

entrée

software for food distributors

entrée V4 SQL

Update Process Overview

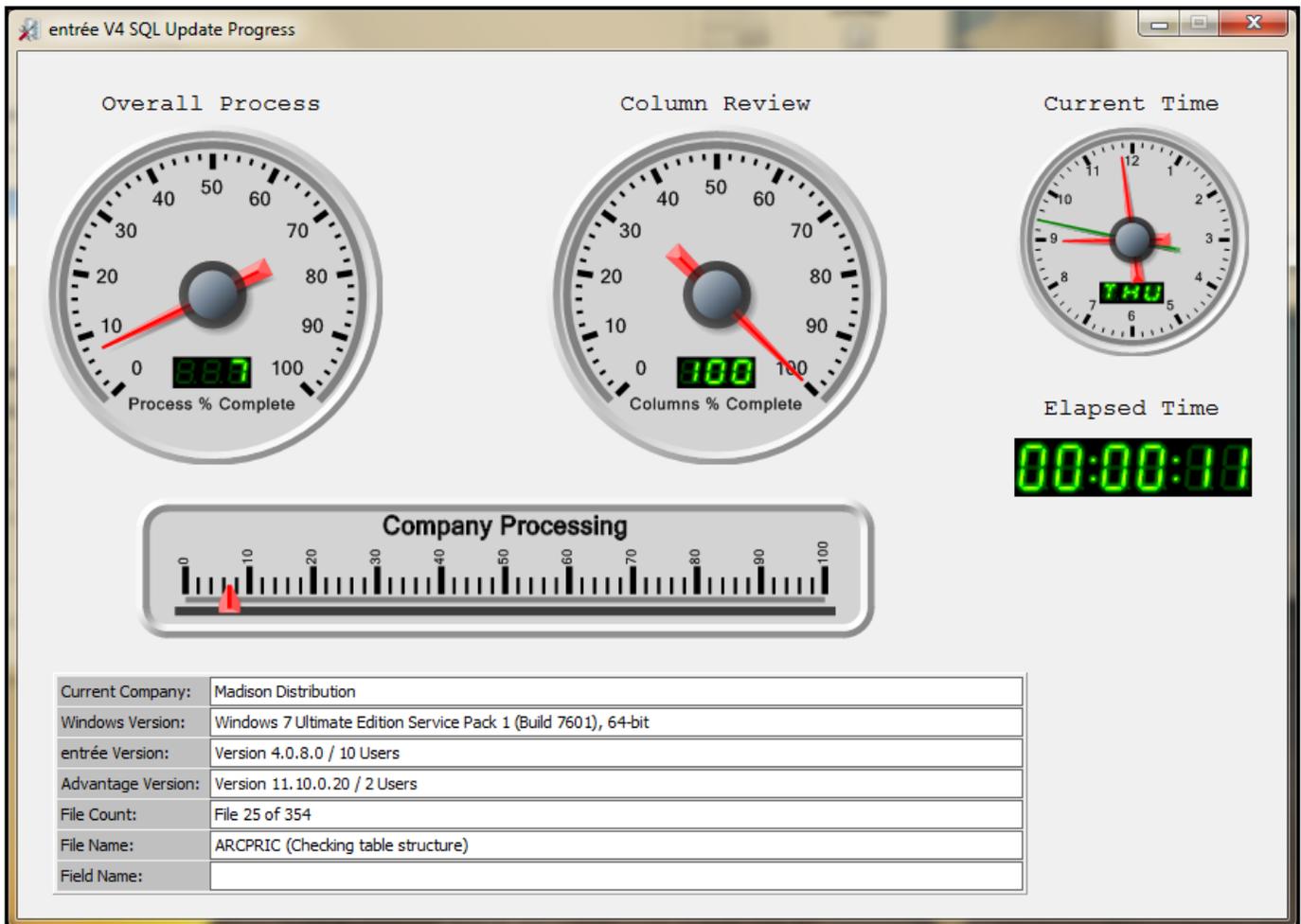


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Important entrée V4 SQL Resources

This guide only provides a brief overview of the installation process for **entrée V4 SQL**. For more detailed information about the **entrée V4 SQL** installation process, release updates, the workstation installation process and more, please download and review the **entrée V4 SQL Install Guide** from the necs.com website following the instructions here.

1. In your browser go to the **necs.com** website and click the **Support** drop down menu.
2. Click and use the **Customer Login** to enter the secure area of the website. In this area release upgrades are posted along with links to other support services and documentation.
3. In the menu on the left click the **System Guides** option. On this web page you can access to the documentation and system guides that support our software products.
4. Click the **entrée V4** option.
5. Look for the green arrow for the **entrée V4 SQL System Guide** and the **entrée V4 SQL Install Guide** displayed on the right. Click the arrow and a new window will open in the browser for the guide. From here you should download the guides to your computer and save them for future reference.

The search-able and keyword rich knowledgebase for **entrée V4 SQL** can be accessed in the **necs.com** website. It is recommended that this be your primary resource as a system guide. To access it follow these steps:

1. In your browser go to the **necs.com** website and click the **Support** drop down menu.
2. Click and use the **Customer Login** to enter the secure area of the website. In this area release upgrades are posted along with links to other support services and documentation.
3. In the menu on the left click the **KnowledgeBase** option. On this web page you can access to the knowledge bases for many of our software products.
4. Click the **entrée V4 KnowledgeBase** link. You can print any topic you would like a hard copy of locally from the knowledgebase.

entrée V4 SQL System Requirements

Review the minimum Server and Workstation requirements below to ensure your computer network is ready for **entrée version V4**. To improve system performance for larger installations, a faster processor as well as a going to Quad Core technology on the server is recommended. Workstation performance can be increased by a faster processor and more RAM memory.

Server Requirements

- Windows 2008 Server / Windows 2012 Server (including Standard and Server Essentials).
- Dual Core processor. Note that the Sybase Advantage Database Server supports multiple processors on Windows. It is multi-threaded and will perform each user request database operation concurrently or in parallel if multiple processors are present.
- Intel Xeon 2.4 GHz or greater
- 16GB RAM
- Windows 64-Bit
- 500GB hard drive, 1TB recommended / 3TB recommended if using **entrée.DOC** and a high volume of invoice, etc. images are stored (more than 1,000 images/ per day to provide sufficient space for at least 7 years).

Workstation Requirements

- Windows 7 / Windows 8
- Intel I5 or greater
- 4GB RAM
- 1360 x 768 minimum monitor resolution
- 60GB hard drive

Notes for Larger Installations

- To improve system performance a faster processor as well as a going to Quad Core technology on the server is recommended.
- Workstation performance can be increased by a faster processor and more RAM memory.

Remote Desktop Requirements

Minimum Terminal Server requirements (for up to 10 workstations)

- Dual core Xeon processor 2.2GHz +
- 4 GB Ram
- Windows 2003 Server R2

Recommended Terminal Server Requirements (for up to 10 workstations)

- Quad core Xeon processor 2.33GHz +
- 8 GB Ram
- Windows 2008 Server 64 Bit

Note: The **entrée** data files should not be installed on the terminal server. Instead they should live on a separate file server.

entrée V4 SQL Update Process Overview

NECS recommends that you do not completely switch your operation to the **V4 SQL** software once it is installed on your server. Instead, keep your existing **entrée version 3** software running, and put **V4 SQL** through the paces doing things such as printing invoices or any other custom features we have provided for you over the years. Note: Be sure version 3 software is running a current release of the software.

1. Switch to Advanced Security in entrée version 3

Before you begin to migrate to **entrée V4 SQL** you must turn on Advanced Security in **entrée version 3** if you are not already using it. This also means you must create a user account for every person that will be logging in to the **entrée** system.

Go to **System > Security Management >** then check the **Enable “Advanced” Mode** box at the bottom of the screen.

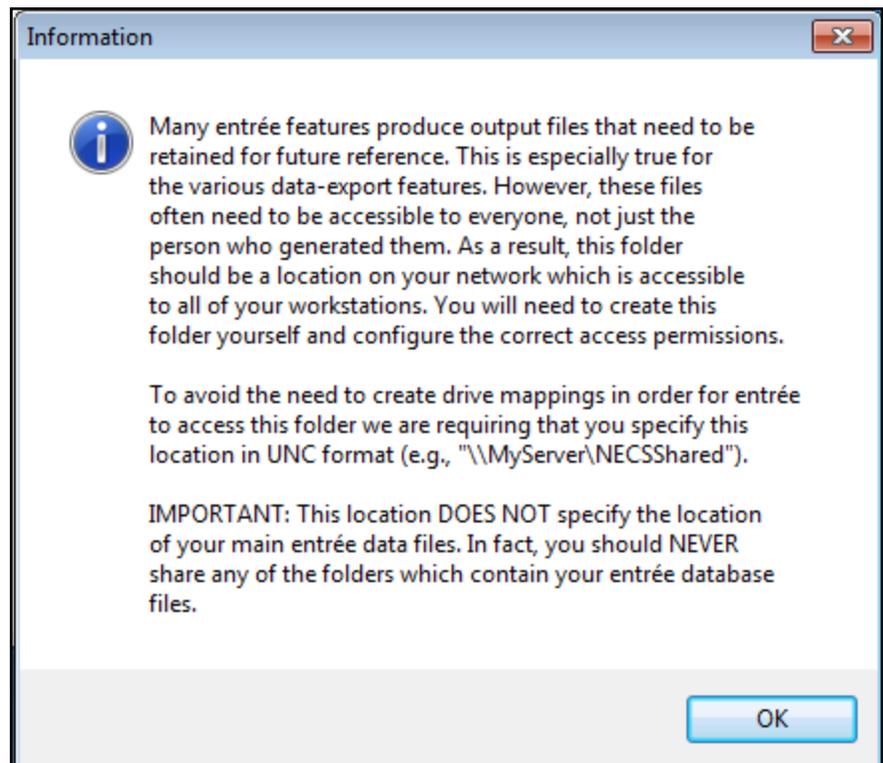
Now use the **Add** button to create your user accounts. Be sure to customize the Settings, which are permissions in **entrée**, on each account to match the functions your users perform in the system.

Tip: Consult the Security Management System in the Using the System Menu chapter of the **entrée V3 Knowledgebase** at <http://www.necs.com/knowledgebase/> for details about this step.

2. Setup V4 NECS Shared Data Folder

At this point you must decide on a location and set up the required NECS Shared data folder. Since drive mapping will no longer be used with **entrée** you need to specify this location in UNC format. For example: **\\MyServer\NECSShared**, where “MyServer” is the name of your local server.

- All **entrée** users must have Read / Write permission for this folder.
- The NECS Shared data folder stores the **entrée** Help files, imported and exported files and output files.
- The information message from the Update Utility shown here provides more details.



entrée V4 SQL Update Process Overview

3. Install the Sybase Advantage SQL Server

Before performing the server installation be sure that the server you choose has enough storage capacity for your **entrée** data files and **entrée.DOC** image files, if you have this add-on module. You can choose any location for your server and it may not be the C: drive if the storage capacity is not there. You can point to any large storage area. Be sure to note the IP address of your server for use with the Update Utility in the area provided below.

Use the V4 SQL USB drive you received from NECS to install the **Sybase Advantage** software.

Insert the USB drive into your server and the installation wizard will automatically launch. The installation wizard will install both your **V4 SQL** software to your server, along with the **Sybase Advantage SQL** server software and all other necessary files.



You will need to save the IP Address of your V4 server for the update process described in this document. Please write the Sybase Advantage SQL Server IP Address on the line below:

entrée V4 SQL Server IP Address: _____

Workstation Installation Notes:

- It is recommended that the workstation installation be done last, when the **V4 SQL** data is ready, so that files and location are in place to launch the new application successfully.
- The workstation installation can be accomplished at this point, as long as you don't actually try to run the software, as you don't have your SQL data setup yet.

4. Install & Run the entrée Update Utility

Once your **entrée V4 SQL** and **Sybase Advantage** software are installed you can run the "Update Utility" found on the V4 SQL USB drive.

This process will create the empty **Sybase Advantage SQL** data files for **entrée**. The first time you run the Update Utility, it will run quickly. The default directory for these files is **\NECSSQL**.

Important Features of the entrée V4 Update Utility

- **Updates your data files to the latest entrée version:** Allows you to see which of your users are still logged in before you proceed with the utility.
- **Backs up your SQL files:** Copies your SQL files from their protected directory, into another location where your backup software can access. Create an editable "Windows Task Scheduler" event to automate the copying of the files to local or Internet based offsite storage.
- **Restores your SQL files:** Can take a file or your entire file set to restore and replace **entrée** SQL file(s).
- **Re-indexes your SQL files:** For those rare occasions when you need to Re-index a specific file or group of files, you will only be able to perform that function here. The "Re-index Files" feature is no longer available or needed from within the main **entrée** software.

4. Install & Run the entrée Update Utility

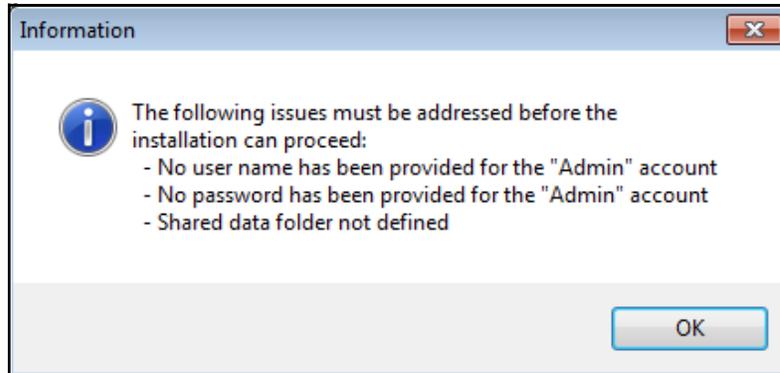
In the Update Utility there are a few informational tools to help you understand what is required for input in the screen.



Click Me!

This button will provide you with information about what other fields are required before the utility can be run.

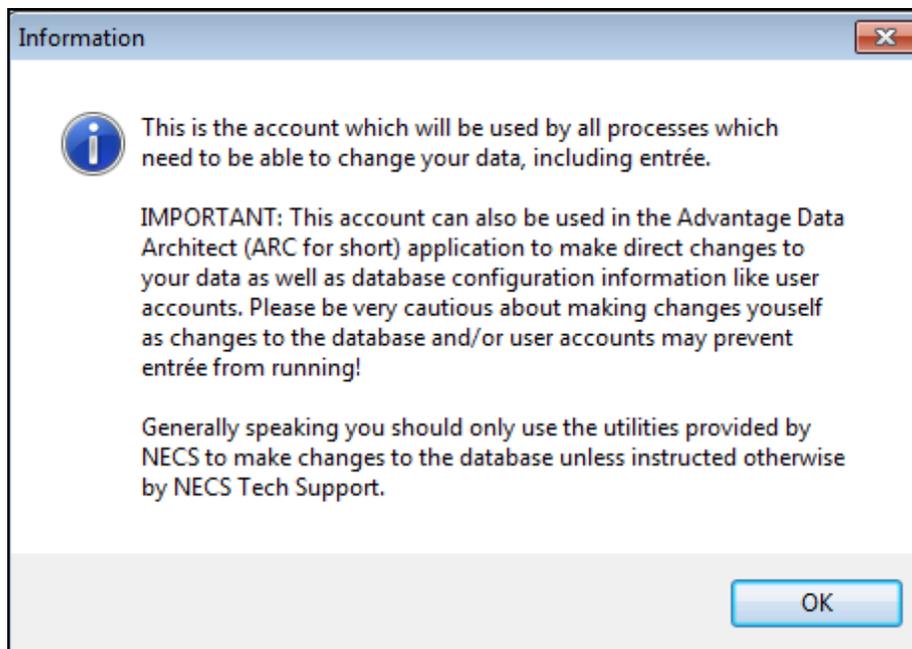
As you can see in the Information message box on the right a list of areas that need to be addressed has been provided.



Information

This button will provide you with information about the specific field it is near on the screen. The Database Administration Account, Database Access Account and NECS Shared data folder sections of the screen have an Information button. The NECS Shared data information message can be seen on page 2 of this document.

This is the Information message displayed for the Database Administration Account section.

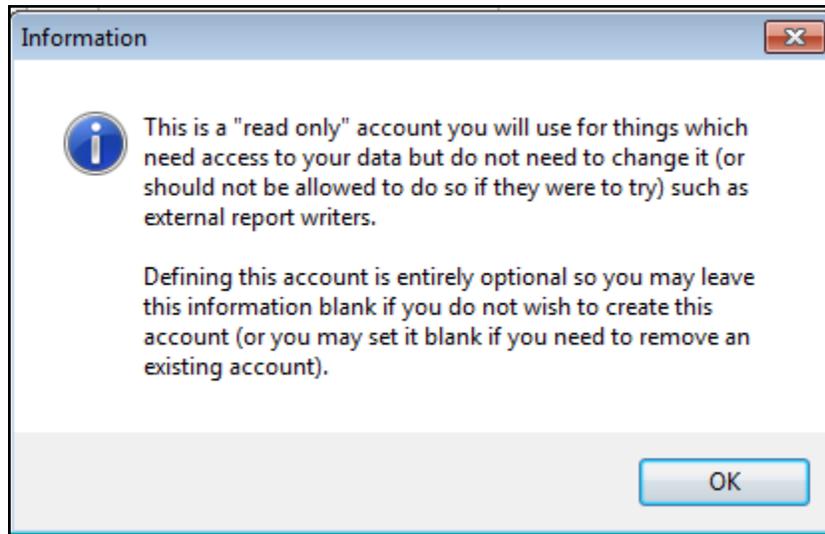


4. Install & Run the entrée Update Utility



Information

This is the Information message displayed for the Database Access Account section.



Update Utility Notes:

- Running this utility requires that all users exit **entrée**, so that the SQL databases can be "locked" for the update.
- **You MUST run the Update Utility on your server** which is required when using **Sybase Advantage SQL** software.

Follow these steps to install and run the Update Utility:

1. Double click the **NECSUpdate** program on your server to run the Update Utility.

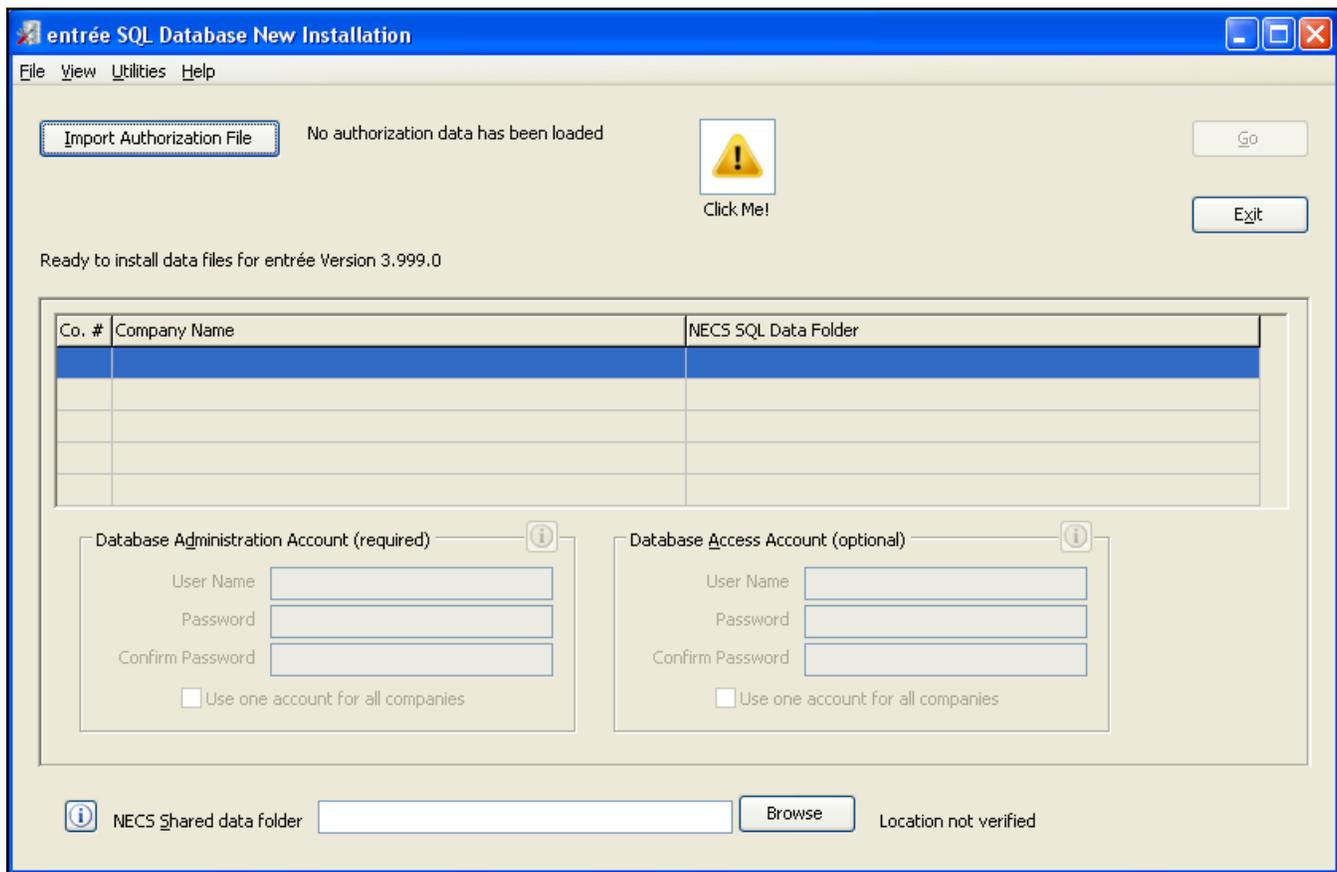
You will see the **entrée NECSCfg Connection Failed** message shown below which is normal.



2. Click **Yes** because this is your first time running the utility.

4. Install & Run the entrée Update Utility

3. The **entrée SQL Database New Installation** screen will open.



4. First you must perform the import and verification of your NECS.dat authorization file. This file will be provided to you by NECS and will be specifically generated for your company.

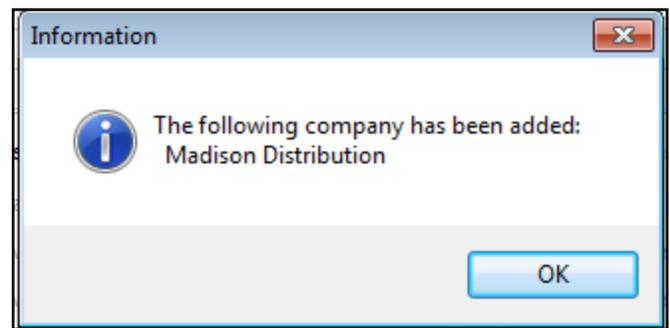
Click the **Import Authorization File** button.

5. Now a browse window will open where you will locate and select the NECS.dat file provided to you by NECS. This file replaces the ARVerify.dat from **entrée version 3**.

6. If the **Import Authorization File** is successfully verified you will see the Information message shown here with the name of your company.

Important Note:

If there is a problem with this file and verification is not successful please contact NECS Tech Support.

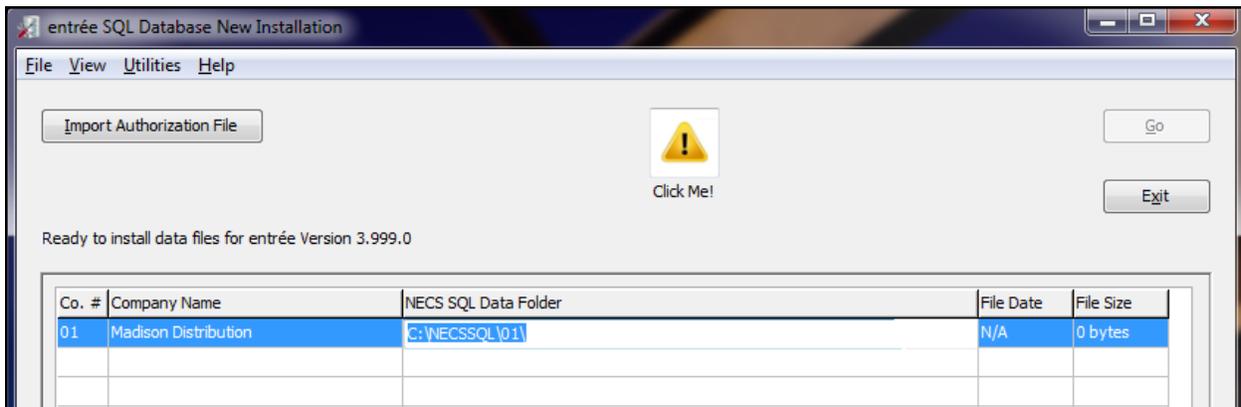


4. Install & Run the entrée Update Utility

- Now you will see the company number (the default is 01), your company name, the location of the NECS SQL data folder and the File Date and Size which are null because the data has not been loaded yet by the Transfer Utility.

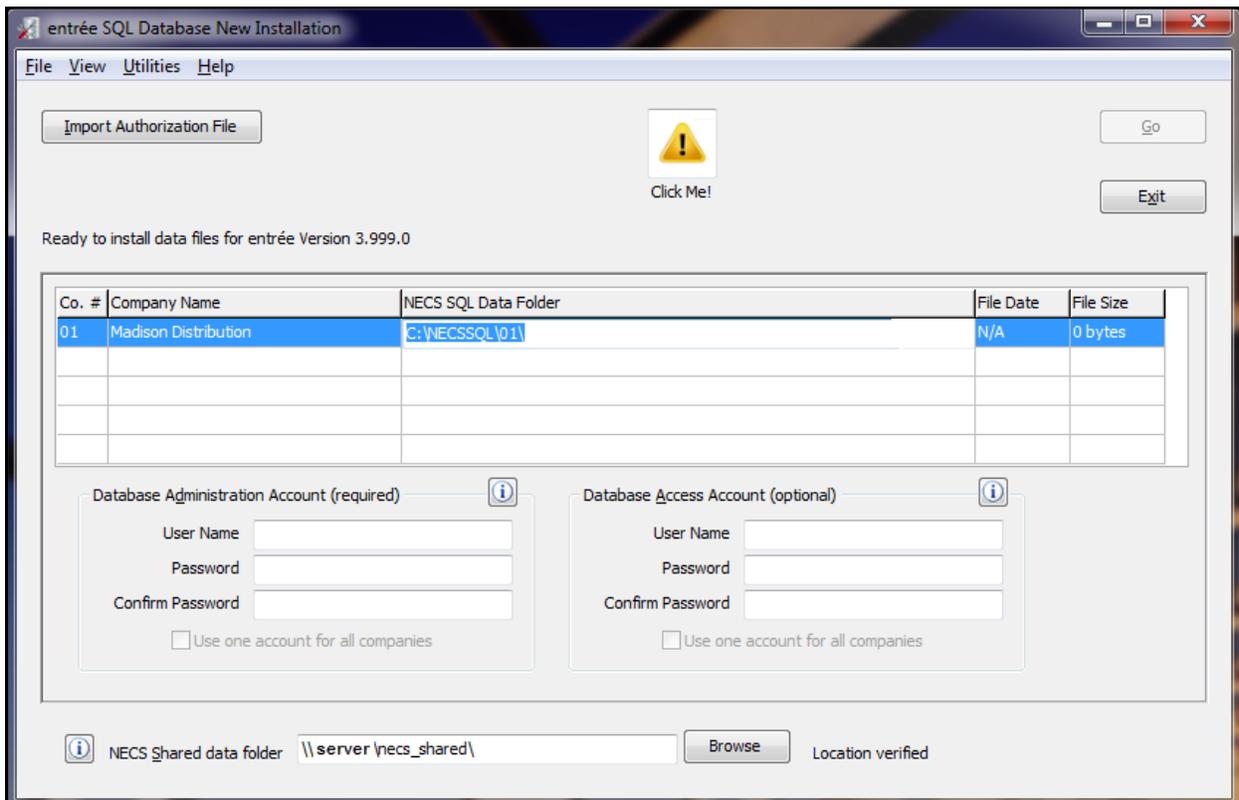
Multi-Company Update Notes:

For businesses with multiple companies defined in **entrée** there will be a separate authorization file for each company that you will import in this step. All your companies will be listed in order by Company number 01, 02 ... with the rest of the information.



- Next you will locate the **NECS Shared data folder** that you created in step 2 on page 3.

Click the **Browse** button and find the **NECS Shared** folder on your network. A **Location verified** message will be displayed near the Browse button when it is successful.



4. Install & Run the entrée Update Utility

9. Now create the *required* **Database Administration Account**.

This account will be used by the System Administrator to make changes to the **entrée** databases.

Enter a **User Name** value and **Password** with confirmation.

Tip: Please be sure to save this information in a safe place and only share this information with the limited number of people who require System Administrator access to your databases.

10. Next you have the option to create a **Database Access Account**.

This account provides *Read Only* access to the **entrée** databases. If you plan on running external report generation software packages against the databases you will need this account.

Enter a **User Name** value and **Password** with confirmation. Please be sure to save this information in a safe place for future reference.

Multi-Company Note:

For businesses with multiple companies once your import all your authorization files you will have the options enabled below these accounts. You can check the **Use one account for all companies** option for one or both accounts you create here.

Co. #	Company Name	NECS SQL Data Folder	File Date	File Size
01	Madison Distribution	C:\NECSSQL\01\	N/A	0 bytes

Database Administration Account (required)

User Name: dba
Password:
Confirm Password:

Use one account for all companies

Database Access Account (optional)

User Name: access
Password:
Confirm Password:

Use one account for all companies

NECS Shared data folder: \\server\necs_shared\ Browse Location verified

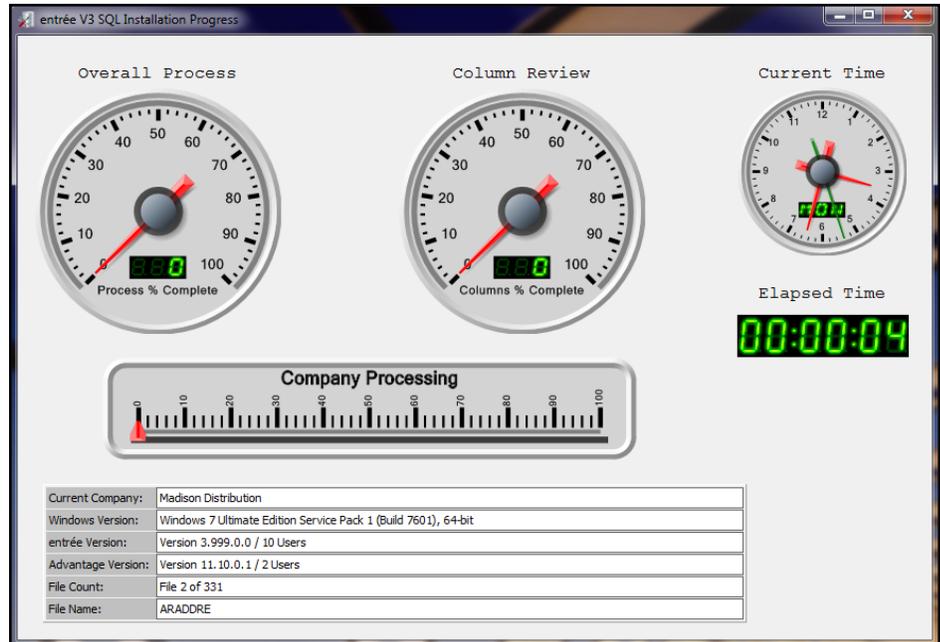
4. Install & Run the entrée Update Utility

11. Now that all the information has been entered and verified hit the **Tab** key and the **Go** button is enabled.
12. Click the **Go** button and the **entrée V4 SQL Installation Progress** screen will display showing you the details about the work of the Update Utility.

Displayed in real time on the dials are Overall Process, Column Review Current Time and Elapsed Time.

In real time as the databases are created their File Name will display in the section at the bottom of the screen.

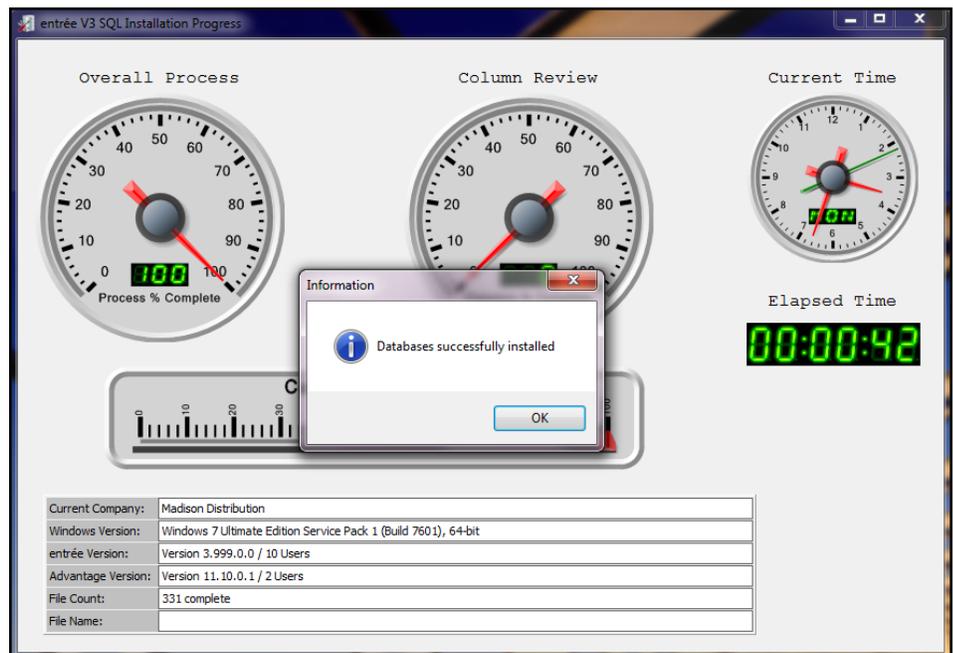
The File Count will increment as the installation process moves forward.



13. When the utility has completed the **Databases successfully installed** message will display. Click **OK**.

14. At this time new customers will start the process of creating their data in **entrée**.

Existing customers will continue on to the next step and run the **Transfer Utility** to convert your existing **entrée** databases to V4 SQL.



entrée V4 SQL Update Process Overview

5. Running the Transfer Utility

Found on the V4 SQL USB drive the **Transfer Utility** will convert and load the **entrée version 3** data into your new **entrée V4 SQL** databases.

Transfer Utility Note:

At this time transfer rates are running at 1 GB per hour. This is critical information to consider when planning your upgrade to **entrée V4 SQL**.

Follow these steps to run the Transfer Utility:

1. Double click the **SQLXfer** program in the “e4 Transfer Util” folder on the USB drive plugged into your server to run the **Transfer Utility**.
2. Verify the version 3 Data File Locations on the **entrée SQL Data Transfer Utility** screen. Use the Browse button to locate the correct location if needed. Normally you will not have to modify the file information because it is extracted from the **entrée** system.
3. If the **Server IP Address** field is enabled, enter the IP address for your V4 server.

Tip: When you installed the server you were asked to write the IP address on page 4 of this document.

4. Once the information required by the transfer utility has been entered click the **Transfer Data** button.

entrée SQL Data Transfer Utility

Version 3 Data File Locations

Path to NECS Common Files Browse...

Path to accounting Common Files Browse... Copy NECS path

Version 4 Database Configuration

Server Name (if available) Edit Server Configuration

Server IP Address Server Port Number

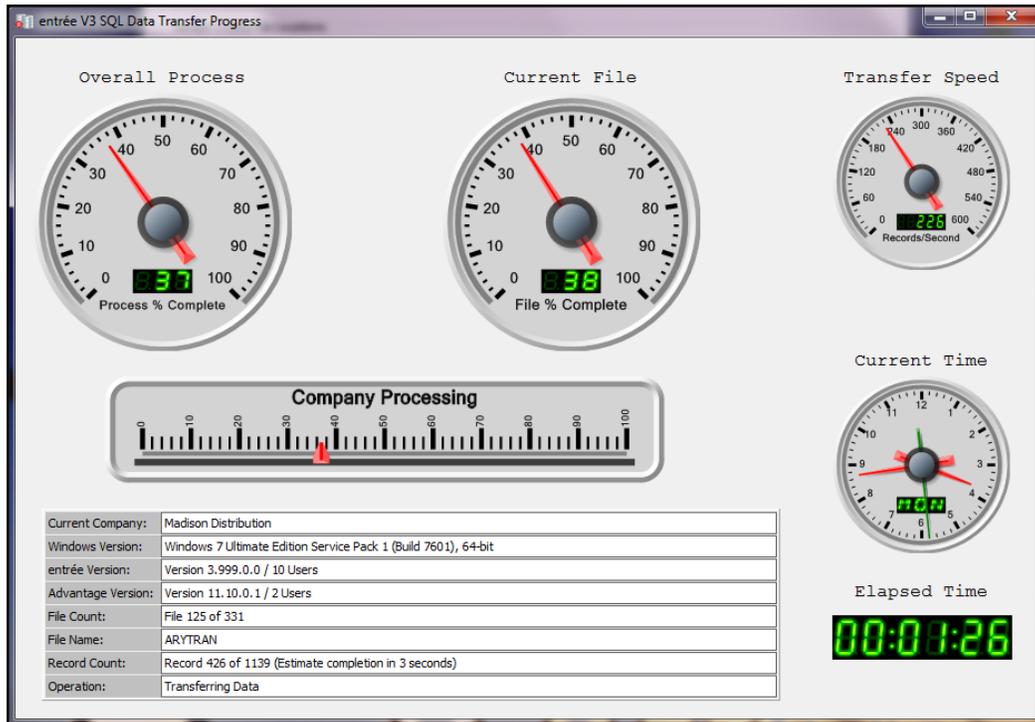
Ready to transfer data for 1 company

Transfer Data

The **entrée V3 Data Transfer Process** screen will display and begin processing your data with dials showing Overall Process, Column Review Current Time and Elapsed Time for the transfer.

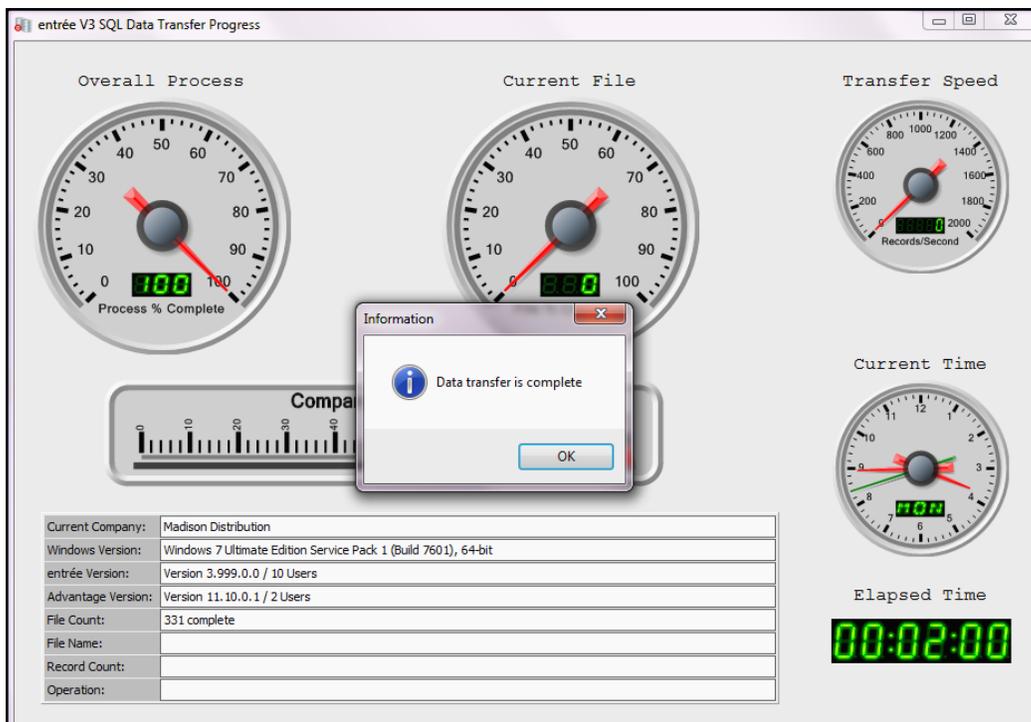
5. Running the Transfer Utility

In real time you can see the databases as they are transferred. File Count and File Name along with other information will update on the screen as the transfer progresses.



5. When the transfer of your data has completed the **Data transfer is complete** message will display. Click **OK**.

Now proceed to the next update process step and perform your Workstation Installs.



entrée V4 SQL Update Process Overview

6. Run the Workstation Installer on each entrée Workstation

You will need to run the "Workstation Installer", Found on the V4 SQL USB drive, so that the client software is installed on each users workstation. The IP address of your server is the critical piece of information needed to run the install on your workstations.

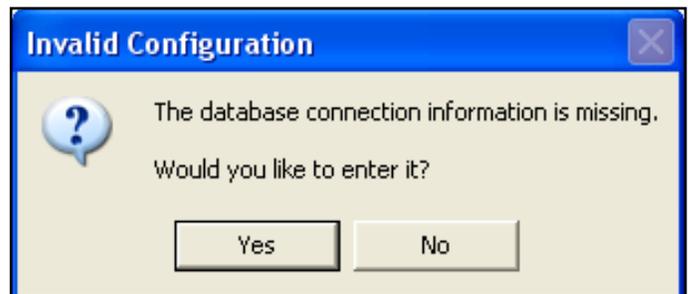
This Workstation Installer will place a new **V4** icon on your users desktop. Users will be able to select either the **V3** or **V4** icon to launch the appropriate version. This provides an opportunity to continue to use **V3** as normal, and have your users begin to experiment and test **V4** so that they are comfortable with it.

Once you are finished with testing and are ready to make the switchover to **V4 SQL**, simply re-run the **Transfer Utility** to ensure your data is up-to-date. Lastly remove the **V3** icon from your users workstation desktops.

7. Your First Run of entrée V4 SQL



1. Find the NECS shortcut with the SQL truck (shown on the left) on your desktop.
2. Double-click the NECS shortcut to run **entrée V4 SQL** for the first time.
3. The **Invalid Configuration** dialog box will display.
4. Click **Yes**. Now you will proceed to setup and verify your database connection information for **entrée**.
5. The new **entrée** system will now create the data objects and other resources it needs to run as seen in



7. Your First Run of entrée V4 SQL

- When the **SQL Database Connection Configuration** screen is displayed click the **I already know my server's IP address** button.
- Now enter the **IP Address** for your server in the box and **Port Number** 6262.

Tip: When you installed the server you were asked to write the IP address on page 4 of this document.

- Click the **Test Connection** button.
- When the server address is validated the **Save** button will be enabled click **Save**.

The screenshot shows a window titled "SQL Database Connection Configuration". It contains a text box with instructions: "entrée ultimately needs to know the IP address of the server which is running the Sybase Advantage Database Server. If you already know the correct address you may enter it in the appropriate field below. If you don't know the IP address of the server you will at least need to know the 'machine name' of the database server, which entrée can then try to translate into an IP address. Just be aware that, for various reasons, it may not always be possible for entrée to translate a given machine name. In that case you will need the assistance of someone who knows the correct IP address. If directly entering the IP address does not allow you to connect to the database then it may be necessary to make adjustments to the networking setup on this machine. Any changes to the network setup must be". Below the text are two radio buttons: "Find my server by Machine Name" (unselected) and "I already know my server's IP address" (selected). Under the first radio button are fields for "Machine Name of database server" and "Port Number" (6262), with a "Find" button. Under the second radio button are fields for "IP Address" (highlighted with a red box) and "Port Number" (6262), with a "Test Connection" button. At the bottom are "Save" and "Cancel" buttons. A note says "Use 'Test Connection' to validate the address and activate the 'Save' button".

- Next the Login screen is displayed enter your **Username** and **Password**.

Click the **Login** button.

The screenshot shows a login screen with a red background. On the left is the "LOGIN entree" logo. In the center, there are two input fields: "USERNAME" with "ADMINISTRATOR" entered and "PASSWORD" with "*****" entered. Below the fields are "Login" and "Quit" buttons. On the right is the "V4 SQL" logo and copyright information: "entrée Version 3.999.0 © 2000-2013 NECS, Inc. All rights reserved".

7. Your First Run of entrée V4 SQL

11. The **entrée V4 SQL** home screen will now open.

The new Ribbon Menu can be seen across the top of the screen with the legacy menu from version 3 below it in the dark gray bar. As mentioned earlier in this document the legacy menu can be turned off in System Preferences in the System menu whenever you like.

The entrée version 4 Application Window



V4 SQL Command Menu

This **entrée V4** command menu is accessed by clicking on the **V4 SQL** circle icon in the upper left corner.

The command menu includes:

- **Recent Tasks**
- **Window**
- **Show Login Screen**
- **Change Working Date**
- **Change Company**
- **Launch Remote Support**
- **Exit**



- Please visit our website at **necs.com** to learn about our other add-on modules, products and services.
- If you would like more information about **entrée.PEN**, the Anoto Digital Pen interface, please contact NECS Sales by emailing Anoto@necs.com.
- Contact our **NECS Sales Department** at sales@necs.com for more information.
- Contact the **Tech Support Department** at tech@necs.com for assistance.
- For information about current NECS software training classes use this link: necs.com/training.php

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