



Facility Administration - Installation Guide for 14.3

Version 1



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1 Introduction

This is the Facility Administration Installation Guide. This document guides you through the upgrade process and helps you to set up Facility Administration.

Please follow the information outlined here to ensure that your installation (or upgrade) goes as smoothly possible.

This guide is divided into the following sections:

- Installation checklist (giving you a general overview of the steps that you should take to upgrade Facility Administration)
- Preparations before performing the installation/upgrade
- Backing up your Facility data
- Installation/upgrade process
- Post-installation configurations
- Connecting to SQL Server

2 Facility Administration installation checklist

The following checklist gives you a general overview of the upgrade process. As you work through this guide systematically, you will find that you can check off each item one by one.

Steps	Check
All relevant installation files for all the products that you have purchased have been downloaded.	☐
Ensure that any extracted timetable file (TTD) is integrated back into Facility Admin.	☐
Facility ePortal service stopped. Facility Data Server service stopped.	☐
Backup of data and templates completed.	☐
All users are logged out of all Facility products.	☐
Rename the existing directory in which Admin is installed e.g. 'Adminold'.	☐
Create a new directory with the same as the old installation directory e.g. 'Admin'.	☐
Install Facility Administration into the newly created directory, which you created in the previous step.	☐
Install additional modules such as Document Storage into the same directory.	☐
Copy folders such as 'Exam_in', 'Exams out', 'CTF_In' etc... from old Admin directory to new Admin directory. Note: Where your 'Exams_in' etc folders are located elsewhere (including in a top level folder) please ignore this step.	☐
Open Facility Administration and select the existing CDB connection file.	☐
Log into Facility Administration.	☐
Allow the Behaviour Events to be migrated to the new structure (may take some time , depending on the number of events)	☐
Confirm that all additional modules, such as Document Storage, are installed.	☐

Facility Data Server service started	☐
Facility ePortal service started	☐

3 Preparations

Before performing the installation/upgrade, you must ensure that you have performed the following steps:

1. For Facility Scheduler users only: Ensure that any changes you have made in Scheduler are integrated into the Facility Administration database **before** you upgrade.

Note: Never attempt to integrate a TTD file into the Facility database more than once. A Scheduler file that was extracted prior to upgrade **cannot** be integrated after the upgrade. See section 3.2 on page 7.

To view the details of all the TTD files that have been integrated and extracted in a particular data set, go to **Database | Extraction and integration log**.

You should check this log for the current data set (or for the working data set of the coming academic year, if one exists) and ensure that you integrate any outstanding file.

After integrating the TTD file, no timetabling work should be performed during the upgrade. After the upgrade, take a fresh extract. This file may then be given to the school Timetabler and becomes the working TTD file.

2. For all Facility Administration users, take a backup of:
 - All data sets
 - Assessments and Report Templates
 - All Finance data (For Finance Users)
 - All configuration files (i.e. the files stored in *C:\Admin*, prior to upgrade)
3. Ensure that all components you have purchased and downloaded are of the correct version.

3.1 Important notes for Welsh schools

Welsh institutions must install both:

- Facility Administration (Wales)
AND
- Facility Administration (Without Finance) *OR* Facility Administration (Including Finance)

Other components may be installed alongside these basic two.

Users will be given access to all compatible Facility components that they have purchased by download.

Additional components for Facility ePortal do not require extra installation files. Access to extra functionality is controlled by a license key. This is explained in the Facility ePortal Installation Guide.

Note: Facility ePortal 14.3 will be released in 2015. You do not need to upgrade ePortal at this time.

3.2 Integrating the Scheduler TTD file

Note: If you upgrade without first integrating your TTD file, you **will not be able to use your current TTD file after upgrade.**

If you are currently working on a TTD file in Facility Scheduler that you wish to use after the upgrade, you must:

1. Extract the TTD file from Facility Scheduler.
2. Integrate the TTD file with your current version of Facility Administration.
3. Upgrade Facility Administration.
4. Upgrade Scheduler.
5. Extract the TTD file from the new version of Facility Administration.
6. Work with the TTD file in the new Scheduler.

4 Backing up Facility data

It is possible to back up Facility data to any digital medium. We recommend that you back up to a location on your computer's hard drive or to an optical media or tape as required. It is important to store the backup off-site to avoid losing your primary and backup data, for example in the event of a fire at your primary site. It is also recommend that the backups taken are password-protected to ensure that they are secure.

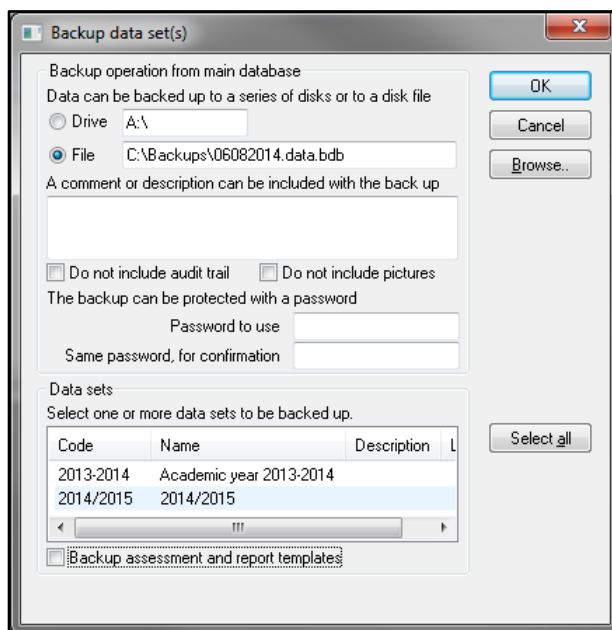
It is possible to back up data sets to a location on your hard drive.

Once backed up to your hard drive, copy the backup files to an external medium and store off-site.

4.1 Backing up to a location on your hard drive

To back up to a location on your hard drive:

1. Open Facility Administration.
2. Go to **Database | Backup data**. The 'Backup data set(s)' dialog appears.
3. Click **Browse**.
4. Select a folder in which to save the backup file e.g. C:\My Backup.
5. Type in a file name and include today's date in the file name.
6. Click **Open**.



7. Select to backup all data sets or a single dataset:
 - a. To back up a single data set containing the data for a particular academic year, select the data set in the list view.
 - b. To back up all data sets in a single backup file, click **Select all**. (If you have a large number of data sets, it is preferable to back up each one in a separate file, rather than to include all data sets in a single backup file.)
8. Type in a password in the 'Password to use' text box and confirm the password in the text box below.
9. Click **OK**. The backup data is prepared and a progress bar appears.

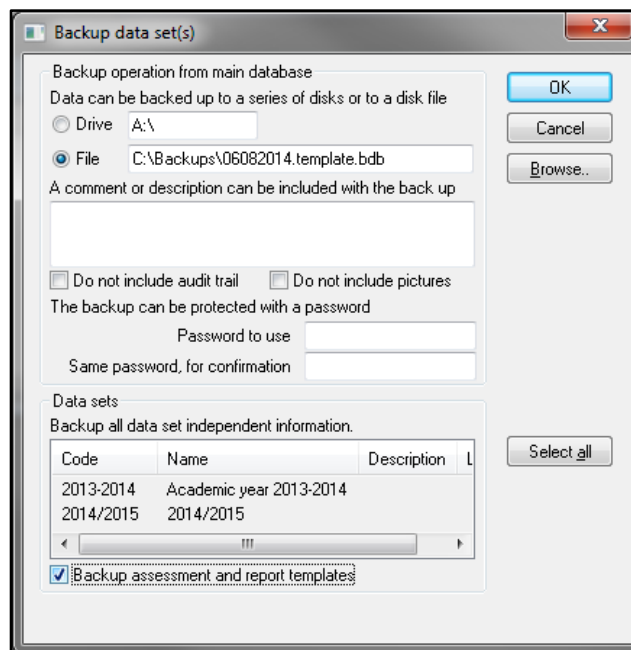
When the backup is complete, a dialog box appears to inform you that the backup was successful.

4.1.1 Backing up the Assessment and Reports templates data

In addition to backing up the data sets, it is necessary to back up all assessment and report templates.

To generate an assessment and report template backup on your hard drive:

1. Go to **Database | Backup data**. The 'Backup data set(s)' dialog appears.
2. Click **Browse**.
3. Select a folder in which to save the backup file e.g. C:\My Backup.
4. Type in a file a name and include today's date in the file name. Ensure that you give the backup file a different name to the data set backup you created in section 0.
5. Click **Open**.
6. Select the 'Backup assessment and report templates' check box.



7. Specify a password in the 'Password to use' text box and confirm the password in the text box below.
8. Click **OK**. The backup data is prepared and a progress bar appears.

When the backup is complete, a dialog box appears to inform you that the backup was successful.

4.2 Finance backup

Note: If you do not use the Facility Finance module, please ignore this section.

To take a Finance backup, go to **Accounts | System | Backup accounts data**. Follow the instructions on-screen.

5 Installing Facility Administration

Before you begin the installation:

1. Ensure that **all other users are logged out** of both Facility Administration and Facility ePortal and have closed the applications.
2. If any users are using any Facility products during the installation, it will not be possible to overwrite some of the executable files in the application folder and the installation software gives no warning that the upgrade has been incomplete.
3. Make sure that you are logged into the server you are about to upgrade with **Administrator** rights.
4. When installing on a server operating system we recommend that Facility applications are installed on the D:\ partition rather than on C:\. If you currently operate with the installation on the C:\ drive, and have not encountered any problems, then there is no need to change this configuration at this time.
5. Before proceeding with the installation, you should determine where your current version of Facility Administration is installed. Upgrades must be installed to this same directory. Typically this is C:\Admin but to verify this (or to determine where your previous installation was saved):
 - a. Right-click the Facility Administration icon on your desktop and select 'Properties'.
 - b. Select the 'Shortcut' tab.
 - c. Check the path in the 'Target' field.

5.1 Before upgrading

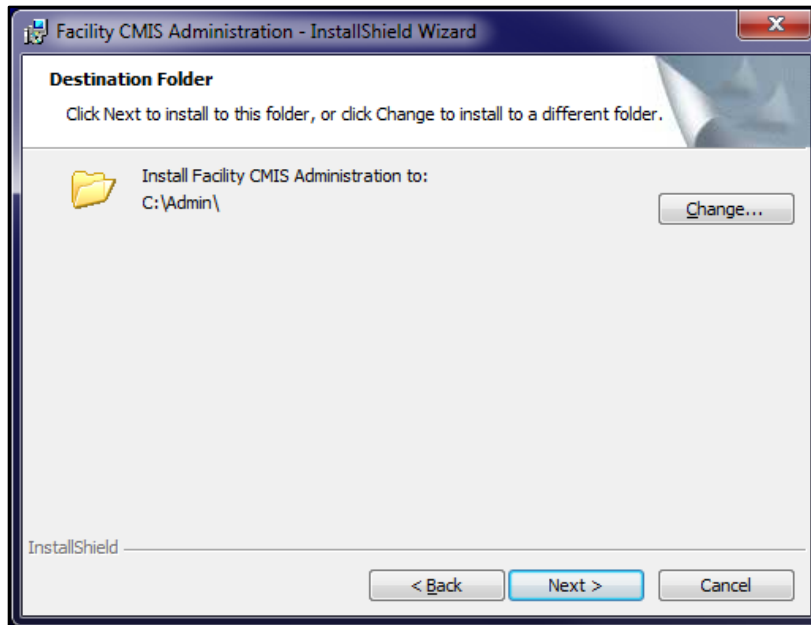
Before you can upgrade Facility Administration:

1. Log in to Facility Administration as an **Admin** user.
2. Disconnect all users from Facility Administration (go to **Database | Disconnect inactive users**).
3. Go to **File | Exit**.
4. From the **Start menu, select 'Control Panel'**.
5. Double-click **Administrative Tools**. The 'Administrative Tools' dialog box appears.
6. Double-click the **Services** icon.
7. Right-click and select 'Stop' for the following services:
 - Facility Data Server
 - Facility ePORTAL
 - World Wide Web Publishing (note that this will disable any other web sites that your school are hosting using IIS on this server)
8. Rename the current installation directory from C:\Admin (the default) to C:\Adminold. **Do not delete** this directory.
9. Create a new directory and give it the same name as the previous installation directory: C:\Admin.

5.2 Running the installation

To begin the installation:

1. Unzip the downloaded file and double-click the 'Setup.exe' file. The 'Welcome screen' appears.
2. Click **Next**. The 'Destination folder' screen appears.



3. Click **Change** if you want to install to a location other than the default C:\Admin. If you are upgrading, you must choose the same directory as your old Facility Administration. (See point 4 in section **Error! Reference source not found.**)
4. Click **Next**.
5. You are prompted to select the setup type, select **Secondary** or **Primary**.
6. Click **Next**. A summary of the choices you have selected appears.
7. Click **Install** and files are copied across.
8. After a few moments the installation is complete. Log in to Facility Administration and access your CDB. A table validation routine is automatically performed and once completed you may use your newly upgraded Facility Administration.

5.2.1 Installing optional components

Note: Do not install components that do not match the version of Facility Administration currently installed in the destination installation directory. For example, Doc Storage v14.3 is **only compatible** with Facility Administration v14.3.

To install any additional components that you may have purchased (i.e. Room Booking, Document Storage, SMS, etc.):

1. Log in to Facility Administration as an **Admin** user.
2. Disconnect all users from Facility Administration (go to **Database | Disconnect inactive users**).
3. Go to **File | Exit**.
4. From the **Start** menu, select 'Control Panel'.
5. Double-click **Administrative Tools**. The 'Administrative Tools' dialog box appears.
6. Double-click the **Services** icon.
7. Right-click and click **Stop** for the following services:
 - Facility Data Server
 - Facility ePORTAL
 - World Wide Web Publishing (note that this will disable any other web sites that your school are hosting using IIS on this server)

8. Unzip the downloaded file and double-click the 'Setup.exe' file.
9. The Welcome screen appears. Click **Next**.
10. The Choose Destination location screen appears. You **must select the same destination location** as you chose in step 3 in section 5.2.
11. Click **Next**.
12. Click **Install**. The component is installed.

To install any additional components, repeat steps 8-12.

5.3 Connecting Facility to the Database

Once Facility has been installed with any additional components, it needs to be connected to the database. This can use the existing connection files.

Once Facility has been connected to the database, a database validation is performed to check the various tables and data.

5.4 Post-installation configuration

If the previous version of Facility Administration (which you backed up to C:\Adminold) contained the following items:

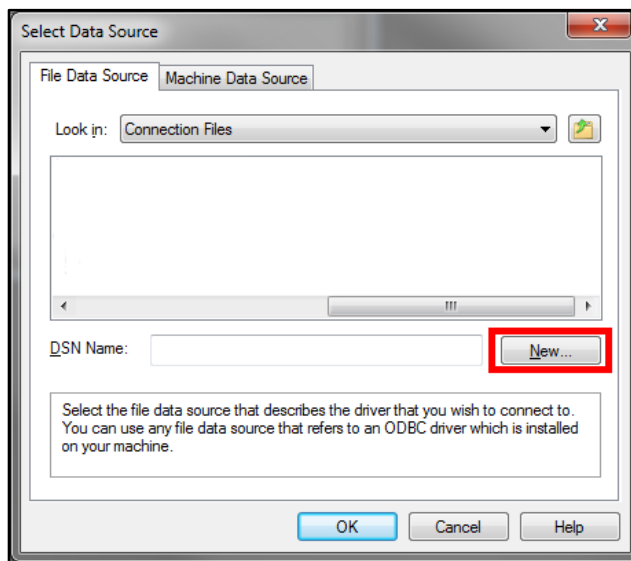
- CTF_Out
- CTF_In
- CTF_Suspended
- CTF_Imported
- CTF_Rejected
- Exams_In
- Exams_Out

Copy these folders and paste them into your new installation directory (C:\Admin)

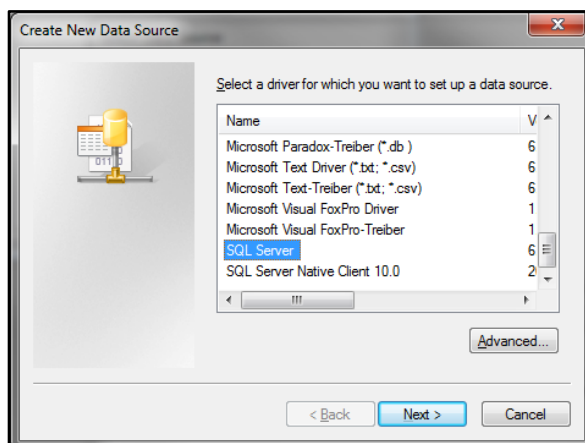
6 Connecting Facility Administration to SQL Server

If you want to make a new connection to SQL Server, which contains the Facility database:

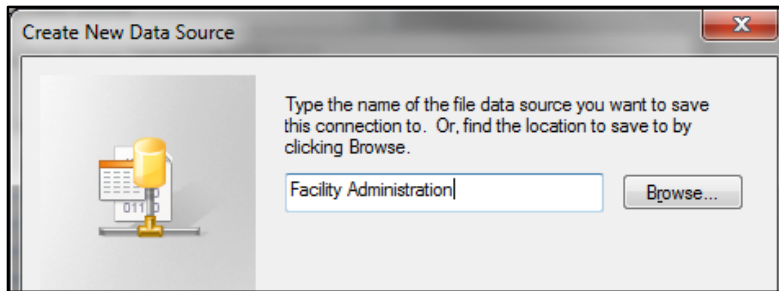
1. Open Facility Administration.
2. Go to **File | New**.
3. Select **Database | Connection**.
4. Ensure that 'table owner' is completed with the current schema name of the database. This is usually STUD_ADMIN. You can check this by opening SQL Server Management Studio on the server, expanding the Facility database, expanding tables and looking for the prefix to all of the table names. Where the prefix is 'dbo' the table owner name may be left blank.
5. Click **OK**.
6. From the 'File Data Source' tab, click **New**.



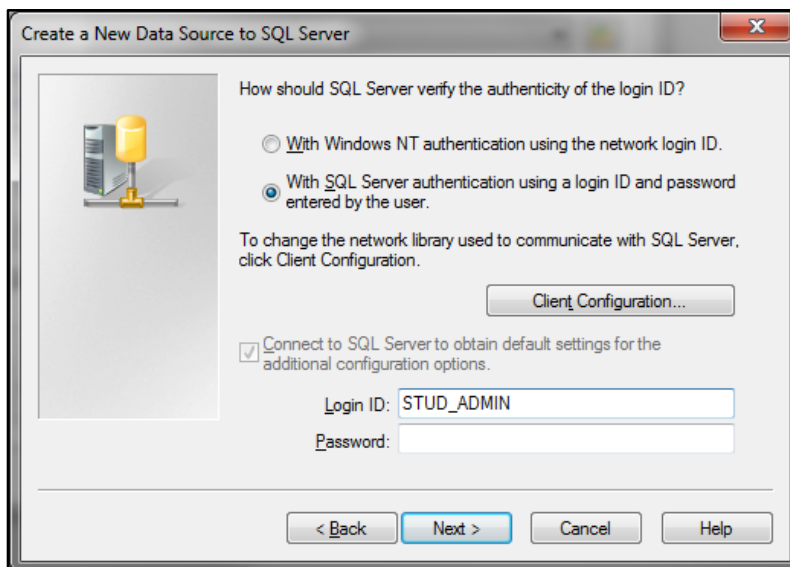
7. Select the 'SQL Server driver' from the list of data sources.



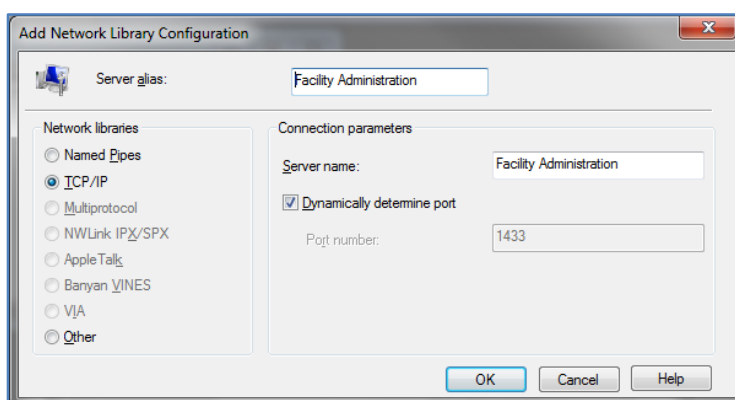
8. Click **Next**. You are prompted to name the new file data source. Call it 'Facility Administration'.



9. Click **Next**. A summary of the settings you have made up to this point appears.
10. Click **Finish**. The 'Create a New Data Source to SQL Server' dialog box appears.
11. From the 'Server' drop-down, select the server on which SQL Server is installed.

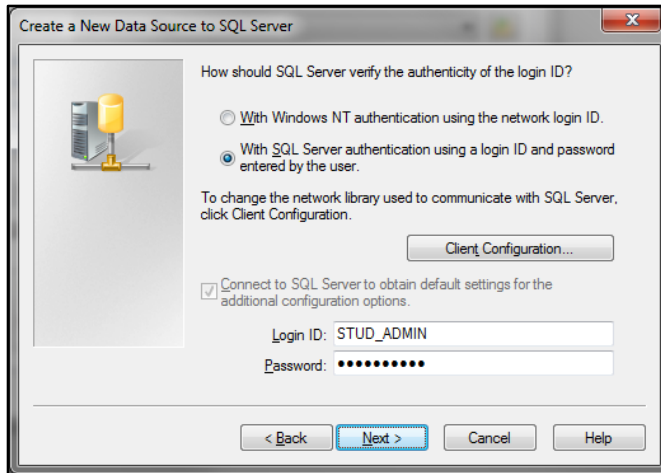


12. Click **Next**. At this point you must specify how connections to the database will be authenticated.
13. Check the option for 'With SQL Server authentication using a Login ID and password entered by user'.
14. Click **Client Configuration**.
15. Ensure that 'TCP/IP' is selected.

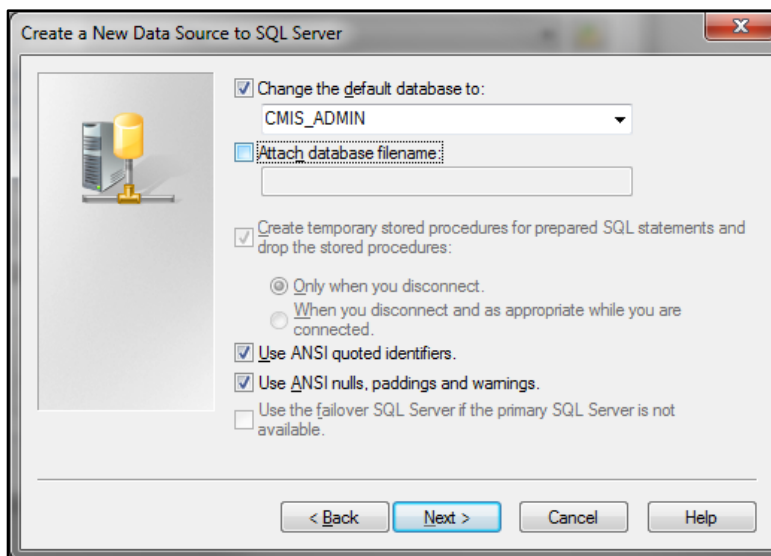


16. Click **OK**.

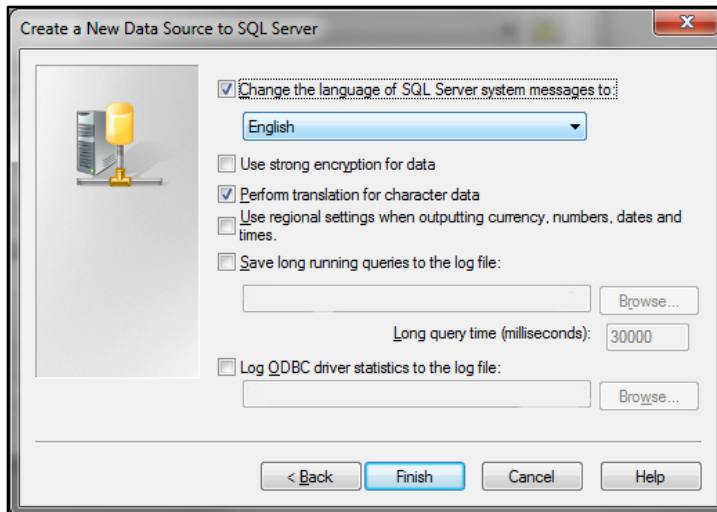
17. Type in your Login ID and Password for the Facility database, which is hosted on the SQL Server computer (this information was applied when the database was first created).



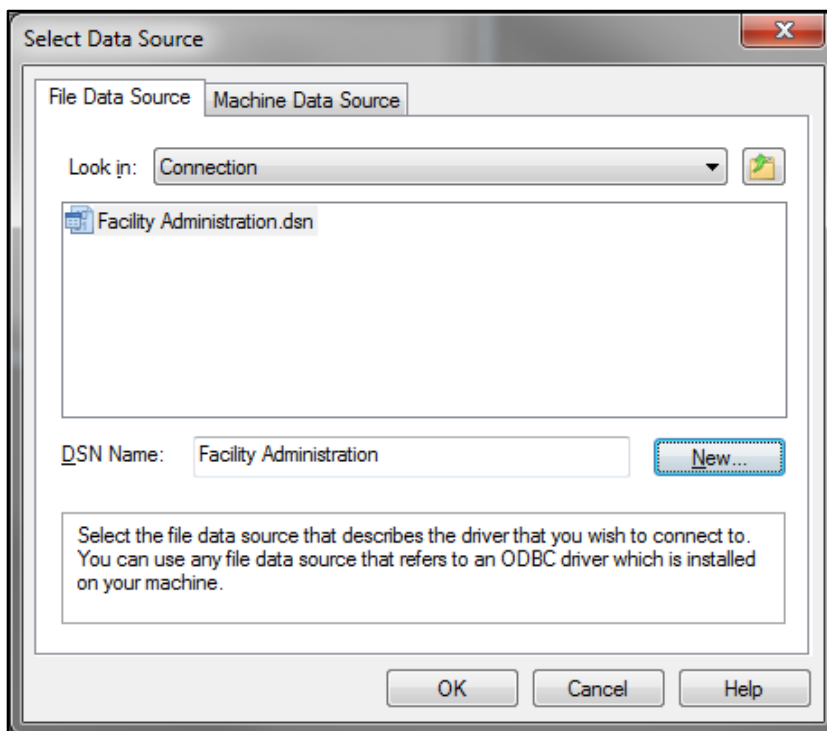
18. Click **Next** and confirm that the correct database has been selected (typically CMIS).



19. Click **Next**. A screen allowing you to set up logging options appears. Retain the default values on this screen.



20. Click **Finish**. A summary of the various configurations appears.
21. Click **Test Data Source** to confirm that the connection is functioning.
22. Click **OK** for the message that the connection is functioning.
23. Click **OK** on the 'ODBC Microsoft SQL Server Setup' dialog box. At this point you have created a new Data Source and it appears in the 'Select Data Source' dialog box.



24. Click **OK** to select the new data source you have created.
25. Go to **File | Save**.
26. Exit the software and reopen to test.