

2. Installing Mun-Ease 2018 (EDB version)

2.1 MUN-EASE 2018 - EDB OR SQL SERVER?

Mun-Ease 2018 can use either the SQL Server database or the Elevate database (EDB). Both databases have the same features. The Elevate Database (EDB) is a very fast multi-user database and includes many features that are usually associated with enterprise databases (database views, stored procedures, and multi-table updates that can be processed in a single transaction).

The EDB is also easy to install and maintain. Thus the EDB is probably a good choice if your organization has limited or no technical staff.

Your initial decision on this matter is not critical. There is no downside to initially selecting one database and then deciding at a later point to switch to the other. We provide a utility that allows you to move data back and forth between the EDB and SQL Server. The conversion process takes just a few minutes and is very easy.

The steps for installing the EDB version of Mun-Ease are documented in the following pages while instructions for installing the SQL Server version are described in Chapter 1.

2.2 DOWNLOAD THE INSTALLATION PROGRAM

Users can download the installation program from the www.mun-ease.com web site. The “setup” executable is approximately 300 megabytes. It will take a few minutes to download. Go to the <http://www.mun-ease.com/download.html> web page. Mun-Ease displays the following screen:

2018 Release

	64-Bit Version	32-Bit Version
Elevate Database (EDB) <u>Installation Instructions</u>	Download 64-bit EDB 2018 Complete Version (for new 2018 users) <u>Right-click to save the installation program to the user's desktop.</u> Run the program. You must enter a password to install the new release. The password can be obtained by emailing us at support@mun-ease.com or by calling us at 949-248-5788.	Download 32-bit EDB Server 2018 Complete Version (for new 2018 users) <u>Right click to save the installation program to the user's desktop.</u> Run the program. You must enter a password to install the new release. The password was e-mailed to the primary contact of your organization. The password also can be obtained by emailing us at support@mun-ease.com or by calling us at 949-248-5788.
SQL Server Database <u>Installation Instructions</u>	Download 64-bit SQL Server 2018 Complete Version (for new 2018 users) <u>Right-click to save the installation program to the user's desktop.</u> Run the program.	Download 32-bit SQL Server 2018 Complete Version (for new 2018 users) <u>Right-click to save the installation program to the user's desktop.</u> Run the program.

Figure 2-1: The downloads page on the Mun-Ease web site.

Right-click on the appropriate version of Mun-Ease and save the executable file to the user's desktop. For example, if you were to right-click on the 32-bit EDB version, the link would be saved as Setup2018v18"xx"Edb32.EXE on your desktop.

We include separate installation instructions for the EDB version and SQL Server version. They can be downloaded or viewed by clicking on the Installation Instructions link. Both the EDB and SQL Server instructions include information that specific either the 32-bit or 64-bit installations. That information is described in the following pages.



Figure 2-2: Password to download the 2018 version

2.3 PASSWORD FOR 2018 VERSION

We sent an e-mail in September 2018 to (a) our current customers, (b) prospects, and (c) previous customers (customers who use an older version of Mun-Ease). The e-mail contained an attachment that contained our September 2018 newsletter. We also sent a separate e-mail to the primary contact of our current customers. That e-mail contains the password to install the 2018 version.

If you did not receive an e-mail from us, please call or e-mail and we will promptly send you the password.

You can also call us at 949-248-5788 or e-mail us at support@mun-ease.com if you have any questions about the installation.

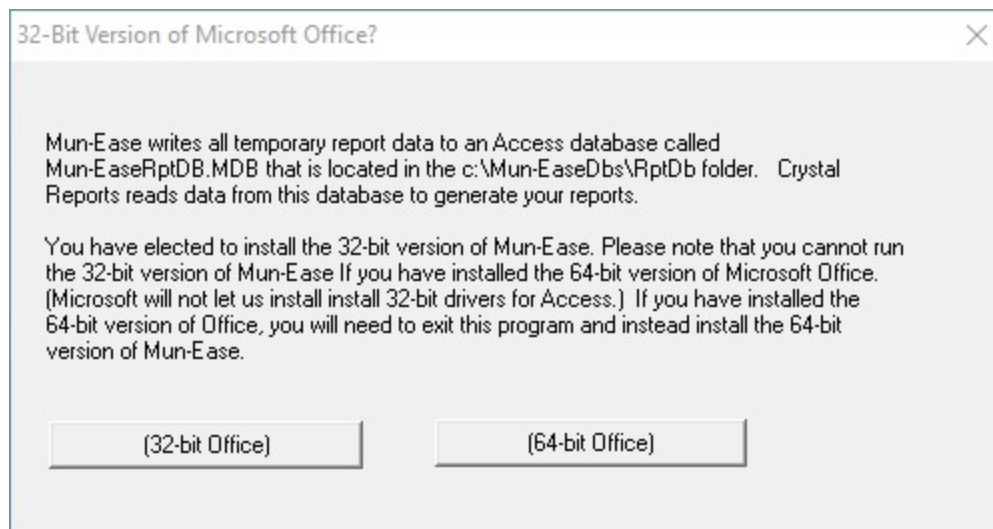


Figure 2-3: 32 or 64 bit version of Microsoft Office

2.4 Mun-Ease 2018 – 64-Bit or 32-Bit Version?

The Elevate database users can download either the 32-bit or 64-bit version of Mun-Ease.

- Setup2018v18”xx”Edb32.Exe
- Setup2018v18”xx”Edb64.Exe

You should install the 64-bit version only if you have a 64-bit processor and are running the 64-bit version of Microsoft Office. You can determine if your computer has a 64-bit processor by clicking on the *start* button and then right-clicking on the *computer* menu option. You can determine if you are running the 64-bit version of Office by choosing the *Help | About* menu option with Word.

Note that Microsoft does not allow you to install both 32-bit and 64-bit drivers for Microsoft Office on the same computer. Thus you will encounter compatibility issues if you try to install the 64-bit version of Mun-Ease in an environment where you are using Office 365 (which is generally installed as a 32-bit version).

Questions and Answers

Question I am reinstalling Mun-Ease on a user’s PC. Should I uninstall Mun-Ease before installing a new version?

Answer No. Do not uninstall a previous version of Mun-Ease because you could also remove the user’s database. Instead, just install the new version over the old version. Mun-Ease will not overwrite the user’s data. The installation program will also remove outdated files from the user’s computer.

Question Should I install the 2018 version in the same folders that I used for the 2012 and 2015 versions?

Answer In previous versions, the installer could specify that the user’s personal folder to be either:

C:\Users\Public\AppData\Prescient Software\Mun-Ease

or

C:\Users\<Win-Sign-On>\Prescient Software\Mun-Ease
(where <WinSignOn> is the user’s Windows sign-on.

We no longer provide the installer with the option to use the “public” folder (option #1). Why? In the years since we first released Mun-Ease, Microsoft has been increasingly concerned about security and privacy issues. Thus they do not recommend the “public” folder. Also the “appdata” subfolder can be problematic unless the user has admin rights. In many instances, data in the appdata folder is hidden from the user’s view.

Thus we now recommend the second option for the user’s personal folder. If you are changing the personal folder, you may need to copy files and data from the old “public” folder to the new folder.

2.5 INSTALLER NEEDS ADMINISTRATIVE RIGHTS

The installation program creates new folders on both the user’s PC and the network server (if the database is installed there). It also updates the Windows Registry and files in the Windows folder.

Thus the person installing Mun-Ease will need administrative rights to both the user PC and the network server (if the database is to reside on the server). **Mun-Ease should be installed under the sign-on of the user that will be**

using the software otherwise the user will not be able to view the icons. (Initiate the installation program with the “run as administrator” option.

2.6 MUN-EASE 2018 INSTALLATION

The next few pages will outline the installation steps. We recommend that you spend a few minutes to read this section before installing Mun-Ease. Doing so will ensure that the installation goes quickly and without problems.

Steps:

- 1) Close all programs and applications.
- 2) Download either the Setup2018v18”xx”Edb32 or Setup2018v18”xx”Edb64 .exe from the www.mun-ease.com/download.html page to your desktop.
- 3) Right click on the *Installation Instructions* link and save the installation instructions to your desktop.
- 4) Right-click on the Start menu, and choose the *open windows explorer* menu option. Choose either the 64-bit setup program (SetupEdb64.exe) or the 32-bit setup program (SetupEdb32.Exe).

The Setup program performs several tasks. They are: (a) installation of the Mun-Ease executable files, (b) installation of the EDB database files, (c) installation of the Crystal Reports runtime viewer, (d) installation of the EDB Manager, and (e) registration of the standard databases with the EDB Manager.

Users of the Enterprise version of Mun-Ease should install Mun-Ease on each user’s computer.

We strongly recommend that the installer disable *user account control* (UAC) before installing the 2018 version of Mun-Ease. The UAC can be disabled by clicking on the *user accounts* icon within the Control Panel. Click on the *turn user account control* icon and uncheck the UAC check box.

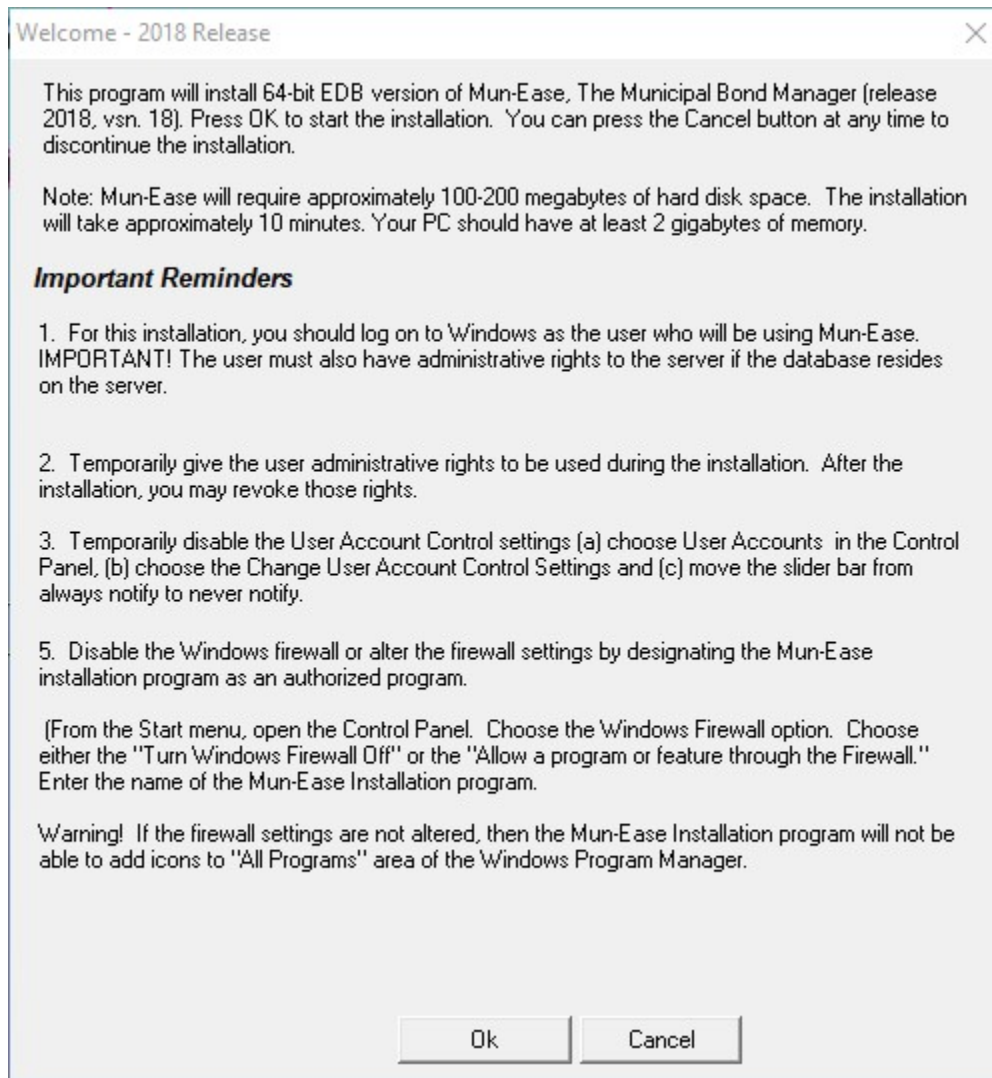


Figure 2-4: Welcome Screen

2.7 USER ACCOUNT CONTROL MESSAGE

The installation program displays the following message from the Microsoft User Account Control:

User Account Control:

Do you want to allow this app from an unknown publisher to make changes to your device.

Setup2018SQL64.Exe.

Publisher: Unknown. Yes No

Enter Yes.

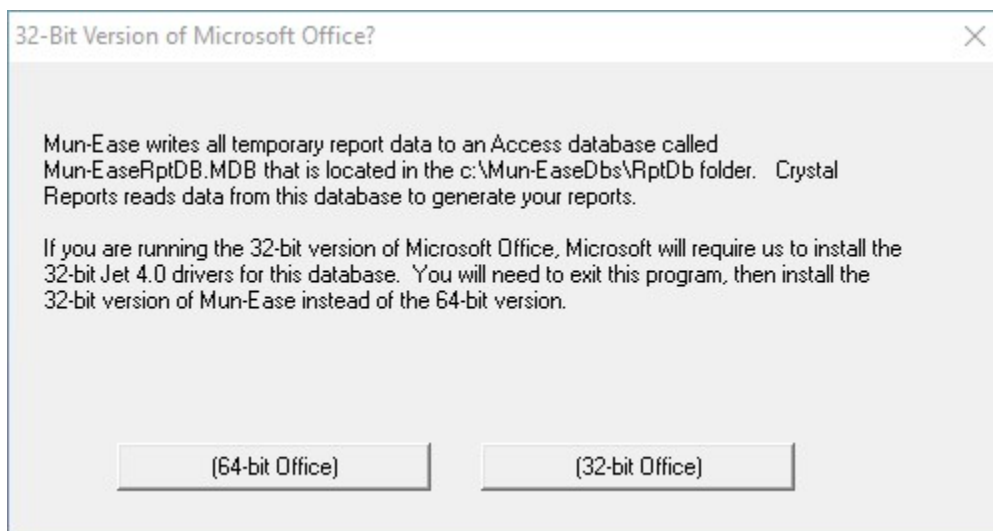
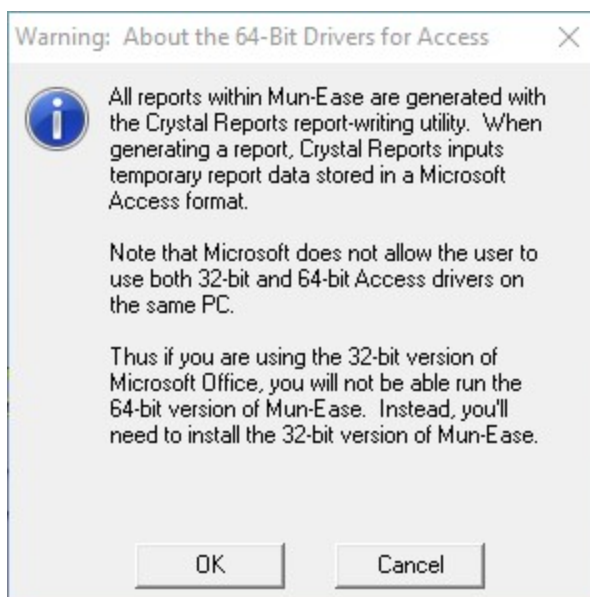


Figure 2-5: What version of Microsoft Office are you running?

If you have chosen to install the 64-bit version of Microsoft Office, you must install the 64-bit version of Mun-Ease. Conversely, if you have chosen to install the 32-bit version of Microsoft Office, you must install the 32-bit version of Mun-Ease.



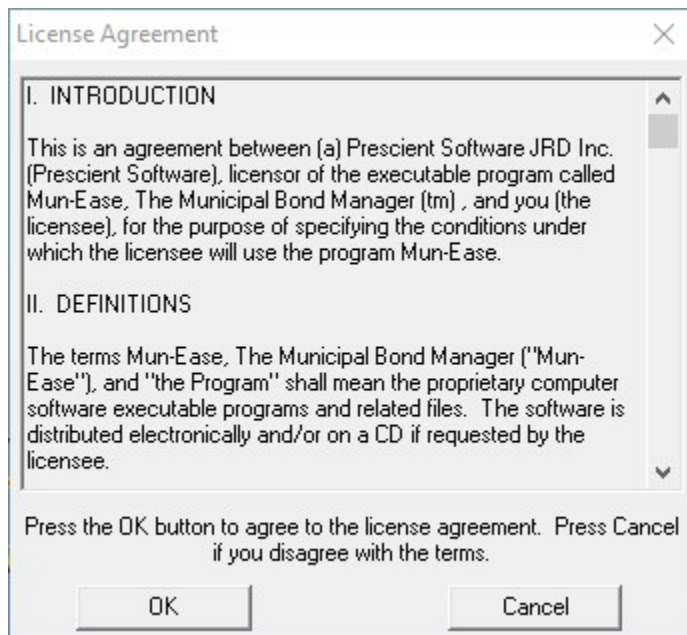
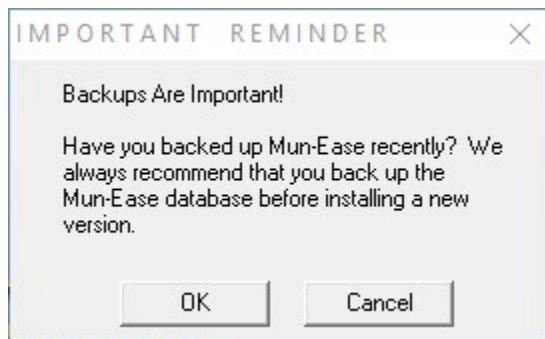


Figure 2-6 License Agreement Acknowledgements

Read the license agreement. If you agree with these terms, click *OK*.

2.7.1 THE WINDOWS REGISTRY AND THE INSTALLATION PROGRAM

The installation program reads the Windows Registry on the user's computer to determine if Mun-Ease was previously installed on the user's computer. If it finds registry entries from a prior installation, Mun-Ease will assign the default values for the installation to those used in the past. If no entries are found, then Mun-Ease displays the following message:

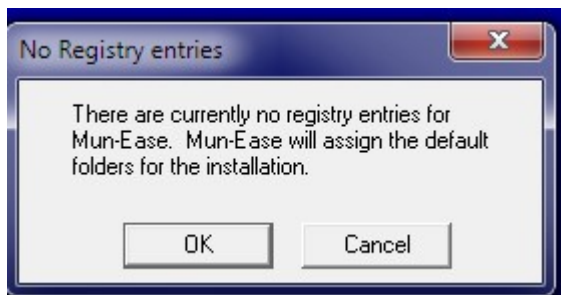


Figure 2-7: No Prior Registry Entries Found

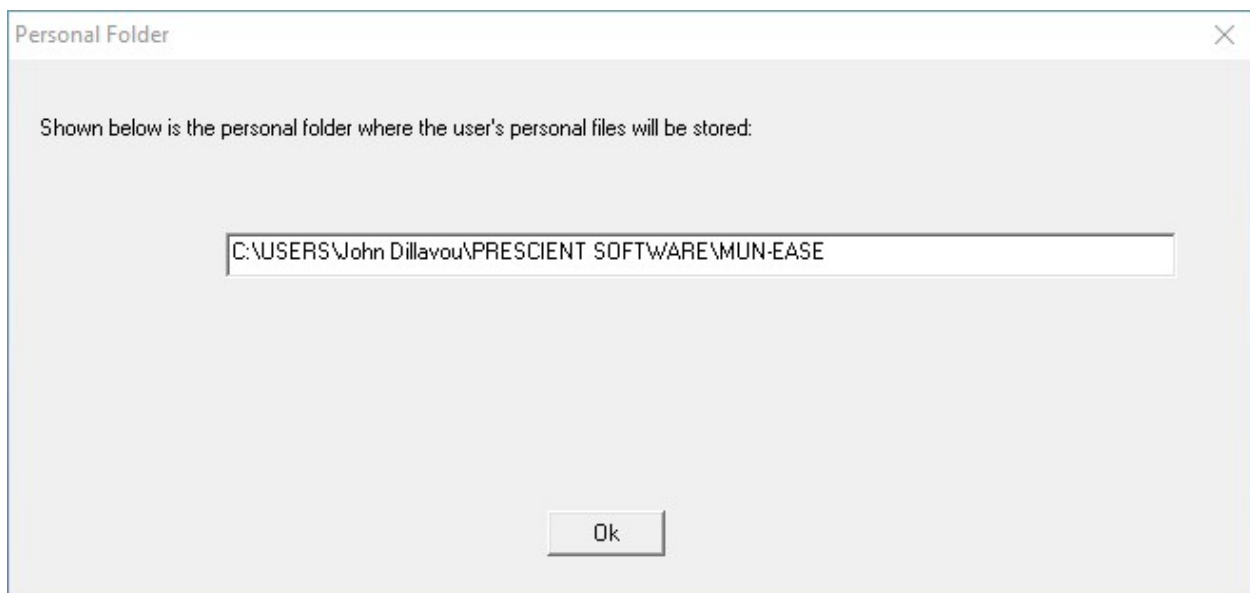


Figure 2-8: Personal Directory

The Mun-Ease installation program then displays a window with our recommended folder location for the user's personal directory:

c:\users\<WinSignOn>\prescient software\mun-ease

where <WinSignOn> is the user's Windows logon ID.

- ✎ Enter the directory for the user's personal (non-shareable) files will be stored. *Background:* Microsoft has issued guidelines to software developers to enable their software can run in a "lock-down" environment. In a "locked-down" environment, the user can run software with only minimal rights. By following these guidelines, companies help protect themselves from viruses and unauthorized access to their computers. Mun-Ease 2018 is designed to run in a "locked-down" environment.

- ↳ The personal folder is also used to store the Wmuni.Ini file and temporary files used in recursive calculations. The Wmuni.Ini file stores the user's settings that are defined in the installation program. The installation program will create several subfolders from the main personal folder. These subfolders include folders for the user's spreadsheet templates (\templates), sizing and refunding profiles (\profiles), pdf files (\pdffiles), documentation (\doc), the Mun-Ease Crystal Report specifications (\CrystalAccess), and UDL files (\UdlFiles).

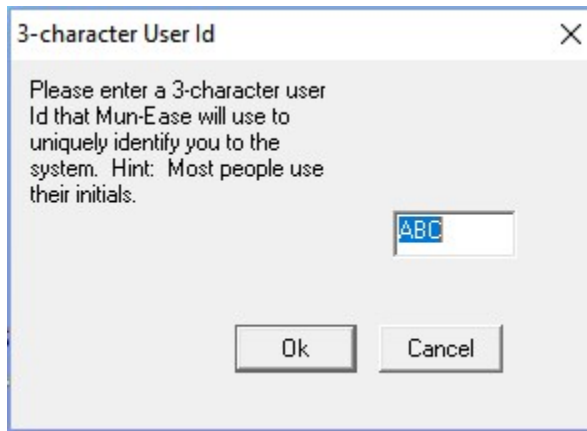


Figure 2-9: User ID

Enter a three-character user ID which Mun-Ease will register as its first user. Most users select their initials for the user ID. The User ID is extremely important in a multi-user environment. Mun-Ease ensures that one user does not overwrite the work of another user by monitoring activities of each user. Thus the User ID must be unique.

Click OK. The *personal directory* dialog box appears.

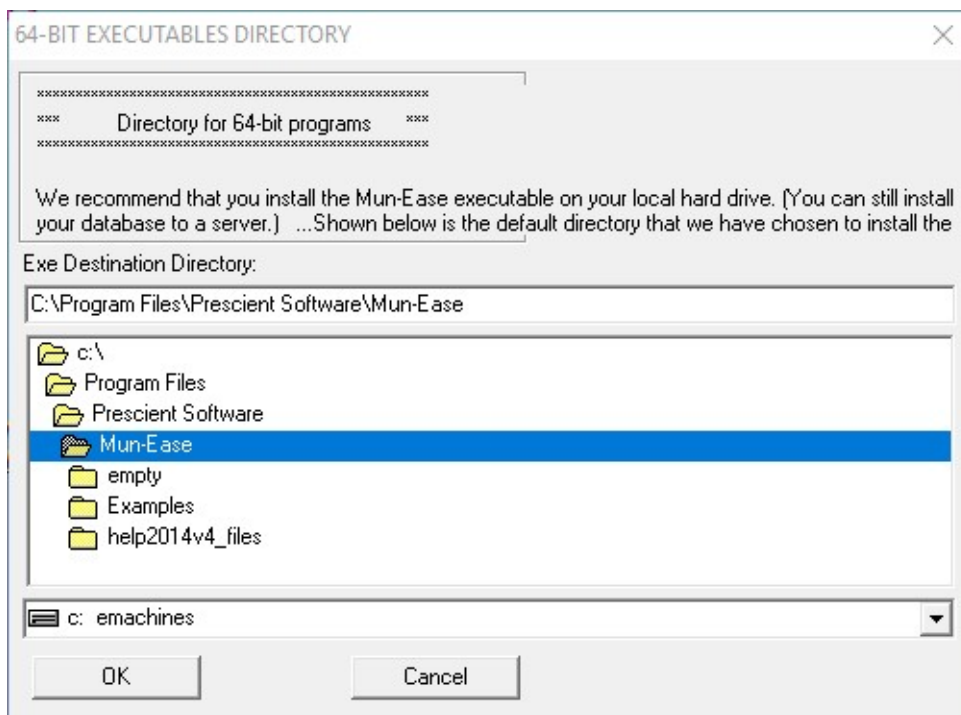


Figure 2-10: Folder Location for 64-Bit Executables

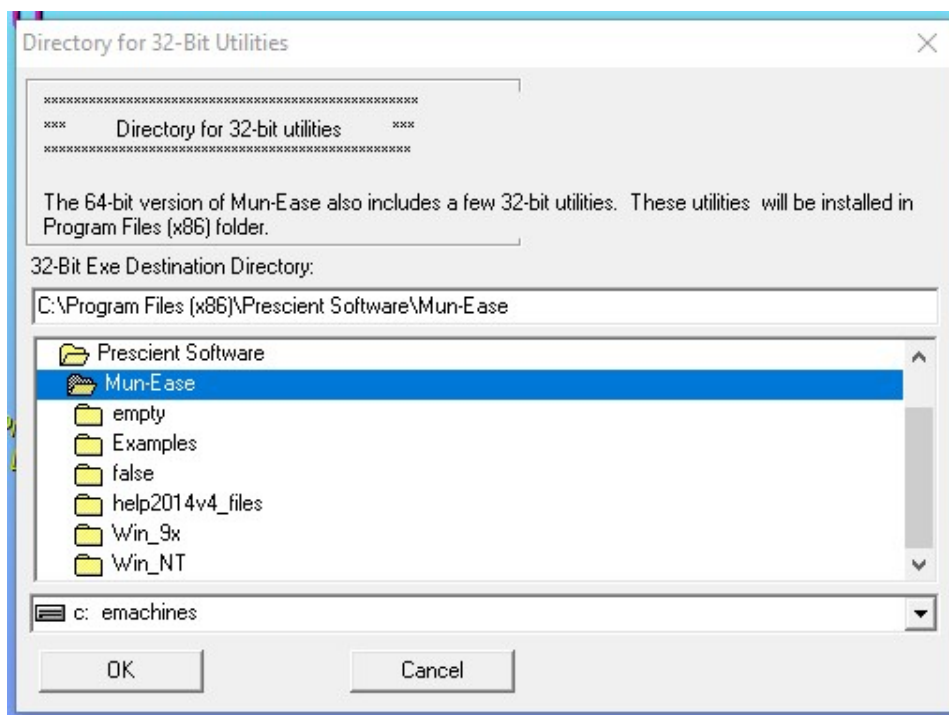


Figure 2-11: Folder Location for 32-Bit Utilities

32-Bit Utilities

The 64-bit version of Mun-Ease also contains a few 32-bit utilities. Enter the file folder where the 32-bit utilities will reside. The Mun-Ease installation program suggests a default directory of **C:\Program Files (x86)\Prescient Software\Mun-Ease**.

Recommendation: For performance reasons, we generally recommend that you install the executable files on your local hard drive. Note that installing your executables on a local drive does not restrict you from placing your database on a server.

After you click Ok, Mun-Ease displays a window where you define the folder location for the user's personal data.

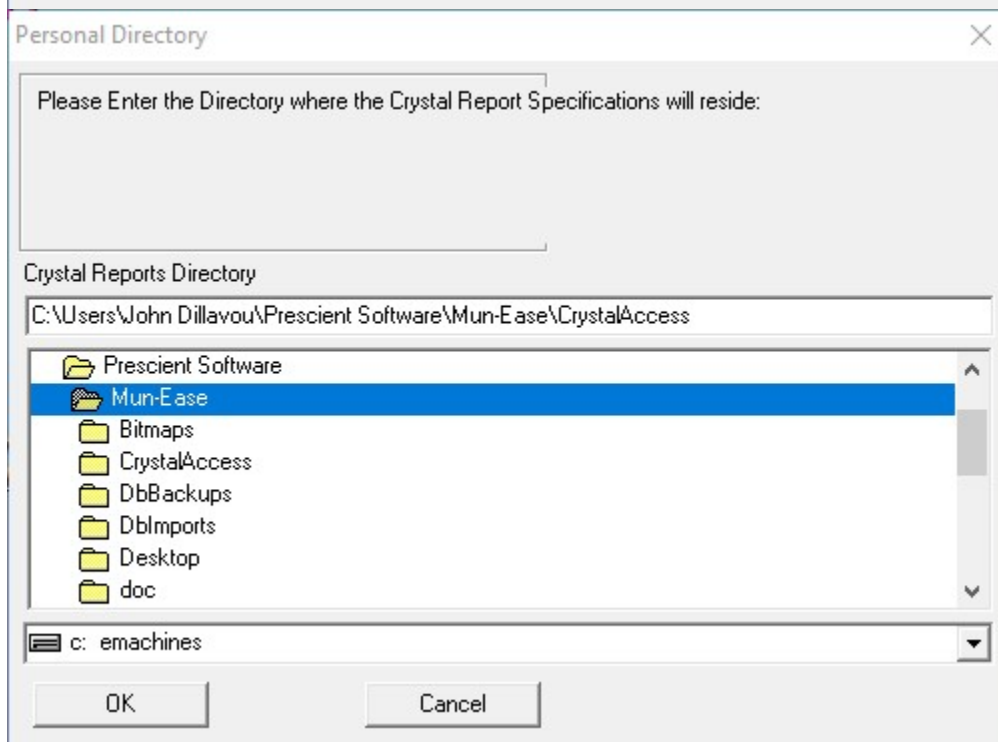
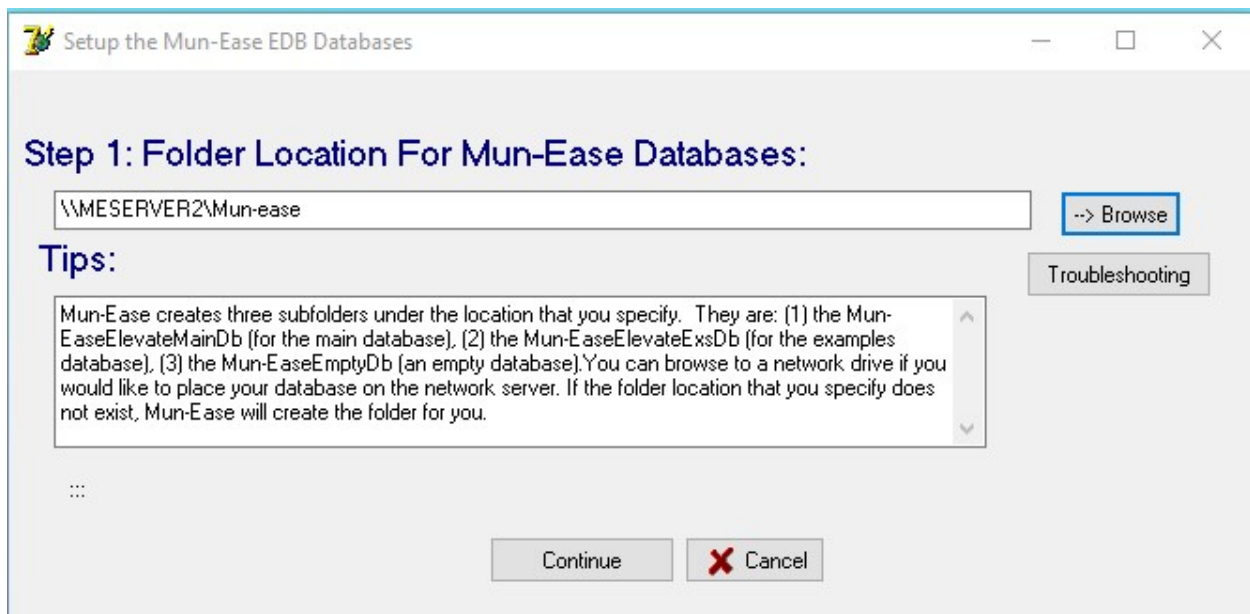


Figure 2-12: Recommended folder for Crystal Reports utilities

Figure 2-13: Database Folder

Enter the root directory where the database files will be stored. The installation program suggests a root directory for you if you have installed a previous version of Mun-Ease. If it does not find a previous registry entry, the default location is: **C:\ Mun-EaseDbs**. If you wish to install the database in another directory, click on the “browse” button and choose the desired folder.

As an example, the above graphic shows that the installation program will install the standard databases in the Mun-EaseDbs folder on the C drive.

Important!

The installation program creates and installs three database subfolders based on the root directory that you enter. These subfolders are:

- a) **Mun-EaseElevateMainDb** - This directory is where your production database resides. The installation program will not override any existing files in this directory.
- b) **Mun-EaseElevateExsDb** - This directory is where the examples database resides. The installation program always overwrites any existing files so that examples are current.
- c) **Mun-EaseElevateEmptyDb** - This directory is where empty database tables are stored. When you create a new database, copy files from this directory to the new database directory.

Mapped Drive Letters – Use With Care

Many organizations use a mapped drive letter to define the network location where the user’s files stored on the network (e.g. M:\Mun-EaseDbs). If you do use a mapped drive letter, be sure that the mapped drive letter was not created with a backslash. If the mapped drive does include a backslash, then an error will occur when Mun-Ease attempts to create a subdirectory (e.g., M:\Mun-EaseDbs\Mun-EaseElevateMainDb). In reality there are two backslashes in this case between the mapped drive and the subdirectory.

Review of Installation Directories

Based on the file paths that you have chosen, the installation program will install the Mun-Ease files in the following directories:
IMPORTANT! If the directories are incorrect, cancel the installation process and start over again.

Windows Logon (for creating icons)	John Dillavou
File folder for 64-bit executables	C:\Program Files\Prescient Software\Mun-Ease
File folder for 32-bit executables	C:\Program Files (x86)\Prescient Software\Mun-Ease
Personal Directory (where temporary data files will be stored)	C:\USERS\John Dillavou\PRESCIENT SOFTWARE\MUN-EASE
Crystal Report Spec Folder:	C:\Users\John Dillavou\Prescient Software\Mun-Ease\CrystalAccess
Main Database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateMainDb
Examples database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateExsDb
Empty database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateEmptyDb
UDL files folder for Access Report Database	C:\USERS\John Dillavou\PRESCIENT SOFTWARE\MUN-EASE\UDLFiles
Directory for Elevate Configuration File	\\MESERVER2\Mun-ease\EdbConfig
Directory for Access database that contains report data	C:\Mun-EaseDbs\RPTDB

Continue

Abort Installation

Important suggestion: Print this screen in case you need to review settings at a later time.

After you run the installation program, you can create additional databases through the EDB Manager.

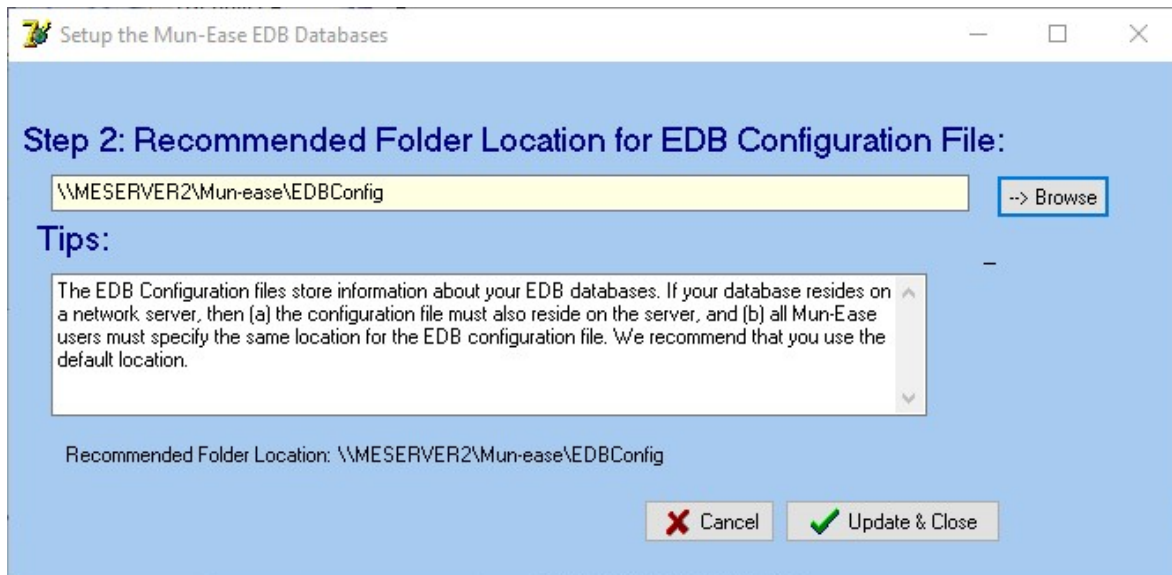


Figure 2-14: EDB Configuration File

The EDB Configuration files store information about your EDB databases. If you run Mun-Ease in a multi-user environment and your database resides on the server, then the EDB Configuration files must also be on the server. We recommend that you choose the EDBConfig subfolder under the root directory for the EDB databases. The above graphic demonstrates that we followed these recommendations (the EDBConfig folder is underneath the database root directory that we chose on the previous page). All Mun-Ease users must specify the same location for the EDB Configuration file.

Important! The entries in the EDB Configuration file should be in an ANSI format – **not Unicode**.

Based on the file paths that you have chosen, the installation program will install the Mun-Ease files in the following directories:
IMPORTANT! If the directories are incorrect, cancel the installation process and start over again.

Windows Logon (for creating icons)	John Dillavou
File folder for 64-bit executables	C:\Program Files\Prescient Software\Mun-Ease
File folder for 32-bit executables	C:\Program Files (x86)\Prescient Software\Mun-Ease
Personal Directory (where temporary data files will be stored)	C:\USERS\John Dillavou\PRESCIENT SOFTWARE\MUN-EASE
Crystal Report Spec Folder:	C:\Users\John Dillavou\Prescient Software\Mun-Ease\CrystalAccess
Main Database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateMainDb
Examples database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateExsDb
Empty database directory	\\MESERVER2\Mun-ease\Mun-EaseElevateEmptyDb
UDL files folder for Access Report Database	C:\USERS\John Dillavou\PRESCIENT SOFTWARE\MUN-EASE\UDLFiles
Directory for Elevate Configuration File	\\MESERVER2\Mun-ease\EdbConfig
Directory for Access database that contains report data	C:\Mun-EaseDbs\RPTDB

Important suggestion: *Print this screen in case you need to review settings at a later time.*

Figure 2-15: Review of Chosen Directories

After you press the OK button, the following message appears:

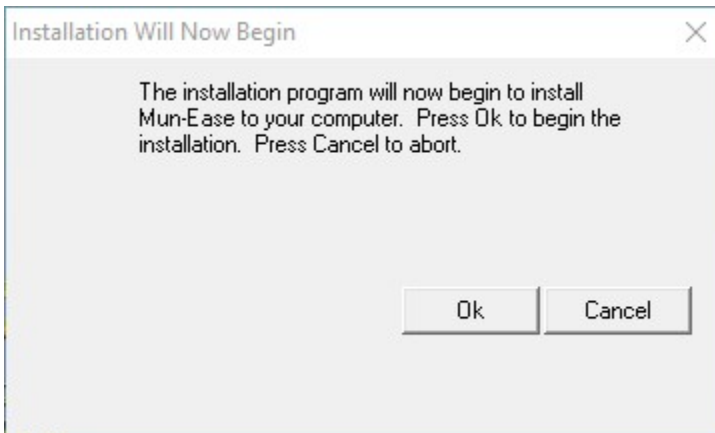


Figure 2-16: Notice that Mun-Ease Installation Will Start

After you press Ok, Mun-Ease will begin copying files from the CD to your computer. After the installation program has finished installing the files, it Displays a message about the screen resolution and fonts to be used.

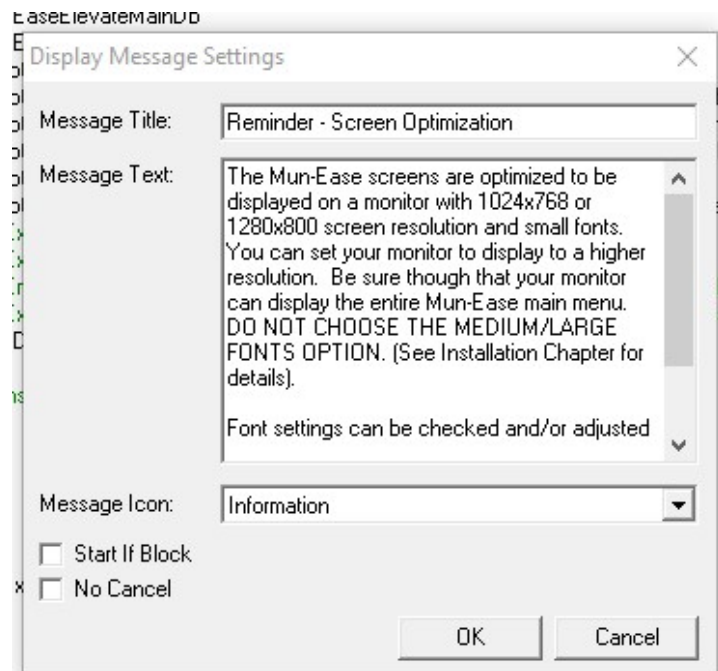


Figure 2-17: Warning About Large Fonts

All Windows applications other than those that display text in a graphical mode are optimized for a specific screen resolution. Mun-Ease screens are optimized for 1024x768 or 1280x800 screen resolution. You can choose a higher resolution, however it will appear that Mun-Ease is only displaying windows in a fraction of the available screen space.

Important: DO NOT choose the Medium or Large Fonts display option in the Display Options section of the Windows Control Panel. There are many well-documented problems with large fonts¹. (Non-believers can google “problems with large fonts” to view a small sample of the issues with large fonts.) When you use medium or large fonts in Mun-Ease, many screens will appear truncated. The truncated screens are those that have controls anchored to the bottom of the page. If have chosen large fonts because the characters are too small to read on the screen, we recommend an alternative solution: just reduce the screen resolution of your monitor.

¹ Specifying large or medium fonts will even cause Windows to truncate some screens in the Control Panel.



Figure 2-18: Reminder: Install Fonts If Necessary

The installation program then displays a reminder to install fonts. *Background:* The reports that we provide with Mun-Ease use the Arial, Arial Narrow, Times, Garamond, and Lydian BT fonts. With the exception of the Lydian BT (and possibly Garamond fonts), users will have all of these fonts installed. We provide the latter two fonts in the \fonts subdirectory of the user's personal folder.

You should check your computer to determine if the required fonts are installed. You can install the fonts by opening Windows Explorer and browsing to the \fonts folder of your personal directory. Right-click on first font and choose the install option from the menu. If the font is already installed, Windows will inform you of that fact. Press the cancel button if the fonts are already installed. Repeat the same process for the remaining fonts. Note that if you do not have the required fonts installed, Crystal Reports will substitute a font resembling the required font. Arial fonts are substituted for Lydian BT fonts and Times fonts are substituted for Garamond fonts.



Figure 2-19: Hardware Key Drivers

If you are installing Mun-Ease for the first time on your computer, you will need to install the drivers for the hardware key. Usually you do not need to reboot the computer after you install the drivers. If you do not install the drivers, Mun-Ease will display the message "Unable to detect hardware key."

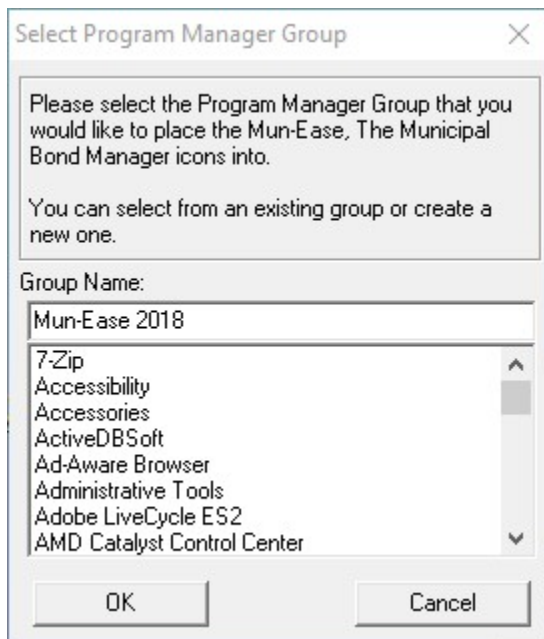


Figure 2-20: Program Manager Group

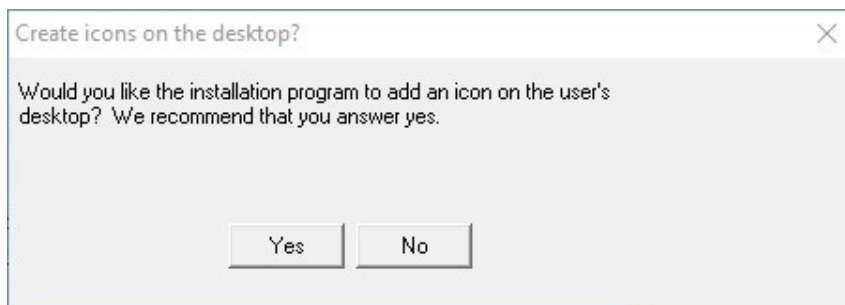


Figure 2-21: Inquiry: Add an icon to the Mun-Ease desktop?

Click OK to install Mun-Ease under the default program name of Mun-Ease 2018. This program group will contain the Mun-Ease icons. The Installation program only creates icons under the All Programs area. You can place an icon for Mun-Ease by copying and pasting the desired icon from the Mun-Ease 2018 group to your desktop. This topic is discussed in more detail later in the chapter.

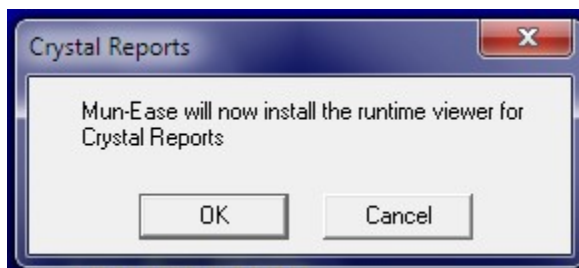


Figure 2-22: Installation Program Begins Installation of Crystal Reports Runtime Viewer

After the icons are created for the Mun-Ease 2018 group, the installation program notifies the user that the installation of the Crystal Reports Runtime Viewer is about to begin. It is necessary to install the Runtime Viewer because all of the reports in Mun-Ease are in a Crystal Reports format.

The installation program does not need any input from the user during installation. When completed, the installation program displays a message that the Runtime Viewer has been installed

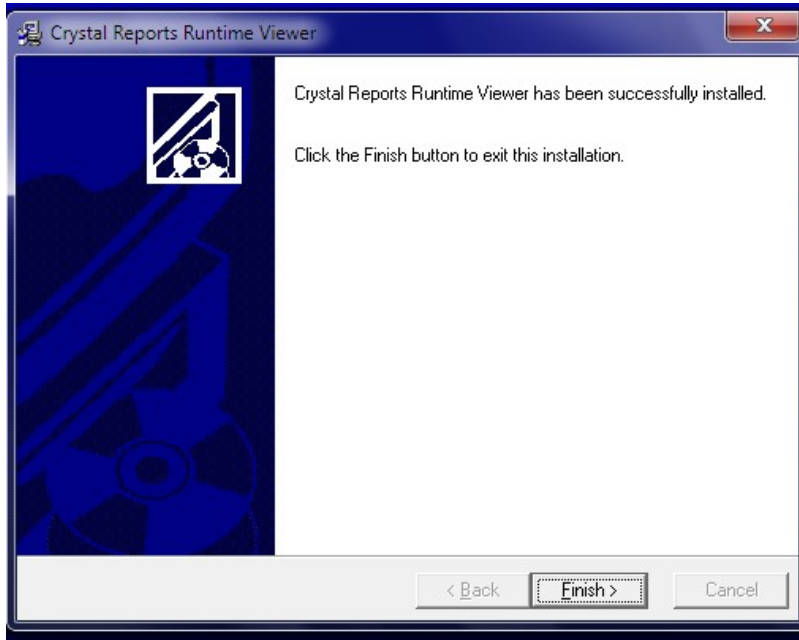


Figure 2-23: Runtime Viewer Successfully Installed



Figure 2-24: Register DLLs and Active X Controls

The Mun-Ease installation displays a dialog box before it attempts to register the DLLs and Active X controls. *Important!* Note that this task can't be completed if you are attempting to install Mun-Ease while you have an older version of Mun-Ease running at the same time.

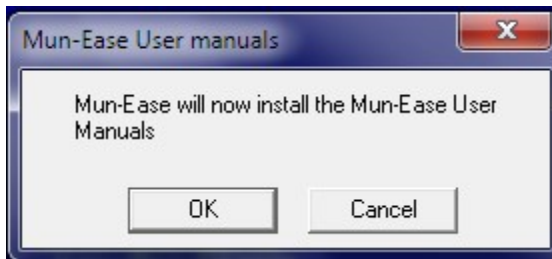


Figure 2-25: Install User Documentation

2.9 INSTALLING THE USER DOCUMENTATION

The Mun-Ease installation program displays a dialog box before it begins to install the user documentation. The user documentation is in PDF format and can be accessed within Mun-Ease through the *help | view user manuals* menu option.

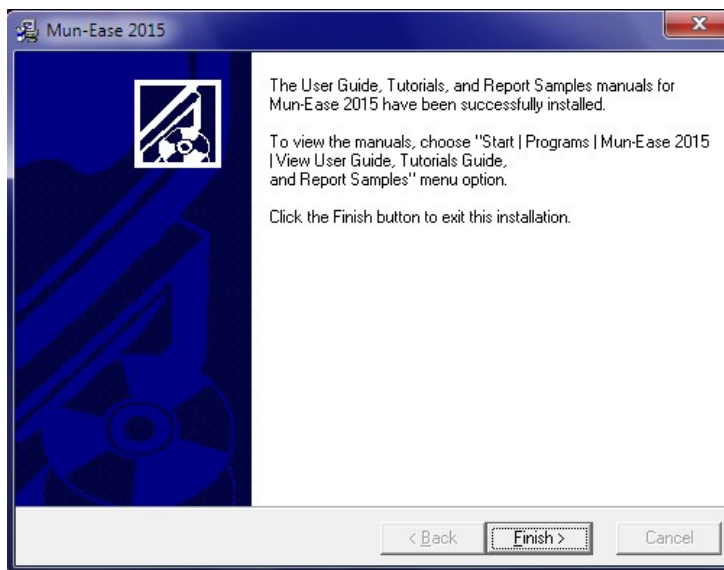


Figure 2-26: Documentation Installed Message

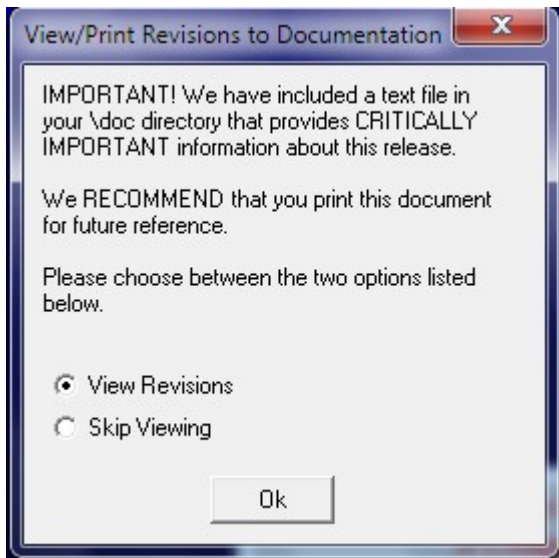


Figure 2-27: View Changes Included in Release

Prescient Software always provides additional information about the release of Mun-Ease in a file called *Latest2018.pdf*. By default, this information is installed in the `\doc` folder in the user's personal directory. If you click on the *View Revisions* radio button, Mun-Ease will start WordPad so that you can view the revisions. You can also view this document in Mun-Ease through the *help | what's new* menu option.



Figure 2-28: Successful Installation of Mun-Ease

2.10 INSTALLATION OF THE ELEVATEDB MANAGER

The ElevateDB Manager is a tool to manage your databases. With it, you can (a) define the location and attributes of standard Mun-Ease databases, (b) create a new database or delete an existing database, (c) define the location of the EDB Configuration file (which is important for multi-user environments), (d) backup and restore an existing database, and (e) view table data within the Mun-Ease database. Later in this chapter we will discuss how to perform these tasks.

Mun-Ease displays the following EDB splash screen before the installation begins:

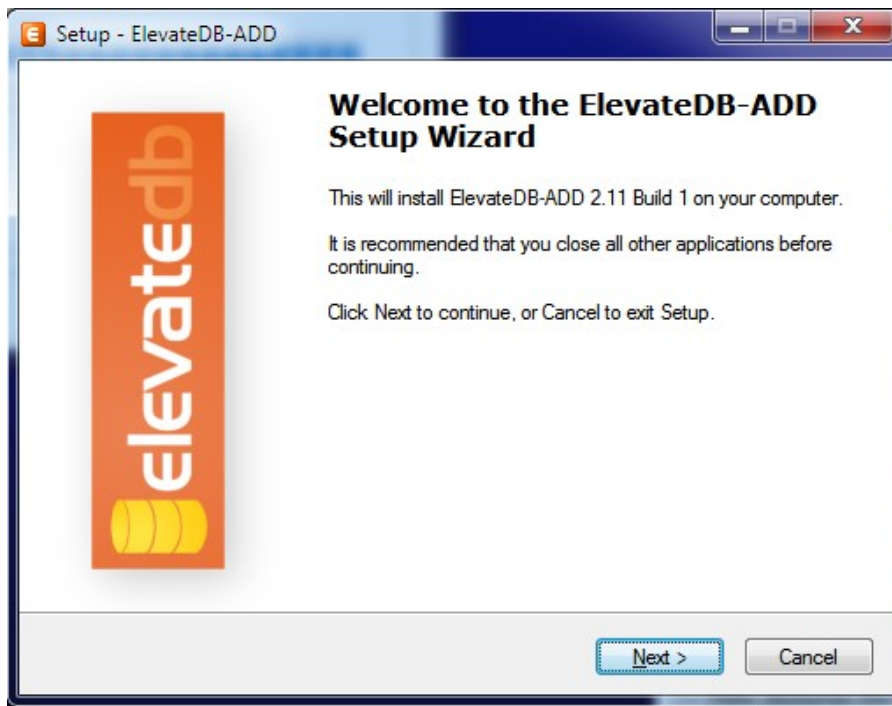


Figure 2-29: EDB Manager Splash Screen

If the current version of the EDB Manager is already installed on your computer, a message will be displayed stating that fact. You will then be asked if you want to continue installation. In most cases, you will answer “NO.”

The installation program then displays a window showing where the EDB Manager will be installed. If you are installing the 32-bit version of the EDB Manager on a 64-bit Windows 7 computer, the default directory is “*C:\Program Files (x86)\Elevate DB 2 ADD.*”. If you are installing the 64-bit version of the EDB Manager on a 64-bit Windows 7 computer, the default directory is “*C:\Program Files\Elevate DB 2 Add.*”

After the EDB Manager is installed, a window is displayed asking if the installation program should create an icon. Answer “Yes” to create an icon. Note that the icon is create under the “*All Programs*” menu and not under the “*Mun-Ease 2018*” group.

The installation program then displays a message that the EDB Manager has been successfully installed.

Registering the Standard Databases

After the EDB Manager has been installed, the installation program can register the standard Mun-Ease databases (*Mun-EaseElevateMainDb*, *Mun-EaseElevateExamplesDb*, and *Mun-EaseElevateEmptyDb*).

The installation program displays a message listing the databases that have been registered.

Important:

If the standard databases were registered previously, then the installation program will not register the databases. If you have changed the location of the EDB databases, you will need to run the EDB manager and manually update the databases. This procedure is discussed later in the chapter.

Important! The entries in the EDB Configuration file should be in an ANSI format – not Unicode.

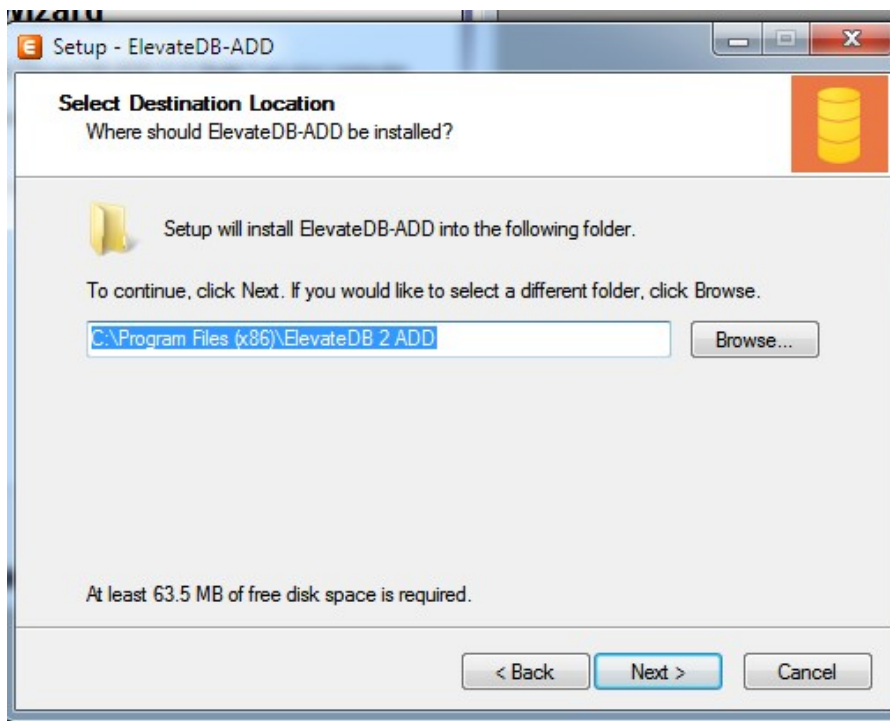


Figure 2-30: Installation Directory for EDB Manager

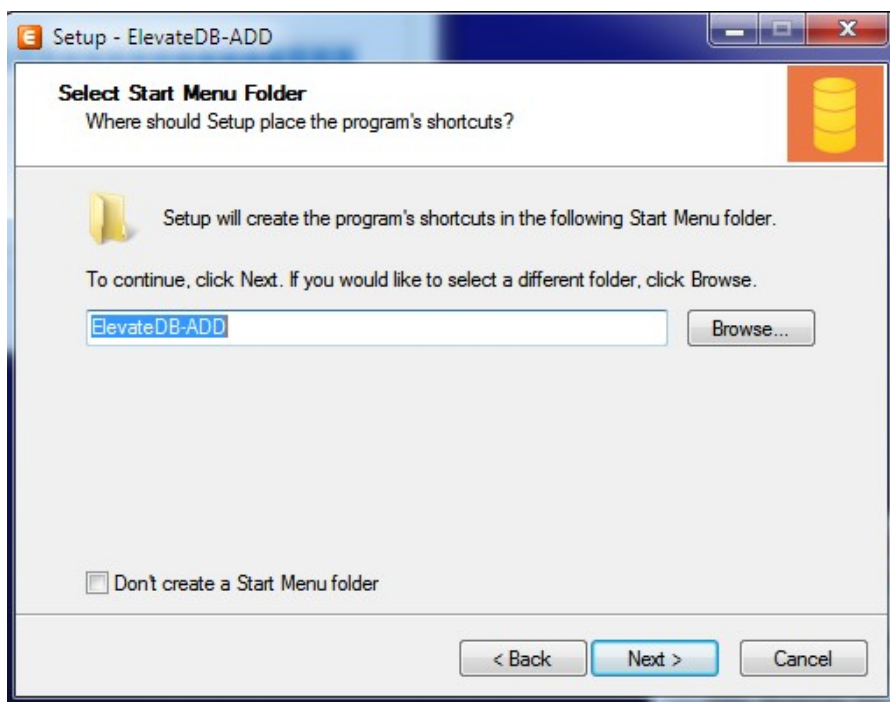


Figure 2-31: Icon for EDB Manager

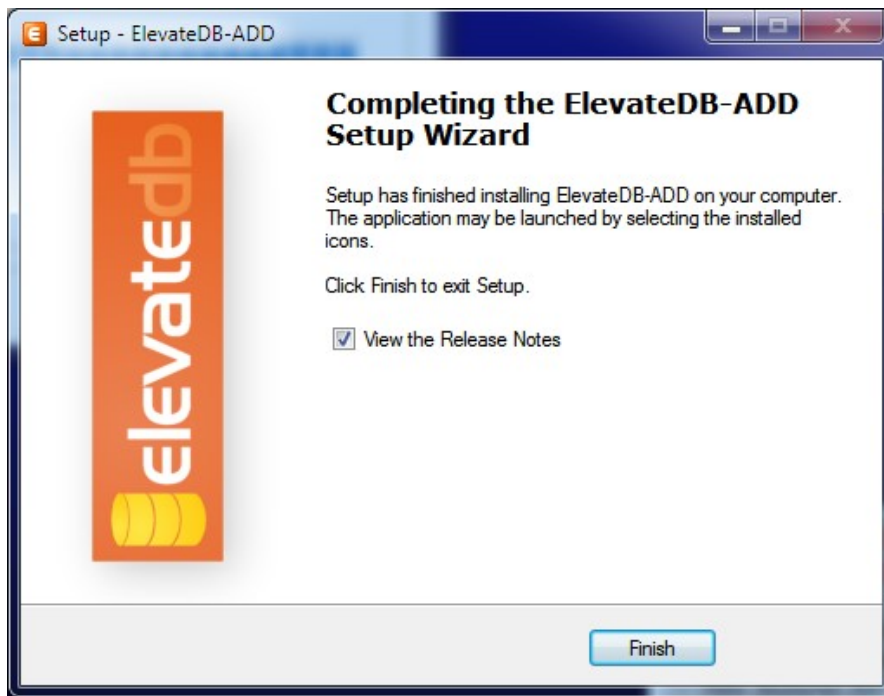


Figure 2-32: EDB Manager Successfully Installed

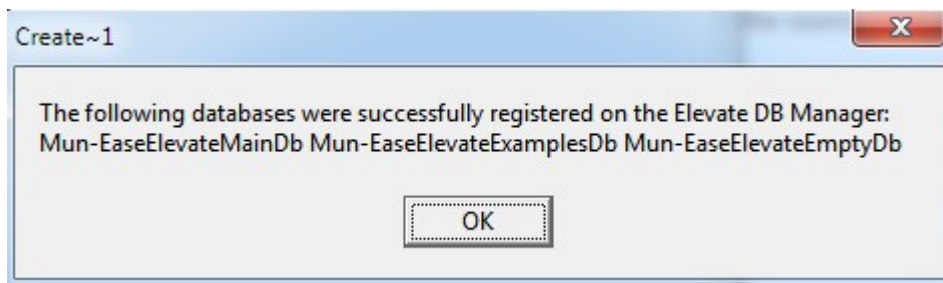


Figure 2-33: EDB Databases Successfully Registered

2.11 THE ACCESS REPORT DATABASE

All of the reports within Mun-Ease are generated with the Crystal Reports runtime viewer. Whenever a user requests Mun-Ease to generate a report, Mun-Ease writes the report data to two database tables (**Rptdtl** and **Rpthead**). The **Rptdtl** table contains a record for every line in the report and the **Rpthead** contains one record for all of the information in the header and footer of the report. Each report is identified by a 3-character report ID field and the user ID of the person generating the report. Mun-Ease keeps only the most current version of each report on the database.

The **Rptdtl** and **Rpthead** tables are placed in a separate Access database residing on the user's PC. Thus each user has a Report database on his individual computer.

The SQL Server and EDB versions use the same Crystal Report specifications and the same Access database that is stored locally on each user's computer. In addition to reducing the overhead on the server, this change eliminates the development and maintenance costs that are incurred by supporting two different versions of the report specifications.

The Access database is called **Mun-EaseRptdb.MDB** and resides in the **C:\Mun-EaseDbs\RptDb** folder. You connect to the database through the UDL (uniform data link) connection file located in the \UDLFiles folder in your personal directory. By hard-coding the folder where the report database resides, we eliminate the requirement for the user to initialize the settings of this UDL file.

Initializing the settings of the UDL file can be daunting because the properties for the connection file are different for 32-bit and 64-bit computers. If you look in the \UDLFiles subfolder under your personal directory, you will see (a) one UDL file to be used for Windows XP computers (**AccessRptDbForMun-EaseJet40.UDL**), (b) another to be used for Windows 7 computers (**AccessRptDbForMun-EaseWin7.UDL**) running the 32-bit version of Mun-Ease, and (c) still another for 64-bit computers running the 64-bit version of Mun-Ease (**AccessRptDb64.UDL**). The installation program automatically detects the user's environment and will create the correct settings for each UDL file.

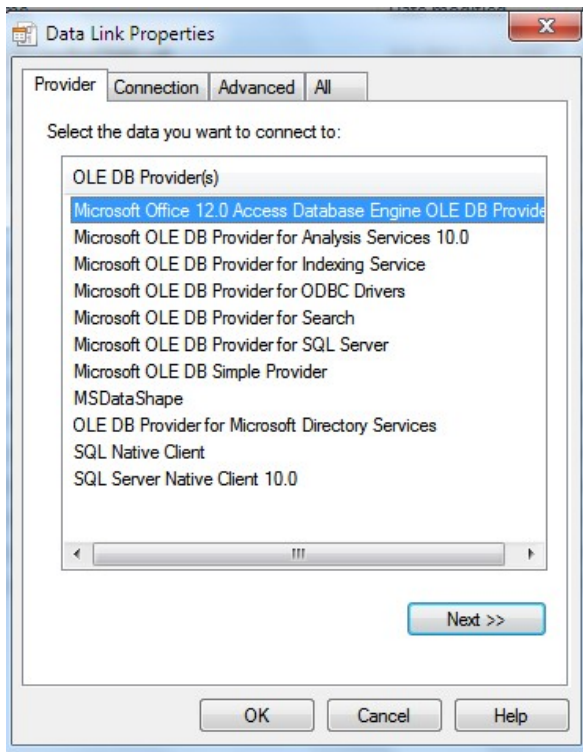


Figure 2-34: 64-Bit Provider Tab in the UDL Wizard

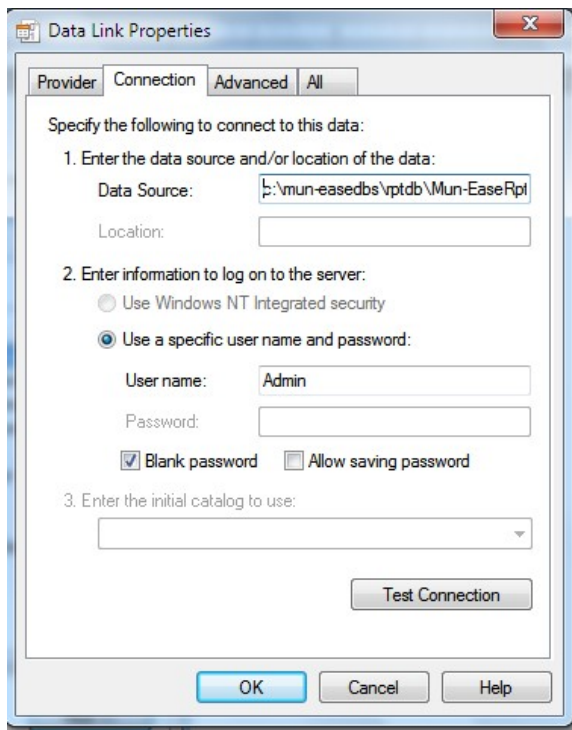


Figure 2-35: 64-Bit Connection Tab in the UDL Wizard

Installing the Access Database Engine (optional)

We provide a menu option in the Mun-Ease 2018 group to install the 64-bit Access database Engine. In most cases, you will not need to install the database engine. Choose this option only if you do not see the Microsoft Office 12.0 Database Engine OLE Db Provider option in the provider tab of the UDL wizard.

Instructions for Creating 32-Bit Access Drivers Windows 7 64-Bit Computers

The installation program creates an additional icon called “Access DB Driver Instructions for 64-bit computer” in the Mun-Ease 2018 group. This icon contains a text file with instructions on how to set up the 32-bit Access UDL file on a 64-bit computer. The text file is named *UDLInstructions64bit.Text* and is located in the \UDL subfolder.

Why do we include additional instructions?

The UDL wizard always assumes that you are creating 64-bit drivers. Thus you cannot install the Access drivers using the UDL wizard. Instead you’ll need to click on the Windows *Start* button and choose the *Run* menu option. Insert the following statement into the Run text box:

C:\Windows\syswow64\rundll32.exe "C:\Program Files (x86)\Common Files\System\OLE DB\oledb32.dll",OpenDSLFile C:\Users\<WinLogOn>\AppData\Prescient Software\Mun-Ease\UdlFiles\AccessRptDbForMun-Ease.udl

(where <winlogon> is either public or the Windows User ID.)

As mentioned earlier, the installation program will install the correct options for the *AccessRptDbForMun-Ease.UDL* file based on the version of Windows that you are running. If you encounter problems, you will need to verify that you have a good connection to the Report database. Shown below are the steps to verify the connection.

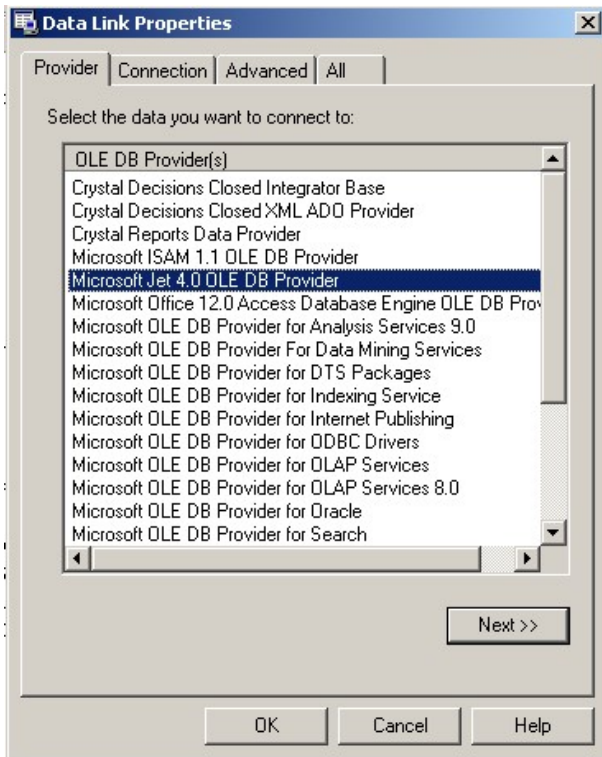


Figure 2-36: Datalink Wizard – Provider Tabbed Window (32-bit)

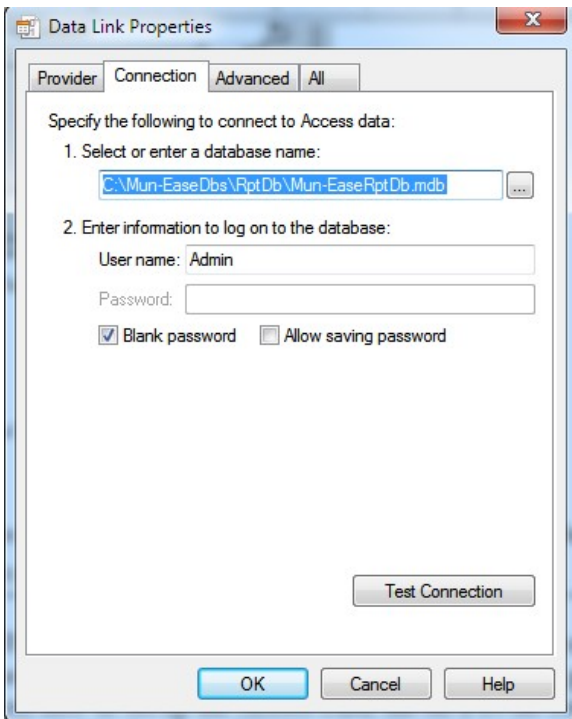
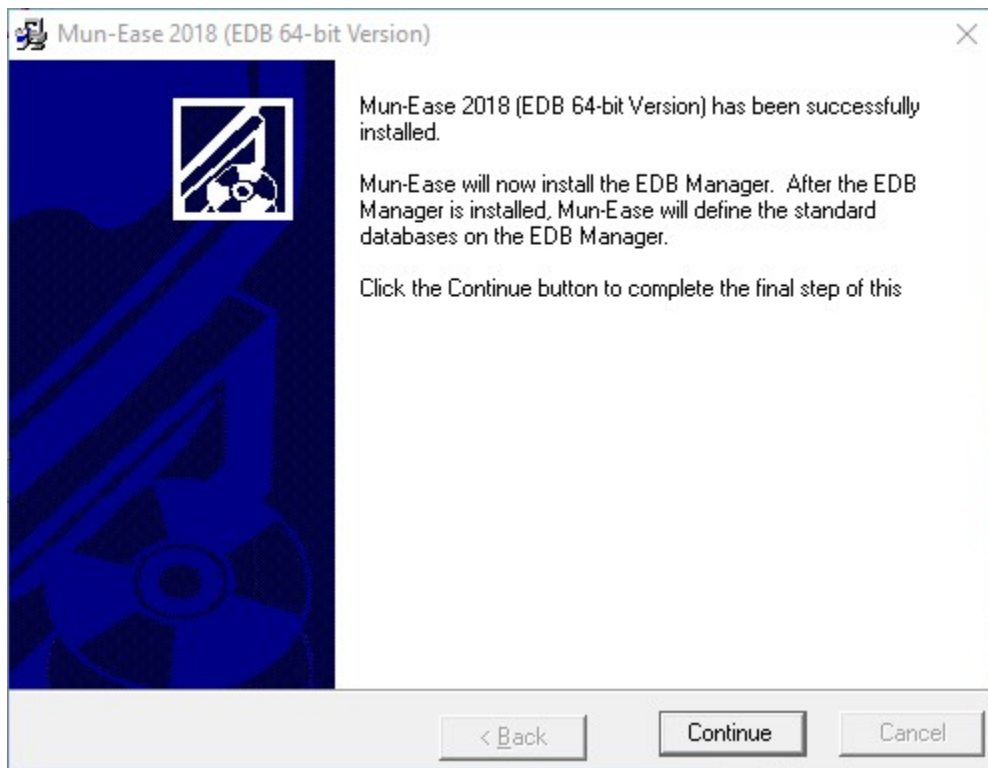


Figure 2-37: The Datalink Wizard - Connection Tabbed Window (32-bit)



2.12 THE EDB MANAGER

The EDB Manager allows you to manage your databases. Through the EDB Manager, you can (a) create a new database, (b) peruse data in an existing database, (c) configure your databases to run in a multi-user environment, (d) change or update the security levels of a database, and (e) backup or restore a database.

While you can also change the structure of a database, we advise against this action. Mun-Ease expects the data to be in a specific format. If you change the database format, Mun-Ease will not recognize those changes and which will cause Mun-Ease to abnormally terminate.

If you are a database administrator, you may decide to limit access to the EDB Manager. There are many other functions within the EDB Manager that may be incompatible with the security policies at your location.

(Note to BDE users: The EDB Manager is similar in many ways to the BDE Administrator. However, EDB Manager has many more capabilities including the ability backup and restore a database and the ability to peruse data within the database.)

2.12.1 RUNNING THE EDB MANAGER

You start the EDB Manager by choosing the “**Start | ElevatedDB Manager**” menu option. Do not use the Unicode version of the EDB Manager.

We create the Mun-Ease databases under the “Default” session. The session is also where the location of the EDB Configuration file is defined. This location is also saved EDBConfig section of the wmuni.ini file located in the user’s

personal directory. In a multi-user environment, all users must define the same location for the EDB configuration files.

The login user ID to the default session is “*Administrator*” and the password is “*EDBDefault*.”

The entries in the EDB Configuration file should be in an ANSI format – not Unicode.

Under the Default Session is a section for the databases. The installation program creates the three standard databases (*Mun-EaseElevateMainDb*, *Mun-EaseElevateExamplesDb*, and *Mun-EaseElevateEmptyDb*).

Creating a New Database

You can create a new database by performing the following steps: (a) In the Windows Explorer, create a new folder for the database. (b) Copy all of the files from the *Mun-EaseElevateEmptyDb* folder to the folder where the new database will reside. (c) Start the EDB Manager. Open the Default session and right-click the databases folder and select the “new database” option from the pop-up menu. Enter the name of the new database and the folder location. The EDB Manager should populate the database with tables that were copied through Windows Explorer.

Perusing Database Tables

Start the EDB Manager. Open the *Databases* folder and select the desired database. Under the databases tabbed folder, open the *Tables* folder and select the table that you wish to peruse. Press *Open Table* in the *Tasks* Window. The table should open on the right-hand side.

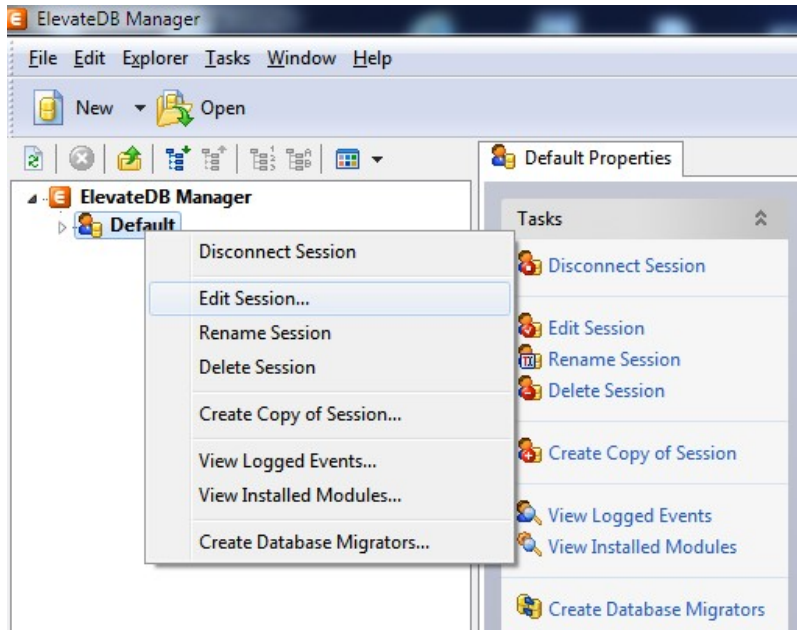



Figure 2-38: Editing an EDB Session

Edit Session

General Local Behavior Customizations Login Locking/Buffering Progress


Session Name

 Enter the session name and description.

Name


Description

Session Type

 Select the session type. A local session directly accesses the files that make up a given database, regardless of where they are located. A remote session accesses database(s) through an ElevateDB Server using the communications protocol in ElevateDB. If you select a remote session type, you must fill in more information on the Remote page that will appear in order to successfully connect to an ElevateDB Server.

☒ Local ☐ Remote

Character Set

 Select the character set to use with the session. With local sessions, the character set must match the character set of the configuration being accessed. With remote sessions, the character set must match the character set of the ElevateDB Server being accessed.

☒ ANSI ☐ Unicode

Figure 2-39: The General Tab

Note that the character set is ANSI.

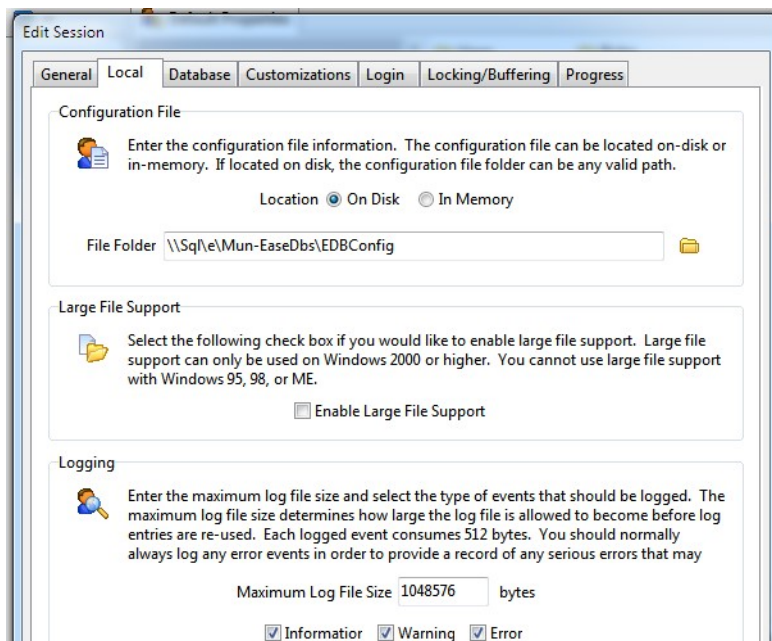


Figure 2-40: Defining the Location for the EDB Configuration File

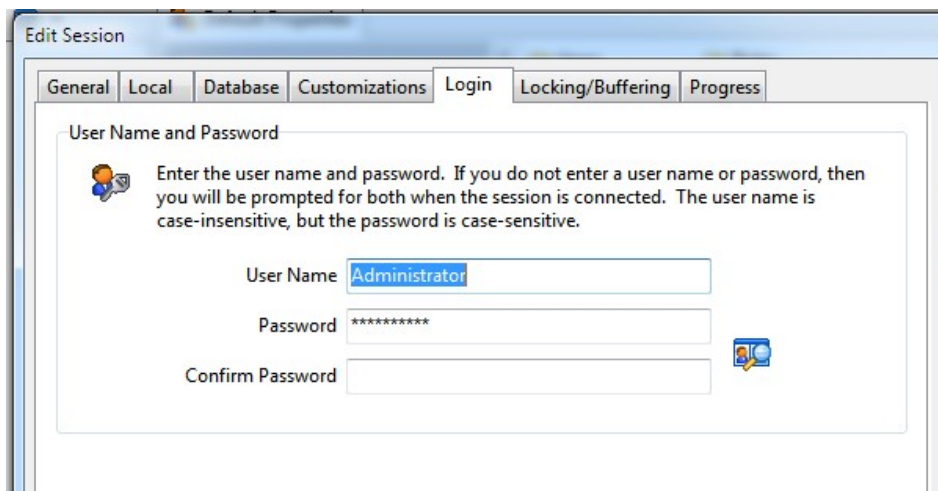


Figure 2-41: Defining the User Name and Password

The user name is Administrator and the password is EDBDefault.

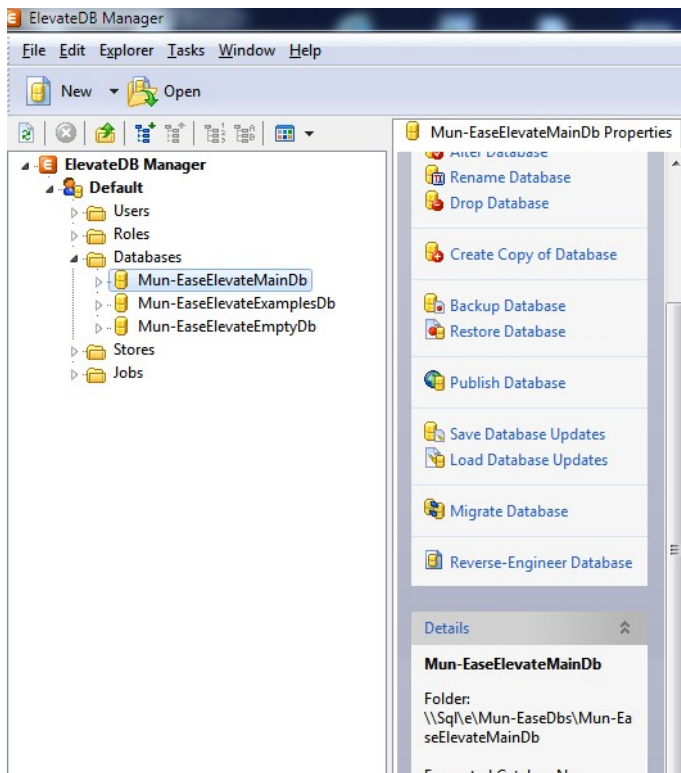


Figure 2-42: Selecting a Database – Note the Folder Location of the Database in the Bottom Middle Section.

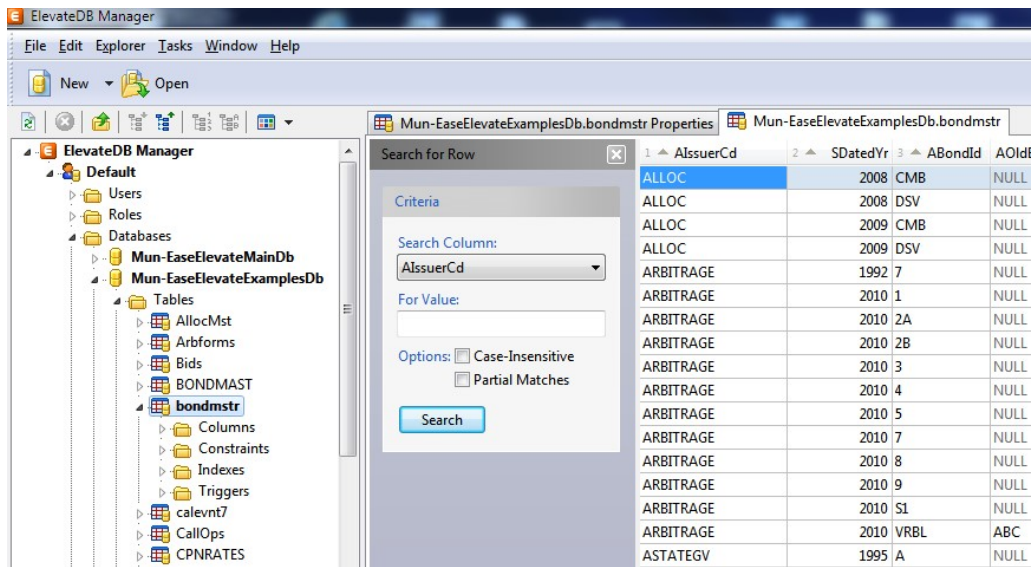
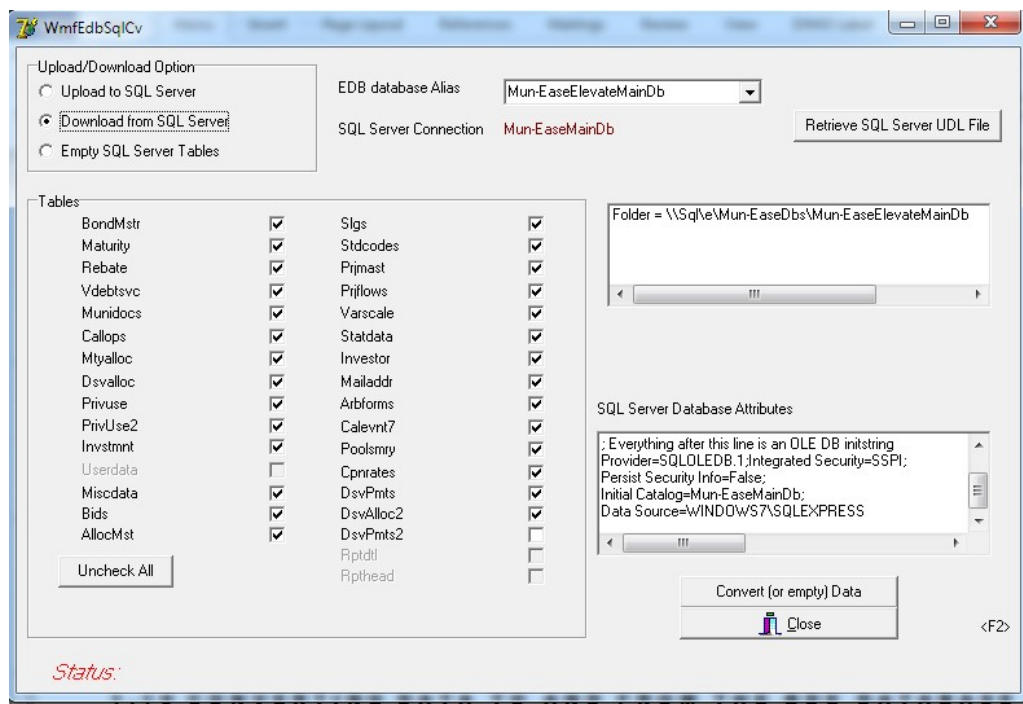


Figure 2-43: Perusing Data Within a Database Table



2.13 CONVERTING DATA TO AND FROM SQL SERVER.

1. Choose the Start | All Programs | Mun-Ease 2018 | Convert EDB database to SQL Server menu option.
2. In the top left-hand corner, click on a radio button to (a) copy the EDB database to a SQL Server database, or (b) copy a SQL Server database to an EDB database, or (c) empty a SQL Server database.
3. In the *Tables* group box, check the tables that you wish to convert. Click on the *check all/uncheck all* button, if you wish to convert all of the tables (recommended).
4. In the upper right-hand corner, select the EDB database from the combo box item list that you wish to convert (either upload or download).
5. In the middle right-hand side, select the SQL Server database from the combo box item list that you wish to convert (either upload or download).
6. Press the *Convert (or empty) Data* button. The Status label will display the tables as they are converted. When all of the tables are converted, a message box will display stating that fact. (Note: at times, Windows will hide this box. If the migration process appears to stop, press the <alt> tab key and the message box will reappear.)
7. Press the Close button.

2.14 USB KEY DRIVER SETUP

To install the drivers, choose the *USB key driver installation* menu option from within the *Mun-Ease 2018* group. The drivers are automatically installed after the command prompts are displayed to you. The Windows firewall must be disabled when installing the hardware key. (The hardware key installation routine will ask your permission before it disables the firewall.)

2.15 INSTALLING THE HARDWARE KEY

Users who are upgrading from a previous version of Mun-Ease must call Prescient Software so that their key may be reprogrammed for the new version. Prescient Software can reprogram the key over the telephone in a few minutes. Call: (949)248-5788.

Before you can begin using Mun-Ease, you must install the Sentinel Scribe hardware key by plugging the hardware key into the USB port.

Users who have not purchased the complete Mun-Ease package will be restricted to the modules that they purchased through the hardware key. The hardware key can be reprogrammed to allow the execution of additional modules by calling Prescient Software.

Warning: Your hardware key must be connected for the complete Mun-Ease session. Failure to connect the hardware key will result in an error.

Installation

1. On your desktop, click on the *Mun-Ease Utilities* icon. Choose the *USB Key Driver Installation (vsn 7.6.7)* menu option.
2. Answer Yes to the prompt: “Do you want this app to make changes to your device?”
3. Click on the “next” button to each of the prompts that follow. The very last prompt asks if the driver installation program can temporarily disable the firewall. Answer *Yes*. The USB key drivers will be installed. If you encounter difficulties, remove the USB driver and reinstall again.

2.14.1 PLACING A MUN-EASE ICON ON YOUR DESKTOP

The Mun-Ease installation program places the Mun-Ease group of programs under the Mun-Ease Utilities icon in the *Programs* group on your computer. The installation program can also place this icon on your desktop.

If you declined this option while performing an installation, you can manually place a Mun-Ease icon on your desktop through the following steps:

1. Click on the start button on the Windows taskbar. Open up the Mun-Ease 2018 program by choosing the *programs | Mun-Ease 2018* menu option. Highlight the *Mun-Ease 2018, The Municipal Bond Manager* menu option. While it is highlighted, right click on it and choose the *copy* menu option from the pop-up menu. Press <esc> and return to your desktop. Right-click on the desktop and choose the *paste* option. Windows will copy the icon (and it’s contents) to the desktop.

2.15 THE REGISTRY & WMUNI.INI FILES

The installation program creates entries in the Windows Registry and updates a `wmuni.ini` file in your personal folder (usually `c:\documents and settings\All Users\Application Data\Prescient Software\Mun-Ease`).

The *Getting Started* chapter provides detailed information about how Mun-Ease uses information contained in these two files.

2.15.1 WINDOWS REGISTRY

Mun-Ease stores directory information in the Windows Registry. This information is stored in the **HKEY_LOCALMACHINE | SOFTWARE | Prescient Software | Mun-Ease** directory. We store directory paths for the executable folder (*ExeDir*), the user's personal folder (*perdir*), and the root database folder (*EDBRootDbDir*) where the database subfolders reside. Additionally Crystal Reports stores information in the **HKEY_LOCALMACHINE | SOFTWARE | Crystal Decisions** folder.

When you install Mun-Ease for the first time, Mun-Ease creates an initialization file (*wmuni.ini*) in the user's personal folder. We also update the "ini" file every time you access your user record on the *Userdata* table. The *Wmuni.ini* file and is used by Mun-Ease to initialize your setup parameters in the *Userdata* table. Shown below is the format of a typical Wmuni.ini file:

```
[EXEDIR]
EXEDIR=C:\Program Files (x86)\Prescient Software\Mun-Ease
[MDBDIR]
MDBDIR=C:\Program Files (x86)\Microsoft SQL Server\MSSQL\Data\DB
[PERDIR]
PERDIR=C:\Users\TypicalUserID\Prescient Software\Mun-Ease
[UDLDIR]
UDLDIR=C:\Users\TypicalUserID\Prescient Software\Mun-Ease\UdlFiles
[USERID]
USERID=ABC
[DEBUGMODE]
DEBUGMODE=OFF
[EDB_INIT_STATUS]
EDB_INIT_STATUS=DB_LOADED
[EDB_ROOTDBDIR]
EDB_ROOTDBDIR=\\Sql\l\Mun-EaseDbs
[EDB_CONFIGPATH]
EDB_CONFIGPATH=\\sql\l\Mun-EaseDbs\EDBConfig
FIRSTMOINFY=1
[USERNAME]
USERNAME=Prescient Software
[DISABLEDBBROWSE]
DISABLEDBBROWSE=N
[STARTUPSTATUS]
Initializing=Completed 10/16/2012 16:44
[HWKEYINFO]
HWKEYTYPE=USB
[GLACCTINFO]
ACCT_HDNG=
ACCT_CODES=
[INTERNETADDONOPS]
BONDSALESTATUS=
OPENLOOK=N
BONDSALEISSUER=
BONSALEDATEDYR=2012
BONDSALESUFFIX=
[INVOICEINFO_Mun-EaseMainDb]
INTERESTRESETS=Avg rate of 2.05323 for rate scale 2010SCALE was computed for pmt # 1. Date range for pmt # 1 is from
01/01/2010 - 01/31/2010
INVOICEDATETIME-2004POOL=Last generated invoices for September on 09/05/2012 @ 13:23
[INVOICEWEBADDR]
INVOICEWEBADDR=www.mun-ease.com
[INVOICEINFO_Mun-EaseElevateMainDb]
INTERESTRESETS=Avg rate of 2.05323 for rate scale 2010SCALE was computed for pmt # 1. Date range for pmt # 1 is from
01/01/2010 - 01/31/2010
[CURRENT_ONLINEUSER]
CURRENT_ONLINEUSER=ABC
```

Important: Users require read/write access to the wmuni.ini file!

The Wmuni.ini file has sections denoting (a) the executable directory [EXEDIR], (b) the database directory [EDBDbDir], (c) the personal directory [PERDIR], (d) the user ID [USERID] of the person who installed Mun-Ease, (e) the name of the user [USERNAME], and (f) the first month of the fiscal year [FIRSTMOINFY].

When you sign onto Mun-Ease for the first time or sign-on under a new user ID, Mun-Ease reads information in the wmuni.ini file and creates a record for your user ID on the *Userdata* file.

The wmuni.ini file is also updated whenever you update your user options (through the *UserOps* speed button or through the *setup | user options | edit your own user profile* menu option). This option updates your user name, the first month in the fiscal year, and the run-time options for the Internet Add-On Module.

The wmuni.ini file also contains other information. For example, the Internet Add-On module can be used to conduct competitive bond sales over the Internet. The processing options for this feature are defined in the **InternetAddonOps** group. The options defined are (a) the bond issue to be sold competitively, (b) the status of the bond sale (no-sale, pre-sale, active, or closed), and (c) whether bidders can view competitor bids during the sale (openlook = Y or openlook = N).

2.17 TROUBLESHOOTING: CRYSTAL REPORTS ERRORS

Report Generated With Blank Data

Diagnosis: Data in the report needs to be refreshed. Click on the report button again to regenerate the report.

Background: The report database is a Microsoft Access database. The Access database performs database operations in memory whenever possible. We attempt to force Access to empty its memory buffers before generating a report by issuing commands to close and reopen the report database tables. We also issue a command to Crystal Reports to refresh its view of the database. There are times though when these steps are not sufficient. Thus you may need to regenerate the reports by pressing the report button again.

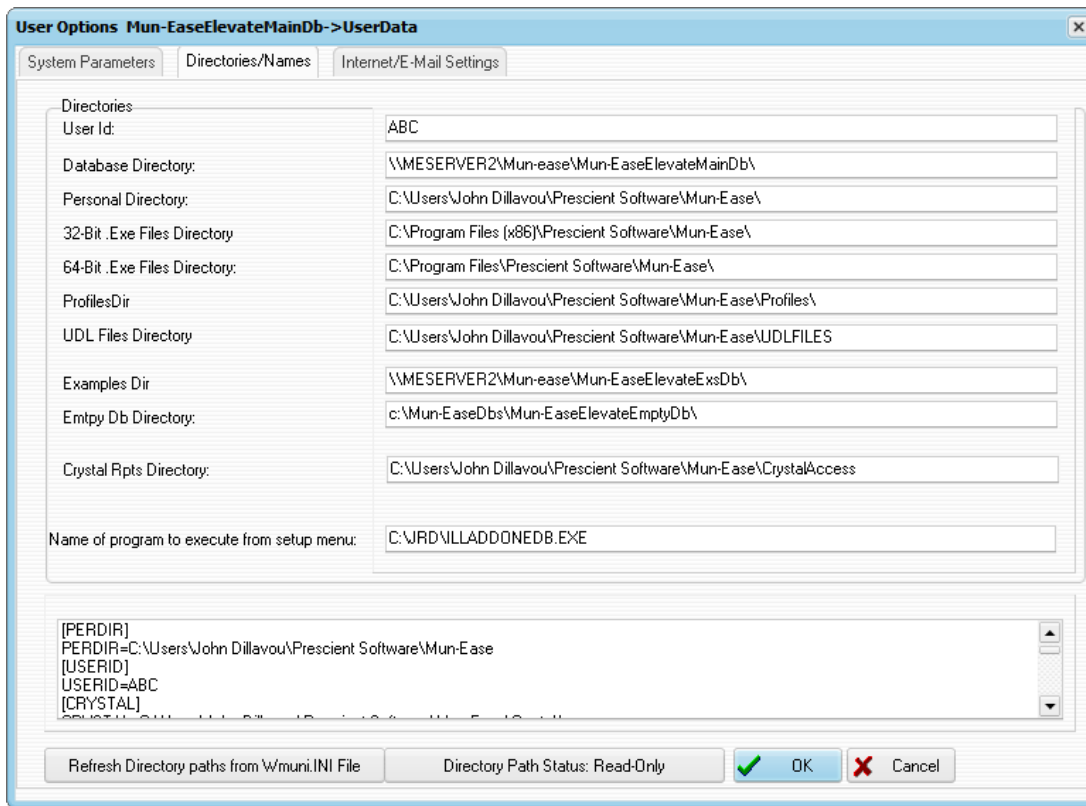


Figure 2-44: Typical Folders for a Windows 7 User

2.18 TROUBLESHOOTING: USER UNABLE TO SEE MUN-EASE ICONS

The Installation program creates icons for the various functions of Mun-Ease in in the *Mun-Ease 2018* group that is created under the *all programs* area of the *Public* menu. There are two reasons why the user would be unable to see the Mun-Ease icons:

- The installation program aborted before all of the installation tasks were completed. (Creating the icons is one of the last tasks performed by the installation program).
- The installer installed Mun-Ease under a Windows sign-on that is different from the Windows sign-on of the user. Recall that the installer should install Mun-Ease under the user's sign-on and temporarily give the user administrative rights before initiating the installation process).