Overview

This document describes how to install Shelter Pro on Windows based computers (workstations) both in a stand-alone and a networked environment. Pick your installation scenario below and follow the outlined steps.

Scenario 1 (SQL Server backend) - Installing Shelter Pro to run in a networked environment
> For the Server:
> 1) You should first follow the document **"Shelter Pro Installation Guide – SQL Server Components"**. This document can be obtained from Shelter Pro Software. Contact information is available on www.ShelterPro.com.
>
> For the other computers/workstations:
> 1) In this document, follow "**Installing SQL Native Client**". Shelter Pro will not be able to connect with SQL Server without this!
> 2) In this document, follow "**Running the Shelter Pro installer**", selecting '**Workstation only/upgrade**';
> 3) In this document, follow "**After installing – starting Shelter Pro**". Note that for each workstation, you will need to change a setting within Shelter Pro so that the software knows where to find the shared folder on the server. This is discussed in "After installing – starting Shelter Pro". Notice the section Starting Shelter Pro when the setup type is "Workstation only / upgrade" for specifics.

Scenario 2 (non-SQL Server backend) - Installing Shelter Pro to run standalone on a single computer,
> If your intent is to install Shelter Pro to run standalone on a single computer (such as a single-workstation installation, or if you are installing Shelter Pro for the purposes of product evaluation), you only need the follow the **"Running the Shelter Pro installer"** section in this document. Note that you will select the 'Full Installation with Database' for this scenario.

Scenario 3 (non-SQL Server backend) - Installing Shelter Pro to run in a networked environment
> Under this scenario, you will be installing both on server and client workstations.
>
> For the Server:
> 1) In this document, follow **"Running the Shelter Pro installer"**, selecting '**Full Installation with Database**' option;
> 2) In this document, follow **"Sharing the Database on a network"**;
> 3) In this document, follow "**After installing – starting Shelter Pro".** Note that the first time Shelter Pro is used, the database will go through a 'first time use' process. This is a one-time process that will not be repeated when Shelter Pro is later used.
>
> For the other computers/workstations:
> 1) In this document, follow "**Running the Shelter Pro installer**", selecting '**Workstation only/upgrade**';
> 2) In this document, follow "**After installing – starting Shelter Pro**". Note that for each workstation, you will need to change a setting within Shelter Pro so that the software knows where to find the shared folder/database on the server. This is discussed in "After installing – starting Shelter Pro". Notice the section Starting Shelter Pro when the setup type is "Workstation only / upgrade" for specifics.

Database backups

Note that data/server backups are a customer responsibility. There is no data backup functionality included with Shelter Pro as this is a broader consideration beyond solely the Shelter Pro database. Regular server backups should be in place to safeguard your data, both Shelter Pro data and any other mission critical data necessary for business operations.

Installing Shelter Pro in a server / networked environment

Shelter Pro is network and multi-user ready. It can be installed in a networked environment which will allow a Shelter Pro database to be stored, accessed, and shared by multiple concurrent users from multiple workstations.

There are 4 common options for network installs discussed below. Choose which approach applies to you and follow the guidance. The 4 options discussed are:

1) Client/Server
2) Peer-to-peer
3) Client/Server with SQL Server (includes Remote Desktop/Terminal Services/Citrix)

Client/Server
1) First decide where the Shelter Pro database will be installed. This will typically be a shared folder on a network server. This first step is necessary to establish the server database which will be utilized by each of the workstations on the network. On the network server, use the Shelter Pro installer (setup.exe) and install with the setup type of **Database only** (further discussed in the next section of this document).
2) Now each workstation install can occur for the computers connected to the network server. On each workstation, use the Shelter Pro installer (setup.exe) and install with the setup type of **Workstation only / upgrade**. After installation, start Shelter Pro on the workstation. Shelter Pro will prompt you to specify the Database Folder where the Shelter Pro database is located on the server. After specifying the folder, you should be able to continue and you should then see the Shelter Pro Start-up screen. If further detail is needed, refer to the section titled **Starting Shelter Pro when the setup type is "Workstation only / upgrade"** later in this document.
3) Repeat step 2 for each workstation.

Peer-to-peer
1) First decide which computer in the peer-to-peer network is the "primary" machine. On this computer, use the Shelter Pro installer (setup.exe) and install with the setup type of **Full Installation with Database** (further discussed in the next section of this document).
2) Now each workstation install can occur for the computers connected to the network server. On each workstation, use the Shelter Pro installer (setup.exe) and install with the setup type of **Workstation only / upgrade**. After installation, start Shelter Pro on the workstation. Shelter Pro will prompt you to specify the Database Folder where the Shelter Pro database is located on the "primary" machine. After specifying the folder, you should be able to continue and you should then see the Shelter Pro Start-up screen. If further detail is needed, refer to the section titled **Starting Shelter Pro when the setup type is "Workstation only / upgrade"** later in this document.
3) Repeat step 2 for each workstation.

Client/Server with SQL Server (includes Remote Desktop/Terminal Services/Citrix)

With the SQL Server option with Shelter Pro, you will still need to use this guide for workstation installations. However for the database server installation, there is a separate installer and document (Shelter Pro Installation Guide - SQL Server Components) which are required and can be obtained from RoseRush Services, LLC. Contact information is available on www.ShelterPro.com.

For the client software, Shelter Pro should be installed on the shared computer (e.g. the computer which will host the Remote Desktop application environment, or the "Citrix box"). On this computer, use the Shelter Pro installer (**setup.exe**) and install the workstation/client software. Install with the setup type of **Workstation only / upgrade**. After installation, start Shelter Pro. Shelter Pro will prompt you to specify the Database Folder where the Shelter Pro database is located on the server. After specifying the folder, you should be able to continue and then see the Shelter Pro Start-up screen.

Running the Shelter Pro installer

Shelter Pro is installed by executing "SETUP.EXE". This is a standard MS Windows installation program which installs the Shelter Pro application on a Windows based computer. Setup.exe is typically downloaded from the website www.ShelterPro.com. Contact Shelter Pro Software via email if you don't have a copy of Setup.exe.

To begin the installation process, Setup.exe should be accessible on the computer system from either the setup.exe having been downloaded from the internet or from a provided CD. To install, setup.exe should be **double-clicked** which will initiate the installation process.
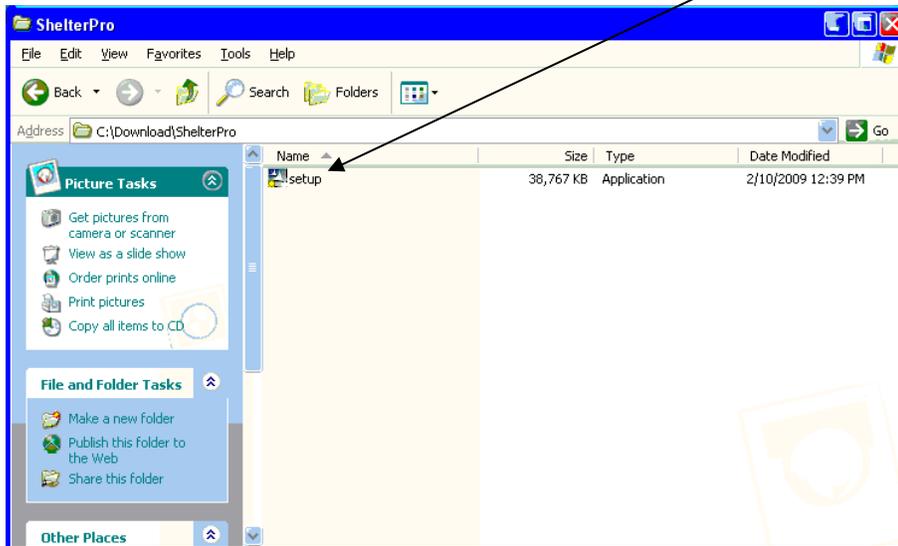
If you see this security warning, select Run to continue with the installation:

Running the Shelter Pro installer (continued)

This is the first screen you should see during the installation. This confirms you are running the Shelter Pro installation program. Select Next to continue.

This is the next screen. Again click Next to continue.
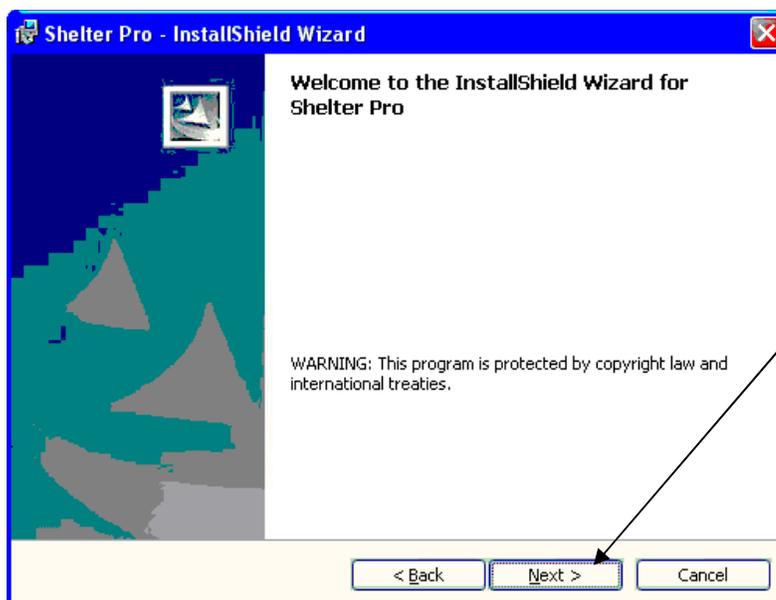
<u>Running the Shelter Pro installer (continued)</u>

<u>Customer Information</u>
On this screen you will enter your name in User Name, and your Organization name in the Organization field.

<u>Install this application for:</u>
This setting determines if the install will include the program items and desktop icons will be installed for all Windows user accounts on the computer. Note that this setting is <u>not</u> connected to running Shelter Pro on a network for multi-user access.

If Shelter Pro is to be run by any user who uses this computer, select "Anyone who uses this computer" so that the Shelter Pro program icons will be available to all user accounts. Otherwise, select "Only for me" and the Shelter Pro program items will only be available for the one user account. Then click <u>N</u>ext to continue.

Running the Shelter Pro installer (continued)

Destination Folder
On this screen, you will see the folder where Shelter Pro will be installed. This can be modified if desired, however we recommend leaving this set to C:\Shelpro.

To change this setting, click the Change button to alter the Installation folder.
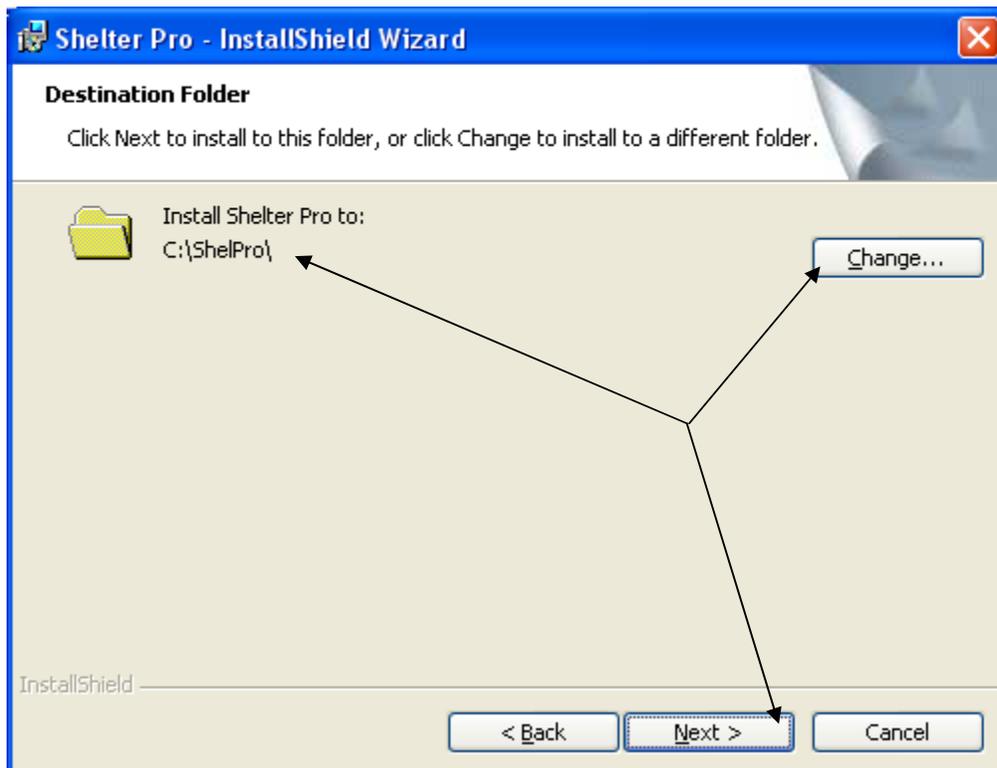
Running the Shelter Pro installer (continued)

Setup Type
This next screen will allow you to choose the installation type. It's important to understand and choose the correct option.
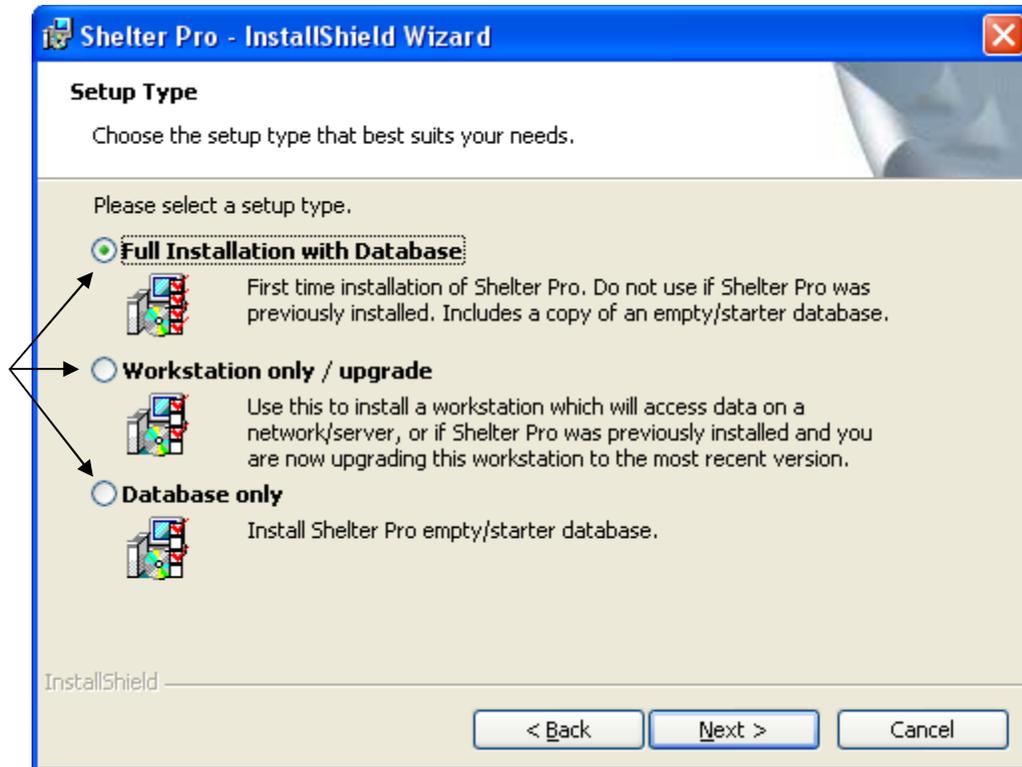
Choose **Full Installation with Database** if this is a stand-alone Shelter Pro installation on a single computer which will use its database on the same computer. This would include if you are installing Shelter Pro for demonstration/evaluation purposes. This option installs an empty copy of a Shelter Pro database on the computer along with the Shelter Pro program.

Choose **Workstation only / upgrade** if this computer will run Shelter Pro, however the database will be accessed on another computer, such as a network server, SQL Server, or another computer on a peer-to-peer network. This option only installs the Shelter Pro program; it does <u>not</u> install a database on the computer. Also, use this option if Shelter Pro was previously installed, and you are now upgrading this computer to a newer version.

For a new install, when Shelter Pro is run it will need to be directed to a network folder where the database is to be accessed as this option does not install a Shelter Pro database on the workstation. Refer to the section titled "Starting Shelter Pro when the setup type is Workstation only / upgrade" later in this document for further guidance.

Choose **Database only** if this computer will only store the Shelter Pro database which will be accessed by other computers on a network and this computer does not need to run Shelter Pro. This can be used on a **network server** where a shared Shelter Pro database will be stored.

Running the Shelter Pro installer (continued)

Ready to Install the Program

On this screen, verify the information selected is correct. When the **Install** button is clicked, Shelter Pro will be installed.
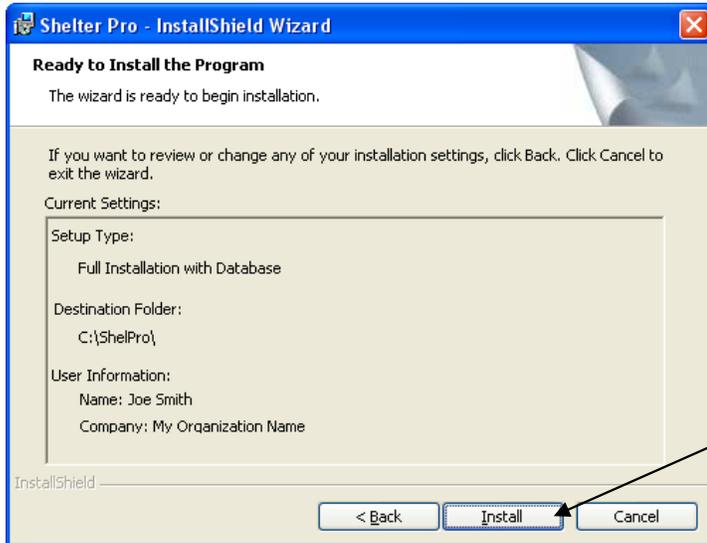
Running the Shelter Pro installer (continued)

Status of the installation

During the installation you will see a status progress screen similar to this sample.
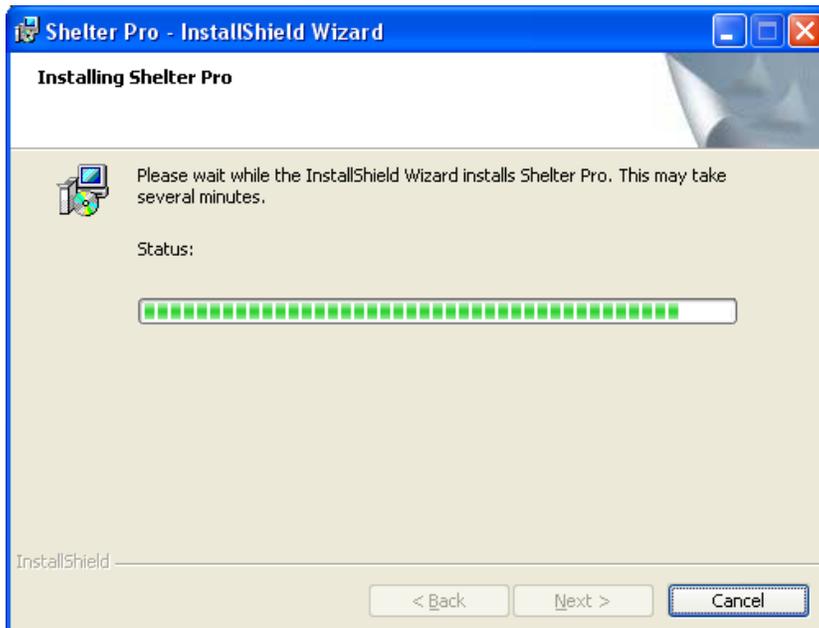
Running the Shelter Pro installer (continued)

Success confirmation and Finish

If the installation is successful, you will see this screen. If there are any errors, they will need to be corrected and the installation process will need to be repeated.

Click Finish to complete the installation and exit the installation program.
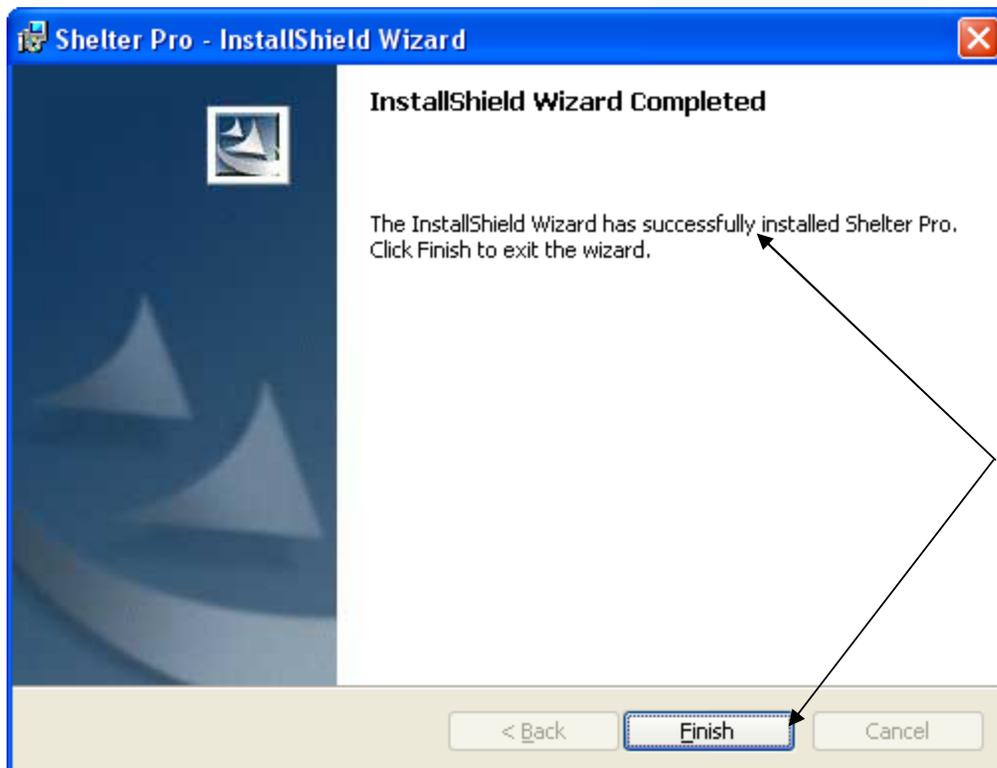
Sharing the database on a network

This section <u>only</u> applies to the computer which will be acting as a database server. These instructions do not need to be followed for each workstation.

Shelter Pro is a network ready program, and the database can be shared and simultaneously accessed by multiple computers running the software.

To be functional on a computer network, the '**data folder**' must shared, and all users must have the 'full control' permissions so that the database can be updated during day to day usage. In other words, the database must be 'visibile' on the network, and must not be 'read-only'. This section discusses the process of making the server's database folder accessible on the network.

Here are the steps to make sure this requirement is met.

1) **Using the 'computer' function**
   - navigate to the 'C' drive (aka Local Disk);
   - locate the 'Shelpro' folder.
   - Right click the 'Shelpro' folder, and select 'Properties'.

Shelter Pro Installation Guide
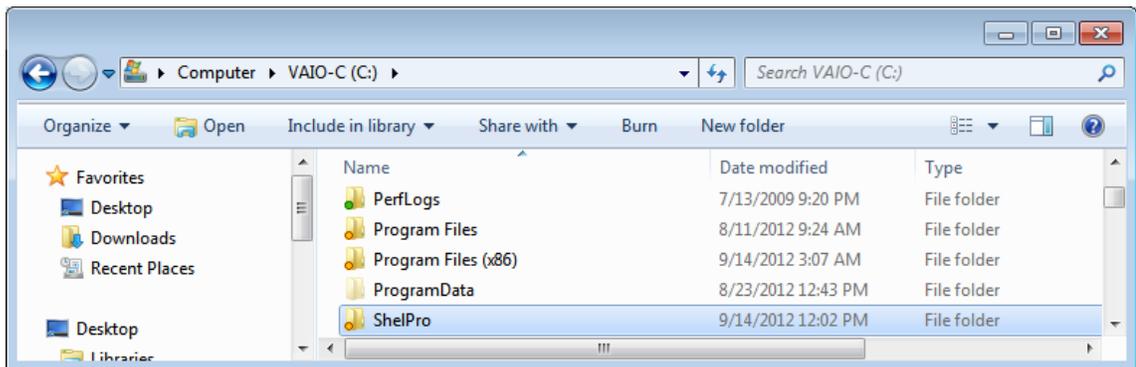
Sharing the database on a network (continued)

2) **On the 'Shelpro Properties' window**
   - go to the 'Sharing' tab.
   - If the folder is 'Not Shared', click the "Advanced Sharing" button.
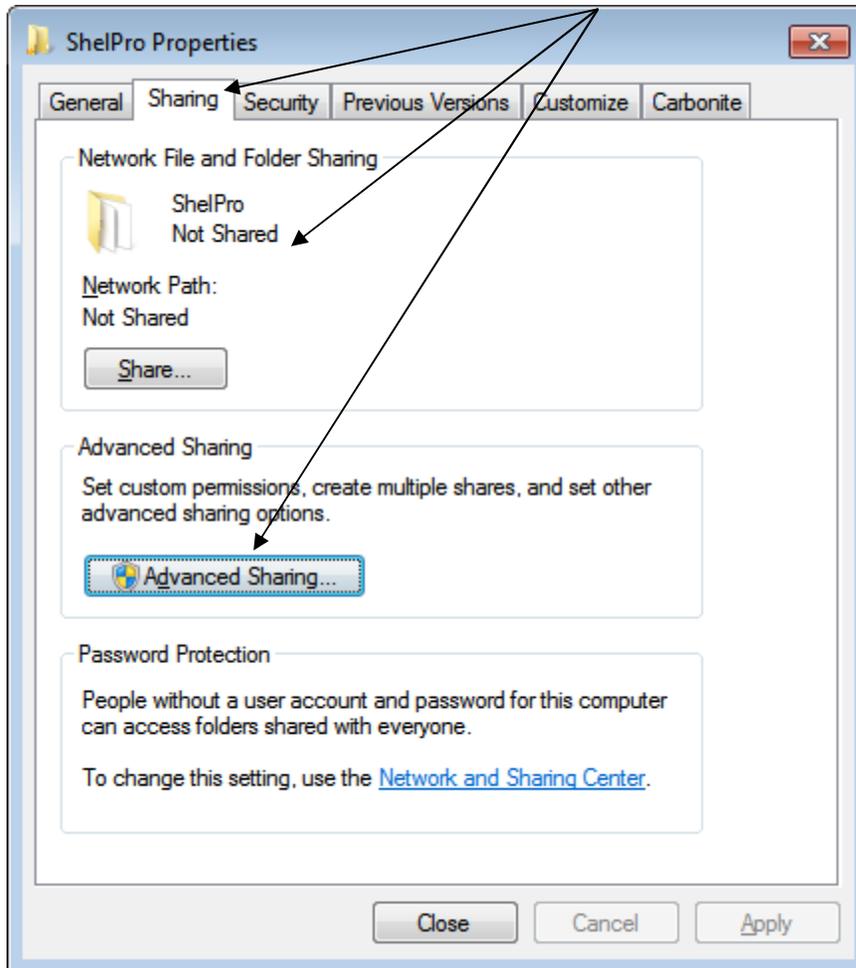
Sharing the database on a network (continued)

3) On the 'Advanced Sharing screen:
- click 'Share this folder',
- click 'Permissions'.
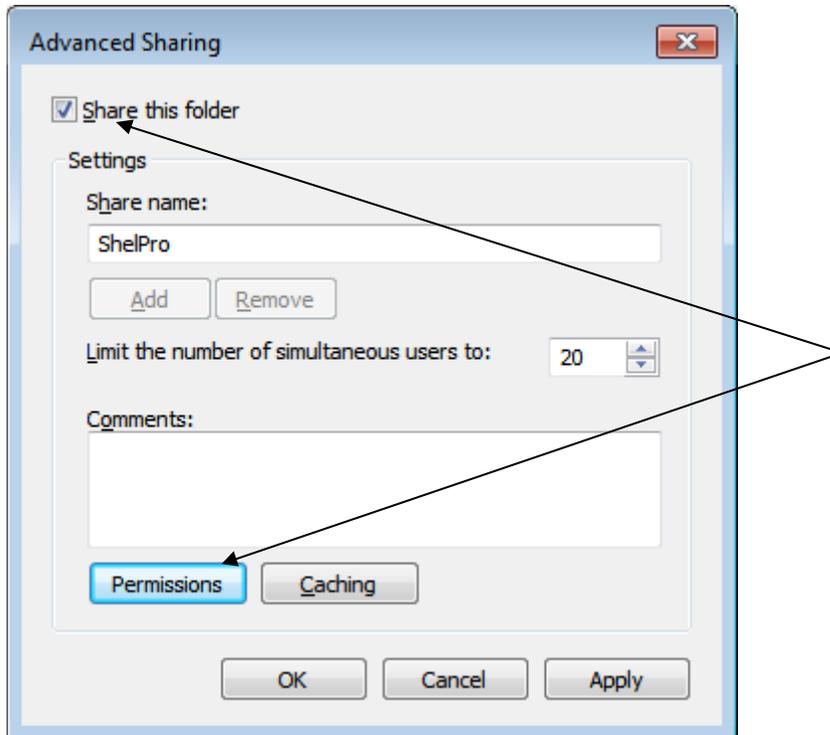
Sharing the database on a network (continued)

4) **On the 'Persmissions for ShelPro' screen:**
   - select 'Everyone',
   - select 'Full Control',
   - click 'Apply',
   - click OK.
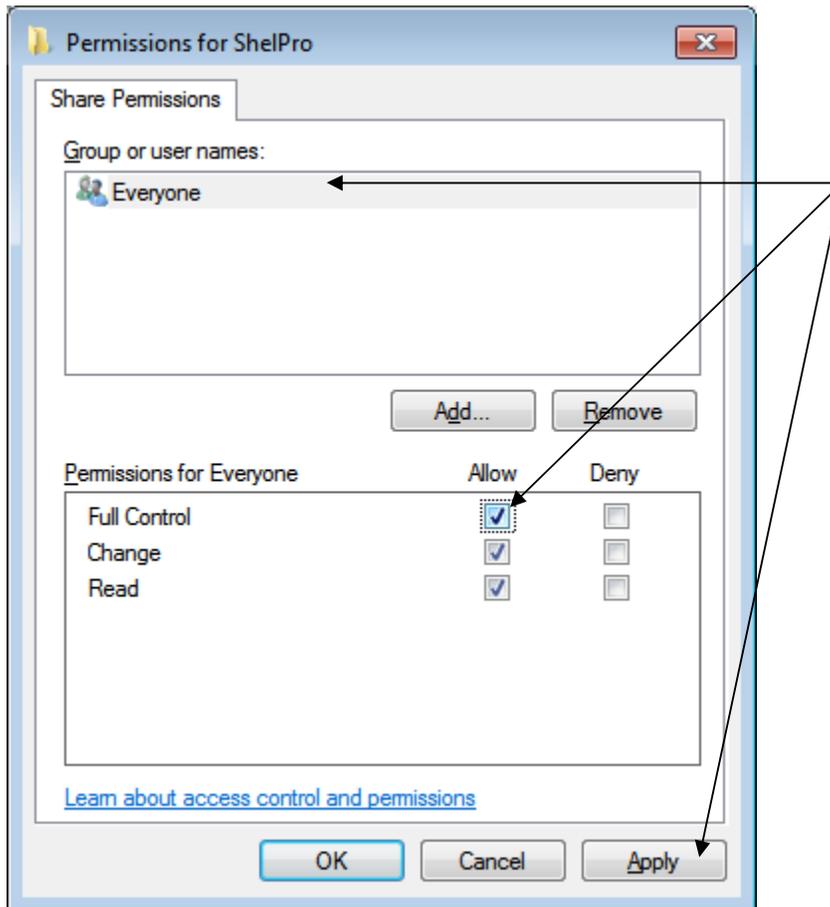
Sharing the database on a network (continued)

5) **On the 'Advanced Sharing' tab;**
   - click Apply;
   - click OK.
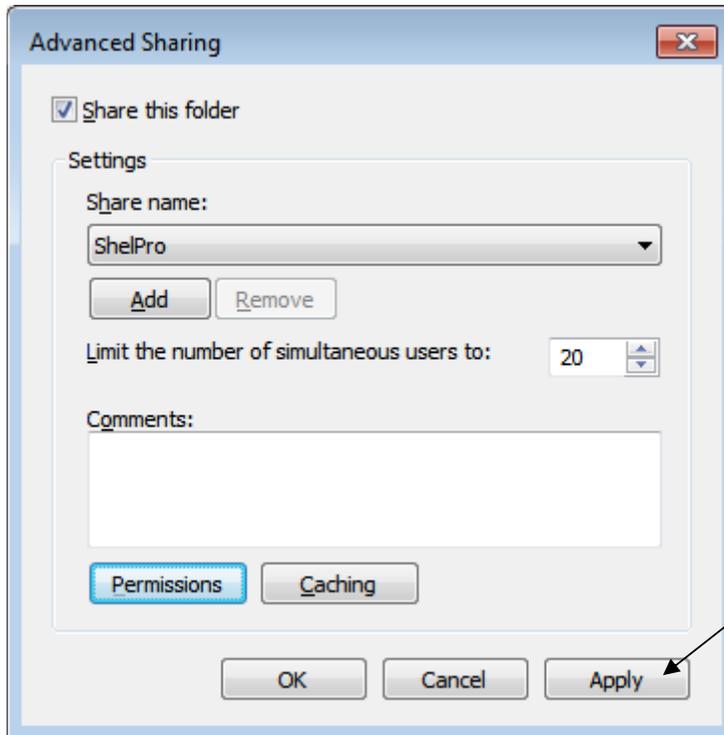
Sharing the database on a network (continued)

6) **Note that Shelpro folder is now shared and has an assigned Network Path**
   - This is necessary so that other computers on the network can access the database via a "UNC" path, or a 'Mapped Network Drive' setting.
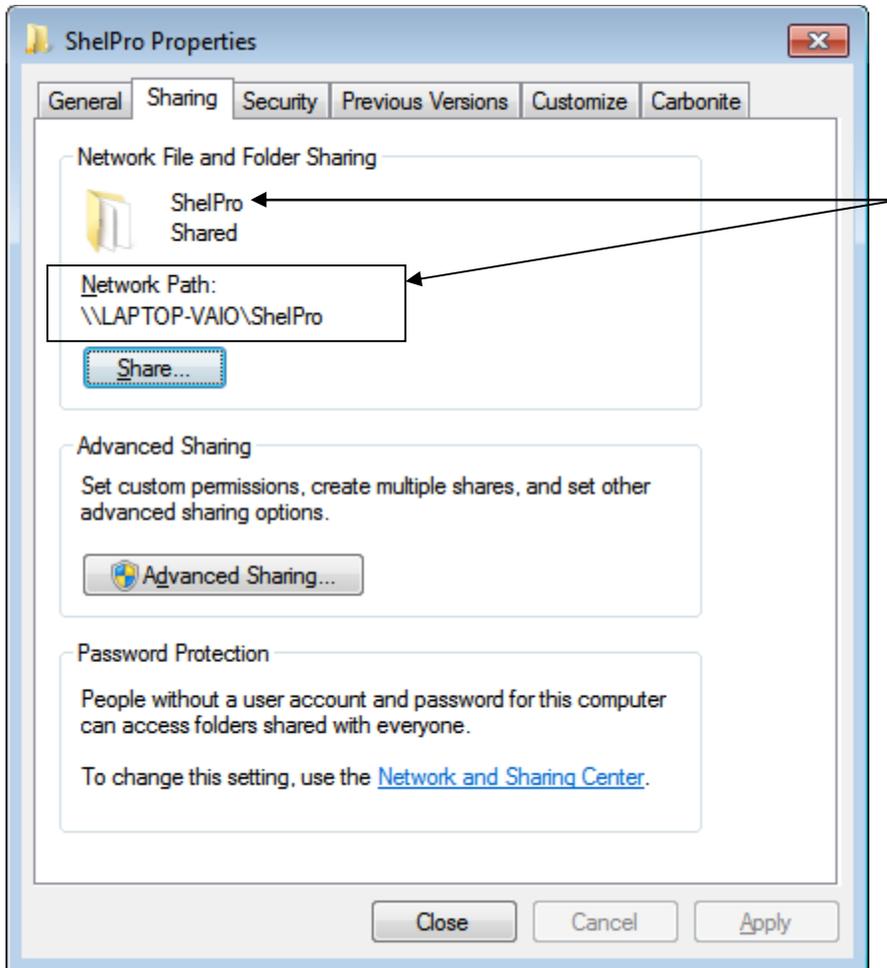
After installing - Starting Shelter Pro

If **Full Installation with Database** or **Workstation only / upgrade** were selected for the installation, there will be program items and desktop icons to run Shelter Pro.

Starting Shelter Pro when the setup type is "Full Installation with Database"

Click the Shelter Pro program item to start Shelter Pro. Note that the first time a new Shelter Pro install is started, you will be notified the database needs to be setup for 'first time use'. Follow the prompts to allow this process to be performed.

Next, you will see a screen similar to this sample. In the Login ID box, you will be able to select TEST DEMO, and then click Ok to enter the Shelter Pro application. The database being accessed will be an empty Shelter Pro database.

Starting Shelter Pro when the setup type is "Workstation only / upgrade"

Note: if you are installing this workstation as part of the steps of installing Shelter Pro with SQL Server, you should now return to the document titled "**Shelter Pro Installation Guide – SQL Server Components**" and continue with the steps. Otherwise, continue with this document.

Click the Shelter Pro program item or desktop icon to start Shelter Pro.

If the installation is an upgrade to an existing Shelter Pro setup, the program should start successfully. Note that with some upgrades, the database will need to be upgraded. If this is the case, you will see messages on the screen as the database upgrade is applied. Once the database upgrade is complete, you will see the Shelter Pro Start-up screen (sample above). Go ahead and login and begin using the new version of Shelter Pro.

After installing - Starting Shelter Pro (continued)

Starting Shelter Pro when the setup type is "Workstation only / upgrade" (continued)

If the installation is a first-time install, when Shelter Pro starts it will prompt you to specify the folder where the Shelter Pro database resides. You will see a screen that looks something like this sample.
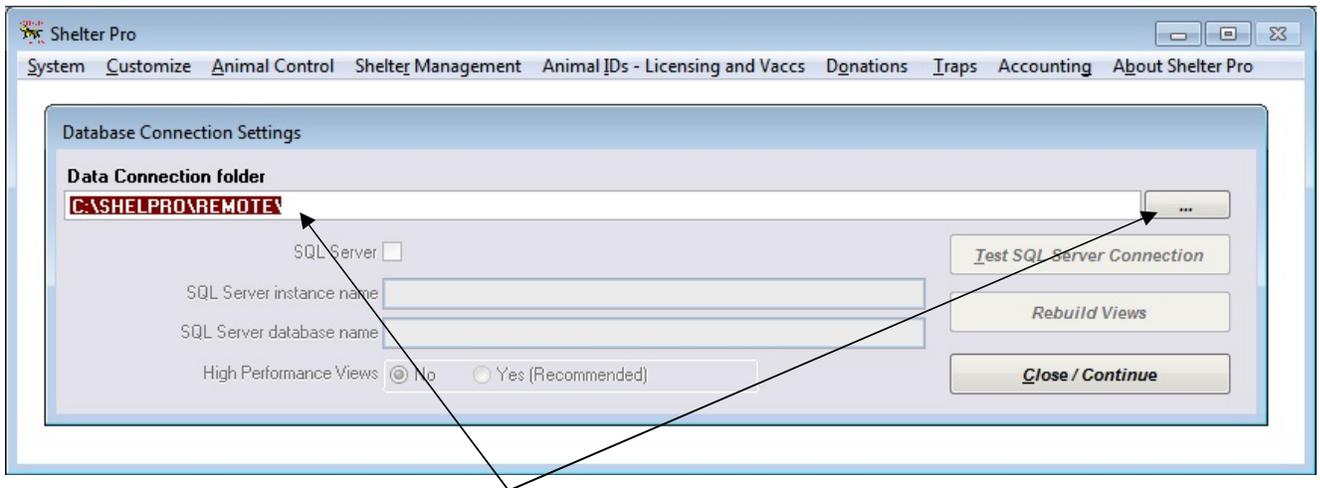
Notice that Shelter Pro is attempting to open a database in the folder C:\SHELPRO\REMOTE. This 'error' screen is showing because Shelter Pro is not finding a valid database in the folder (remember the installation did not install a Shelter Pro database).

The Data Folder setting should be modified to specify the folder (typically a folder on a server in a networked environment) where the Shelter Pro database is located. Note that you can click the "…" button to use standard Windows navigation to locate and set the Data Folder setting, or you can simply type the path into the Data Folder setting box directly.

After installing - Starting Shelter Pro (continued)

Mapped network drive versus UNC path
Shelter Pro supports both. UNC path settings are recommended, but the choice is yours. UNC path settings are preferred because they enable Shelter Pro's features for Windows Scheduled Tasks to be utilized.

A **UNC path** sample is shown below. Note that for the workstation, the "//LAPTOP-VAIO/" is a reference to the "C" drive on the server, and the 'SHELPRO/REMOTE' references the folder on the server where the Shelter Pro database is stored and shared on the network.
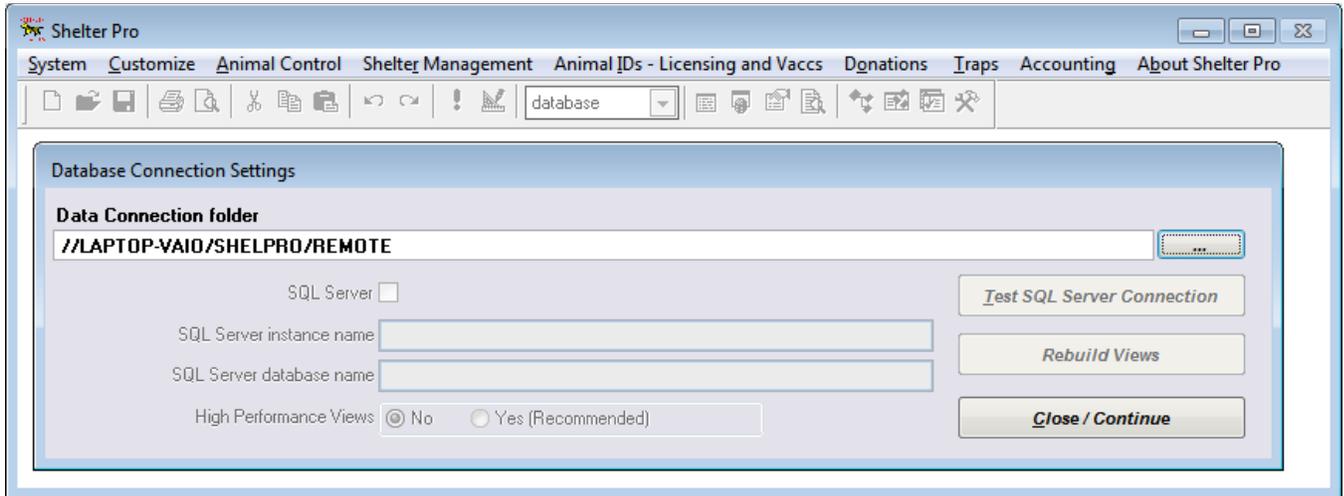
A **Mapped network drive** sample is shown below. Note that for the workstation, the "Z" drive is a "mapped network drive" reference to the "C" drive on the server where the Shelter Pro database is stored and shared on the network.
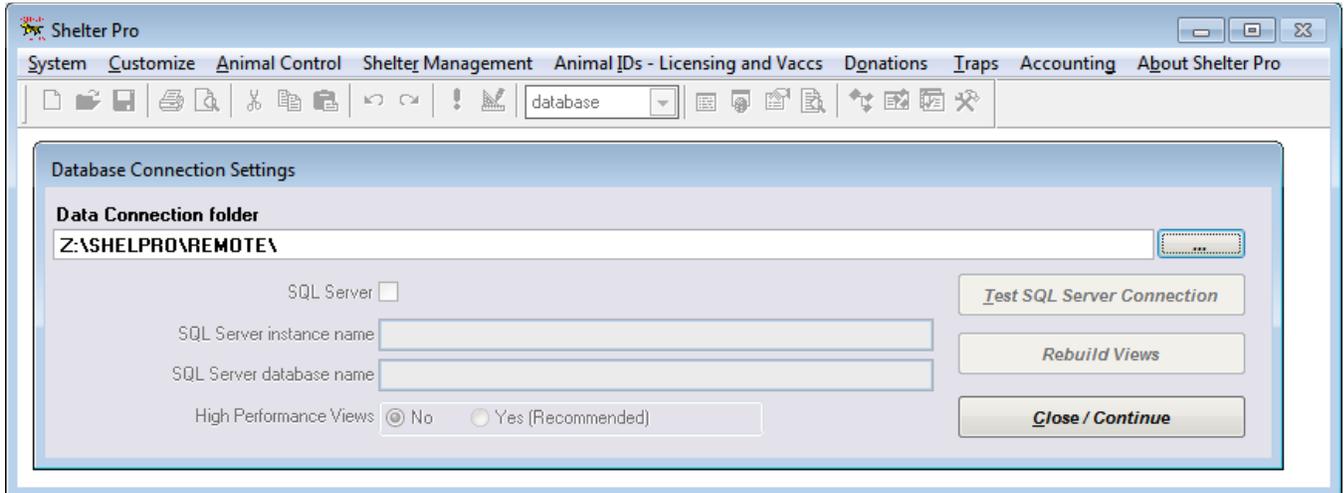
After installing - Starting Shelter Pro (continued)

Once the Data Folder is set correctly, click the Close/Continue button to get into Shelter Pro. You will then see the Shelter Pro Start-up screen.
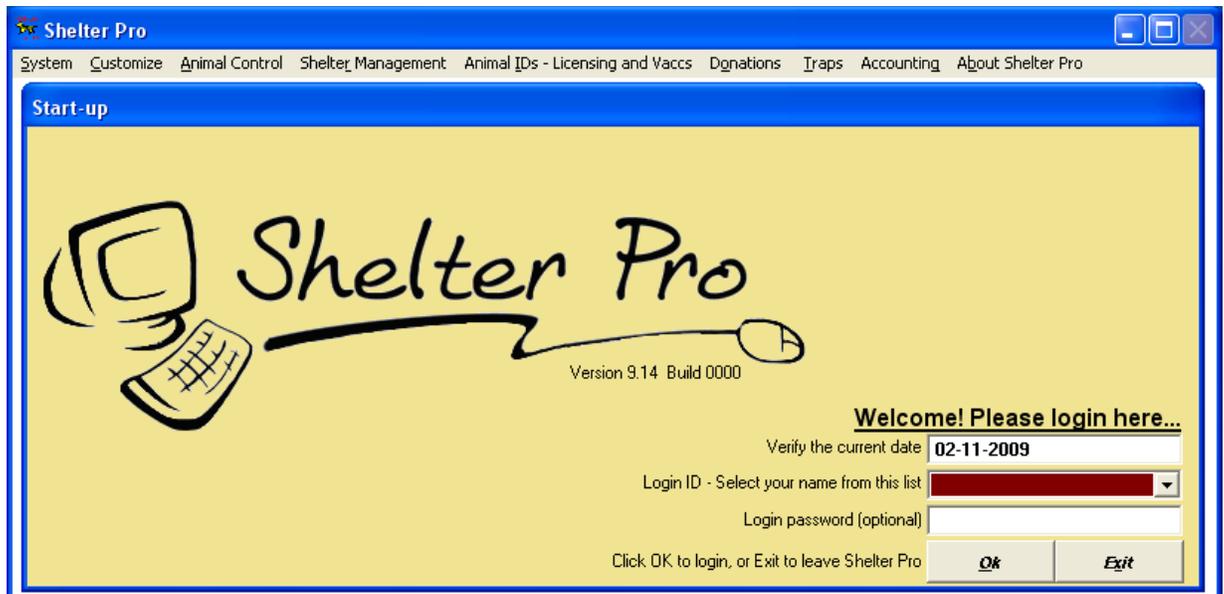
After installing - Starting Shelter Pro (continued)

Modifying the Data Folder after Shelter Pro is successfully running

If Shelter Pro is running successfully, however it's not opening the correct database, you should modify the Data Folder setting to re-direct Shelter Pro to the appropriate database.

To do this, start Shelter Pro and get to Shelter Pro Main Menu. On the main menu, select CUSTOMIZE/DIRECTORIES to open the screen where you can alter the Data Folder path. After the Data Folder is changed, Shelter Pro will exit and will need to be re-started to access the database.
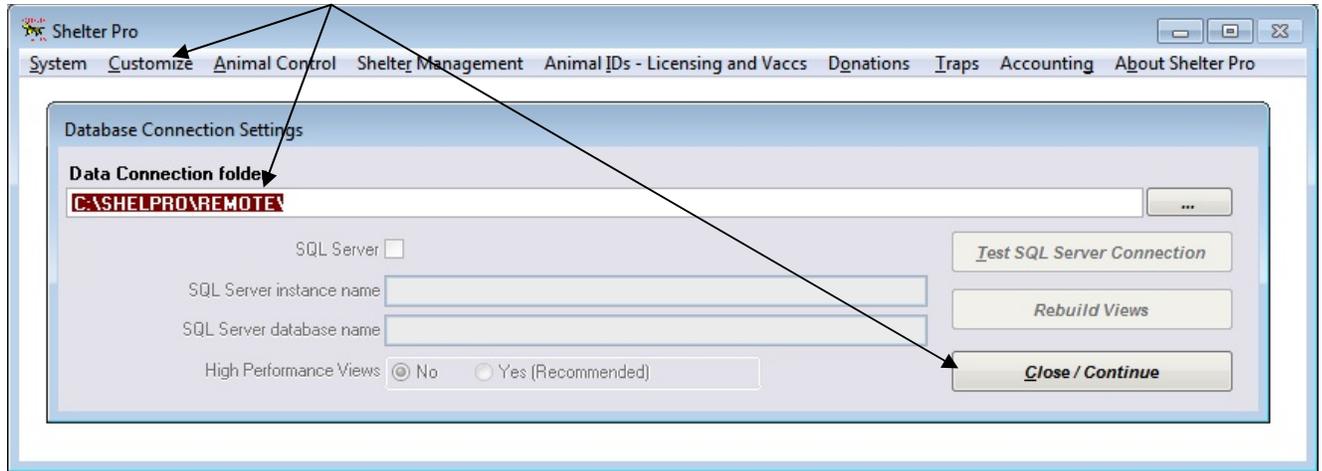
Mapped network drive versus UNC path
Shelter Pro supports both. UNC path settings are recommended, but the choice is yours. UNC path settings are preferred because they enabled Shelter Pro's features for Windows Scheduled Tasks to be utilized.

After installing - Starting Shelter Pro (continued)

Accessing and printing the Shelter Pro documentation

The installer will place the Shelter Pro documentation on the installed computer. The documents will be located in the installation folder, within a subfolder named "HELP".
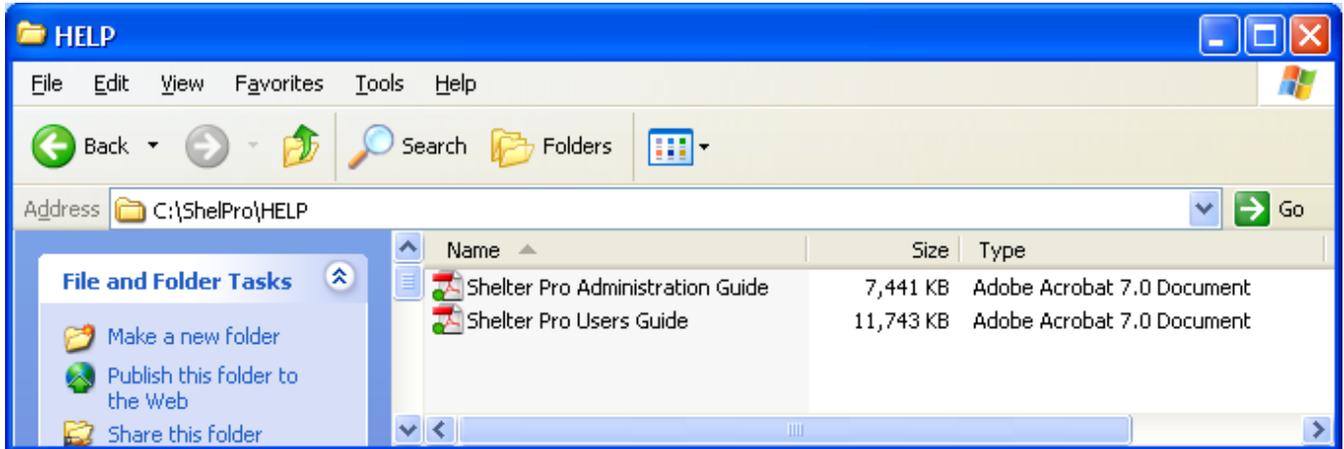
The documents will cover the detailed functions and configurations of the Shelter Pro Software application.

The Shelter Pro Users Guide should be printed and referenced by the Shelter Pro users such as staff members who will process events on Shelter Pro, such as Animal Control incidents, Shelter Cases, Animal Licensing, etc.

The Shelter Administration Guide should be printed and referenced by the Shelter Pro users who will fill the role of system administrators of Shelter Pro. These functions would include things like user administration, system configuration items, etc.

Installing SQL Native Client

SQL Native Client is an ODBC driver used for SQL Server connectivity and SQL processing. The driver is a Windows based application provided by Microsoft Corporation, and redistributed by Shelter Pro software.

It must be installed on the server. The installation is a typical Windows application software installation. Upon completion, SQL Native Client will show as an "installed program" under Control Panel on the server.

Note: installing SQL Native Client must be completed prior to running the SQLServerDatabase.exe program.

To begin, double-click the downloaded SQLNativeClient.zip file to begin the installation.
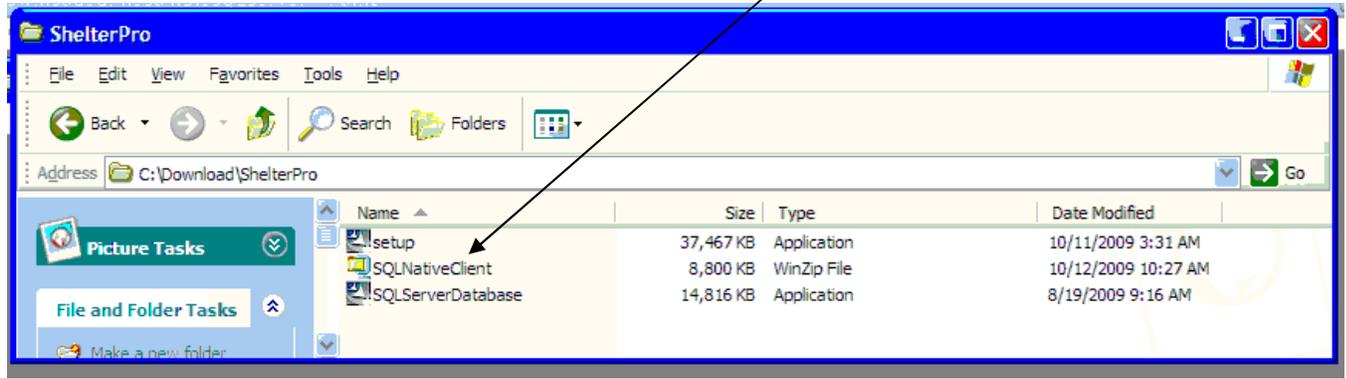
The zip file contains both 32-bit and 64-bit versions of SQL Native Client. Choose the appropriate installer for your particular operating system.

sqlncli.msi = 32-bit version   **sqlncli_x64.msi = 64-bit version**
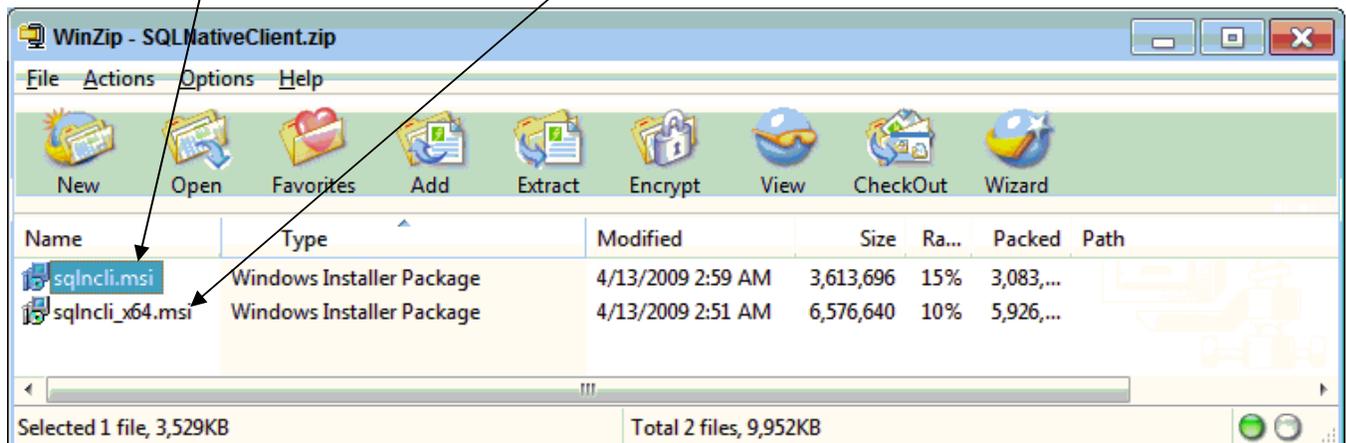
The installation of SQL Native client is very straightforward. If there are any questions, please refer to Microsoft's website for support Q+A (www.microsoft.com).