



# **Client Care Desktop**

## **5.0x Installation and Upgrade Guide**



**SYNAPTIC**  
**CLIENT CARE**

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## Introduction

This multi-purpose guide has been created to provide;

- A high level overview of Client Care Desktop (CCD) components
- An understanding of installation types
- A 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 installations and upgrades are performed by personnel who have a good understanding of your infrastructure, such as an internal or external IT department.

If you have opted for an un-assisted installation and have questions regarding this document, please contact our application support team on 0800 028 0033 before you start the process.

Please be aware that application support team can only advise you regarding the process and if you require us to perform the install, this will need to be scheduled and may incur a charge.

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

## Minimum Specification

The most recent minimum specification document can be found by clicking [here](#) or visiting [www.synaptic.co.uk/support](http://www.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 application support team on 0800 028 0033 or email [support@synaptic.co.uk](mailto:support@synaptic.co.uk).

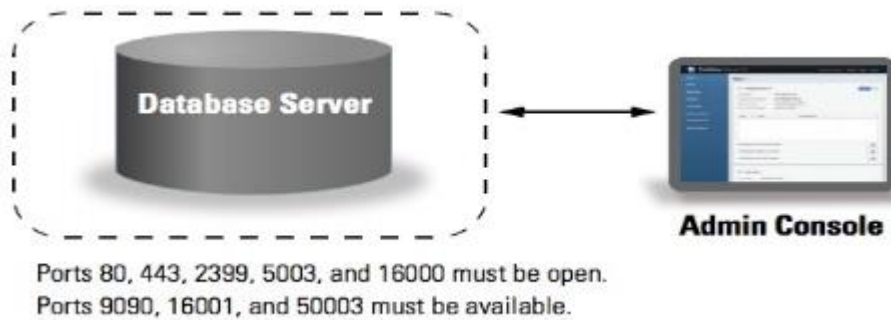
## Prior to Installation

Please ensure you have;

- Read this guide fully
- Read the [CCD Remote Desktop Access](#) document if using CCD via RDP or Citrix
- Access to the installation media – [download CCD installer file](#) and save
- Received a new set of CCD 5.00 licences
- Determined which version of FileMaker should be installed on each of your machines
- Backed up your databases

## Components

### FileMaker Server



FileMaker Server is a dedicated database server that publishes FileMaker databases and makes them available over a network.

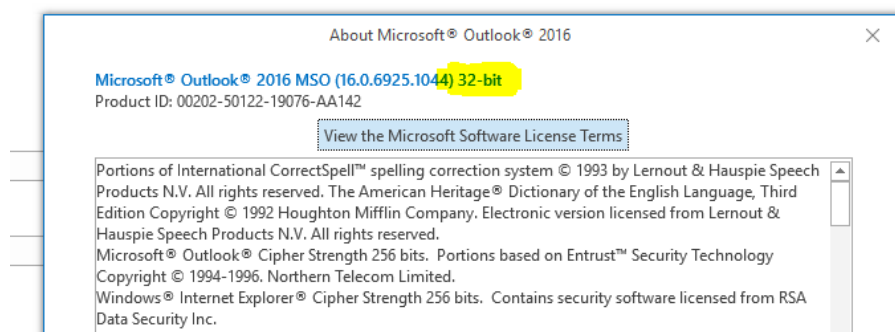
It hosts the database files that make up CCD and is used in systems where more than one person requires access to CCD.

### 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

### Product Information



### Databases

CCD 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.

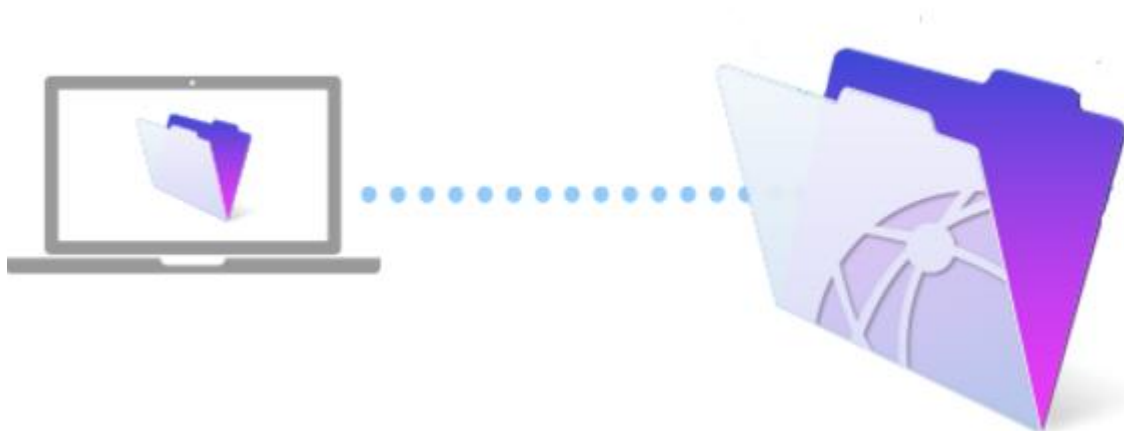
## Installation Types

### 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

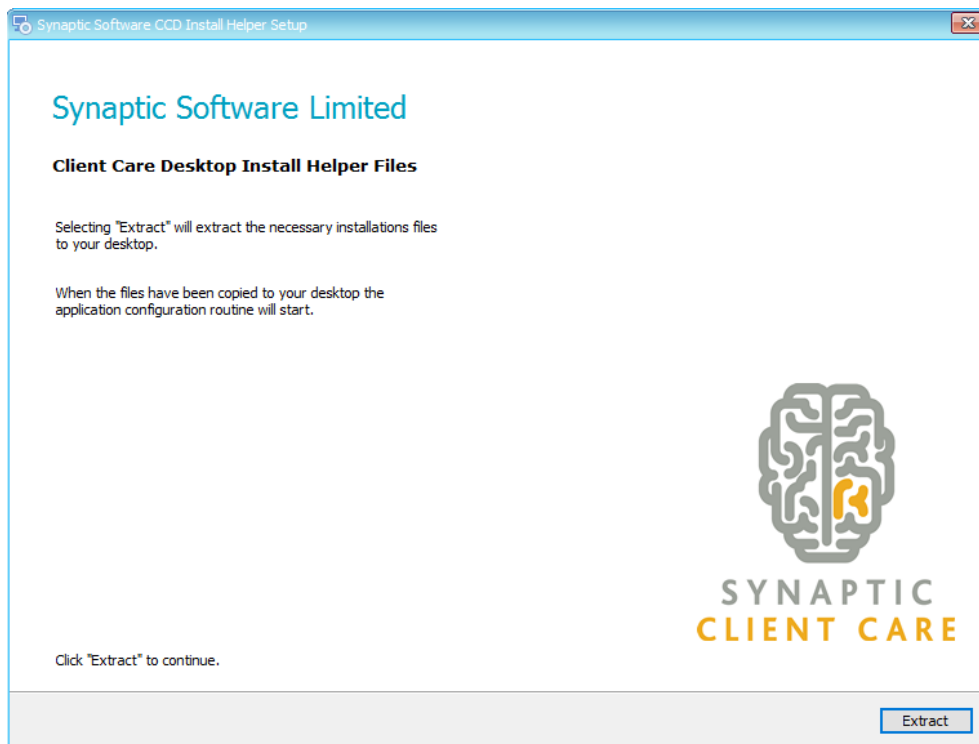
#### Setup Requirements

Before CCD can be installed you will need to ensure you have;

- CCD v5.00 Installation File - **SSL\_CCD\_InstallHelper\_5.00.xxxx.exe**
- Noted the architecture of your installed Office application – 32 or 64 bit

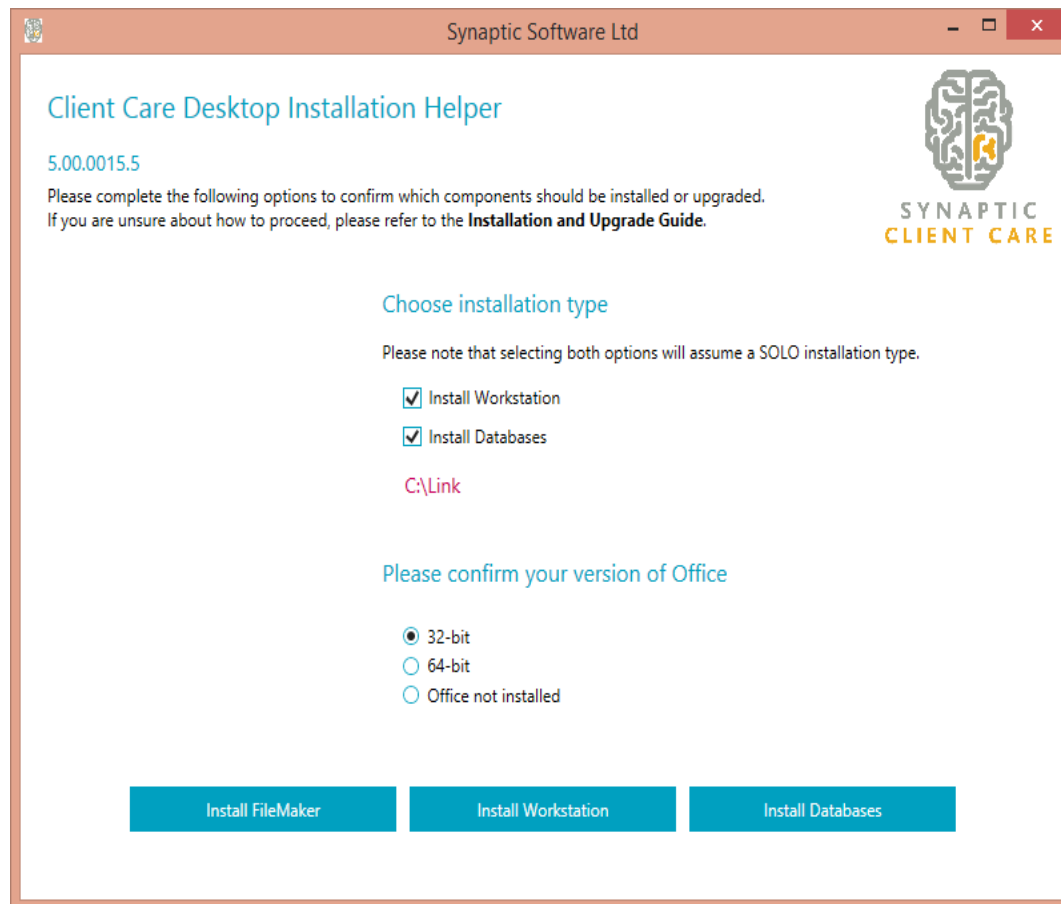
#### Installation Procedure

Double click the **SSL\_CCD\_InstallHelper\_5.00.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'



If an appropriate version of FileMaker is not installed on your machine the section entitled '**Please confirm your version of Office**' will be active. A selection will be required before you can progress to installing any components.

Please install each component in the following order;

1. FileMaker – if appropriate
2. Workstation
3. Databases

**NB** The FileMaker installer may take some time to load.

Once the installation process has finished, you should complete the setup wizard which will place a new CCD Icon on the desktop to launch the application.



## Server

### Obtaining CCD Databases

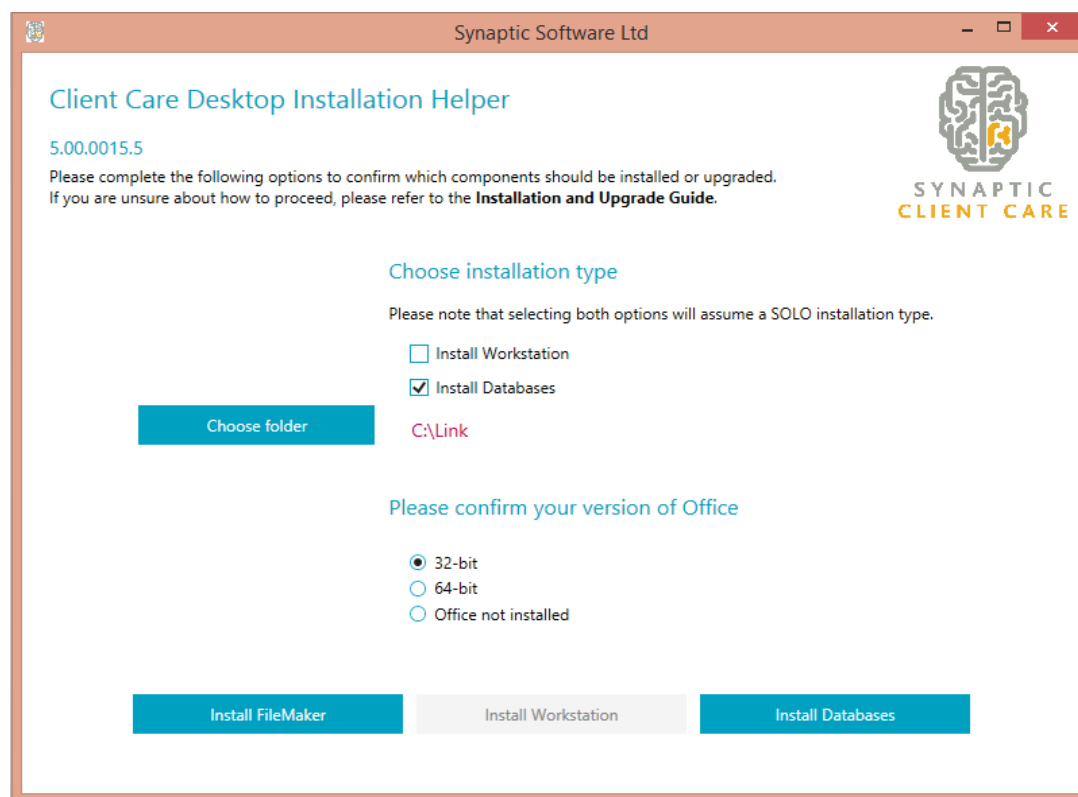
### Setup Requirements

Before CCD can be installed you will need to ensure you have;

- CCD v5.00 Installation File - **SSL\_CCD\_InstallHelper\_5.00.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\_5.00.xxxx.exe** file



Select 'Install Databases' and choose the location of your new directory to install them to.

If an appropriate version of FileMaker is not installed on your machine the section entitled '**Please confirm your version of Office**' will be active. A selection will be required before you can progress to installing any components.

Please install each component in the following order;

1. FileMaker – if appropriate
2. Databases

**NB** The FileMaker installer may take some time to load.



## 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.

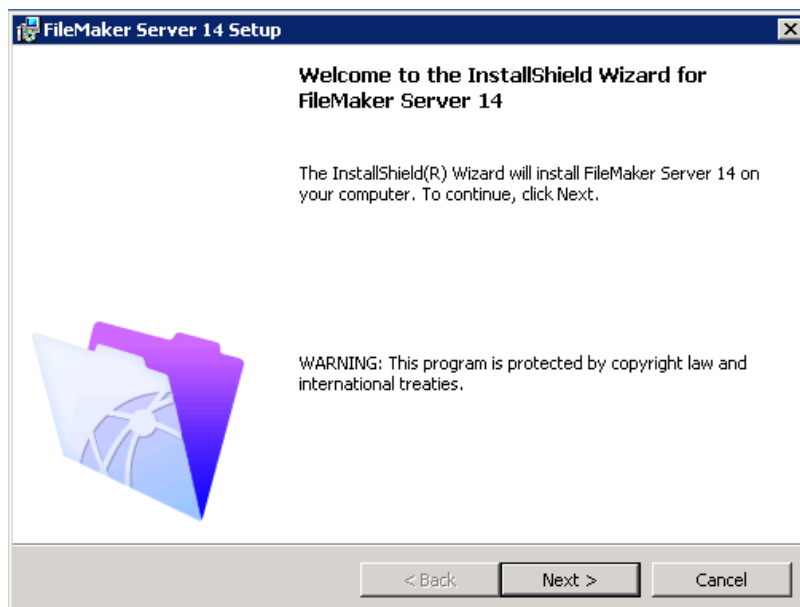
If you are installing FileMaker Server without an Internet connection, you have to manually download and install ARR following procedures in the following article;

### Manually Installing Application Request Routing

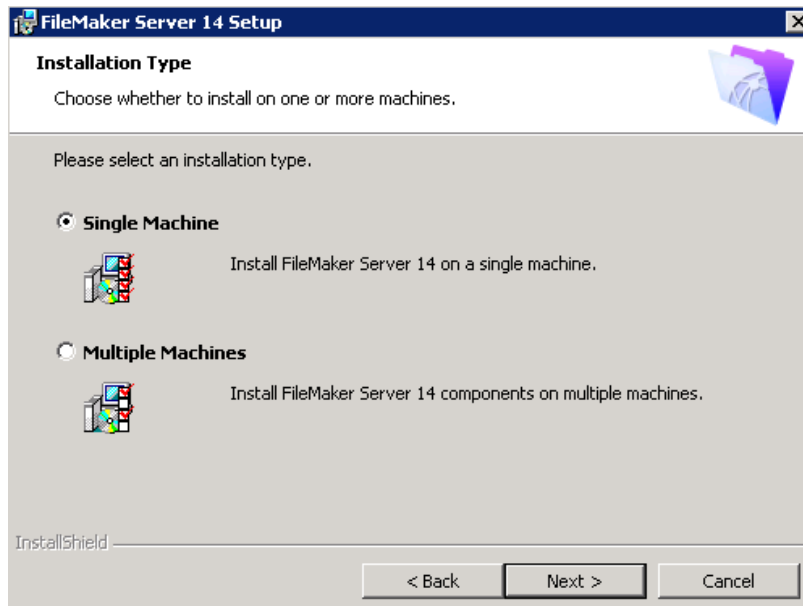
#### Installation

If you are not in possession of the installation medium and licence code, please contact the application support team.

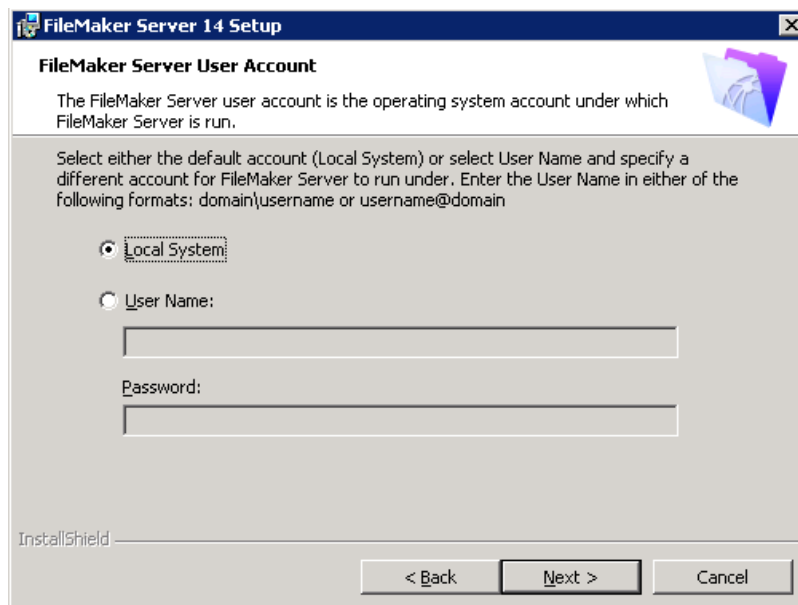
Double click the **fms\_14.0.x.xxx.exe** file



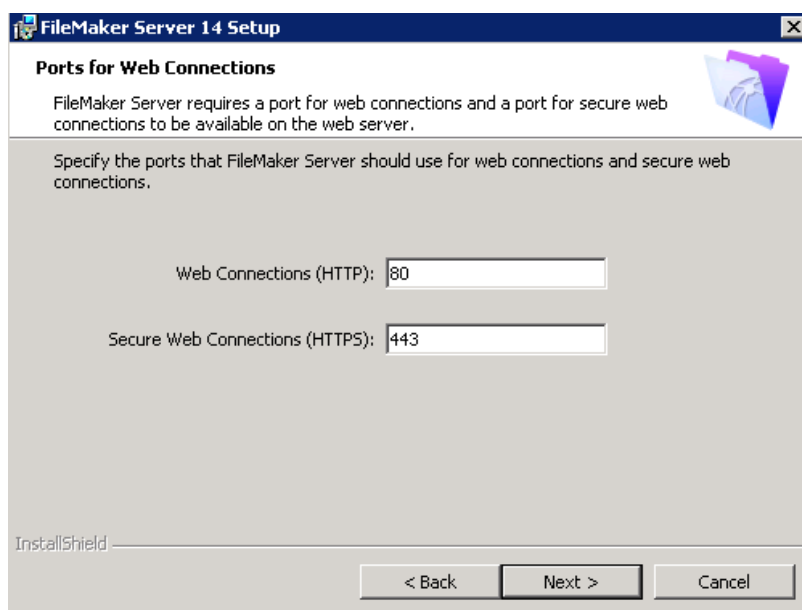
Follow the on-screen dialogs selecting a Single Machine installation (we will not be enabling any Web components).



Choose Local System Account



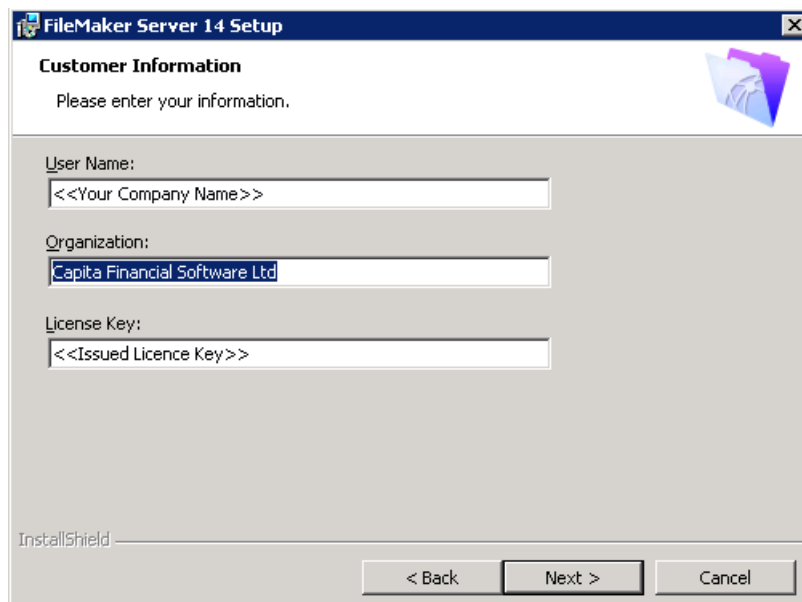
If the default ports for Web Connections are not available, please assign new ports



The screenshot shows the 'Ports for Web Connections' window in the FileMaker Server 14 Setup. The window has a title bar with the FileMaker logo and the text 'FileMaker Server 14 Setup'. Below the title bar, the title 'Ports for Web Connections' is displayed. The main text area contains the following instructions: 'FileMaker Server requires a port for web connections and a port for secure web connections to be available on the web server.' and 'Specify the ports that FileMaker Server should use for web connections and secure web connections.' There are two input fields: 'Web Connections (HTTP):' with the value '80' and 'Secure Web Connections (HTTPS):' with the value '443'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

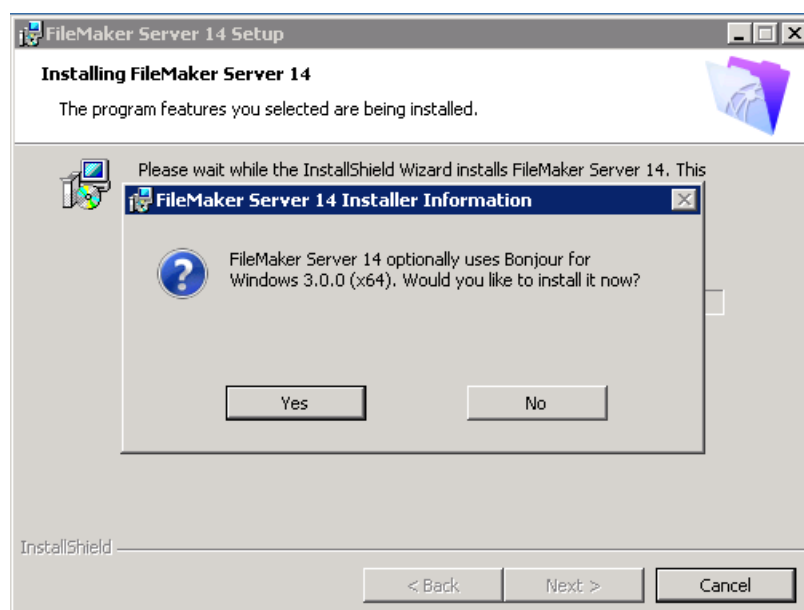
Enter Licence details supplied

**NB Organisation should be set to Capita Financial Software Ltd**

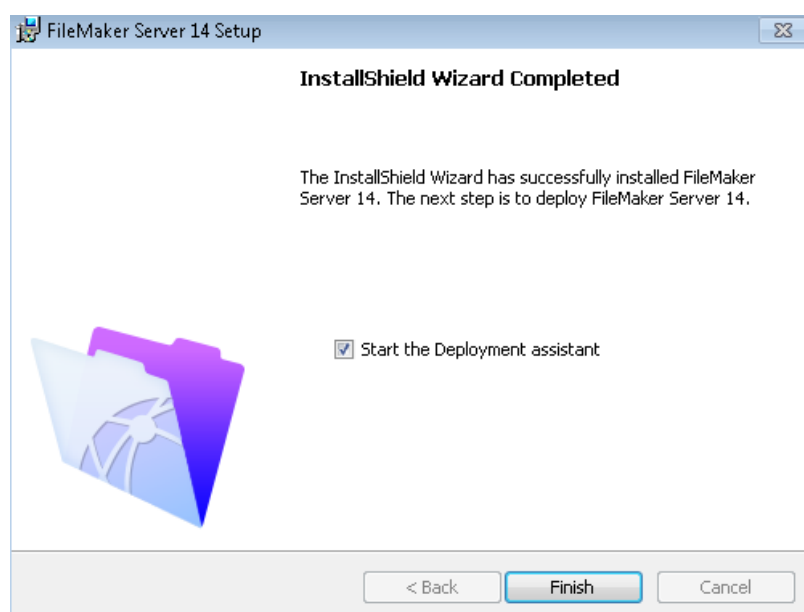


The screenshot shows the 'Customer Information' window in the FileMaker Server 14 Setup. The window has a title bar with the FileMaker logo and the text 'FileMaker Server 14 Setup'. Below the title bar, the title 'Customer Information' is displayed. The main text area contains the instruction: 'Please enter your information.' There are three input fields: 'User Name:' with the placeholder '<<Your Company Name>>', 'Organization:' with the value 'Capita Financial Software Ltd', and 'License Key:' with the placeholder '<<Issued Licence Key>>'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

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 application 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](mailto:support@synaptic.co.uk) with the following information

Company Name:

User Name:

Password:

Password PIN:

**NB** 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.

**Deployment Assistant**

1. Setup    2. Identification    3. Technologies    4. Type    5. Test    6. Summary

---

**Set Up Admin Console Account**

Set up the Admin Console account for FileMaker Server. Use this account when you log in to the Admin Console. For details about password strength, see Help.

User Name: \*

admin

Password: \*

\*\*\*\*\*

Confirm Password: \*

\*\*\*\*\*

Password Strength: Weak

---

**Password Hint**

Provide an optional hint to help you remember the password. It should remind you of the password but should not give the password away. The hint cannot contain the password.

Password Hint:

Fruit

---

**Password PIN**

Create a 4-digit PIN for use in resetting the Admin Console account password via the command line interface. CAUTION: The PIN cannot be changed unless the FileMaker Server application is reinstalled.

PIN: \*

\*\*\*\*

Confirm PIN: \*

\*\*\*\*

Cancel    Back    **Next**    Finish

Click next until you reach screen 3 'Technologies'.

**Deployment Assistant**

1. Setup    2. Identification    **3. Technologies**    4. Summary    5. Progress

**ODBC/JDBC**

ODBC and JDBC are application programming interfaces (APIs) that provide a common language for interacting with a variety of data sources and database services, including FileMaker Server. Enable ODBC/JDBC on FileMaker Server if you want to use other applications (like spreadsheets, word processors, and reporting tools) to view, analyze, and modify FileMaker data.

Do you want to enable ODBC/JDBC?

☐ Yes, enable ODBC/JDBC

☒ No, do not enable ODBC/JDBC

**Web Publishing**

Web publishing allows you to publish databases on the internet or an intranet. Enable web publishing if you want to make FileMaker data available in a web browser.

Note: A custom SSL certificate is required to access web publishing technologies over a secure and trusted connection. Obtain a custom certificate from a [Certificate Authority \(CA\) supported by FileMaker](#) and install the certificate.

Do you want to enable web publishing?

☐ Yes, enable web publishing

☒ No, do not enable web publishing

**Buttons:** Cancel, Back, Next, Finish

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'

**General Settings** ?

Server Information    Email Notifications    Admin Console    **Startup**    ODBC/JDBC    Administrator Groups    Connections

**Machine Startup**

Configure FileMaker Server to automatically start when the machine starts. To configure the Web Publishing Engine to automatically start, you must first configure FileMaker Server to automatically start.

☒ Automatically start Database Server

☐ Automatically start Web Publishing Engine

**Database Server Startup**

Configure FileMaker Server to automatically open databases when the Database Server starts.

☒ Automatically open databases that are in the database folders

**Buttons:** Revert, Save

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.

The screenshot shows the 'FileMaker Server' console with the 'FileMaker Clients' tab selected. Under the 'Client Settings' section, the text states: 'Your FileMaker Server license does not restrict the number of simultaneous FileMaker Pro client connections.' There are three settings with spinners: 'Limit number of FileMaker Pro client connections' is set to 75 and is checked; 'Set maximum idle time allowed for FileMaker clients (minutes)' is set to 720 and is unchecked; 'Maximum Simultaneous Script Sessions' is set to 25. At the bottom right are 'Revert' and 'Save' buttons.

## Databases tab

Set Maximum Number of Files to Host at **75**

Click Register and enter 'SCC14'

The screenshot shows the 'FileMaker Server' console with the 'Databases' tab selected. Under the 'Limit on Hosted Files' section, the text says: 'Specify the maximum number of database files FileMaker Server can host at one time.' The 'Maximum Number of Files to Host' spinner is set to 75. Under the 'Registered Runtime Solutions' section, the text says: 'To host a runtime solution created with FileMaker Pro Advanced, register the solution's file type.' The checkbox 'Allow FileMaker Server to automatically host registered runtime solutions' is checked. Below this is a list box for 'File Type' containing 'SCC14'. To the right of the list box are 'Register...' and 'Remove' buttons. Under the 'Database Cache' section, the text says: 'Based upon the memory available on the computer where FileMaker Server is running, the maximum allowed cache size is: 7167 MB' and 'If Web Publishing is enabled in a single machine configuration, you should set the database cache to no more than 50% of the maximum.' The 'RAM Reserved for Database Cache (MB)' spinner is set to 512. At the bottom right are 'Revert' and 'Save' buttons.

Database cache should not be set to maximum capacity. 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 FileMaker '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 ?						
<input checked="" type="checkbox"/> Allow enabled schedules to run						
ENABLED	NAME	TYPE	LAST COMPLETED	STATUS	NEXT RUN	GROUP NAME
<input checked="" type="checkbox"/>	Daily	Backup			23-Dec-2016 23:00:00	
<input type="checkbox"/>	Hourly	Backup			Disabled	
<input type="checkbox"/>	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.

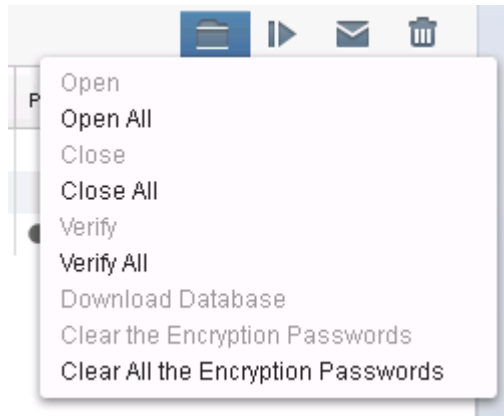


## Hosting the CCD Databases

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.

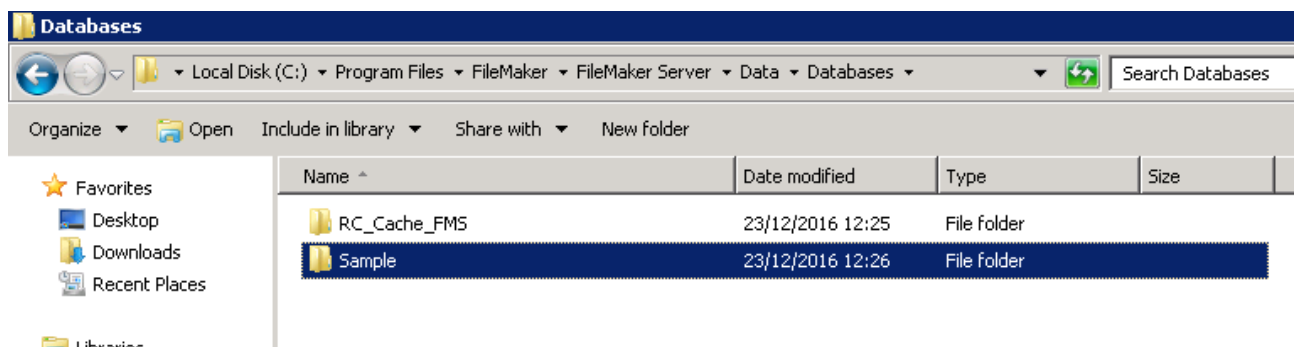


Open **Explorer** and navigate to the default database folder

Remove the **Sample** folder

Create a new folder called **CCD**

Copy the \*.scc14 files created in the **Obtaining CCD Databases** section into this new folder.



Back in **FileMaker Server** select the **Folder** icon again and select 'Open All'

You should now see the CCD files listed in the CCD folder.

The server configuration is now complete.

## Workstation

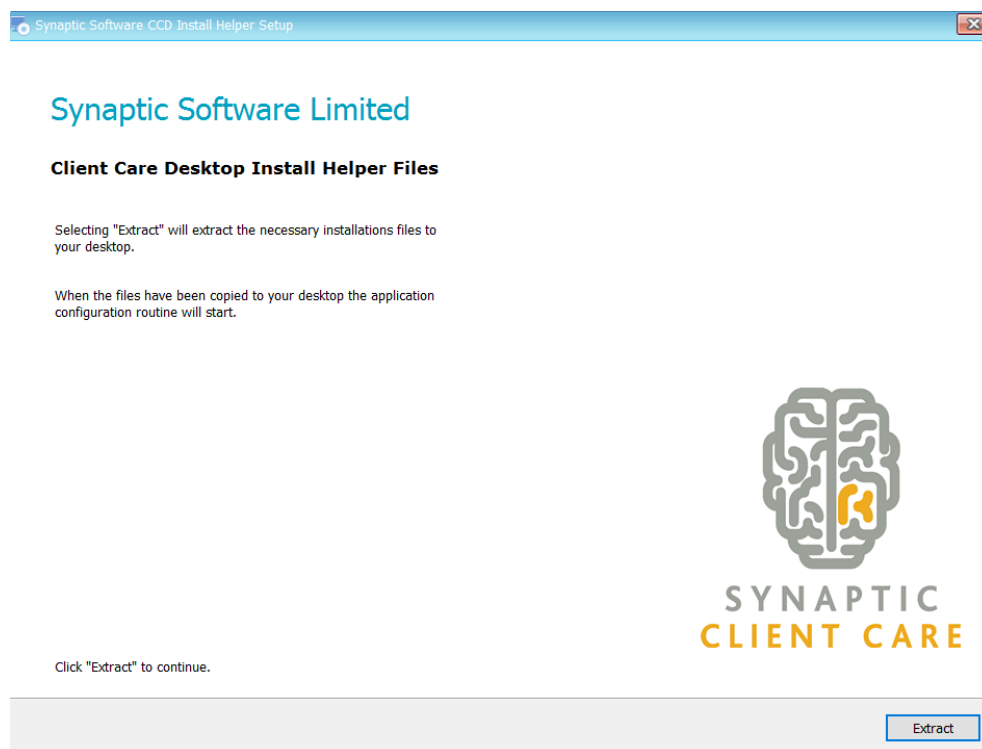
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Before CCD can be installed you will need to ensure you have;

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

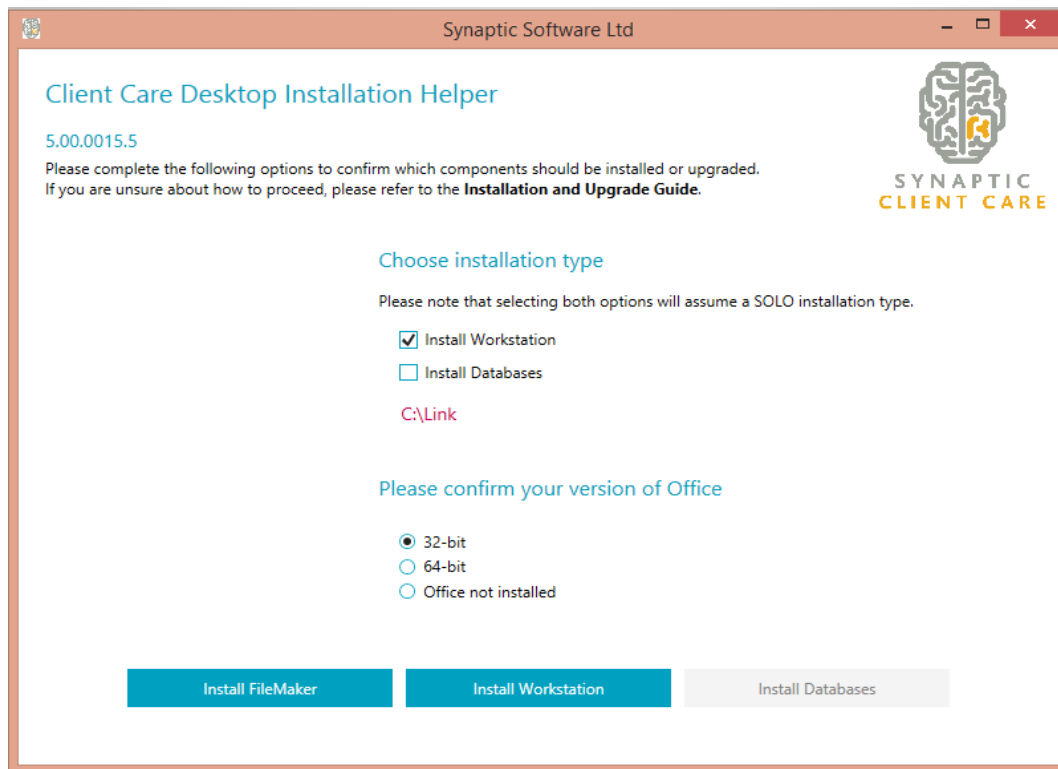
### Installation Procedure

Double click the **SSL\_CCD\_InstallHelper\_5.00.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, in this case we would select 'Install Workstation'.



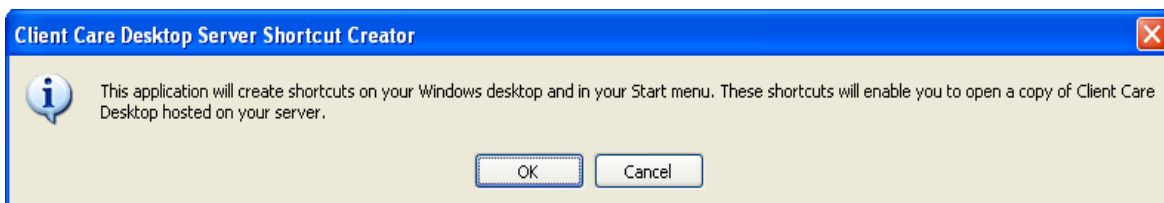
If an appropriate version of FileMaker is not installed on your machine the section entitled '**Please confirm your version of Office**' will be active. A selection will be required before you can progress to installing any components.

Please install each component in the following order;

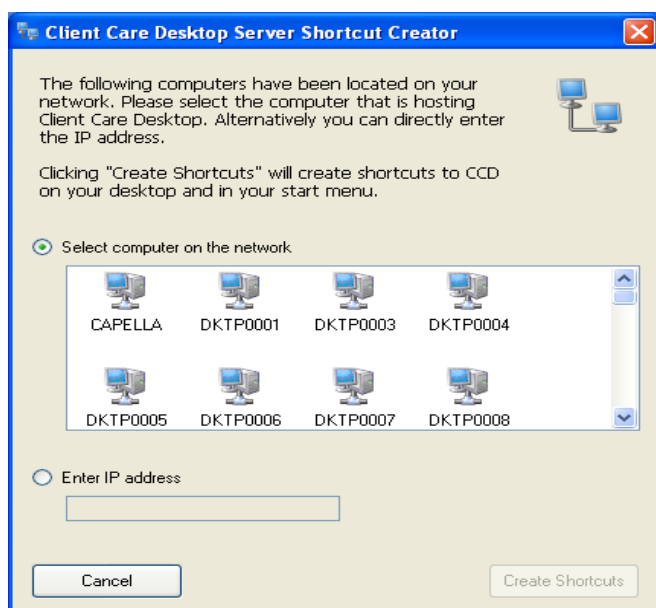
1. FileMaker – if appropriate
2. Workstation

**NB** The FileMaker installer may take some time to load.

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'

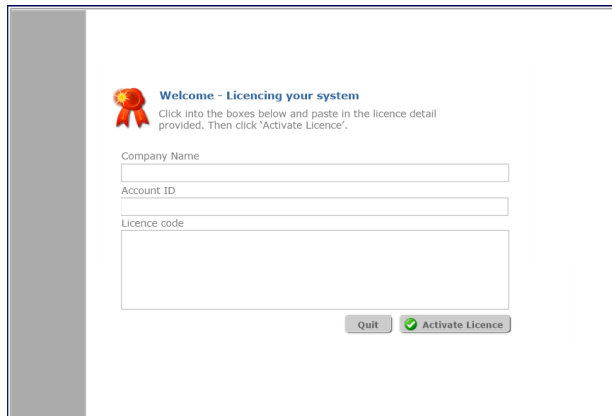
This will complete the installation and place an icon on the desktop to connect to the hosted databases on the server.



## Initial Setup

### Licences

The first time you launch CCD v5.00, 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. Please contact our application support team on 0800 028 0033 if you do not have a new set of licences.



The screenshot shows a software licensing window titled 'Welcome - Licensing your system'. It features a red ribbon icon and instructions: 'Click into the boxes below and paste in the licence detail provided. Then click 'Activate Licence''. There are three input fields: 'Company Name', 'Account ID', and 'Licence code'. At the bottom right, there are two buttons: 'Quit' and 'Activate Licence' (which has a green checkmark icon).

Enter the details and select 'Activate Licence'

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

User Name: superuser

Password: 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 details for your users. At this point, you can opt to set up all users or just the main user. You can add the remaining staff when you first log into CCD to complete the setup and configure your system.

Enter the main user under the heading 'Set-up the System Administrator Account' and make a note of their details.

The 'Login ID' should be unique for each user on the system.

SYNAPTIC  
CLIENT CARE DESKTOP

System setup wizard (Synaptic Software Limited)

Follow the screens below to complete the basic configuration of Client Care Desktop

Welcome

Your Company

Banking

Logos

Network Membership

**Your Staff**

Installed Software

Your Web site

System Backups

Complete

Set-up the System Administrator Account

Forename

Surname

Login ID:

You can change this automatically generated login ID in the staff record later.

Password: password

You be will forced to change it the first time you login to the system.

◀ Last

Next ▶

From here click on ‘Next’ and you will be able to add other staff members into the system

SYNAPTIC  
CLIENT CARE DESKTOP

System setup wizard (Synaptic Software Limited)

Follow the screens below to complete the basic configuration of Client Care Desktop

Welcome

Your Company

Banking

Logos

Network Membership

**Your Staff**

Installed Software

Your Web site

System Backups

Complete

▼ Add

Forename	Surname	Reference
Mike	Crossley	CroM

Enter details for each member of staff in your organisation.

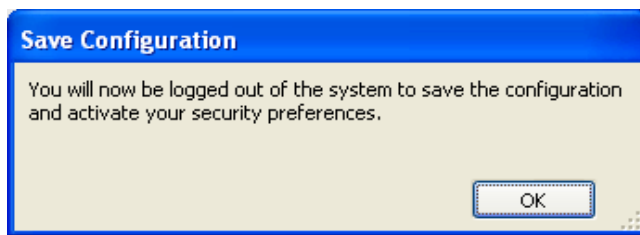
◀ Last

Next ▶

Once you have finished entering your staff members continue to go through each page until you have completed the System setup wizard.

www.synaptic.co.uk

Upon clicking 'Finish' the following message will be displayed.

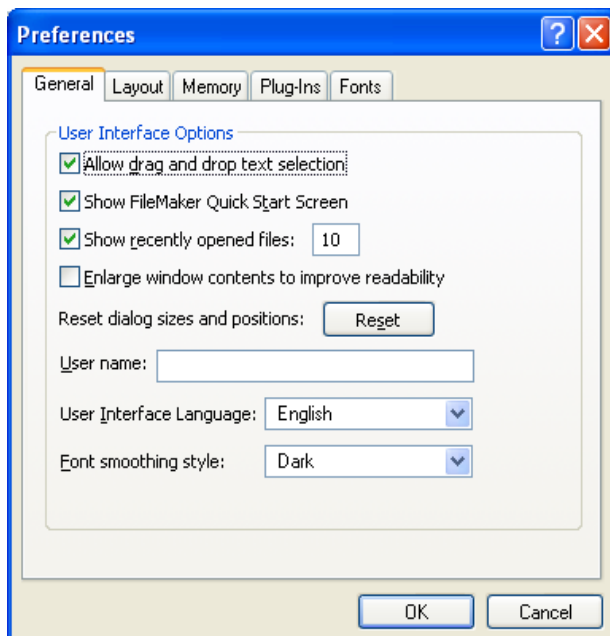


Clicking "OK" will log you out and take you to the login screen. Now enter the 'Login ID' that you created for the staff member in the Username field and Password. By default, all user passwords are initially set to 'password' as you will be prompted to change this.

#### Log on

A login screen titled "Please enter your login information". It has two input fields: "Username" and "Password". Below the fields are "Cancel" and "OK" buttons.

You will be asked to set this as your User Name. Click 'OK' which will take you to the following screen where you can enter the Login ID into the 'User name' field.



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.

### Setting the territory

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.

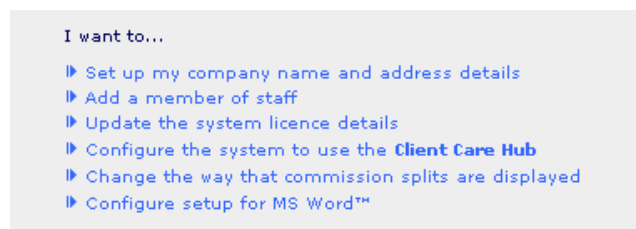
If you are unsure which Territory you need to select, please call the application support team on 0800 028 0033 for further advice.



### Setting up Word store

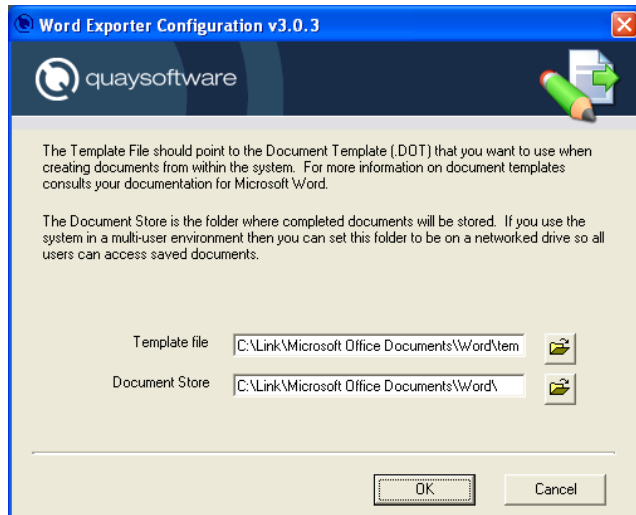
Enter 'Setup' from the main menu.

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.





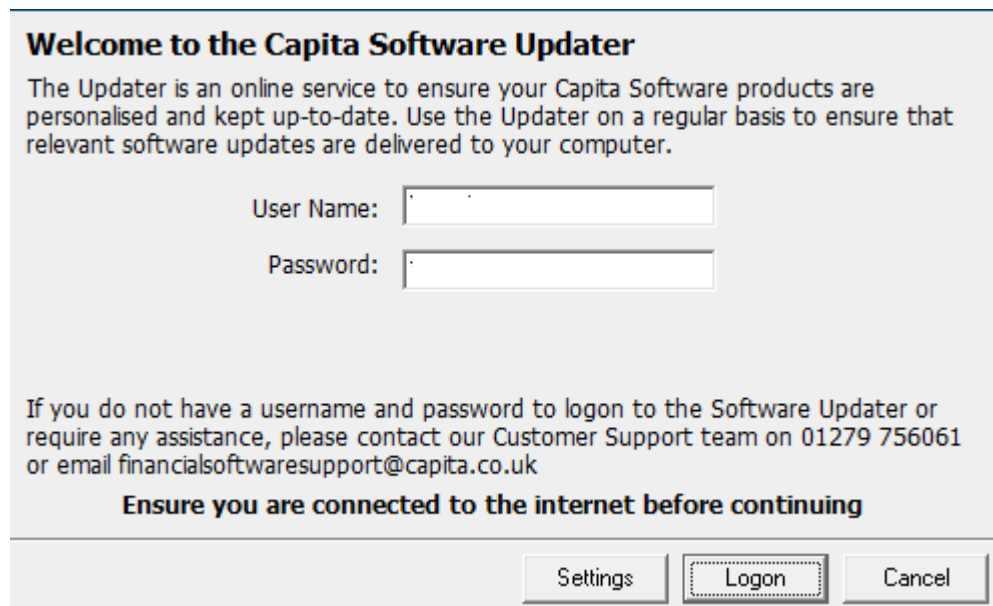
### Software Updater

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 menu and select the first option in the blue links to 'Update components of the Client Care Desktop to the latest versions'.



This will display a User Name and Password field. If you do not have these details, please contact the application support team on 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](mailto:financialsoftwaresupport@capita.co.uk)

**Ensure you are connected to the internet before continuing**

You should be subscribed to the following packages;

- 4.50 Providers (system admins only)
- 5.00 Standard

Please contact the application support team if this is not the case.

If there are files to be updated and you are in the correct groups click 'Update Now!'

Once the update has completed, click 'Exit'.

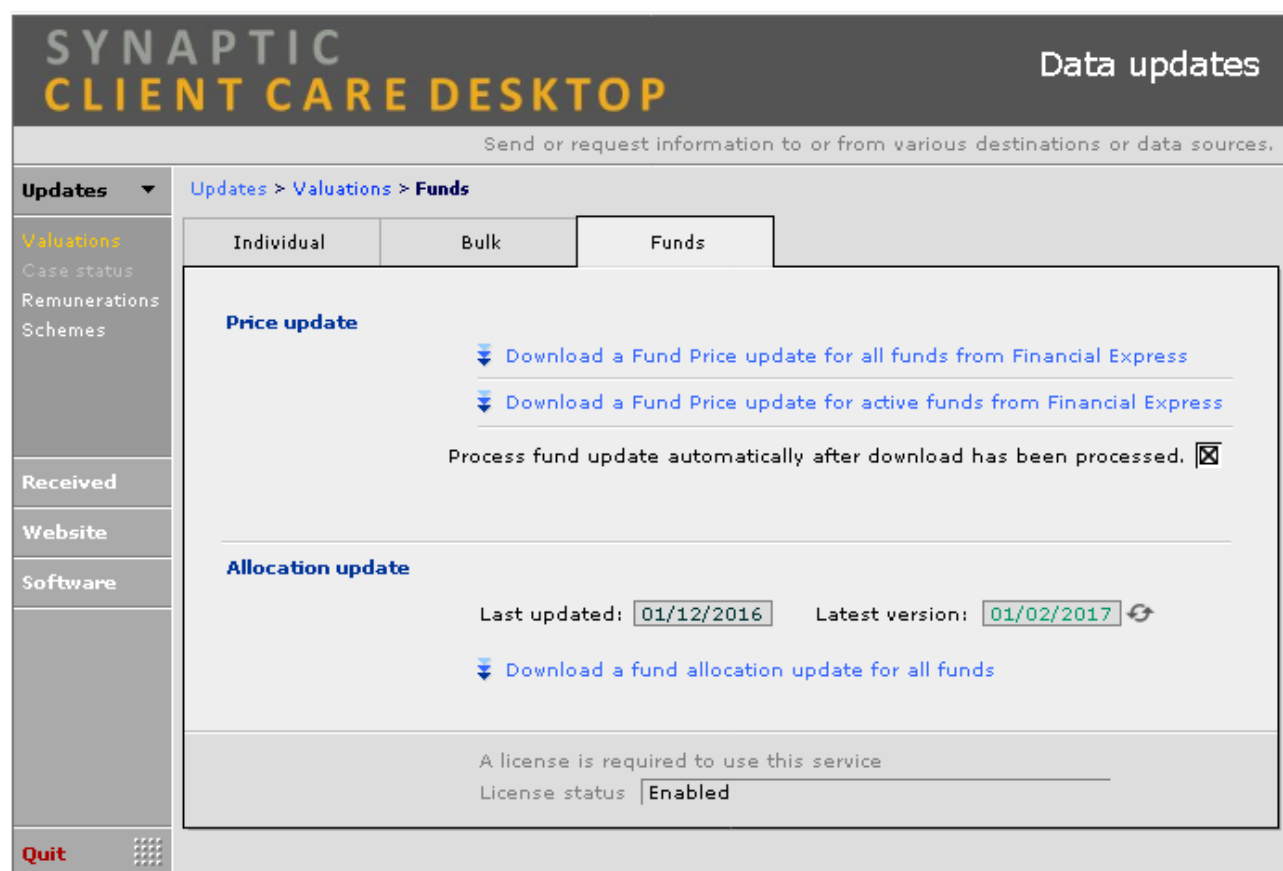
### Financial Express Download

The fund prices in CCD are updated via a download from Financial Express. This download should be run as part of your installation to populate the latest funds in your system.

To run the price update you will need to go to 'Updates' from the main menu and select the third option in the list 'Download a Price update from Financial Express'.



A full update is needed so select the first option 'Download a Fund Price update for all funds from Financial Express'.



Once downloaded, a message will pop up in the bottom right hand corner of the screen.



Navigate to 'Updates' and 'Received' and click on the message to begin the update.

SYNAPTIC  
CLIENT CARE DESKTOP

Updates

Received ▾


Received data  
Processed

Website

Software

Quit

Data updates received



Data updates received and waiting processing for user : TESB

Select a message to process from the list below.  
Until you select a message the data will not be processed.

Message type	Message details	Date	Time
Financial Express Fund Price	QSS	09/02/17	14:16:00

General updates

Openwork

Do not automatically create new client records ☒

NB This may take up some time to complete.

## Upgrades

Before proceeding with an upgrade, we advise you to take a manual backup of your database files.

Please refer to [Setting up Word store](#) to take a note of the Template and Document Store locations as these will need to be re-entered on each PC post upgrade. Alternatively, type 'C:\Link\LnkPrint.exe Config' into the run command to see the dialog.


### Solo

Follow the installation steps for new installs [Solo](#).

**NB** Instead of Install Databases, it will say Upgrade Databases.

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

During the upgrade, the summary screen below will be displayed to show record counts between the source and target system.



SYNAPTIC  
CLIENT CARE

CLIENT CARE DESKTOP UPGRADE 4.50.0020

4.1

Collecting Source Data

Applying Version Changes

Populating Target System

Date Started: 22/12/2016

Time Started: 09:44:34

Source: 4.50.0020

Target: 4.50.0020

Clear DataFile: 09:44:40

Populate DataFile: 09:44:41

**Records counts**

Filter by file:

		No of records (source)	No of records (datafile)	No of records (target)
Advice	Advice	0	0	0
Agencies	Agencies	0	0	0
Analysis	Analysis	0	0	0
Archive	Archive	0	0	0
BatchMaster_Update	BatchMaster_Update	0	0	0
BatchMembers	BatchMembers	0	0	0
Cheques	Cheques	0	0	0
Clients	Clients	0	0	0
Clients	Addresses	0	0	0
Clients	JoinClientsAddresses	0	0	0
Clients	Goals	0	0	0
CommMatching	CommMatching	0	0	0
Commrec	Commrec	0	0	0
Commrec	_temp_commission_splits	0	0	0
Commrec	Offset	0	0	0
Commrec	Invoice	0	0	0
Commrec	VAT	0	0	0
Contacts	Contacts	0	0	0
Contacts	Commission Basis Deductive	0	0	0
Credit	Credit	0	0	0
Devel	Devel	0	0	0
ECommArc	ECommArc	0	0	0
ECommIn	ECommIn	0	0	0
Employees	Employees	0	0	0
EReceipt	EReceipt	0	0	0

Once the upgrade has completed, the upgrade report will be saved on the desktop as a PDF. This will show record counts in the original tables, the data file and the target tables. If these record counts do not match, they will be highlighted in red.

The following tables will either match or increase in the target tables;

File	Table
Clients	Addresses
Clients	JoinClientsAddresses
Insurer	Insurer
Manager	Manager
Manager	Licencing
Preferences	Cabinets
Preferences	InvulIntegration
Preferences	Sections
Preferences	valueListMembers

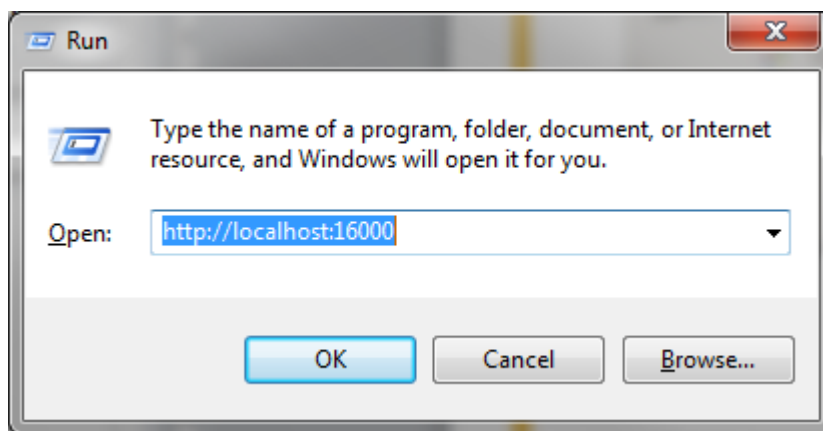
This routine will not uninstall FileMaker 11 which should be removed manually using the Add/Remove programs procedure applicable to the operating system.

## Server

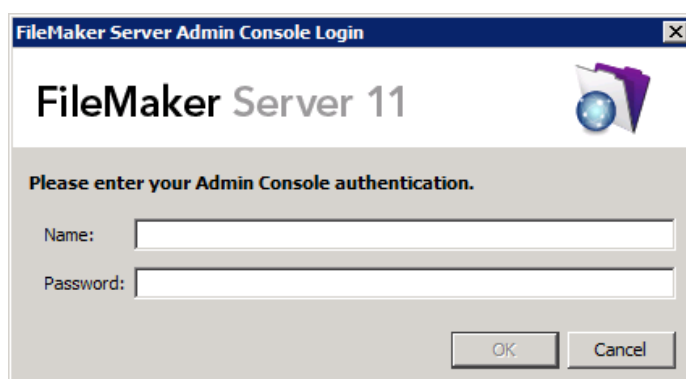
### Preparing to Upgrade the Database

Before you start the upgrade you should ask all users to log out of the system then stop the current CCD data from being hosted out. To do this you will need to load the FileMaker Server Admin Console.

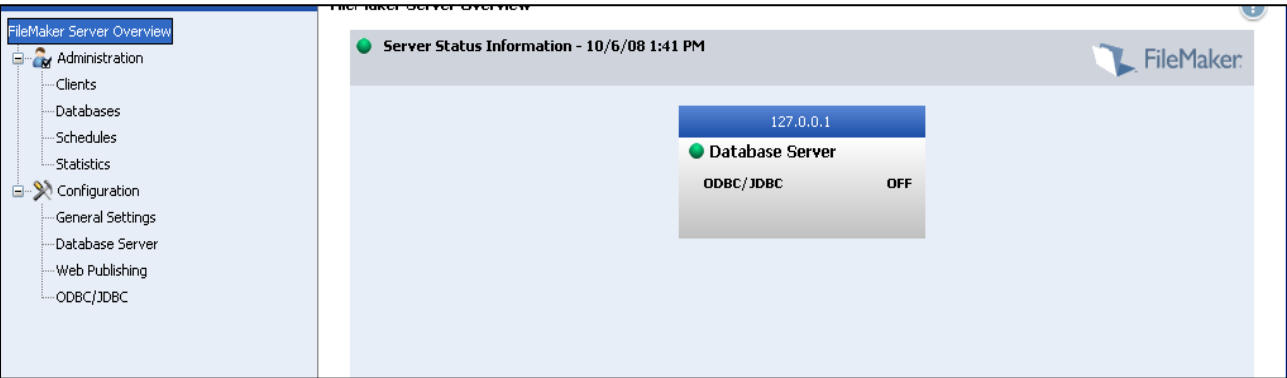
To access the FileMaker Server Console go to 'Start > Run' Type `Http://localhost:16000` on the server.



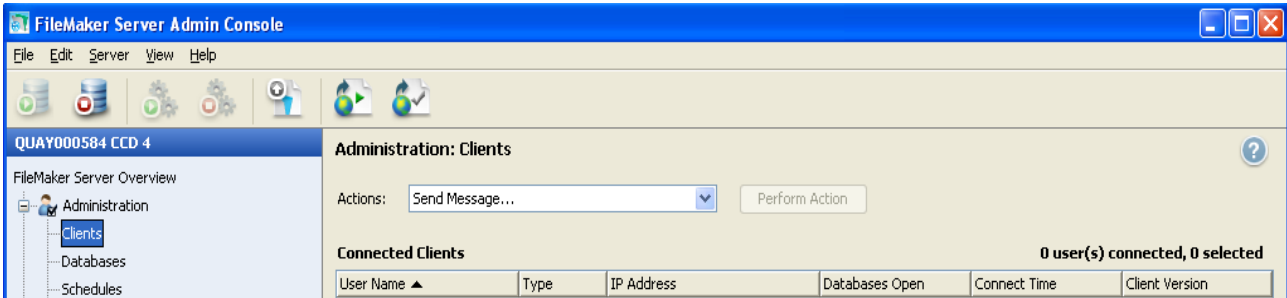
Enter the logon details – typically Name: 'Admin' and Password: 'june256'



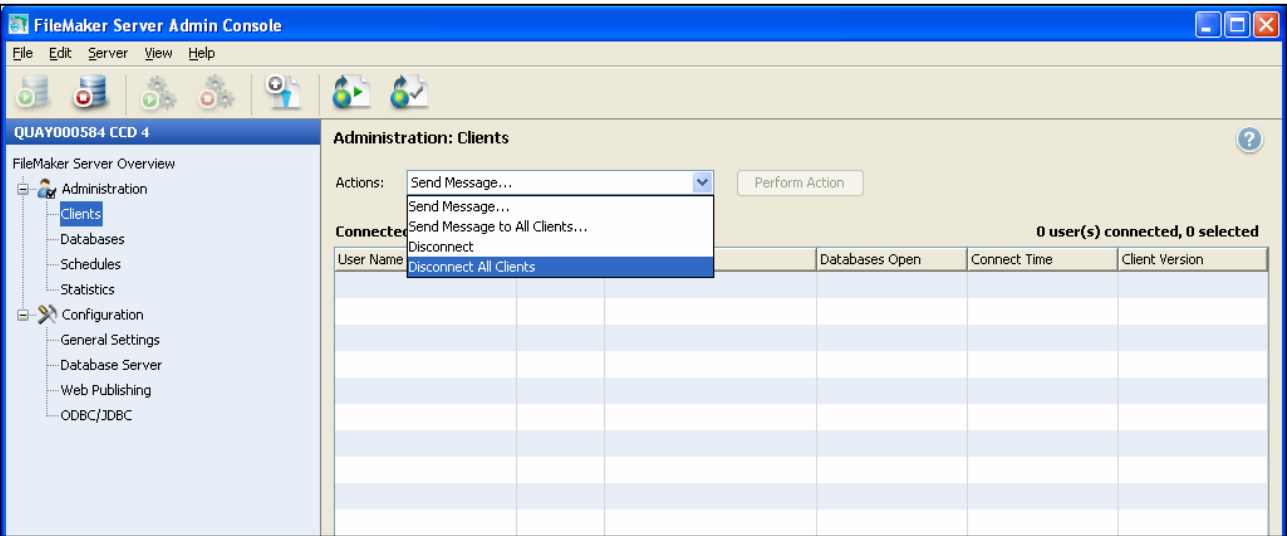
Once the FileMaker Server Admin Console has loaded, you will need to go to the ‘Clients’ option on the left hand side under ‘Administration’.



Here you can see all the users currently logged into the system and disconnect them should anyone still be logged in.

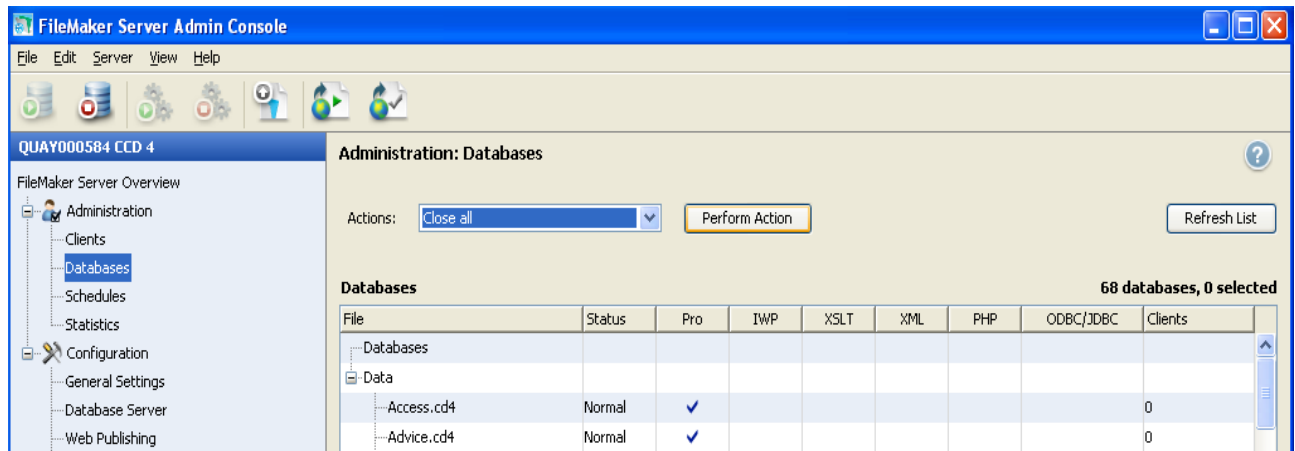


If you need to disconnect any users from the system you would need to click on the ‘Actions’ dropdown menu and select ‘Disconnect All Clients’ and then click ‘Perform Action’.

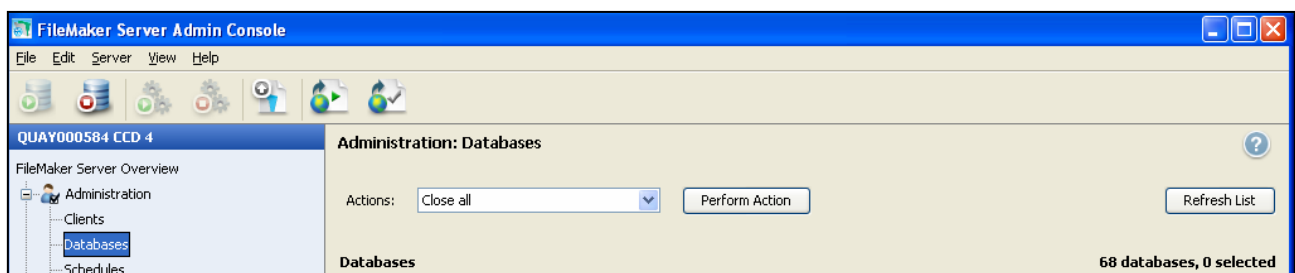




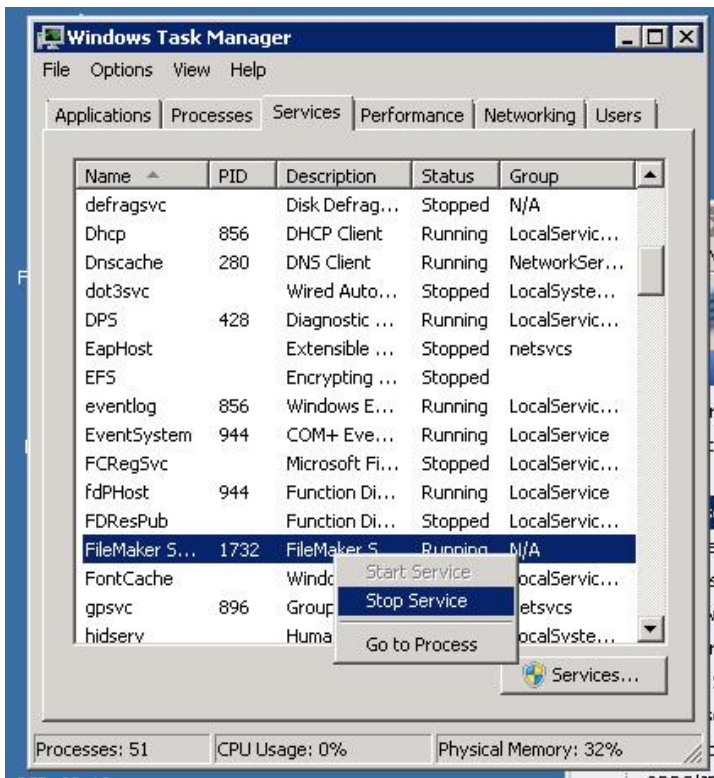
Now that all the users have been disconnected from the system you can stop hosting the databases so it can be backed up. To stop hosting the databases, go to the left hand menu and select 'Databases' from the 'Administration' menu this will take you to 'Administration: Databases' screen



To close the databases you will need to click the 'Actions' dropdown menu and select 'Close all', click 'Perform Action'



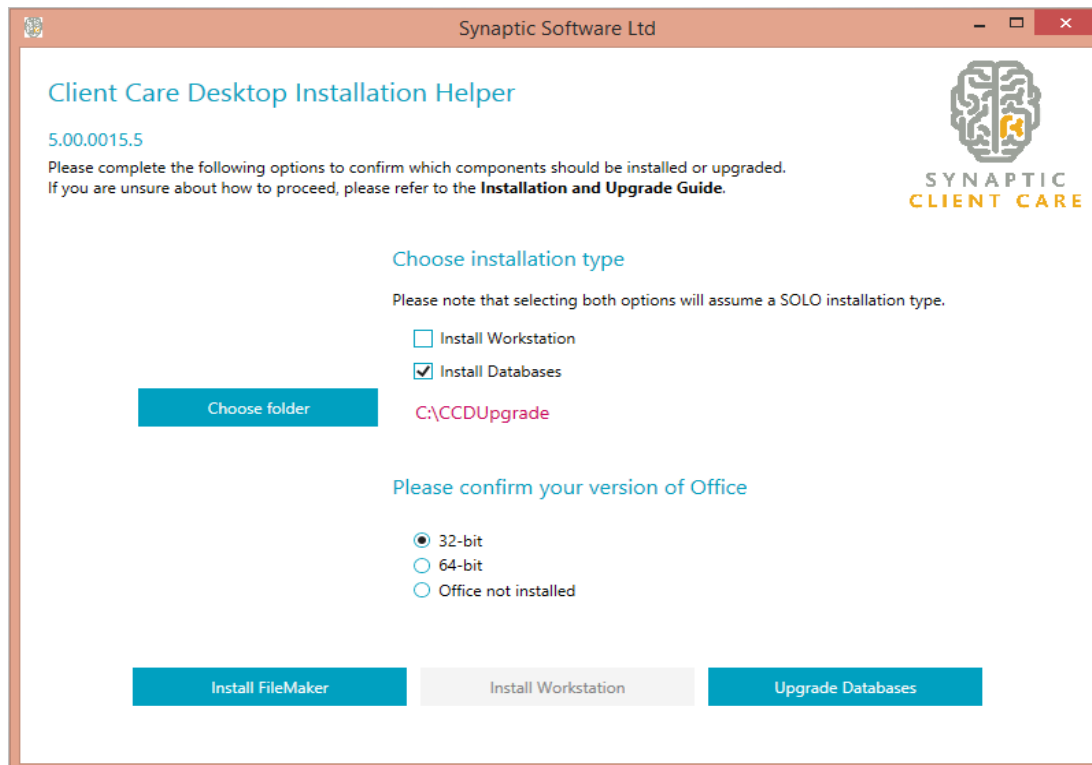
Now stop the **FileMaker Server** service under Services tab in Task Manager.




### Upgrading the Database Files

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

Open the installer and point it to the databases to be upgraded within the 'CCDUpgrade' directory. The installer will detect if the directory already contains CCD files and will update the files and launch the data migration process.



During the upgrade, the summary screen below will be displayed to show record counts between the source and target system.



CLIENT CARE DESKTOP UPGRADE 4.50.0020

Collecting Source Data

Applying Version Changes

Populating Target System

Date Started: 22/12/2016  
Time Started: 09:44:34  
Source: 4.50.0020  
Target: 4.50.0020  
Clear DataFile: 09:44:40  
Populate DataFile: 09:44:41

Records counts

Filter by file: choose file

		No of records (source)	No of records (datafile)	No of records (target)
Advice	Advice	0	0	
Agencies	Agencies	0	0	
Analysis	Analysis	0	0	
Archive	Archive	0	0	
BatchMaster_Update	BatchMaster_Update	0	0	
BatchMembers	BatchMembers	0	0	
Cheques	Cheques	0	0	
Clients	Clients	0	0	
Clients	Addresses	0	0	
Clients	JoinClientsAddresses	0	0	
Clients	Goals	0	0	
CommMatching	CommMatching	0	0	
Commrec	Commrec	0	0	
Commrec	_temp_commission_splits	0	0	
Commrec	Offset	0	0	
Commrec	Invoice	0	0	
Commrec	VAT	0	0	
Contacts	Contacts	0	0	
Contacts	Commission Basis Deductive	0	0	
Credit	Credit	0	0	
Devel	Devel	0	0	
ECommArc	ECommArc	0	0	
ECommIn	ECommIn	0	0	
Employees	Employees	0	0	
EReceipt	EReceipt	0	0	

Once the upgrade has completed, the upgrade report will be saved on the desktop as a PDF. This will show record counts in the original tables, the data file and the target tables. If these record counts do not match, they will be highlighted in red.

The following tables will either match or increase in the target tables;

File	Table
Clients	Addresses
Clients	JoinClientsAddresses
Insurer	Insurer
Manager	Manager
Manager	Licencing
Preferences	Cabinets
Preferences	InvulIntegration
Preferences	Sections
Preferences	valueListMembers

This routine will not uninstall FileMaker 11 which should be removed manually using the Add/Remove programs procedure applicable to the operating system. 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**.

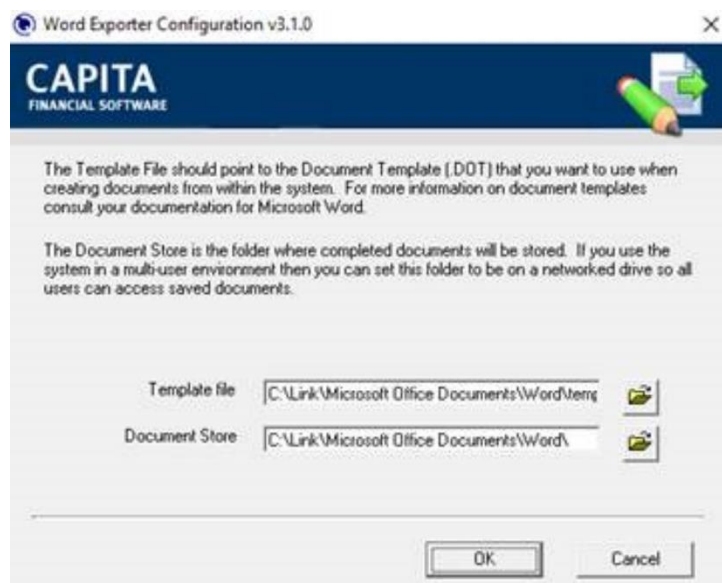
### Installing FileMaker Server 14

Once installed, instead of copying blank CCD databases into the FileMaker Server CCD directory, move your upgraded databases held in the 'CCDUpgrade' directory into this folder.

### Upgrading the Workstation files

You will now need to upgrade the Workstations to ensure full compatibility with the upgraded databases. The installer will automatically upgrade the local components, but before running the installer please ensure you take a note of the local Word repository settings as these will need to be re-entered post upgrade.

Type '**C:\Link\LnkPrint.exe Config**' into the run command on the PC to be updated. This will display a dialog with the current settings.



Follow the steps in [Workstation Installation Procedure](#)

Once the system has been upgraded, follow the steps in the section [Financial Express Download](#) to populate your fund database.

## Troubleshooting

### 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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