** in the Product Suite window.

2- Initializing Single-User CharterLog

Note -- If any error messages appear during the initial startup phase, make a note of the text of the error message and the error number (if any) and contact Polaris Microsystems (856-848-1043).

- Double click the **Single-User CharterLog** icon on the desktop.
- If the registration dialog appears, enter your System ID, Serial Number and Registration Code. *These numbers and associated instructions are enclosed in the CD ROM envelope.* If you are evaluating CharterLog and do not have registration codes, click **OK** to proceed past the registration dialog.
- You may see a warning that Access Control is not active. This is displayed until you establish a list of CharterLog users. (See Setting Up User Access Control in the CharterLog Help file.)

3- Importing Version 2.1 Data

Note — This procedure is necessary only if you are upgrading from version 2.1 or earlier of CharterLog, and have an established database of information.

- Shut down CharterLog if it is running.
- Select *Start>Programs>CharterLog>CharterLog Data Manager* to start the data manager.
- Verify that the CharterLog data folder path is shown in the **Data Path** field. If not, click the ellipsis (...) button to the right and locate the folder.
- Click the **Import Version 2.1 Files** button. The data manager will locate your existing and convert it.
- Click the **Close** button to exit from the data manager.

Sample Data Setup

Note --This step is optional. Sample data is provided so that you can more conveniently evaluate CharterLog prior to purchasing it.

1- Installing the Sample Data Files

- Insert the CD into the workstation's CD ROM drive. The CD will auto-start and display the Product Suite window. If the CD does not auto-start, select *Start>Run...* to open the Run dialog. Click **Browse** and locate CDROM.EXE on the CD drive. With this file selected in the Run dialog box, click **OK**.
- Click the **Sample Data** icon on the left, then click **Install**.
- Step through the install screens. If you are unsure about the install options presented on a screen, accept the preset options and click **Next >** to proceed to the next screen. When you get to the last screen, click **Finish** to complete the installation.
- Click **Exit** in the Product Suite window.

2- Accessing Sample Data

- Double click the **Single-User CharterLog** icon on the desktop.
- Select *File>Set Data Path* from the main menu.
- Click the ellipsis (...) button to the right of the Data Path field to open the Browse for Folder dialog. Locate the "Sample Data" folder. The default location is in the *Program Files\CharterLog* folder. Click **OK** to close the Browse dialog and set the new Data Path.
- Click **Exit** to close the Data File Location dialog.

Uninstalling CharterLog

Uninstalling Program and Sample Data Files

- Select *Start>Settings>Control Panel* to open Control Panel, then double click the **Add/Remove Programs** icon.
- Double click “Single-User CharterLog...” in the programs list. Select the *Automatic* uninstall method then click **Next**.
- If you installed the sample data, double click “CharterLog Sample Data” in the programs list. Select the *Automatic* uninstall method then click **Next**.
- Click **Finish** to uninstall the program.

Multi-User CharterLog

Installation Overview

Multi-User CharterLog operates as a “client/server” application. In layman’s terms, this means the following:

- The CharterLog program files must be installed on each workstation from which it will be run. *The Multi-User CharterLog program files cannot be installed to or run from a shared Server drive.*
- The CharterLog data files are located in a pre-designated folder on a shared Server drive. No data files are stored on workstation drives.
- Database Management System (DBMS) software must be installed only on the Server. The DBMS manages requests for data from the “client” workstations. CharterLog uses the Advantage Database Server as its DBMS.

Installation Procedure

- Install the Multi-User CharterLog Server Support files on your Server, and prepare your data files. See the Server Setup section of this guide for detailed instructions.
- Install and initialize Multi-User CharterLog on each of your workstations. See the Workstation Setup section of this guide for detailed instructions.

Server Setup

In order to prepare your Server for Multi-User CharterLog, you must do the following:

1. Install the Multi-User CharterLog Server Support Files.
2. Install the Advantage Database Server.
3. Initialize the CharterLog data folder.

Detailed instructions for each of these steps follows.

1- Installing Multi-User CharterLog Server Support Files

- Insert the CD into your Server's CD ROM drive. The CD will auto-start and display the Product Suite window. If the CD does not auto-start, select *Start>Run...* to open the Run dialog. Click **Browse** and locate CDROM.EXE on the CD drive. With this file selected in the Run dialog box, click **OK**.
- Click the **CharterLog Server Setup** icon on the left. If you have purchased Multi-User CharterLog and have an ADS registration card, click **Install Full Server**. If you doing a pre-purchase evaluation, click **Install Eval. Server**.
- Step through the install screens. If you are unsure about the install options presented on a screen, accept the preset options and click **Next >** to proceed to the next screen. When you get to the last screen, click **Finish** to complete the installation.
- Click **Exit** in the Product Suite window, then remove the CharterLog CD.
- Continue with Installing Advantage Database Server below.

2- Installing the Advantage Database Server

Note — You must be logged onto Windows NT as a user with Administrative Privileges in order to install the Advantage Database Server.

- Select *Start>Programs>CharterLog>Install ADS*.
- Proceed through the introductory windows that appear on the screen and install the Advantage Database Server files. If install request that you insert Disk #2, ignore the message and click **OK**.
- When all files have been copied, the Product Information window will be displayed. Enter the Advantage Serial Number, Validation Code, and the name of the registered owner (your company name). *Reference the CharterLog Registration Instruction sheet enclosed with your CD Rom to find your ADS serial number and validation code.*
- Note the radio buttons for choosing the Advantage Database Server Startup option. If you are unsure of which to choose, accept the preset option (*Automatic*) and click **Next**.
- The ANSI Character Set screen will be displayed. This screen allows you to configure the ADS to match your country's language requirements. If you are unsure of which to choose, accept the preset option and click **Next**.
- Select *Start>Programs>Advantage Database Server>ADS Configuration Utility*. Click the **Configuration Utility** tab and verify that the **Database Settings** are showing in the window are no smaller than those listed below. If any particular setting is smaller set it to the corresponding minimum.

Minimum ADS Settings

Connections: 10	Work Areas: 125
Tables: 100	Index Files: 150
	Data Locks: 200

- Click **Exit** to close the ADS Configuration Utility.
- Select *Start>Settings>Control Panel*. Double click on the Services icon. In the Services window, select “Advantage Database Server” then click the **Stop** button. Wait for the service to stop.
- When the Advantage service has stopped, click the **Start** button to restart it. Verify that “Started” and “Automatic” is listed next to “Advantage Database Server” in the Services window, then click the **Close** button.

- In the Control Panel, double click on the **System** icon to open the System Properties dialog. To get the best performance from the Advantage Database Server, click the Performance tab and set the **Application Performance Boost** to None. *If you are concerned about changing this setting, see the NT Foreground Performance Boost sidebar below.*
- Continue with Initializing the CharterLog Data Folder below.

3- Initializing the CharterLog Data Folder

The following procedure will establish a dedicated folder on the server hard drive for holding the CharterLog data files, and will initialize the folder with empty files.

- Locate the **CharterLog Data Manager** icon on the server desktop and double click it.
- Type a fully-qualified path into the **Data Path** field. If in doubt as to what path to choose, a good choice is “C:\CharterLog Data”.

***Important!** If the data folder was previously initialized, the **Data Path** field will already contain a path. If this is the case, do not change this path without consulting your network administrator.*
- Click the **Check Files** button. The data manager will create the folder, if necessary, then initialize the data files.
- Click the **Close** button to exit from the data manager.

This completes the server setup. Continue with Workstation Setup in the next section.

NT Foreground Performance Boost

Windows NT allows foreground processes (applications that are run directly from the server console) to be given priority in the dispensing of CPU time. Windows NT refers to this feature as “Application Performance Boost”. However, services such as the ADS run as background processes. If foreground processes are given a performance boost, the performance of all services, including the ADS will suffer. Typically the only foreground processes run on the server are maintenance and backup processes which are not performance-critical tasks. Therefore, it is usually advantageous to turn off the foreground performance boost feature.

Workstation Setup

Note — Perform the following steps for each workstation from which you will be running CharterLog.

1- Installing the CharterLog Program Files

- Insert the CD into the workstation's CD ROM drive. The CD will auto-start and display the Product Suite window. If the CD does not auto-start, select *Start>Run...* to open the Run dialog. Click **Browse** and locate CDROM.EXE on the CD drive. With this file selected in the Run dialog box, click **OK**.
- Click the **Multi-User CharterLog** icon on the left, then click **Install..**
- Step through the install screens. If you are unsure about the install options presented on a screen, accept the preset options and click **Next >** to proceed to the next screen. When you get to the last screen, click **Finish** to complete the installation.
- Click **Exit** in the Product Suite window, then remove the CD.

2- Initializing Multi-User CharterLog

Note -- If any error messages appear during the initial startup phase, make a note of the text of the error message and the error number (if any) and report it to your network administrator.

- Double click the **Multi-User CharterLog** icon on the desktop.
- If the registration dialog appears, enter your System ID, Serial Number and Registration Code. *These numbers and associated instructions are enclosed in the CD ROM envelope.* If you are evaluating CharterLog and do not have registration codes, click **OK** to proceed past the registration dialog.
- If a **Browse For Folder** dialog box appears, use this dialog to locate the CharterLog data folder (set up in the previous section) on your server drive. Select this folder then click **OK**. *If you are not sure where the data is located, contact your network administrator.* At this point, CharterLog should establish a connection with the server, open the data files, and display the main program window. You may also see a warning that Access Control is not active. This is displayed until you establish a list of CharterLog users. (See Setting Up User Access Control in the CharterLog Help file.)

Importing Version 2.1 Data

Note — This procedure is necessary only if you are upgrading from version 2.1 or earlier of CharterLog, and have an established database of information.

Important! The following must be performed from the workstation on which the single-user version of CharterLog (v2.1) resides. You must also have previously installed Multi-User CharterLog on the workstation.

- Verify that Multi-User CharterLog is not running on your workstation or any other workstations on the network.
- Select *Start>Programs>CharterLog>CharterLog Data Manager* to start the data manager.
- Verify that the CharterLog data folder path is shown in the **Data Path** field. If not, click the ellipsis (...) button to the right and locate the folder on the server drive.
- Click the **Import Version 2.1 Files** button. The data manager will locate the single-user data, convert it and save it to the network server.
- Click the **Close** button to exit from the data manager.

Understanding the ADS Service

The Advantage Database Server is designed to run as a Windows NT “service” in order to provide the most robust and safest database management possible. (See *Understanding Windows NT Services sidebar below for a brief explanation of NT services.*) As a service, the ADS has better control over how and when the program is started and shut down. For example, if the startup type *Automatic* was selected during installation, the ADS will automatically start when the server is powered-up or reset. This provides a benefit over regular applications because it does not require a user to log in and start the ADS after a power failure or other unexpected shut down.

The default installation option is for the ADS service to be configured to start automatically when the server is powered-up. The following procedure can be used to verify that the ADS service is running after installation, or to manually start or stop it if necessary.

- Open the Windows NT Control Panel folder. (*Start>Settings>Control Panel*)
 - Double click on the **Services** icon. Choose the Advantage Database Server from the list provided.
 - Click either the **Start** or **Stop** button as required.
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Understanding Windows NT Services

In Windows NT, many server-side programs act as a service. Unlike regular applications, services run in the background providing application support and have no user interface of their own. Most services can be started, stopped, paused, and continued. Windows NT services are controlled through the Windows NT Service Control Manager. The Services dialog box lists all installed services and their current status.

Services information includes the following:

Server status — relates the current status of the service (started, stopped, or paused)

Startup options — allows you to select the startup type for the selected service (automatic or manual)

Startup parameters — the startup parameters box allows you to specify startup parameters to a particular service.

Uninstalling Multi-User CharterLog

Uninstalling Workstation Files

Note — Perform the following steps on each applicable workstation.

- Select *Start>Settings>Control Panel* to open Control Panel, then double click the **Add/Remove Programs** icon.
- Double click “Multi-User CharterLog...” in the programs list. Select the *Automatic* uninstall method then click **Next**.
- Click **Finish** to uninstall the program.

Uninstalling Server Files

Note — You must be logged onto Windows NT as a user with *Administrative Privileges* in order to uninstall the server files.

- Select *Start>Settings>Control Panel* to open Control Panel, then double click the **Services** icon. Locate and select the “Advantage Database Server” service, then click the **Stop** button. Leave the Control Panel open.
- Select *Start>Programs>Advantage Database Server>ADS Service Uninstall*. This will remove the ADS from the Windows NT Service Manager.
- If necessary, Select *Start>Settings>Control Panel* to open Control Panel, then double click the **Add/Remove Programs** icon.
- Double click “Advantage Database Server for Windows NT” in the programs list to remove the ADS files.
- Double click “Multi-User CharterLog Server Support” in the programs list. Select the *Automatic* uninstall method then click **Next** to remove the support files.