

# Training Events Database (TED) Setup Guide

This document describes the basic process for installing the Training Events Database (TED) system. It does not cover installing FileMaker Pro or FileMaker Server, the software needed to run TED, or how to use TED once it has been installed.

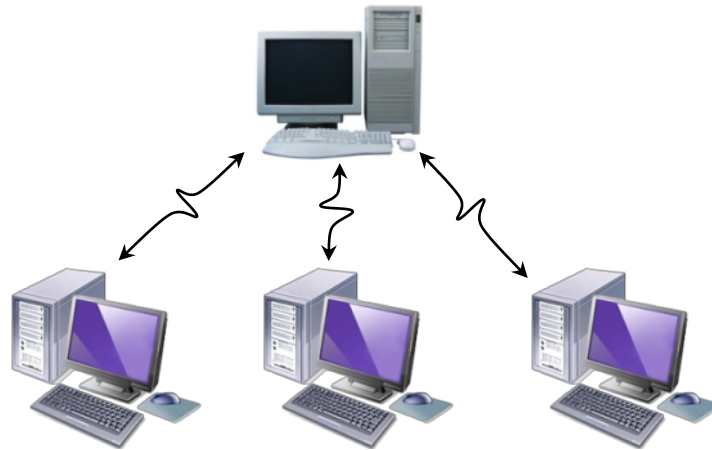
## General Considerations

TED is a database system that is built and runs on FileMaker software. You must have FileMaker Pro 11 installed on the computer that will be using TED. Although a single user can install and operate TED using FileMaker Pro on his or her computer, TED is designed to be used over a network and shared among multiple users.

To share TED over a network, each computer accessing TED will need its own copy of FileMaker Pro installed. When used this way, one computer will act as the “host” and will be the only system with TED files located on it. Other computers are “clients” accessing the copy of TED which has been opened in FileMaker Pro (or FileMaker Server) on the host computer. Client access to TED is through FileMaker Networking, not by opening the TED files located on the host machine directly. This means that FileMaker Pro or FileMaker Server must be running on the host and the TED database must be open on that computer.

### Host Computer

- Requires either FileMaker Pro or FileMaker Server.
- The only computer with the TED FileMaker files installed on it.
- Must have TED open for others (Clients) to access TED
- Requires its own copy/license if hosting from FileMaker Pro.
- Network Sharing in FileMaker Pro must be turned on.
- It is best if this computer is not being used for anything but hosting the TED database. However that is not a requirement.



### Client Computer(s)

- Require FileMaker Pro.
- If hosting TED on FileMaker Pro you can connect up to eight other clients simultaneously.
- Each client computer requires its own copy/license for FileMaker Pro.
- It is not necessary to turn FileMaker Sharing On to access TED on the network.
- Connect to TED using FileMaker Networking, not by opening the file directly.

### Installing TED

There are three basic installation options for TED; one when using TED on a single computer, two other ways to setup TED for sharing with multiple users over a network. The difference between the two methods for sharing TED over a network is based on the type of FileMaker software used to host TED. TED can be hosted using either FileMaker Pro or FileMaker Server. [Note: there are two versions of FileMaker Server, Server and Server Advanced, but either will work for hosting TED.] In general, FileMaker Server provides a more stable environment and better performance, but costs considerably more to purchase and maintain. When choosing between FileMaker Pro and FileMaker Server the primary considerations for TED users are:

#### FileMaker Server:

- Supports up to 250 concurrent users (unlimited for Advanced).
- Automated backup functionality.
- Better performance, particularly for large data sets.
- The host machine should be dedicated to running FileMaker Server and cannot be used as a workstation.

#### FileMaker Pro:

- Supports up to 9 concurrent users.
- No automated backup functionality is available.
- Host machine can also be a workstation (but caution needs to be exercised).

For additional information about differences between FileMaker Pro, FileMaker Server, and FileMaker Server Advanced, please see <http://www.filemaker.com/products/compare/>. If you choose to host TED using FileMaker Server (either version) you still need to purchase FileMaker Pro for each client computer.

### Installing TED to run in FileMaker Pro

If you don't already use FileMaker you will need to purchase and install FileMaker Pro on the computer(s) that will be using TED. CalSTAT can provide information about where you might be able to buy FileMaker at discounted/educational rates. Follow the installation instructions that come with the software when installing FileMaker Pro or FileMaker Server. Please remember that you must be running FileMaker 11 (whether Pro, Server, or Server Advanced) to use TED. If you don't already have FileMaker Pro 11 you may need to purchase FileMaker Pro 12 and request a downgrade license for FileMaker 11. When you receive the downgrade license you will also receive a link that allows you to download the FileMaker 11 software.

When using FileMaker Pro the setup process is the same whether TED will be used on a single computer (i.e. without network sharing) or shared over the network. The only difference is that if TED will be shared over a network FileMaker Sharing must be turned on for the computer that will be hosting TED (described below).

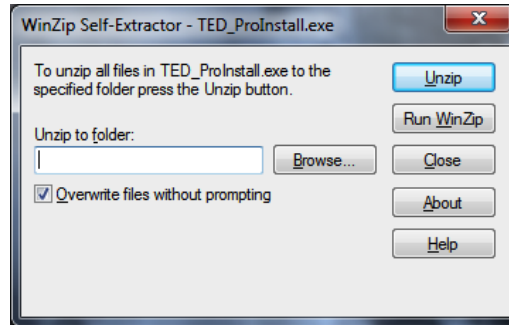
Once FileMaker Pro is installed on all computers that will be using TED you must add the FileMaker file that comprises the TED system to the computer that will be hosting TED. The TED database is contained in a single FileMaker file, TED\_Rev.fp7. When installing TED to run on FileMaker Pro, you will use a file named TED\_ProInstall.exe. Place that file on the desktop of the computer that will host TED and double-click on it or right click and select "Open." The WinZip Self-Extractor will open allowing you to select an Installation Location. The default location will likely be in the computer's Temp Folder. Click the Browse button and select another

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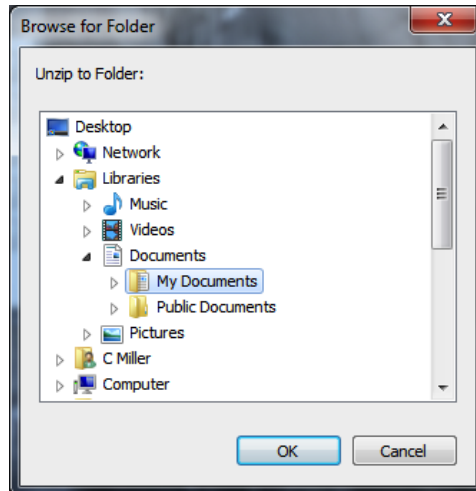
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location where the user has full Read/Write permissions. The My Documents folder is good selection for most installations.

Double-click the TED\_ProInstall.exe file to install the TED files to the single user or host computer.



Click the Browse button to select the location for TED. The TED folder can go anywhere on the computer where you have read/write permission, such as the My Documents or Documents folder. If automatic backups are configured for the computer you are installing on, it is recommended that you install to a location that will be backed up. However, the TED database cannot be open during the backup operation.



The installer will create a TED folder in the directory you select. The file TED\_Rev.fp7 and a folder titled TED Backup will be placed in that folder. Within the TED Backup folder there will be another folder titled Data. These folders and TED\_Rev.fp7 are only installed on one computer – the single user or host computer if sharing. You can now open the TED\_Rev.fp7 file through FileMaker Pro and begin using the TED system.

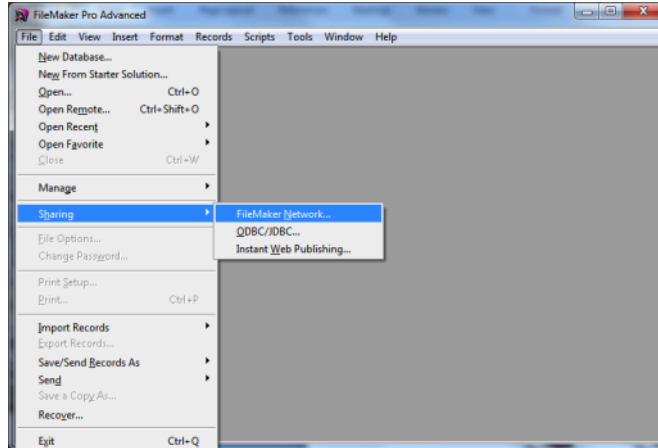
### *Share TED Using FileMaker Pro*

By default FileMaker Pro installs with Network Sharing Turned off. Before other users can access TED over the network you will need to turn FileMaker Network Sharing on for the computer hosting TED. Start FileMaker but

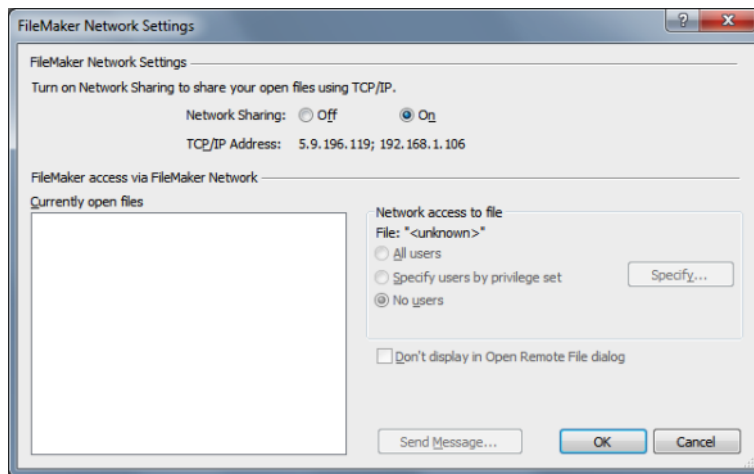
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do not open TED. In FileMaker Pro open the FileMaker Network Settings by going to File > Sharing and selecting FileMaker Network. In the console window that opens you will be able to set FileMaker Network Sharing to **ON** if it isn't already.

With TED closed, go to File > Sharing > FileMaker Network.



In the FileMaker Network Settings window check that Network Sharing is On.



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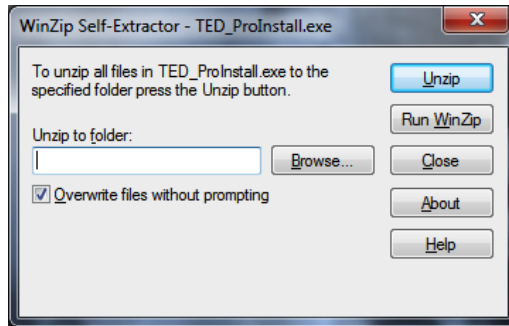
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### Installing TED to run in FileMaker Server

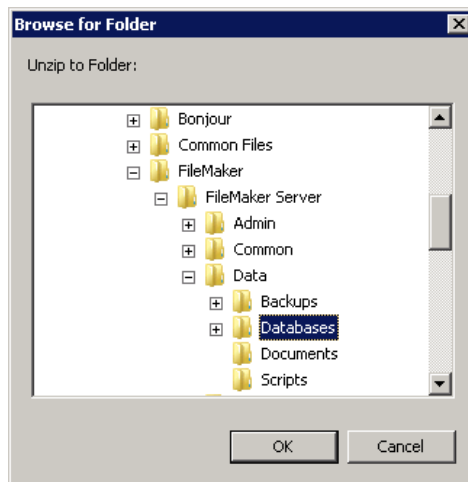
Once you have installed FileMaker Server 11 or Server Advanced 11 you must add the file TED\_Rev.fp7 to the Databases folder on that computer. You will also need Administrator permissions to log into the FileMaker Server 11 Admin Console and start those files. Once you have done that, TED will be available anytime the server is running. Although FileMaker Server provides a tool for loading Databases to FileMaker remotely using the FileMaker Admin Console, most users find it simplest to copy files directly to the folder.

When installing TED to run on FileMaker Server, you will use a file named TED\_ServerInstall.exe. Place that file on the desktop of the computer that is running FileMaker Server and double-click on it or right click and select "Open." The WinZip Self-Extractor will open allowing you to select an Installation Location. The TED\_Rev.fp7 file needs to be placed in the FileMaker\FileMaker Server\Data\Databases folder.

Double-click the TED\_ServerInstall.exe file to install the TED files.



Click the Browse button and navigate to the FileMaker\FileMaker Server\Data\Databases.



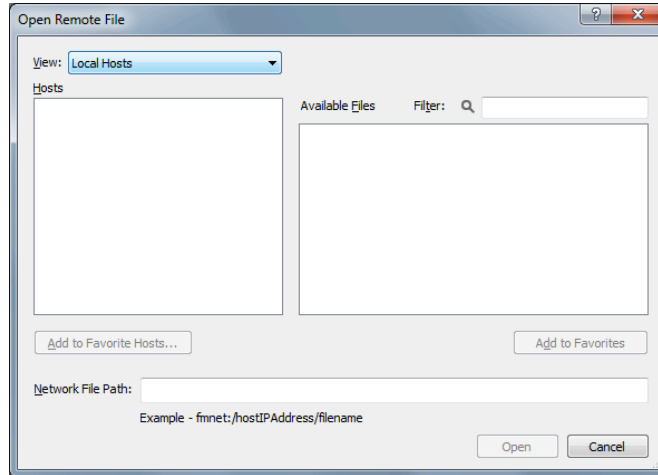
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Once you have added TED\_Rev.fp7 to the server, log into the FileMaker Management Console and Start the database. See the FileMaker Server Administrator's Guide for information about how to do this.

### Opening TED from Client Computers

Be sure that TED is open on the computer hosting TED and, if hosting from FileMaker Pro, make sure that FileMaker Networking is turned on. Start FileMaker Pro on the computer you wish to connect to TED and then go to File > Open Remote



Set View to Local Hosts and you should see any computers that have FileMaker Pro running with shared databases open.

Click the computer that is hosting TED and you will see TED\_Rev.fp7 on the right. Double-click to open.