

***Relius Documents PC  
SQL Express  
Installation and Configuration***

***April 15, 2008***

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## 1 Overview

This document covers the installation of the Relius Documents PC (RDPC) Database Server, powered by Microsoft SQL Express (MSSQL). For the installation of the workstation software, please use the Relius Documents Workstation Installation and Configuration Manual. If you are using your own SQL Server database system, there is no need to run this installation.

**If you have already installed the RDPC SQL Express software to your database server for version 4.x (or higher) and you have no plans to migrate to another database server, there is no need to run this installation.**

This installation will only work on Windows 2000 Server with Service Pack 4 or greater, as well as Windows Server 2003 (Standard or Enterprise Editions) with Service Pack 1 or greater. All other operating systems are not supported. The use of virtual environments and connections, such as Microsoft Virtual Server or VMWare, are not supported by SunGard Relius. If a virtual environment is detected, the installation will abort. For additional technical information regarding this topic, please contact Relius Technology at 1-800-326-7235.

The installation of MSSQL consists of the following basic procedures:

- 1) Read and understand the entire document.
- 2) Install and configure Windows Server 2003.
- 3) Install and configure MSSQL Express.
- 4) Import and Convert your existing database or import a new, blank database. This particular portion of setting up your database will be conducted during the RDPC workstation setup.

## 2 Installation and Environment Considerations

### 2.1 Hardware Requirements & Supported Operating Systems

All hardware requirements are specified on our web site ([http://www.relius.net/support/qt\\_technology.aspx](http://www.relius.net/support/qt_technology.aspx)).

The only supported operating systems for RDPC SQL Express are Windows 2000 Server and Windows Server 2003, Standard or Enterprise Edition. All other operating systems will cause the installation to fail. SunGard Relius cannot guarantee “workaround” scenarios for database servers.

### 2.2 Software Considerations

Microsoft .NET 2.0 is included in this installation. More information on Microsoft .NET can be obtained from Microsoft Windows update (<http://www.windowsupdate.com/>).

When conducting initial configuration (Manage Your Server), do not choose any Windows “role” for the server. None are necessary, and choosing one may unnecessarily compromise your security.

### 2.3 Software fixes and documents via Internet

Fixes, support files, and updated documentation are distributed via the web at <http://www.relius.net/support/loginform.aspx>. Users must have Internet capability to receive these fixes. Once you have logged on, click the “Technology” link to browse the list of available material. You can click “*Subscribe*” (<http://www.relius.net/support/subscribe.aspx>) to receive notification of new fixes by e-mail. SunGard no longer sends patches, updates, and update documentation through the mail, and we strongly urge all users to subscribe to this service.

### 2.4 Installation Methods

The RDPC SQL Express installation is available via download from our web site (<http://www.relius.net/support/loginform.aspx>). Downloading the file to a local hard drive is recommended and supported. Other methods of installing (network volumes, “push” or “ghost” technology, Z.E.N. Works, Zip Drives, etc.) are not supported or recommended. If a network drive is used to install the software, it must be mapped with a drive letter assigned. Running the SETUP.EXE from a volume accessed by browsing with Network Neighborhood will **fail**. Dial-up clients need to contact Relius Technology Support before attempting a download.

### 2.5 Program File Location

The installation of the RDPC SQL Express installs to all the default locations. SunGard Relius strongly recommends allowing the defaults to remain in place.

## 2.6 Virus Scanners

Although SunGard Relius does not endorse, support, or recommend any particular method, virus protection is encouraged on servers and workstations. The two most popular are Symantec's Norton Anti-Virus and McAfee VirusScan by Network Associates. You should update your virus definition files regularly. Some virus scanners – if active during the installation – can interfere with a successful installation. Symptoms include an error message stating that a file cannot be overwritten. Temporarily disable virus scanning before starting the installer. Clients using Norton with Script Blocking turned on should test the functionality of RDPC to determine whether script blocking is affecting the application.

## 2.7 Security Considerations

Responsibility for support of problems and issues related to RDPC running in a locked-down security configuration is that of the end user. Certain circumstances may require billing on a time and material basis. SunGard Relius cannot guarantee that RDPC will install or operate properly on any given locked-down security configuration. RDPC is certified and supported only when run on the default Windows security settings.

The local Windows Administrator (or a user with equivalent Administrator rights) **must** run the installation.

### 3 Performing the Database Installation

#### Pre-Installation Notes:

- a) Be sure no screen saver will become active during the installation. SunGard Relius discourages the use of screen savers whenever running RDPC or its Installer.
- b) The installation process takes approximately **1/2 hour** to complete. In testing the release at SunGard Relius, very large databases have taken less than 1 hour to complete.
- c) Review the RDPC system requirements located on our web site ([http://www.relius.net/support/qt\\_technology.aspx](http://www.relius.net/support/qt_technology.aspx)). **Do not** proceed with the update if your environment does not meet the minimum system requirements.

Unless otherwise noted, all activities contained herein must be directly conducted at the RDPC SQL Express database server.

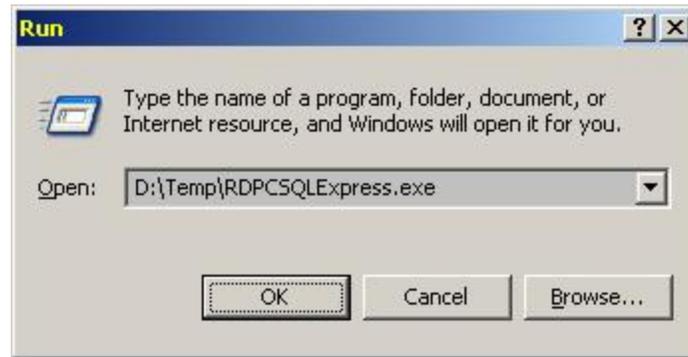
- 3.1 Remove any icons or shortcuts from the **StartUp** folder. Services (such as real-time virus scanning) that may impede or interfere with the installation should be stopped and set to “Manual” before proceeding.

Additionally, programs that are set to launch when Windows is started can also be specified in C:\WINDOWS\WIN.INI. Please **edit** this file using Notepad. Temporarily **remark** the entries **RUN=** and **LOAD=** by placing a semi-colon (“;”) in front of the line (if programs are specified), then **Save** and **Exit** the WIN.INI file. Example of remark:

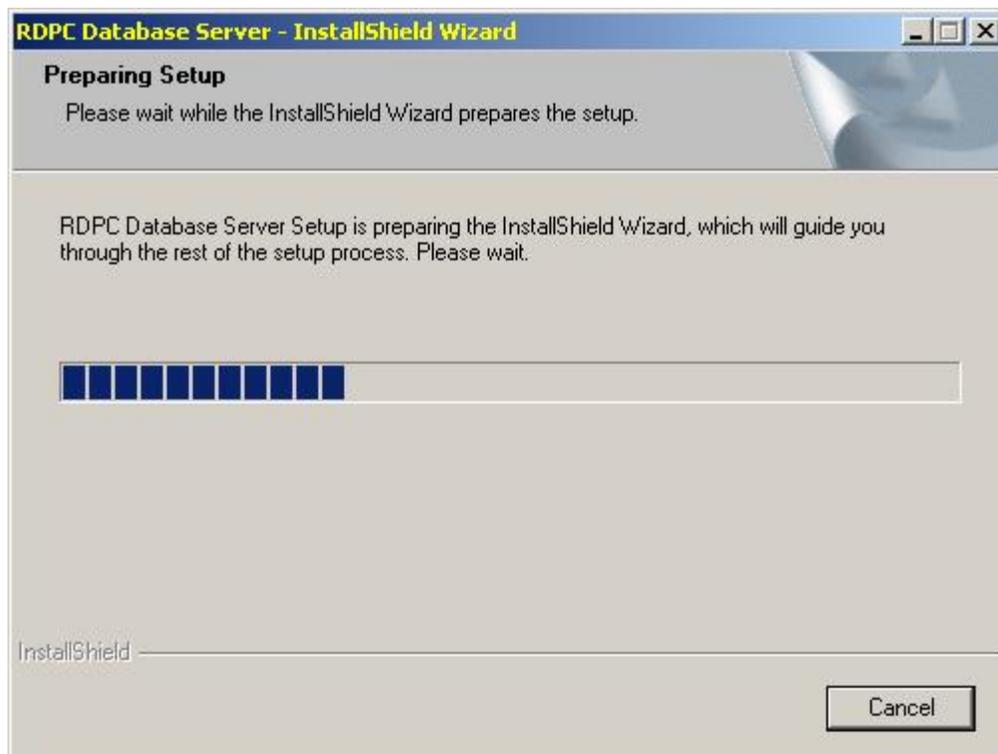
```
;RUN=EXAMPLE.EXE
```

- 3.2 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.
- 3.3 Temporarily disable all virus protection.
- 3.4 Download the RDPC SQL Express Installation from the SunGard Relius web site (<http://www.relius.net/Support/Loginform.aspx>) and copy it to a temporary location on your workstation, such as D:\Temp. Do not attempt to run the installation from the Internet. It must be downloaded.

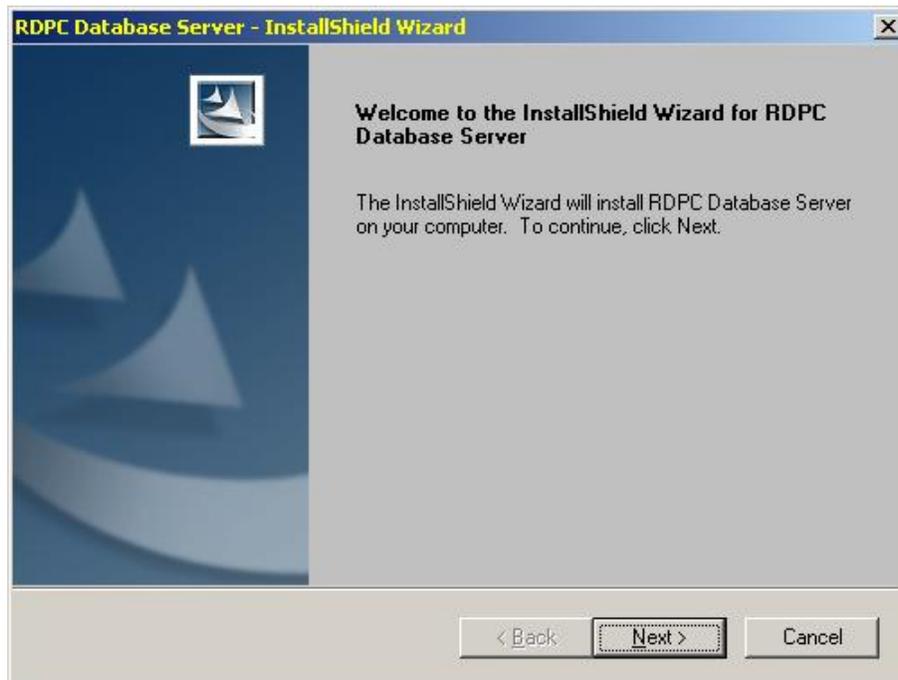
- 3.5 Click *Start* | *Run*, then type in **D:\Temp\RDPCSQLExpress.exe** (where D:\Temp is the location of your downloaded file), and click *OK*.



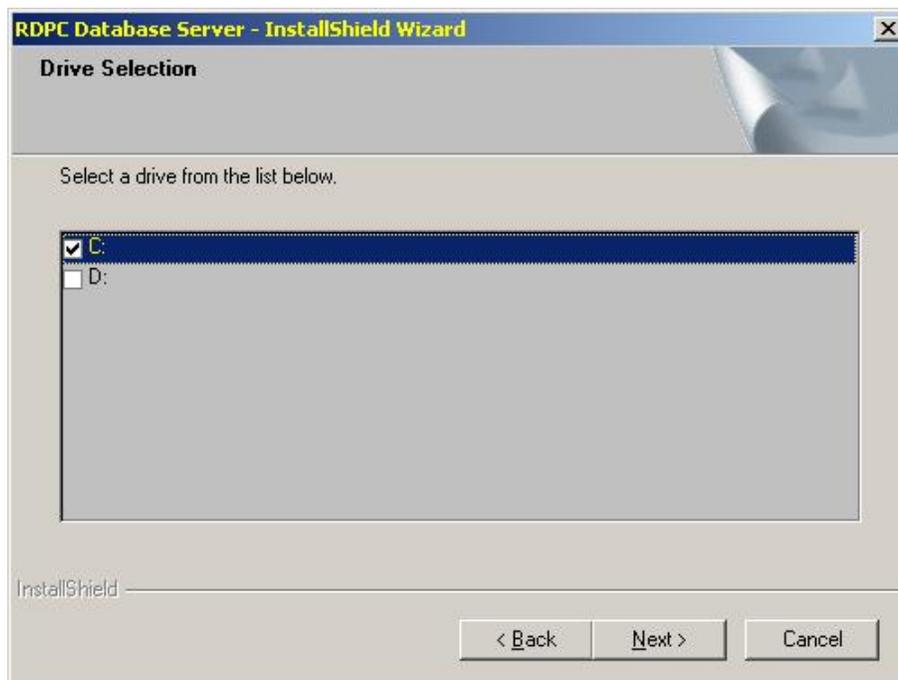
- 3.6 The installation program will copy the necessary temporary files.



3.7 At the “Welcome” screen, click *Next*.



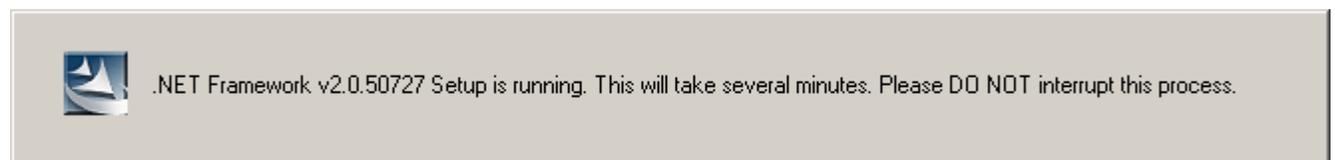
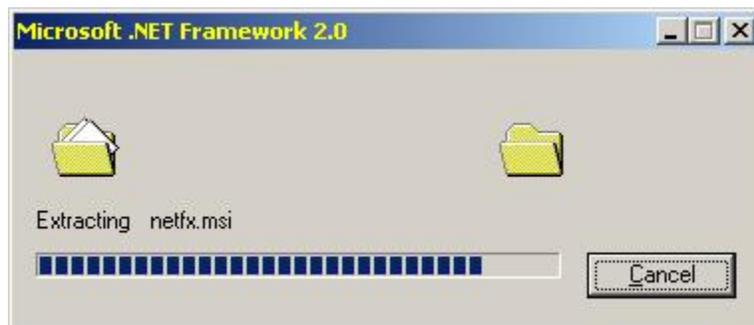
3.8 Choose the local hard drive where you would like the database software installed. Note that only the local drives with enough available space will be listed. If only one local drive that meets the criteria is available, this Step will be skipped.



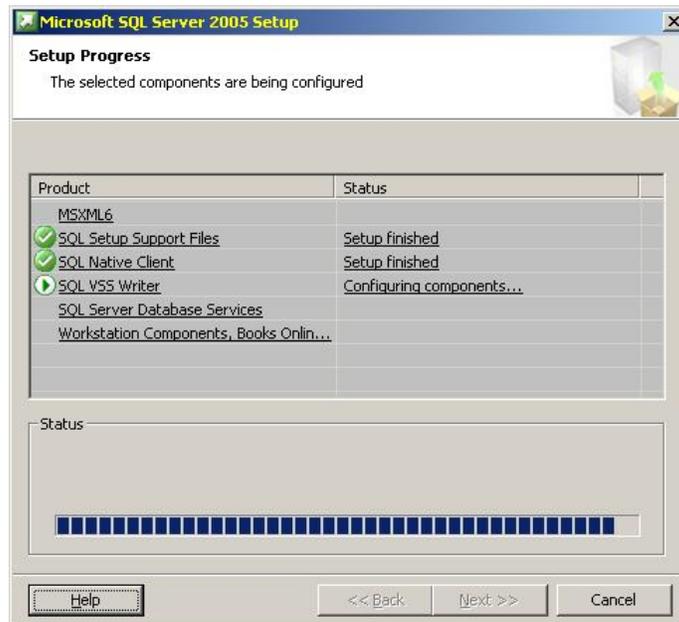
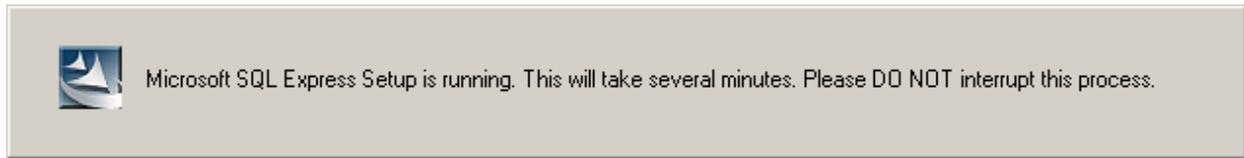
- 3.9 Microsoft .NET 2.0 requires that you read and agree to the End-User License Agreement. Once you have read the entire text, click *Yes* to continue.



- 3.10 The installation of .NET will proceed without any further intervention. This process may take several minutes. Do not interrupt the process.



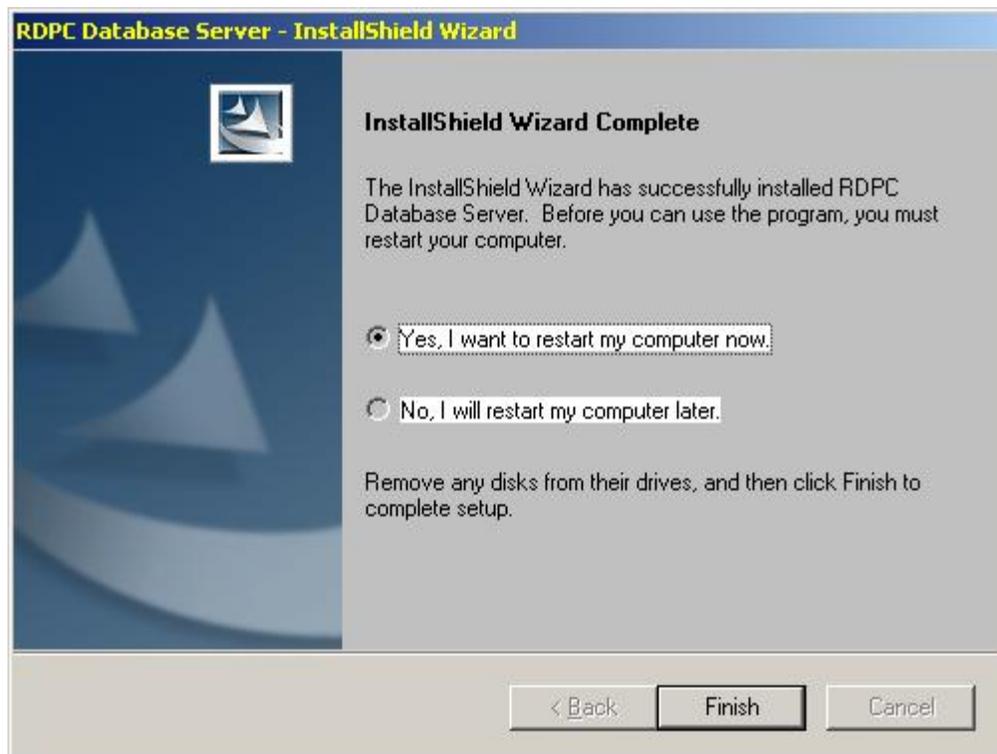
- 3.11 Upon completion of .NET, the MSSQL Express installation will begin without intervention. This process may take several minutes. Do not interrupt the process.



- 3.12 When MSSQL is complete, you will be prompted to take note of your database server configuration. This is important to know for connectivity from your RDPC workstations.



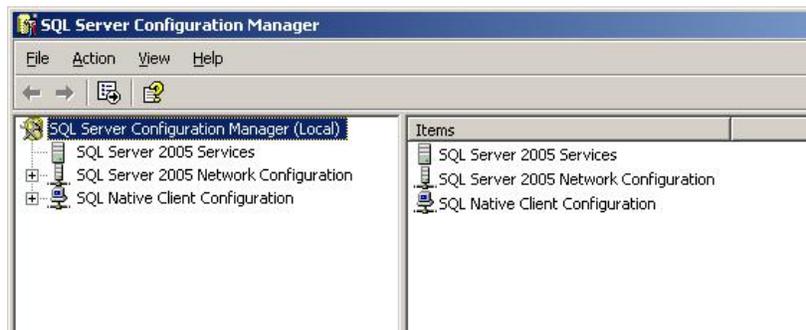
- 3.13 When the installation is finished, you will be prompted to restart your server. **Be sure “Yes, I want to restart my computer now” is chosen and click *Finish*.** Your workstation will shut down all applications and restart. **Do not** interrupt the process.



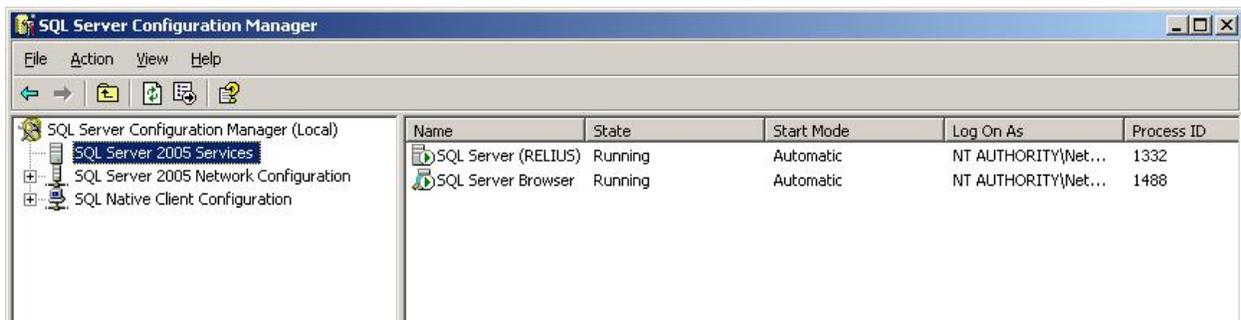
- 3.14 If action was taken in Step 3.1, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder and remove the remark from the **RUN=** and **LOAD=** statements from WIN.INI. Restart any services that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.
- 3.15 **Importing a new (empty) database will be conducted during the RDPC workstation installation. See the instructions on RDPC Workstation Installation for further details.**

## 4 Connecting to Your Database

- 4.1 From the database server, click *Start | Programs | Microsoft SQL Server 2005 | Configuration Tools | SQL Server Configuration Manager*. The SQL Server console will appear.



- 4.2 Browse to the “SQL Server 2005 Services” entry to view the instance, normally **SQL Server (RELIUS)**.

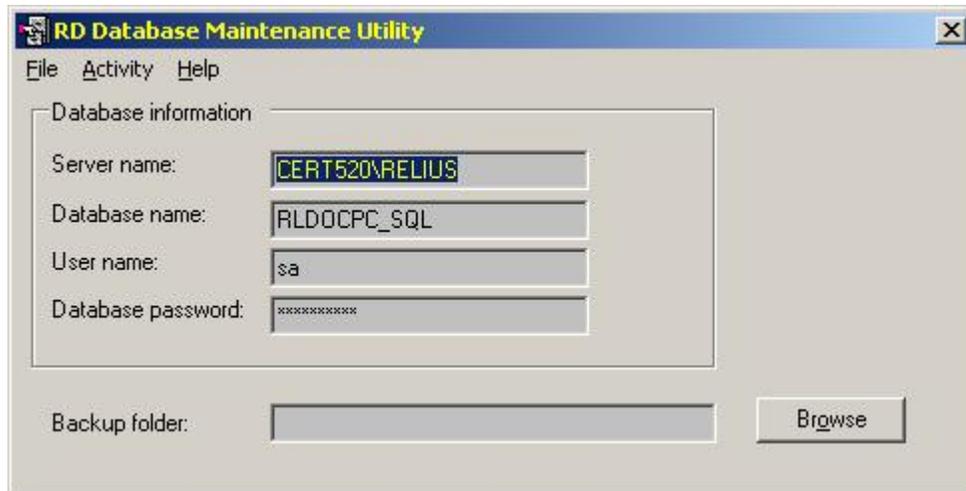


- 4.3 You can choose any number of options by right-clicking the instance and choosing among Start, Stop, Pause, Resume, or Restart.

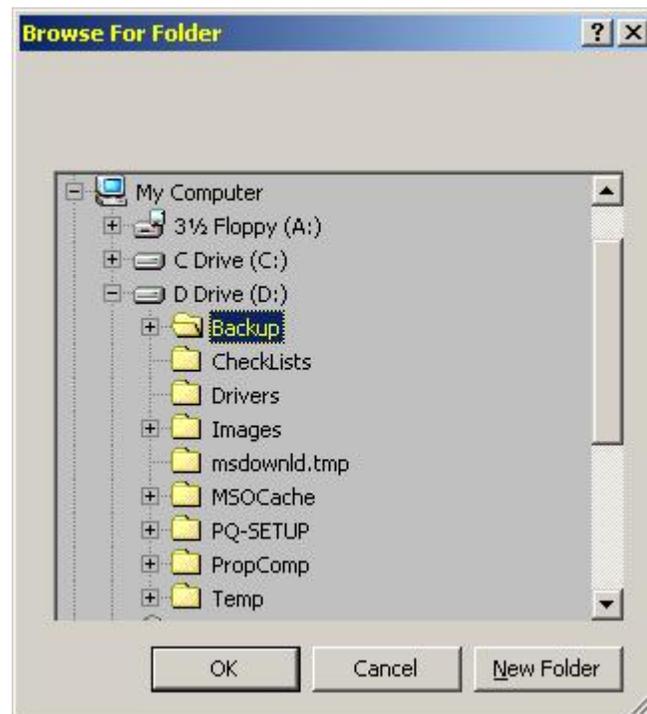
## 5 Database Maintenance

SunGard Relius has provided a new utility that will enable full database exports for the purposes of backup and security. The Steps in this Section are conducted at the RDPC SQL Express Database Server.

5.1 Click *Start | Programs | Relius | Documents | RD Database Maintenance*.



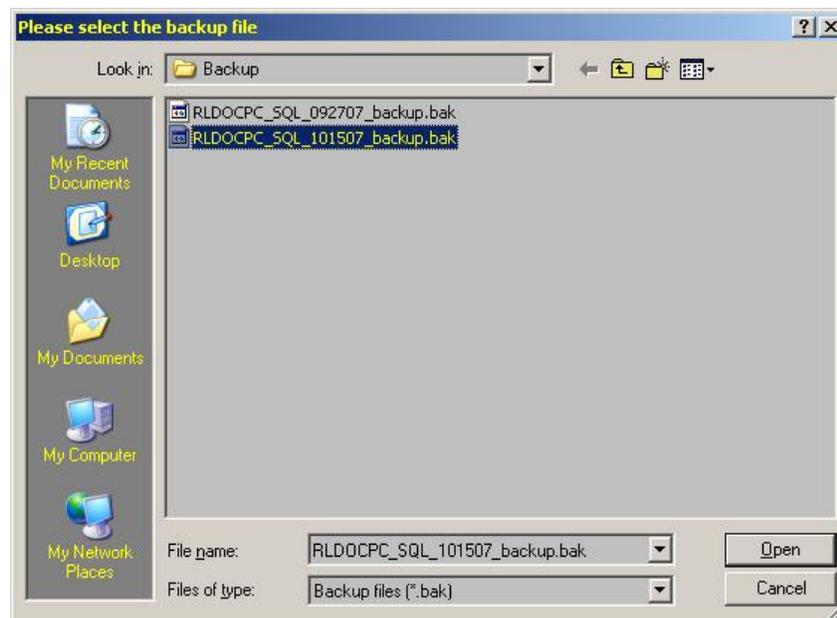
5.2 Verify your information, then enter or browse to your backup folder (e.g., D:\Backup). Click *File | Save Settings* to store any changes you have made.



- 5.3 Click *Activity* | *Backup*. Wait for the message telling you of a successful backup. The file format is as follows: Instance\_Date\_backup.bak. Therefore, if a database were backed up from an instance named RLDOCPC\_SQL on August 1, 2006, the database would be named RLDOCPC\_SQL\_080106\_backup.bak. Use this information to locate and archive your data. When finished, make a backup copy of the \DP\_Data directory where RDP is installed to the workstation.



- 5.4 To restore a backed up database, click *Activity* | *Restore*.



- 5.5 Click *Activity* | *Check Database* to verify your database is on-line and ready for use.



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