

SQL server Installation Documentation for Workgroup Connectivity

Note: this document is applicable for Loan Performer Version 7.07 and above. With versions 7.00 to 7.06 you could only work with SQL Server if a domain was created.

To install Loan Performer, Microsoft SQL server version on a work group settings

1. Install Microsoft SQL server on the “Server computer”. This is the server that is going to be the central repository of data.
2. There are two methods of securing connectivity to an SQL Server using a client.

a) Windows Authentication Mode

When a user connects through a Microsoft Windows® user account, Microsoft SQL Server validates the account name and password using information in the Windows operating system.

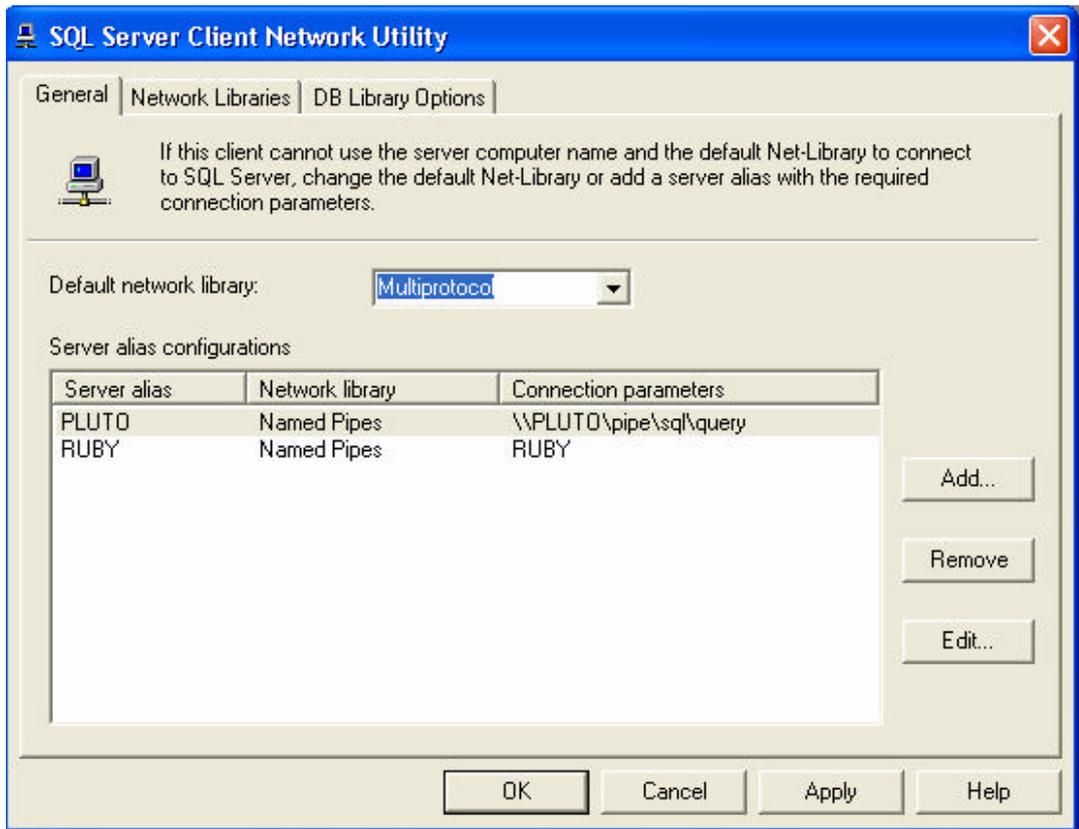
b) Mixed Mode (Windows Authentication and Microsoft SQL Server Authentication).

This option allows users to connect using Windows Authentication or SQL Server Authentication. Users who connect through a Microsoft Windows user account can make use of trusted connections (connections validated by Windows) in either Windows Authentication Mode or Mixed Mode. SQL Server Authentication is provided for backward compatibility.

3. In order to connect to the central database each of the above methods requires client connectivity setups.

For Windows Authentication, install the Microsoft Desktop Engine (MSDE). The MSDE can be found on Microsoft SQL server installation disks, Loan Performer installation disks or can be downloaded free from the Internet. It's also shipped with many of the standard Microsoft software such as Microsoft Office and Visual studio.

4. For workgroup computers or computers using the server login mode, install the MS SQL Server Client connectivity tools to every other computer that is meant to connect to the “Server”. Note the name of the instance that is going to be created on this computer. If you use the default settings, then the default name of the instance is usually the name of the computer.
5. Enter the settings for the MS SQL Server client.



You can connect to the SQL through Named Pipes or Multi-protocol. The above graphics shows how to connect to two SQL Server' instances on two different computers. The first instance is called PLUTO and the second is called RUBY.

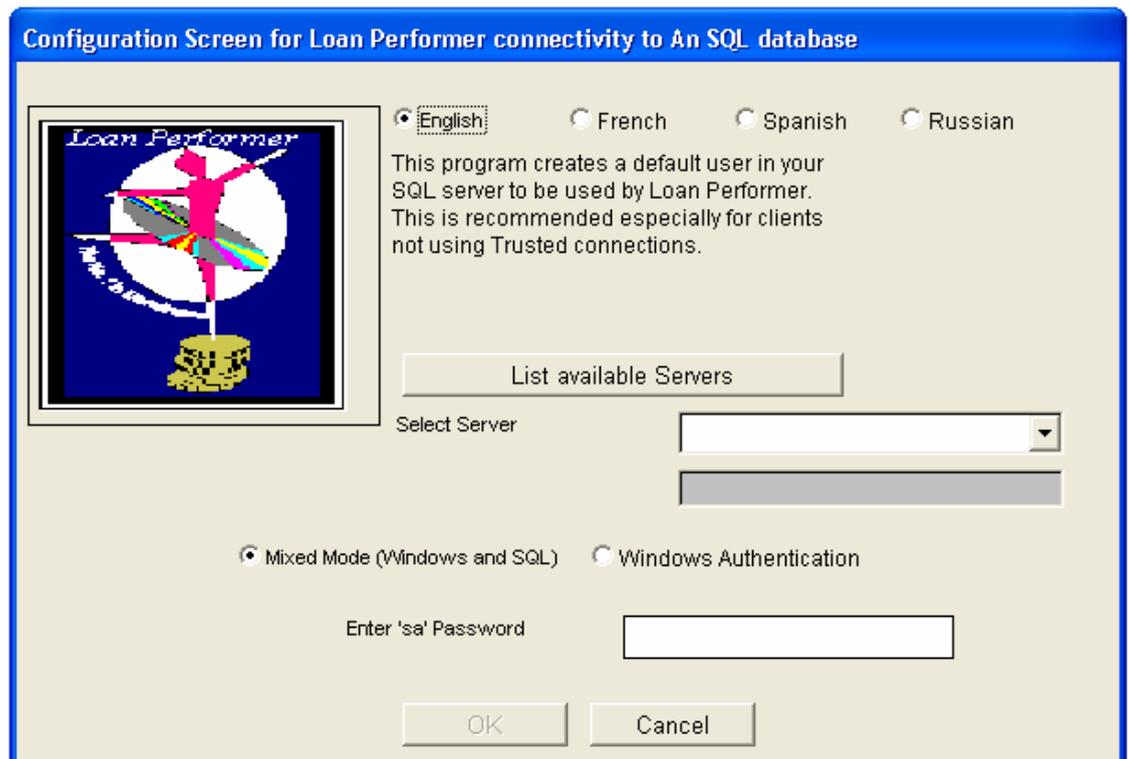
6. Install the Loan Performer database on the SQL SERVER. This can be done in two methods.
 - a) You can run a script from an existing server
 - b) You can import a FoxPro Database.

Please refer to available documentation provided by Crystal Clear Software Ltd, on this (see the Help file).

7. If you have a workgroup network, i.e. your network does not have a Domain, then you have what is referred to as Un-trusted Connection or Non-secure connection. An un-trusted connection requires that SQL server itself validates every connection. Therefore, for Loan Performer to connect to the database, it has to create a user with administrative rights in the database.

Please note that the creation of a Performer user is only important if you do not have Windows Authentication. If you have Windows Authentication, we advise that you use Windows to control the security levels.

1. Install Loan Performer on the local machine (client)
2. On the Loan Performer working folder on your computer, for example c:\lpf707, you will find the file called **LPFSQLUser.EXE**.
3. Double click on this file to open it.
4. You will get the following screen.



5. The first step is to list available servers that you wish to connect to. If no servers are available then you must have skipped the SQL server connectivity part described above or you have not installed any SQL server. Make sure you perform this task first.
6. If there are servers listed and the server you wish to connect is available, then select this. Once selected the name of the server is going to be displayed on the grayed out textbox below the listing.
7. Select the method under which the current user (Windows logon) is going to connect to the SQL server. i.e. Mixed mode or Windows Authentication. If the person logged on the computer does not have administrative rights to the SQL server, then you will need to connect to the SQL server via the 'sa' login. The 'sa' is a default System Administrator created inside the SQL server during the

installation of the database server. You will need to know the password that was given to the 'sa' at the time of installation.

8. If you connect via Windows Authentication, then please note that the user currently logged in must be a network administrator. Otherwise the user will not be created.
9. Click the OK button.

Note:

This procedure needs to be run only once for each instance of SQL server database where Loan Performer will be installed. You do not need to run this on every computer connecting to the database.

You should avoid deleting or modifying the settings of the Performer user in SQL Server unless you understand the necessary effects your modification might create.