TRAINING MANUAL

Installing Palladium Accounting Software

palladium
Accounting

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Installation of Palladium Accounting has several options depending on how you plan to use the software and where you acquired the installation files. There are 3 main portions of Palladium and all three are explained below:

1. **Palladium Accounting Software** - This is the actual software itself. This must be installed on each computer that will use Palladium.

2. **Microsoft SQL Server** - This is the database engine that Palladium uses to store its data. This must be installed once per installation. For a single user setup, SQL can be installed on the same client computer and for a multi user environment, SQL will be installed on the Server and all the other workstations will connect to Server.

3. **Palladium Accounting Automated Backup Server** - Also known as **Palladium Server**, this software runs on the computer where Microsoft SQL Server is installed and provides an automated backup solution. There is a local backup (to the computer) and a remote backup (via FTP to our backup server). The remote backup solution is a subscription service at an additional cost. If you are interested in remote backups, please contact your Palladium dealer for assistance.

Installing Palladium on a Single Computer

Single installation assumes that both the database (SQL) and the software (Palladium Accounting) will be running on one single computer and no other computers will access it over a network.

The download link (One-Click install) on the website includes the prerequisites below

1. **Install SQL Prerequisites Package** - Download and install your choice of SQL prerequisites package (SQL 2005 or SQL 2008). If you are using a 64bit operating system, you must download and install the SQL 2008 prerequisites package. This package will install Microsoft SQL Server Express Edition on your computer for use with Palladium.

2. **Install Palladium Prerequisites Package** - Download and install the Palladium Accounting prerequisites package. This package installs all the items Palladium Accounting needs to run properly (Crystal Reports, .Net framework, etc.).

3. **Install Palladium Accounting** - Download and install Palladium Accounting package of choice.

4. **[OPTIONAL] Install Palladium Server** - You can optionally download and install Palladium Server to do automated backups. On single user installations, this is optional as you will have the ability to perform manual backups inside Palladium Accounting itself. This manual option is only available when SQL is running locally (not on a server). If you wish to have automated backup facilities, you must download and install Palladium Server.

Installing Palladium on a Workstation

A client / workstation setup assumes that multiple computers will be accessing a single Palladium company database (multi-user environment).

Server Setup

This process must be performed once on the server.

1. **Install SQL Prerequisites Package** - Download and install your choice of SQL prerequisites package (SQL 2005 or SQL 2008). If you are using a 64bit operating system, you must download and install the SQL 2008 prerequisites package. This package will install Microsoft SQL Server Express Edition on your computer for use with Palladium. Please note that if your company is going to have more than 10 active concurrent workstations connecting to the server, then we recommend that you purchase and install a full version of Microsoft SQL.

2. **Install Palladium Server** - Download and install Palladium Server software. This will enable you to automate your backups (Local & Remote) and also gives you options to administer the SQL Server. While you are installing the server, take note of the server name. This can usually be obtained by right clicking on My Computer (or Computer in Vista and windows 7). You will need the name of the server to setup the client computers' connections to the server. You should also create a shared folder at this time for your Document forms to be stored in. All Palladium clients will connect to this share to retrieve your customized document forms. This provides a central place for forms storage. If you don't know how to share a folder, please ask your network administrator to help you. The final consideration for server installation is that if you are using Windows firewall, please make sure you either (1) disable the firewall or (2) put in an exception for port 1433. This resolves the problem of Palladium running slowly over a network. The Windows firewall tends to slow the connections to SQL on the computer when an exception is not present.

Client Setup

This must be performed on all client computers that will run Palladium connecting to a server.
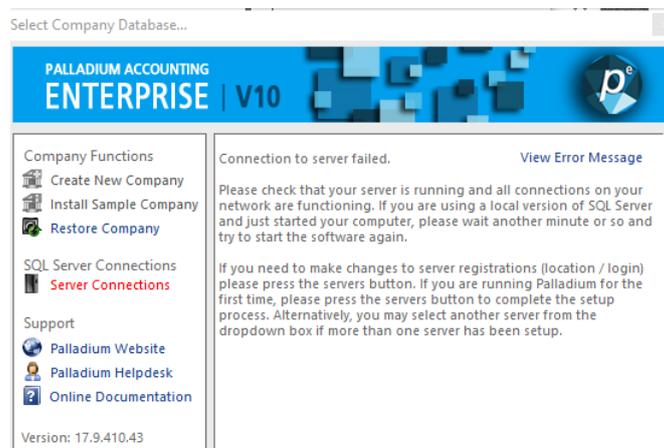
1. **Install Palladium Prerequisites Package** - Download and install the Palladium Accounting prerequisites package. This package installs all the other software that Palladium Accounting software requires to run properly (Crystal Reports, .Net framework, etc.).

2. **Install Palladium Accounting Software** - Download and install Palladium Accounting package of your choice (Individual, Business or Enterprise).

Installing Palladium Updates

From time to time new updates will be released on our web site and Palladium will always automatically check for the updates and alert you if new updates are available for you to download and install. However, you can also update your software by going to the help menu inside Palladium and choosing "Palladium Updates". You uninstall your current version of Palladium, download and install the Palladium Accounting update (as performed in step 3 above) and update your database.

Configuring Palladium Accounting

Once Palladium Accounting Software has been installed, you must specify where the SQL Database that you wish to connect to is located. Please note that you can have multiple connections to different databases resident on different servers in several locations in a multi user environment and also that the SQL server will be locally on your computer for a single user setup. For a client/server setup you can also connect to a remote server via VPN.
The first time you run Palladium you will receive a connection to server failed warning. The servers Link will turn red in colour as illustrated below.

To resolve this, select the server connections tab. For a new installation, the servers' list will be blank and for an existing installation, all of your registered servers will appear. The server with a green tick and the status as "Active" is the server that will be used when you exit this window (your active server).

To create the new server connection, click on the new button and the connection setup (Server Registration) screen below will appear:

Here you can give the server a name of your choice i.e. connection name. The Microsoft SQL Server Location section tells Palladium where the SQL server is located. If it is on your local computer using a default instance of SQL, select Local (Local Computer/Default Instance) and if

you are connecting to a server over a network, VPN, or a named SQL instance, select Remote (Network / VPN) and enter the name of the Server.

The Server Login (Security) section tells Palladium which user account and password to use to connect to the SQL database. If you have not changed this information from the default Palladium settings, then chose Palladium installed SQL Server. If you have installed your own SQL Server or have changed the login information, then choose user installed and enter the username and password to use.

VPN Mode: If the server you are connecting to is in a remote location (including over a VPN) you can choose to allow Palladium to run this connection in VPN mode. This mode will stop all open forms from refreshing when posting transactions. This will decrease the time necessary to post transactions and make Palladium more responsive. However, you must manually refresh your open windows by clicking on the VPN refresh button on the home window (in VPN mode the normal refresh button is replaced with a VPN refresh button to allow you to know that you're running in this mode).

The port setting can also be changed if your administrator requires it. This provides better security over a VPN or public SQL installation. Most of the time, you will leave this as the default 1433. Then you will press the OK button to continue.