Forecast 5 Installation Guide

FORECAST 5 INSTALLATION GUIDE





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User Agreement

1) RIGHTS GRANTED UNDER THIS LICENCE

This agreement grants you use of the Forecast 5 Ltd Software, payment for which is to be made to entitle use

The software includes:

- Software installed on your PC, server or third party Host server regardless of transaction volumes, size of data files or number of companies. Note: extra payment is required for additional users or if the Software is used in a commercial data processing bureau.
- Software maintenance & information services.
- Forecast 5 user Helpline service (clause 6).

Time for payment shall be of the essence of this Agreement. If any amount payable is in arrears, then, without prejudice to any other rights and remedies it may have, Company shall be entitled to suspend the performance of any of its obligations under this Agreement, including, without limitation, suspending Customer's right to Use the Software and Documentation, without Company incurring any liability to Customer or any third party. Late payment fees will apply.

This Agreement includes Software maintenance & information services. Updated Software versions will be released as appropriate.

You must provide an email address to ensure that you receive notice of updates, pre-release information & support newsletters.

Specifically excluded from any rights granted under this licence:

The Total Amount excludes installation, data conversion, on site help & training & such like, which are matters between you & your Supporting Forecast 5 Consultant. Extra users, functions, products or services may be added at any time to the Software by adding the appropriate amount to the Total Annual Amount.

2) TERM

You may terminate this Agreement, by giving Forecast 5 Ltd written notice, 60 days prior to the annual renewal date. Your licence will terminate if the annual renewal payment is not made. On termination, the Software must be uninstalled.

3) OBLIGATIONS

Software title, Intellectual Property & copyright remain with Forecast 5 Ltd. You must protect that ownership of the Software & not attempt to sell, hire, copy (except for back up), transfer or deal with it in any other way.



Neither may you reverse engineer, decompile or disassemble the software product, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation.

The above obligations survive the term of this Agreement and the termination of your usage of the Software.

4) WARRANTIES

You must rely on your own judgment as to the suitability of the Software & computer systems that it is installed on. You must rely on your own professional accounting & financial advice services. No warranties are given other than those implied by law.

IN NO EVENT WILL FORECAST 5 LTD BE LIABLE TO YOU FOR ANY DAMAGES, INCLUDING LOSS OF PROFIT OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF YOUR USE OR FAILURE OF OR FAULT IN THE SOFTWARE PRODUCT.

5) PAYMENTS

Your Total Annual Amount tax invoice will be delivered to the email address stated in this Agreement. Payments are annually in advance, by direct debit from your bank account or credit card. Once paid the amounts are not refundable for any reason. You agree to Forecast 5 Ltd paying commissions or fees to any party who introduces you to or supports the Software. Forecast 5 Ltd has the right to review and increase the Total Annual Amount. You will be advised of such increase by invoice.

6) FORECAST 5 HELPLINE

This Agreement provides access for named users to email & telephone help in using the Software. The cost for this service is included in the Annual Amount.

The Helpline operates 8.30am – 5pm (NZT) Mon-Fri (excluding public holidays). Help is not offered to those, who in the opinion of Forecast 5 Ltd, are untrained operators and suitable training will be recommended.

7) NOTICES / LAW

You agree to advise us, in writing, if you change your location, email, postal address, payment details or if there is any information that we should know about your ability to comply with this Agreement. Forecast 5 Ltd can give notice by delivering it to your last known Software location, email, or postal address.

We reserve the right to amend this agreement with 30 days' notice by email of any changes to this agreement

The laws of New Zealand govern this Agreement.

This license is valid through your use of the Forecast 5 software Ltd.

www.forecast5.com

Current as at 1st June 2013



About Forecast 5

Forecast 5 is an SQL based budgeting and forecast product. This product has been developed by Forecast 5 and is a replacement for the Sage WinForecast product that has been discontinued and will no longer be supported.

Forecast 5 requires Microsoft SQL 2008 or higher in order to work. Forecast 5 comes equipped with a Microsoft SQL 2008 express install for ease of installation. For convenience, Forecast 5 is able to connect to an existing SQL server.



Installation Guide

INSTALLATION CHECKLIST

Before beginning your install of Forecast 5, we recommend you run through this check list to ensure that you do not run into any issues.

PERMISSIONS	Admin permissions on computer and SQL server
PASSWORDS	SA SQL password
ANTI-VIRUS	Temporarily disabled
PREREQUISITE SOFTWARE	.NET Framework 4.0 & SQL server 2008 and greater
SQL SERVER: NEW OR EXISTING	Version 2008 and higher
OPERATING SYSTEM	Windows 7 and higher
FREE HARD DRIVE SPACE	1 GB or higher
SYSTEM MEMORY	4 GB or higher

Please note the Forecast 5 cannot connect to an existing database and will need to create its own (unless it is a Forecast 5 created database).

INSTALLING FORECAST 5

Before downloading the file, ensure you have the correct user permissions on to the single computer or the server.

After you have downloaded the file, click the Forecast.exe.

Select *Install with SQL* if you are installing on a server without SQL or on a single computer.

Select Install without SQL if you are installing on a workstation or the SQL has already been installed.



For installing SQL Server, refer to section <u>SQL Server 2008 Express Installation</u>.



Additional configuration for terminal server installation:

- a. Enable TCP/IP and Named Pipes protocols of SQL Server, to allow client computers to connect to the database on the server, you need to. Follow the steps under the <u>Enabling</u> <u>TCP/IP and Named Pipes Protocols of SQL Server Using "SQL Server Configuration Manager"</u> section.
- b. Give users rights to access the database, refer to section <u>SQL Scripts to add users without</u> <u>administrator rights.</u>

Click the *Next* button to continue.

Porecast5	
Welcome to the Forecast5 Setup Wizard	
The installer will guide you through the steps required to install Forecast5 on your co	omputer.
WARNING: This computer program is protected by copyright law and international t Unauthorized duplication or distribution of this program, or any portion of it, may resu or criminal penalties, and will be prosecuted to the maximum extent possible under the	reaties. Ilt in severe civil he law.
Cancel < <u>B</u> ack	Next >

Select *I Agree*. Click the *Next* button to continue.



🛃 Forecast5			
License Agreement			
Please take a moment to read the li Agree'', then ''Next''. Otherwise clic	cense agreement now. If k "Cancel".	you accept the terms	below, click ''l
Forecast 5 Ltd U 1 Rights Granted Under This agreement grants you which is to be made to ent The software includes: □ Software installed on yo of transaction volumes, siz extra payment is required to commercial data processin	ser Agreeme This Licence Use of the Forecast itle use ur PC, server or third te of data files or nur for additional users on by bureau.	nt 5 Ltd Software, p I party Host server nber of companies or if the Software is	ayment for regardless 3. Note: s used in a
◯ I <u>D</u> o Not Agree	Agree		
	Cancel	< <u>B</u> ack	<u>N</u> ext >

Click the *Next* button to continue.

🛃 Forecast5	
Select Installation Folder	
The installer will install Forecast5 to the following folder.	
To install in this folder, click "Next". To install to a different folder, enter it be	low or click "Browse".
<u>F</u> older:	
C:\Program Files (x86)\Forecast 5 Ltd\Forecast5\	Browse
	Disk Cost
Install Forecast5 for yourself, or for anyone who uses this computer:	
<u>E</u> veryone	
⊙ Just <u>m</u> e	
Cancel < <u>B</u> ack	Next >

Click the *Next* button to continue.



🛃 Forecast5			
Confirm Installation			
The installer is ready to install Forecast5	on your computer.		
Click "Next" to start the installation.			
	Cancel	< <u>B</u> ack	Next >

The installation will start.

😸 Forecast5			
Installing Forecast5			
Forecast5 is being installed.			
Please wait			
	Cancel	< <u>B</u> ack	<u>N</u> ext >

You have now installed Forecast 5. Click the *Close* button.



🙀 Forecast5			
Installation Complete			
Forecast5 has been successfully installed	d.		
Click "Close" to exit.			
Please use Windows Update to check fo	or any critical updati	es to the .NET Frame	ework.
	Cancel	< <u>B</u> ack	

SQL SERVER 2008 EXPRESS INSTALLATION

After you have downloaded the file, you will need to launch the program

from the following dialog. Click *Run* to continue.



The next screen requests you accept the license agreement. Please make sure you do that or you could run into trouble later on if you violate the EULA. Click the *Accept* button to continue.



📸 Microsoft SQL Server 2008 Express Download Setup
For the following components:
.NET Framework 3.5 SP1
Please read the following license agreement. Press the page down key to see the rest of the agreement.
MICROSOFT SOFTWARE
SUPPLEMENTAL LICENSE TERMS
MICROSOFT .NET FRAMEWORK 3.5 SP1 FOR MICROSOFT WINDOWS OPERATING SYSTEM
View EULA for printing
Do you accept the terms of the pending License Agreement?
If you choose Don't Accept, install will close. To install you must accept this agreement.
Accept Don't Accept

The installation will start. The installer will examine and patch your operating system.

👸 Micros	soft SQL Server 2008 Express Download Setup	x
6	Downloading required files	
Download	ding file 1 of 1	
	Calica	

After you start the installation, you will see this dialog. It will reappear after completing the install, and you may need to click the *Cancel* button. The program will still be installed.

Microsoft Windows	×
Please wait while Setup configures the components. This might minutes.	take several
	Cancel

You will need to restart your machine.



🐞 Microsoft SQL Server 2008 Express	Download Setup	23
Setup must reboot before proc	eeding.	
Choose 'Yes' to reboot now or 'No' to man	ually reboot later.	
Details >>	Yes	No

The installation screen will appear. Select SQL Server 2008 Express with

Advanced Services. Click Install.

n instance of S	QL Server 2008 E	ite software, and then insta xpress.	alls 🧶 SC	2L Server2
Select the la	nguage for your ir	nstance of SQL Server 2008		
English	•			
Select the ed	lition of SQL Serve	er 2008 to install:		
 SQL Serve SQL Serve SQL Serve 	er 2008 Express wi er 2008 Express wi er 2008 Express	th Tools th Advanced Services		
The followin	g software prereq	uisites will be installed:		
Windows Windows	Installer 4.5 Powershell 1.0			

Your installation will begin.



The file extraction will take several minutes.





Click OK to continue once the SQL Server 2008 Setup Support Rules screen shows.

📸 SQL Server 2008 Setup		
Setup Support Rules Setup Support Rules identify p corrected before Setup can con	roblems that might occur when you install SQL Server Setup support files. Failures must be tinue.	
Setup Support Rules	Operation completed. Passed: 6. Failed 0. Warning 0. Skipped 0. Show details >> <u>View detailed report</u>	Re-run
	OK Cancel	Help

This screen will appear if you are installing the full version. Choose *Next* to continue.



📸 SQL Server 2008 Setup	
Product Key Specify the edition of SQL	Server 2008 to install.
Product Key License Terms Setup Support Files	Specify a free edition of SQL Server or provide a SQL Server product key to validate this instance of SQL Server 2008. Enter the 25-character key from the Microsoft certificate of authenticity or product packaging. If you specify Enterprise Evaluation, the instance will be activated with a 180-day expiration. To upgrade from one edition to another edition, run the Edition Upgrade Wizard. (*) Specify a free edition: Express with Advanced Services (*) Enter the product key:
	< Back Next > Cancel

Check *I accept the license terms* box and click the *Next* button.

📸 SQL Server 2008 Setup	
License Terms To install SQL Server 2008	, you must accept the Microsoft Software License Terms.
Product Key License Terms	MICROSOFT SOFTWARE LICENSE TERMS
Setup Support Files	MICROSOFT SQL SERVER 2008 EXPRESS WITH TOOLS EDITION
	MICROSOFT SQL SERVER 2008 EXPRESS WITH ADVANCED SERVICES EDITION
	These license terms are an agreement between Microsoft Corporation (or based on where you live, one of its affiliates) and you. Please read them. They apply to the software named above, which includes the media on which you received it, if any. The terms also apply to any Microsoft updates, supplements, Internet-based services, and support services for this software, unless other terms accompany those items. If so, those terms apply. I accept the license terms.
	< Back Next > Cancel

Start the SQL Server 2008 installation by clicking the *Install* button.



📸 SQL Server 2008 Setup			
Setup Support Files Click Install to install Setup Sup	port files. To install or update SQL	Server 2008, these files are required.	
Product Key	The following components a	re required for SQL Server Setup:	
License Terms	Feature Name	Status	
Setup Support Files	Setup Support Files		
		< Back Install	Cancel

SQL Server 2008 will install.

SQL Server 2008 Setup			
Setup Support Files Click Install to install Setup	Support files. To install or update SQL	Server 2008, these files are required.	
Product Key	The following components a	re required for SQL Server Setup:	
License Terms	Feature Name	Status	
Setup Support Files	Setup Support Files	In Progress	
	Performing Windows Installe	r actions.	
		< Back Insta	II Cancel



All rules should have passed. You may get the screen below if you have forgotten to open the firewall ports. Open the required ports and click *Next*.

📸 SQL Server 2008 Setup		
Setup Support Rules Setup Support Rules identify problems corrected before Setup can continue.	that might occur when you install SQL Server Setup support files. Fa	ilures must be
Setup Support Rules O Feature Selection Disk Space Requirements Error and Usage Reporting Installation Rules	eration completed. Passed: 10. Failed 0. Warning 1. Skipped 0. Hide details <<	Re-run
Ready to Install	Rule	Status
Complete	Fusion Active Template Library (ATL)	Passed
	Unsupported SQL Server products	Passed
	Performance counter registry hive consistency	Passed
	Previous releases of SQL Server 2008 Business Intelligence Devel	Passed
	Previous CTP installation	Passed
	Consistency validation for SQL Server registry keys	Passed
	Computer domain controller	Passed
	Microsoft .NET Application Security	Passed
	Edition WOW64 platform	Passed
	Windows PowerShell	Passed
	Windows Firewall	Warning
	< Back Next >	Cancel Help

You will get this prompt if any ports were open at the beginning of the install. Click OK to continue.

Rule Check	k Result
	Rule "Windows Firewall" generated a warning. The Windows Firewall is enabled. Make sure the appropriate ports are open to enable remote access. See the rules documentation at http://go.microsoft.com/fwlink/?LinkId=94001 for information about ports to open for each feature.
	ОК

When the Feature Selection screen appears, select the same as shown below:



Feature Selection Select the Express with Advance and Analysis Services can be clu	ed Services features to install. For clustered installations, stered.	only Database Engine Services
Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Instance Features Instance Features SQL Server Replication Instance Features Reporting Services Shared Features Business Intelligence Development Studio Management Tools - Basic SQL Client Connectivity SDK Microsoft Sync Framework Redistributable Features	Server features are instance-aware and have their own registry hives. They support multiple instances on a computer.
	Select All Unselect All Shared feature directory: C:\Program Files	Microsoft SQL Server\

Click Next to accept the installation of SQL Express.

SQL Server 2008 Setup Instance Configuration Specify the name and instance I	D for the SQL Server instance				
Setup Support Rules Feature Selection Instance Configuration	 Default instance Named instance: 	SQLExpress			
Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules	Instance ID: Instance root directory:	SQLExpress C:\Program	n Files\Microsoft SQL	.Server\	
Ready to Install Installation Progress Complete	SQL Server directory: Installed instances:	C:\Program	Files\Microsoft SQL	Server\MSSQL10.SQL	Express
	Instance F	eatures	Edition	Version	Instance ID
			< Back	Next > Ca	ancel Help



Accept the disk space requirements by clicking Next.

SQL Server 2008 Setup	
Disk Space Requirement	nts r for the SQL Server features you selected.
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Disk Usage Summary:
	< Back Next > Cancel Help

To set up SQL with local system authentication against Operating System accounts, you must select from the list of values. If you want to provide credential's manually, leave the space blank.

Click *Next* to continue.



Server Configuration Specify the configuration.				
Setup Support Rules Feature Selection Instance Configuration	Service Accounts Collation Microsoft recommends that you us	se a separate account for eac	ch SQL Server s	ervice.
Disk Space Requirements	Service	Account Name	Password	Startup Type
Server Configuration	SQL Server Database Engine	NT AUTHORITY\SYSTEM		Automatic 🔻
Ready to Install installation Progress	These services will be configured a	utomatically where possible	to use a low pr	ivilege account.
Ready to Install Installation Progress Complete	These services will be configured a On some older Windows versions t more information, click Help.	utomatically where possible he user will need to specify	to use a low pr a low privilege Password	ivilege account. account. For Startun Type
Ready to Install nstallation Progress Complete	These services will be configured a On some older Windows versions t more information, click Help. Service	utomatically where possible he user will need to specify Account Name	to use a low pr a low privilege Password	ivilege account. account. For Startup Type Manual
Ready to Install Installation Progress Complete	These services will be configured a On some older Windows versions t more information, click Help. Service SQL Full-text Filter Daemon Laun SQL Server Browser	utomatically where possible he user will need to specify Account Name NT AUTHORITY\LOCA NT AUTHORITY\LOCA	to use a low pr a low privilege Password	ivilege account. account. For Startup Type Manual Disabled V

To enter a valid credential, click the *Add Current User* button.

The user will load where you see *Authorised password* below.



Database Engine Config	juration
Specify Database Engine authent Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Account Provisioning Data Directories FILESTREAM Specify the authentication mode and administrators for the Database Engine. Authentication Mode Windows authentication mode Mixed Mode (SQL Server authentication and Windows authentication) Built-in SQL Server system administrator account Enter password: Confirm password:
	Specify SQL Server administrators Authorized Password SQL Server administrators have unrestricted access to the Database Engine. Add Current User Add
	< Back Next > Cancel Help

Check those you wish to send, if any, and click Continue.

🐮 SQL Server 2008 Setup						
Error and Usage Reportin	ng					
Help Microsoft improve SQL Serve	r features and services.					
Setup Support Rules	Specify the information that you would like to automatically send to Microsoft to improve future					
Feature Selection	releases of SQL Server. These settings are optional. Microsoft treats this information as confidential. Microsoft may provide updates though Microsoft Update to modify feature usage data. These					
Instance Configuration	updates might be downloaded and installed on your machine automatically, depending on your					
Disk Space Requirements	Automatic Update settings.					
Server Configuration						
Database Engine Configuration	View the Microsoft policy for SQL Server privacy and data collection.					
Error and Usage Reporting						
Installation Rules	Read more about Microsoft Update and Automatic Update.					
Ready to Install						
Installation Progress	Send Windows and SQL Server Error Reports to Microsoft or your corporate report server. This setting only applies to services that run without user interaction.					
Complete						
	Send feature usage data to Microsoft. Feature usage data includes information about your hardware configuration and how you use Microsoft software and services.					
< Back Next > Cancel Help						

The install will check the rules you have entered. Click Next.



📸 SQL Server 2008 Setup	we compare " Specific & and Date ? " Longe Street P" prove court for	
Installation Rules Setup is running rules to determin	ne if the installation process will be blocked. For more information, click Help.	
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Operation completed. Passed: 9. Failed 0. Warning 0. Skipped 2. Show details >> View detailed report	Re-run
	< Back Next > Cancel	Help

After verifying the install is possible, click Install.

Verify the SQL Server 2008 featu Setup Support Rules	Ready to install SQL Server 2008:
Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Summary Edition: Express with Advanced Services Action: Install General Configuration Features Database Engine Services Full-Text Search Management Tools - Basic SQL Client Connectivity SDK Instance configuration Instance Name: SQLEXPRESS Instance IDs Instance IDs Instance Directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory: C:\Program Files\Microsoft SQL Server\ Configuration file path: C:\Program Files\Microsoft SQL Server\100\Setup Bootstrap\Log\20090325_221433\ConfigurationFile.initial



The install will begin.

SQL Server 2008 Setup	
instanation Progress	
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Running validation configuration timing.
	Next > Cancel Help

The install has been successful. Click Next.

SQL Server 2008 Setup		
Installation Progress		
Setup Support Rules Feature Selection	Setup process complete	
nstance Configuration Disk Space Requirements Server Configuration		
Database Engine Configuration	Feature Name	Status
rror and Usage Reporting	Database Engine Services	Success
istallation Rules	Full-Text Search	Success
eady to Install	Management Tools - Basic	Success
nstallation Progress	SQL Client Connectivity SDK	Success
Complete		
		Next > Cancel Help



You will see the final installation dialog and log file. Click Close.

🚼 SQL Server 2008 Setup		X
Complete Your SQL Server 2008 installation	on completed successfully.	
Setup Support Rules Feature Selection Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Error and Usage Reporting Installation Rules Ready to Install Installation Progress Complete	Summary log file has been saved to the following location: <u>C:\Program Files\Microsoft SQL Server\100\Setup Bootstrap\Log\20090325 221433</u> <u>\Summary McLaughlinM 20090325 221433.txt</u> Information about the Setup operation or possible next steps: Vour SQL Server 2008 installation completed successfully.	
	Supplemental Information: The following notes apply to this release of SQL Server only. Microsoft Update For information about how to use Microsoft Update to identify updates for SQL Server 2008, see the Microsoft Update Web site <http: ?linkid="108409" fwlink="" go.microsoft.com=""> at http://go.microsoft.com/fwlink/?LinkId=108409. Reporting Services</http:>	4 III +
	Close Help	

You must reboot your system again when prompted.

Microsoft SQL Server 2008 Express Download	
SQL Server 2008 Express Setup Package Downloads and installs prerequisite software, and then installs an instance of SQL Server 2008 Express.	SQL Server 2008
Windows must be restarted in order to complete the	e installation.
Restart No	w Close

SQL Server 2008 Express has now successfully been installed.



ENABLING TCP/IP AND NAMED PIPES PROTOCOLS OF SQL SERVER.

Launch the SQL Server Configuration Manager.



Expand the SQL Server Network Configuration. Look for Protocols for SQLEXPRESS. Right click on the Named Pipes and select Enable.



Click OK to the message below.

Warning	Any changes made will be saved; however, they will not take effect until the service is stopped and restarted.
	С



Right click TCP/IP and select Enable.

Sgi Server Configuration Manager			
File Action View Help			
🗢 🄿 🖄 🖾 🗟			
SQL Server Configuration Manager (Local)	Protocol Name	Status	
SQL Server Services	Shared Memory	Enabled	
SQL Server Network Configuration (32bit)	Named Pipes	Enabled	
SQL Server Network Configuration	TCP/IP	Disabled	
Protocols for MSSQLSERVER	AIV 🙀	Disabled	Enable
Protocols for ACT7			Disable
Protocols for SQLEXPRESS			
▲ 💆 SQL Native Client 10.0 Configuration			Properties
Client Protocols			Help
Aliases			nep

Click OK to the below message.

Warning	Any changes made will be saved; however, they will not take
	effect until the service is stopped and restarted.
	СК

Click the SQL Server Services. Right click on the SQL Server (SQLEXPRESS) and select Restart.

🚡 Sql Server Configuration Manager						
SQL Server Services SQL Server Network Configuration SQL Server Network Configuration Protocols for MSSQLSERVER Protocols for SQLEXPRESS SQL Native Client 10.0 Configuration	Name	Running Pupping Start Stop Pause Resume Restart Ptoperties Help	Automatic Automatic Other (Boot, System Automatic Automatic Automatic Other (Boot, System Other (Boot, System Manual	NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET. NT AUTHORITY/NET.		

The service will restart. Remote connection has now been enabled.

SQL Server Configuration Manager	\mathbf{X}
Stopping service	
(<u>C</u> lose	



TERMINAL SERVER INSTALL

Assuming MS SQL has already been installed.

On the Terminal Server, log in as the Administrator.

Run the Forecast 5 installer as Administrator, and install for all users.

Image: Contract State (Section 2) (Sect	er	25/07	/2013 4·04 r
		Open	
	۲	Run as administrator	
		Convert with deskPDF Creato	r
		Troubleshoot compatibility	
		Pin to Start	

Complete installation as shown above, and run Forecast 5 validating the license.

Connect to the SQL database by entering the servername\instance in the box below:

🕼 Open Forecast	
List of Forecast Change SQL Server	
Current SQL Server Name Current Database N	
New SQL Server Name	.\SQLEXPRESS

Forecast 5 needs to create its own database, so enter a name for the database and click Update SQL Server.

Database Name	FORECAST5
	Update SQL Server
OK Cancel	

If there is a pre-made database, this will cause an error.



LICENSING

Launch the program from your desktop or Start Menu.



Enter Product Key and Company Name (check that the name is spelt exactly as in the email you received). Click *Activate Online Now* button to continue.

Type your pro	educt key for activation. You can find your product key on the email you received from
Forecast 5 Li	FC5000
Type your co	mpany name and email address
Company Nam	e Enrenaet 5
Email Address	
Activation re	guires you to be connected to the internet
You might have	ve to activate Forecasth again if
- You uninstall that came with	Forecast5 on one computer and then install it on another. During installation, enter the product key the software. If internet activation fails, call Forecast 5 Limited on 09 8209960.
- You make a s same time. If a	ignificant hardware change to your computer, such as upgrading the hard disk and memory at the major hardware change requires activating Forecast5 again, you will be notified.
- You reformat software again	your hard disk. Reformatting erases your activation status. In this case, you'll have to activate the
- A virus or ma	ware infects your computer and deletes your activation status.
lf you don't ha below.	ve an internet connection, or the internet activation fails, click the Manual Activation button
	1 222 - 1 2011 - 1 2020 - 1 20

Click OK.

×
License succesfully registered
ОК



SQL SCRIPTS TO ADD USERS WITHOUT ADMINISTRATOR RIGHTS

Login to computer as an administrator

Type the following commands in the command prompt (replace the italics with your own username and domain):

🖬 C: \Windows \system32 \cmd.exe	X
Microsoft Windows [Version 6.1.7601] Copyright (c) 2009 Microsoft Corporation. All rights reserved.	• III
C:\Users\charisse.NAVIGATOR>SQLCMD -S.\SQLEXPRESS -E 1> CREATE LOGIN [NAVIGATOR\Melissa] FROM WINDOWS WITH DEFAULT_DATABASE=[master], DEFAULT_LANGUAGE=[us_english] >> >>	
27 GU 1> EXEC sp_addsrvrolemember 'NAVIGATOR\Melissa','sysadmin' 2> GO 1> EXIT	
C:\Users\charisse.NAVIGATOR>	

- 1. SQLCMD –S[SQL_SERVER_NAME] –E
- 2. CREATE LOGIN [*DOMAIN_NAME\USER_NAME*\ FROM WINDOWS WITH DEFAULT_DATABASE=[master], DEFAULT_LANGUAGE=[us_english]
- 3. GO
- 4. EXEC sp_addsrvrolemember 'DOMAIN_NAME\USER_NAME', 'sysadmin'
- 5. GO



Converting your forecast to Forecast 5

Open Forecast 5 and log in.

Login to For	ecast5
You are logg	ing into database
Username	admin
Password	
	OK Change SQL

Click New Forecast.

Open Forecast					
List of Forecast	Change SQL Server				
group by area	Drag a field here to gro	up by that field			New Forecast
Name	Туре	Modified	Owner	Group	New Consolidation
					Rename Forecast
					Copy Forecast
					Change Forecast Group
					Delete Forecast
					Log Out of Forecast5
					Update Current User
					Close User Session
					User Maintenance
					Export Forecast
					Import Forecast
				OK	Cancel



Open WinForecast and open the Forecast to be converted.

Open Forecast		X
ecent <u>Existing Foreca</u>	sts	
Choose a file from those	most recently opened:	
File	Folder	Туре
ABC_0002	C:\progra~2\sage\winfor~1.11\forecast	Forecast
🚦 demo1	C:\progra~2\sage\winfor~1.11\forecast	Forecast
🚦 wfcbas~1	C:\configs\forsor~2	Forecast
🚦 tuakan~1	C:V	Forecast
🚦 Tuakana Roopu2	C:V	Forecast
🚦 Tuakana Roopu	C:V	Forecast
	ABC_0002	OK Cancel
age 50 WinForecast Professiona File Edit View Data Octions	Wizards Forecast Window Help	





Copy the Forecast details from Winforecast to the new Forecast in Forecast 5.

🕎 Sage 50 WinForecast Professional - [ABC_0002.f	s0]
📈 File Edit View Data Options Wizards Fore	cast Window H
🗄 📳 👔 🔚 🗙 Headings	
Payron Tables & Opt	tions
GST Rates & Details	
Forecast Details [ABC_0002.fs0]	Forecast Details [ABC_0002.fs0]
Headings Start Date & Currency	Headings Start Date & Currency
Company Name	Forecast Start
ABC Corp	Month Year First Data Month
Sub-Heading	Apr 🚔 2007 🚔 for 2 🚔 Years. Apr 07 🚔
2007/09 Financial Plan 07-09	Use Month Numbers on Reports
Description	
	Financial Year Start Currency
-	Month Symbol Position
, Ele Davia	
File Parn C:\progra~2\sage\winfor~1.11\forecast\ABC_0002.fs0	□ I <u>n</u> put Data is 000's
OK Cancel <u>H</u> elp	OK Cancel Help



New Forecast 4	
Company Name	ABC Corp
Sub Heading	
Description	
Cycle Frequency	Annually ~
Period Frequency	Monthly ~
Number Of Years	1
Start Date	Apr 07 👻
First Data Period	Apr 07
Reports	Use Month Numbers on Reports
Input	Data in 000's
Country	New Zealand 🗸
Local Currency	NZD V Update Currencies
3rd Party Integration	
None	
○ S A P B1	
	OK Cancel

Enter the Forecast settings from Winforecast to Forecast 5.

🚾 Sage 50 WinForecast Pro	ofessional - [ABC_0002.fs0]	
📈 File Edit View Data	Options Wizards Forecast Window	H
	Headings	ſ
	Payroll Tables & Options	t
	GST Rates & Details	
	Currencies	
	Other Options	
	Parameter Defaults	
	Profiles	
	NPV Parameters	
	Report Layout	
	Default Payroll Tables	
	Default GST Rates	
	Preferences	
	Upgrade	



ove Up	Add Department	Rew/Open Show Eliminations	Details	Profiles	Preferences	[
ove Down	🖳 Delete Department	Deptions Deptions	Currency	Payroll	Parameters	[
		C Eliminations	GST Rates	🕒 Other	Extent/Amend	[
ve Data	Department	Consolidations		Settings	5	

Payroll Tables and Other Options

PAYE Rates Pension Details PAYE Options PAYE Rates	2	Payroll Tables & (Dptions	[ABC	_0	002.fs0]
PAYE Rates Number of Bands 5 On the first 14000 12.2 % Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %	F	AYE Rates Pens	ion Details	PA'	ŕΕ	Options
PAYE Rates Number of Bands 5 On the first 14000 12.2 % Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %						
PAYE Rates Number of Bands 5 On the first 14000 12.2 % Then up to 48000 19.2 % Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %						
Number of Bands 5 On the first 14000 12.2 % Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %		PAYE Rates				
On the first 14000 12.2 % Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %		N <u>u</u> mber of Ban	ids	5		
Then up to 48000 19.2 % Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %		On the first	14000	12.2	%	
Then up to 70000 31.7 % Then up to 116089 34.7 % Thereafter 33.0 %		Then up to	48000	19.2	%	
Then up to 116089 34.7 % Thereafter 33.0 %		Then up to	70000	31.7	%	
Thereafter 33.0 %		Then up to	116089	34.7	%	
		Thereafter		33.0	%	
Bonus, Etc OK Cancel <u>H</u> elp	F	<u>B</u> onus, Etc	1			OK Cancel <u>H</u> elp

Forecast Details	Curre	ncies	GST Rates	Profiles	Payrol	l Tables & Optio	ns Forecast	Other Options Pref
PAYE Rates	Bonus	Pensio	on Details	PAYE Option	s			
						Amount	Percentage	New Band
						14,000	12.20	Delete Band
						48,000	19.20	Delete ballu
						70,000	31.70	
						116,089	34.70	
						0	33.00	



GST Rates & Details:

🕊 GST Rates & Details [ABC_0002.fs0]	×
GST Rates GST Details		
N <u>a</u> me Standard	<u>Bate</u>	<u>N</u> ew Rate
Standard	15.0%	D <u>e</u> lete Rate
Zero	0.0%	
1		
		cel <u>H</u> elp

es	GST Rates	Profil	es	Payroll Tables & Options	Forecast Other Options	Preferences	Parameter D	efaults
ST S	cheme		*	Name	Annual	~ 20	07-08	New
Inv	oice Accrual	~		GST 0%				
Tav	Deriod Ends		*	GST 15%	GST 15%			Delete
	Period Ends							Default
Tw	o Monthly To	~			Set All		_	
Ар	or 07	~			Apr 07	15		
					May 07	15		
					Jun 07	15		
					Jul 07	15		
					Aug 07	15		
					Sep 07	15		
					Oct 07	15		
					Nov 07	15		
					Dec 07	15		
					Jan 08	15		
					Feb 08	15		
					Mar 08	15		



Other Options:

Forecast Other Options [ABC_0002.fs0]	J
Calculation Options Layout Options Courtesy Message Advanced	
Debtor Invoices Creditor Invoices Evenly During Month Evenly During Month	
Calculate Tax & Dividends on Negative Profits (for Consolidation)	
X Allow Stock Balances to be Negative	
▼ Use " <u>B</u> ackwards" Days on Hand for Stock Calculations	
Interest Payments during Holidays for Compound Interest Loans	
A <u>n</u> nual Profile OK Cancel <u>H</u> elp	
Forecast Details Currencies GST Rates Profiles Payroll Tables & Options	Forecast Other Options Preferences Paramete
Calculation Options Layout Options	
Debtor Invoices Creditor	Invoices Bank Interest Method
Evenly During Month 🕤 Evenly	y During Month ~ Average Period Balance ~
Calculate Tax & Dividends on Negative	Profits (for Consolidation)
✓ Allow Stock Balances to be Negative	
Interest Payments During Holidays for C	Compound Interest Loans

Parameter defaults:





eceints		Payments		Add to Stock		Depreciation
Default Input	Method:	Default Input	Method:	Default Input N	lethod:	Default Input Method
Days Credit	Ŷ	Days Credit	v	Days On Hand	Ŷ	Straight Line
Receipts Days Cr	edit	Payments Days (Credit	Days On Hand		Default %:
Set All		Set All		Set All		25.0
Apr 07	20	Apr 07	20	Apr 07	90	Depreciation in:
May 07	20	May 07	20	May 07	90	Direct Costs
Jun 07	20	Jun 07	20	Jun 07	90	
Jul 07	20	Jul 07	20	Jul 07	90	
Aug 07	20	Aug 07	20	Aug 07	90	
Sep 07	20	Sep 07	20	Sep 07	90	
Oct 07	20	Oct 07	20	Oct 07	90	
Nov 07	20	Nov 07	20	Nov 07	90	
Dec 07	20	Dec 07	20	Dec 07	90	
Jan 08	20	Jan 08	20	Jan 08	90	
Feb 08	20	Feb 08	20	Feb 08	90	
Mar 08	20	Mar 08	20	Mar 08	90	

Profiles:

	- <u>P</u> rofiles -			
	Test			
	<u>C</u> har	ige Name		
	Apr	1		
	Jun	1		
	Jul	2		
	Sep	2		
	Oct	1		
	Dec	1		
	Jan	2		
	Mar	2		
	тот	18		
		,		
OK	C	ancel	<u>H</u> elp	



tes	Profiles	Payroll Tables & Options	Forecast Ot	her Options	Preference	s Parameter Defa
*	Name		Annual	v	2007-08	New
*	Even Spread		Even Spread			Delete
	Four-Five-Fo	bur				
	Five-Four-Fo	bur	Set All			Default
			Apr 07		1	
			May 07		1	
			Jun 07		1	
			Jul 07		1	
			Aug 07		1	
			Sep 07		1	
			Oct 07		1	
			Nov 07		1	
			Dec 07		1	
			Jan 08		1	
			Feb 08		1	
			Mar 08		1	
			Total	1	2	

Save Forecast – enter Forecast name.

FORECAST HOME			
Save As Forecast			
Forecast Name	ABC Corp		
	Copy no value		
		OK	Cancel



Sage	50 Wi	nForec	ast Pr	ofe	essional	- TABC 0	002.fs0]		
📈 File	Edit	View	Data]	Options	Wizards	Forecas	st	W
				Op	pening Ba	alance Shee	et	F	ħl
				Pri	ior P & L.				F
				Ba	nk Detail				L
					storine	i ancina		•	L
				Ta	x Details	Andriding			L
				Die	vidend De	etails			L
				-					L
				Pr	ovisions			•	L
				Re	eset Cred	lit Terms		×	L
				Fle	ex			Þ	L
									L
			_	Ac	tuals			•	J.
ch record				1	Name	•	Main Ba	nk	Ac
ABC Cor	р								
Sales	;				Descr	iption			
Direction	ct Cost	is							
Over	heads								
Othe	er Inco	me			ABC	Corp			
🔹 🔁 Bank	Accou	unts		.	「				
1	Vlain B	ank Acc	ount		Annu	al	~		20(
Fixed	Asset	ts		•					
🔁 Loan	IS				Bank	Credit Inte	rest —		
Other	ar Acca	te/Liabi	litior						

Copy Bank details from Winforecast to Forecast 5.

Other Assets/Liabilities
Capital Accounts

R

С

Bank Transf



Sage 50 W	inForecast I View Dai	Professional - [ABC_ ta Options Wizards	0002.fs0] Forecast Window Help					
		× @ P 0						
				ecord Name		Record Prop	perties	
			0	HARDWARE COSTS		Losts Secti	on Heading	
				SOFTWARE SALE	S	Costs Jech	Simeading	
				- D Spreadsheets		Sub-Item		
				Databases	rs	Flex (100%	is unchanged)	
				🗄 🜔 Wages		Se	ction 100%	
				Wages US				
				Production		Sales Tax R	ate	
					ES		<u> </u>	
				Processors		Currency		
				D renpherals		l Deseriation		
				HARDWARE COS	atial	Description		
				Production Cos	its			
				Direct Wages	ges UK			
				Direct Wag	Jes US			
				Hardware	ONT REVENUE			
				Software				
				Staff Salaries	on costs			
					es UK es US			
				Misc Costs				
				OVERHEADS				
				- C Admin Expense	28			
				OTHER INCOME				
					ETS			
				Energy FIXED ASSETS				
				Computer Syste	em			
				Buildings				
					114			
				OTHER ASSETS/	LIABILITIES			
				🖻 😋 CAPITAL ACCOUN	ITS			
				MEMO RECORDS				
FORECAST	HOME	REPORTS	UTILITIES HELP					
		Add Section	🖌 Level Up	Move Up	Add Department	🔂 New/Open	Show Eliminations	;
		Add Folder	ی Show System Data	Move Down	🔁 Delete Department	Digitions Digition		
New/Open	🎦 🔛	Add Record	Delete Section			Eliminations		
Foreca	sts		Edit Data	Move Data	Department	Con	solidations	
Forecast Ex	olorer		Properties					_

Copy sections headings from Winforecast to Forecast 5.

FORECAST	HOME	REPORTS	UTILITIES	HELP						
		Add Section	🖉 Level U	р	Move Up	📑 Add Department	🔁 New/Open	Sh	ow Eliminations	Details
New Ores		Mdd Folder	Show S رو	ystem Data	Move Down	🔁 Delete Department	C Options			Curren
New/Open	1	CADD Record	💭 Delete !	Section			Content Eliminations			📙 GST Ra
Foreca	asts		Edit Data		Move Data	Department	Cor	nsolidati	ons	
Forecast Ex	plorer	4	Properties			_				
Search reco	ord	•	Name	На	rdware Costs			Type	Costs	v
🔻 🔁 ABC Corp							<i>.</i>			
Sales		Descripti	on							
	Hardware Costs		1000							



Copy records from Winforecast to Forecast 5.

In Winforecast, right click on the record list and select "Export Record List".



Then select Clipboard.







HOME REPORTS UTILITIES HELP Add Sample Data Records List Records List Records Details Records Details Data List Data List Export Import Testing Forecast5 (v1.0) - New Forecast ÷ Reports Help Home New/Open Close Show/Hide System Data Records List Records List New/Open Options +Section +Folder +Record Save Delete **Records Details Records Details** Level Up Delete Data List Save As Change Password Data List Show Eliminations Forecasts Edit Data Export Import Consolidations Forecast Explorer Forecast New Forecast Туре New Forecast Description SOFTWARE SALES Word Processors 2007-8 Annual • Spreadsheets Databases SOFTWARE COSTS 🔺 길 Wages Wages UK Wages US Production Materials A D HARDWARE SALES Processors Monitors Peripherals A D HARDWARE COSTS Hardware Materials = Production Costs Direct Wages Direct Wages UK Direct Wages US ▲ OUSTOMER SUPPORT REVENUE Hardware Software CUSTOMER SUPPORT COSTS . A 2 Staff Salaries Staff Salaries UK Staff Salaries US Misc Costs OVERHEADS Utilities

In Forecast 5, move to the Utilities tab, under the Import section, click Record List.





Open record in Winforecast and copy the record type and values to Forecast 5.







AD =						
Home Reports Help						
New/Open Close Show	v/Hide System Data	Records List	Records List	New/Open	Options	Details
ave Delete +Sec	tion +Folder +Record	Records Details	Records Details	Eliminations		Currency
ave As Change Password	Level Up Delete	Data List	Data List	Show Elin	ninations	GST Rates
Forecasts	Edit Data	Export	Import	Consolida	ations	
Forecast Explorer	Record	Production			Reco	ord Type
<u></u>						
New Forecast	Description				Bank	¢
Word Processors					Curr	ency/GST
Spreadsheets					Surr	
Databases	Annual	▼ 2007-8				
SOFTWARE COSTS						
4 🔁 Wages						
Wages UK						
Wages US	Sales Records					
Production					Ac Pl o	f Calas -
Materials					AS 70 0	I Sales •
					AS 76 0	i Sales •
HARDWARE SALES Processors					AS 76 0	i Sales •
HARDWARE SALES Processors Monitors	Sales Records		Percentag	jes	Sales Rec	ords
 HARDWARE SALES Processors Monitors Peripherals 	Sales Records	cessors	Percentag	jes	Sales Rec	ords
 HARDWARE SALES Processors Monitors Peripherals HARDWARE COSTS 	Sales Records	cessors	Percentag Set All	jes	Sales Rec	ords
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Click Save to save the Forecast.





Upgrading Forecast 5, if SQL was not installed with the default path (e.g. Terminal Server)

*Applicable from Version 1 to Version 2

Before running the installer, run the existing version of Forecast 5, log in and go to *Change SQL Server* tab.

Note down the fields *Current SQL Server Name* and *Current Database* as below:

Open Forecast					
List of Forecast	Change SQL Server	r			
		Current SQL Server Name	.\SQLEXPRESS		
		Current Database Name	F5STEPHV3		
		New SOL Server Name			
		Use Windows NT au	thentication		
		Use SQL Server auth	entication		
		Login Name			
		Password			
		Database Name			
			Create Database		
			Update SQL Server		
				OK	Cancel

Exit Forecast 5.

Extract and run the installer, follow the instructions through the setup process.

Start Forecast 5.

If you do not see any error message, Forecast 5 is ready to use. No further steps are required.

Click *No* if you see this error message

rror		
Cannot connect to S	QL Server, search for anoth	er one now?

In the fields New SQL Server Name and Database Name, enter the values noted in earlier.



Open Forecast					
List of Forecast	Change SQL Server				
	Cu	rrent SQL Server Name			
	Cu	rrent Database Name			
				_	
	Ne	w SQL Server Name	.\SQLEXPRESS		
		Use Windows NT a	uthentication	-	
		O Use SQL Server aut	hentication		
		Login Name			
		Password			
	Da	tabase Name	Forecast5		
			Create Database		
			Update SQL Server		
				ОК	Cancel

Click Update SQL Server and login when prompted.

Forecast 5 is ready to use.