

NY Clerk Installation Instructions

IMPORTANT

- **BACK UP DATA USING SQLBAK BEFORE BEGINNING A RE-INSTALL OR MIGRATION**
To be certain that all present data is protected, a current backup MUST exist prior to completing a new install. EGT is not responsible for any loss of data that could have been prevented by backing up the system before installation. Instructions for restoring a backup are provided on [page 12](#) of this document.
- **Full Administrative Rights to the workstation are required so please sign in as admin**
- **User Account Control (UAC) settings must be turned all the way down**
- **An internet connection is required to complete updates**
- **The update repository requires full control. Full control may be setup in the security tab by right clicking and editing the properties of the folder(s).**

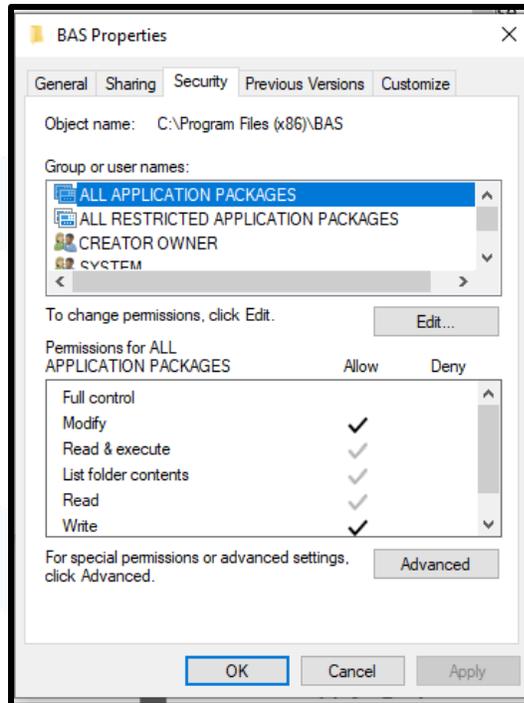
Select the applicable scenario:

- A. New Server/Host Workstation Install of NY Clerk** (NY_Clerk database will be kept on this machine)
 - Refer to [page 2](#) for instructions
- B. New Workstation Install of NY Clerk/Workstation Re-Install** (NY_Clerk database is kept on another Host Workstation/Server)
 - Refer to [page 9](#) for instructions
- C. Migrations** (NY_Clerk only needs to be re-installed on a workstation and the database is already on a server/host workstation)
 - Follow Steps 1-17 of the Server/Host Workstation section and then proceed to [page 12](#)

A. Server/Host Machine Install

(The NY_Clerk database will be hosted locally on a workstation.)

1. Download the NY Clerk_Setup_v7.8.0.9.exe installer from the FTP site to the local workstation.
2. Make sure .NET 3.5 is installed on the Server/Host Workstation
3. Download Microsoft SQL 2019 Server Express
4. Download Microsoft SQL Server Management Studio
5. Install Microsoft SQL 2019 Server Express and select the Custom option.
6. Select the New SQL Server stand-alone installation option
7. If you see a Windows Firewall warning, you can continue. This means you will have to do an extra setup so workstation can connect to the SQL server. (If this installation is for only one workstation hosting the Clerk database then disregard. If multiple workstations will be connecting to the Host Machine then you will have to make changes to the firewall and those steps can be found on page of this document.)
8. On the next step uncheck everything except for Database Engine Services in the Instance Features section.
9. You may leave the name as SQLEXPRESS. If it is **blank**, it means another instance of SQL is installed and just needs to be renamed. In this situation you may just call this instance SQLEXPRESS2019.
10. Switch the SQL Browser to Automatic in the next section. You will do so by clicking on the Startup Type dropdown.
11. In the Database Engine Configuration set the authentication to Mixed Mode and use the following password **5csGPRVwh8LT**.
12. While SQL is installing, proceed to create the **BAS** directory inside of **C:\Program Files (x86)**. Right click on the BAS directory and click on **Properties** and then on the **Security** tab. You'll want to make sure that the **All Application Packages, All Restricted Application Packages, Users, and Trusted Installers** groups are set to the **Modify** permission.



13. Transfer the NY Clerk installer to the BAS directory.
14. Create a NY_Clerk_Updates directory inside of BAS.
 - a. Create a **BAS_Shares** directory inside of BAS or on a drive that is used for sharing.
 - b. Inside of the BAS_Shares directory create another directory called **Clerk** and inside of Clerk create another called **Updates**. (ex. ... \BAS_Shares\Clerk\Updates)
 - c. Right click on the BAS_Shares directory and click on **Properties**.
 - d. Click on **Sharing** tab and then **Advanced Sharing** and activate **Share this folder**.
 - e. We normally set the permission to everyone but with only the Change and Read permissions. If you want to have only specific users access the update directory, please make your changes now. It is important that users have the ability to read and write on this directory otherwise updates may not properly apply.
15. When SQL Server is done installing run the SSMS-Setup-ENU.exe. No special instructions are needed for this so just click next. At the end you'll be asked to restart the workstation but you can continue. Restart the workstation only if you have issues accessing the Management Studio.

16. Open SQL Server Management Studios:

Start menu → All Programs → Microsoft SQL Server Tools 18 → Microsoft SQL Server Management Studio

- a. Select SQL Server Authentication, from the authentication dropdown and enter the login and password below:

Login = sa Password = 5csGPRVwh8LT

Check the *Remember password* box then click "Connect".

17. Restore the NY_Clerk backup taken from the old server.

(Restore instructions have been provided on [page 12](#) of this document.)

18. Launch the NY Clerk installer from the BAS directory specified in step #13.

- a. NY Clerk installer password is **wampum**.
- b. You can leave the installer type as **Typical Install**.
- c. Enter the SQL Server name in the *SQL Server* field (ex. **computername\sqlexpress**).
- d. Enter the database name in the *Database* field (*NY_Clerk* is the BAS default).
- e. Add the Update path to the Update repository field. We strongly recommend using the UNC path (ex. \\SERVERNAME\BAS_Shares\Clerk\Updates) instead of a mapped drive.

If this is an installation on a Host Workstation that will not have other workstations connecting to the SQL database, you can just use the local C drive path to the NY_Clerk directory. (ex. C:\Program Files(x86)\BAS\NY_Clerk_Updates)

- f. Click Install to finish the installation.

19. Head back into the **BAS** directory and now open the **NY_Clerk** directory.

20. Run **UP2D8.exe** as **admin**.

21. Click on the **Check For Updates** button and download the latest updates.

(Update instructions have been provided on [Page 8](#) of this document.)

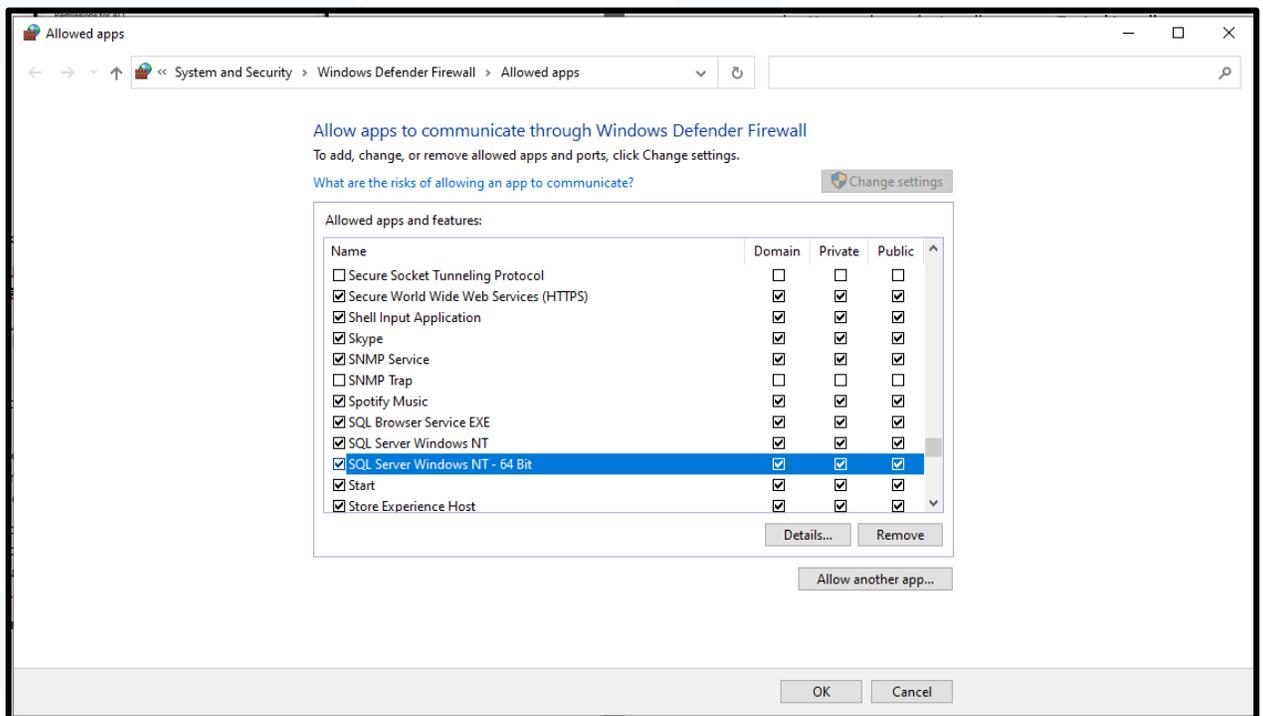
22. After the update has been downloaded run the Launch Clerk icon on the desktop as **admin** to apply the update.

23. The Clerk and Database installations are complete. The last part of the installation on the server is to create Firewall exemptions for SQL and to make sure the SQL named pipes are open to allow external connections to the server.

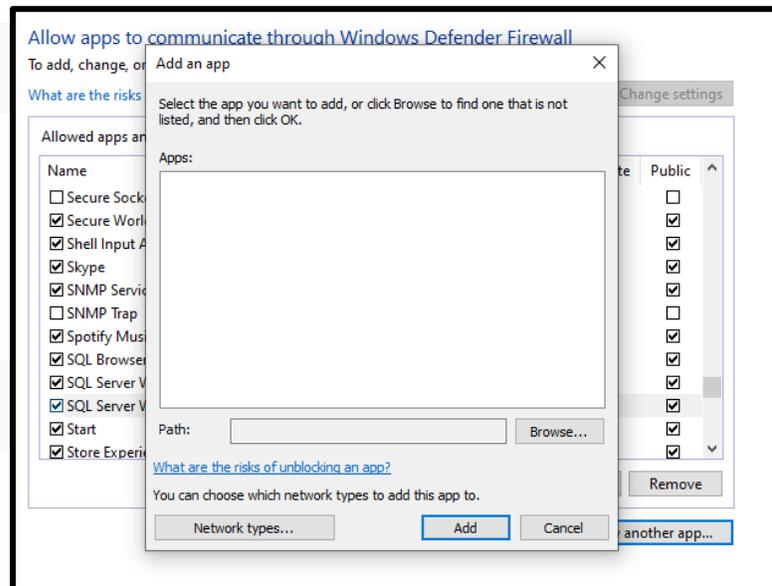
NOTE: These steps should only be followed if this database is on a server or on a host machine that will be hosting the database to other workstations. If this is a standalone database and software machine there is no need for the follow steps.

24. If you are using a Windows Firewall – Open up the Services App, locate **SQL Server**, and double click on it to open the properties windows. Look for the **Path to executable** and note it. Do the same thing for **SQL Browser**.

25. Use the Windows Search feature and type in **Firewall**. You should see an option that says **Allow an app through Windows Firewall** click on it to launch it.



26. When the Window opens click on **Change Settings** and then click on **Allow another app**.

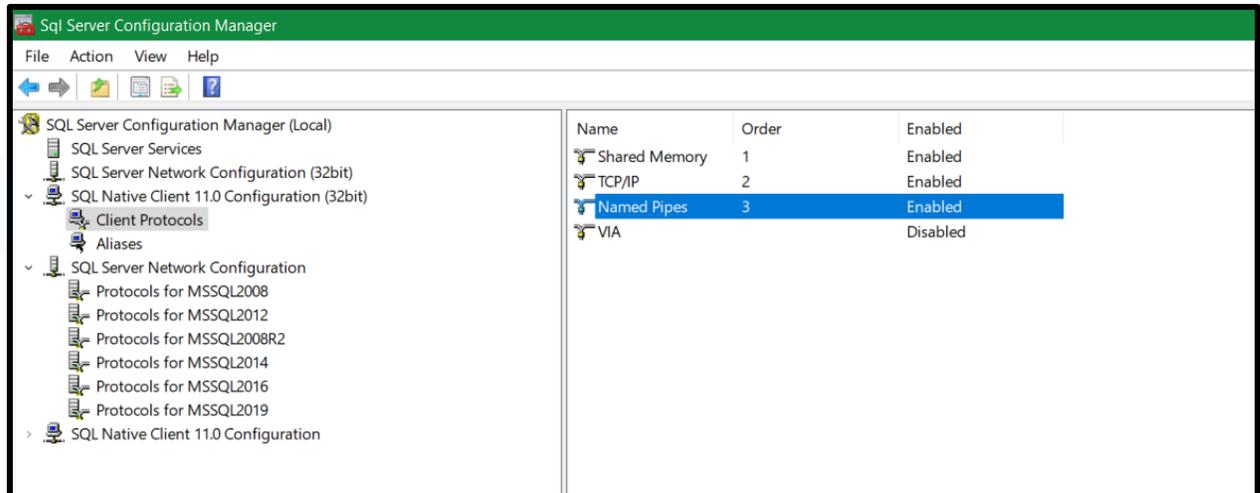


27. Click on **Browse** and enter in the path for the SQL Server. In that directory find the `sqlservr.exe`, select it, and then hit **Add**. Once it has been added check the boxes for Domain and Private.

28. Click Allow another app again and then click on Browse. Enter the path for the SQL Browser, select `sqlbrowser.exe`, and then hit **Add**. Once it has been added check the boxes for Domain and Private.

29. Next you need to configure SQL Server to allow incoming connection by opening the **SQL Server Configuration Manager**. This tool can be found by going to the **Start Menu**, scroll to the Ms and locate the **Microsoft SQL Server 2019** folder. Expand it and you'll see a red tool box named **SQL Server Configuration Manager**.

30. When this tool opens, expand the **SQL Native Client 11.0 Configuration** and select **Client Protocols**. On the right side, right click on **Named Pipes** and select **Enabled**.



31. Now click on **SQL Server Services** on the left side and locate **SQL Server** to restart the service by right clicking on it and selecting **Restart**.
32. The connections should now be accepted by the SQL Server with the configurations above but just in case it does not - go back to the **Windows Firewall > Allowed Apps** and check the box for **Public** in both **SQL Server** and **SQL Server Browser**.

Applying Updates – Host Machine

IMPORTANT

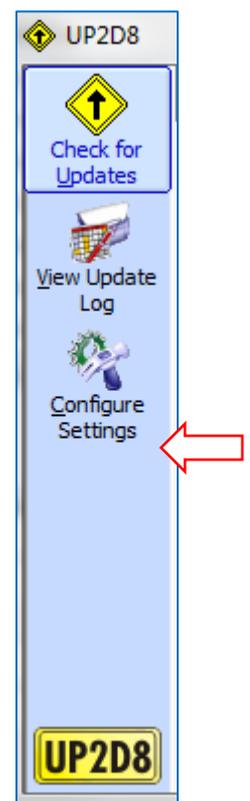
Due to recent procedure changes in the way the UP2D8 component handles updates, extra attention must be paid to the Clerk version following installation.

All users must sign out of the Clerk software before doing any updates. Not doing so may cause corruptions in the database or other issues we may have to bill to resolve

The initial version of Clerk is 7.8.9, it is essential that the user is updated before continuing to use the software. If more workstations are involved, please be sure that they are all updated before continuing.

1. Open the NY Clerk folder which can be found in the path specified in step 12 of the installation instructions above on the previous page.
2. Locate the UP2D8 application and **right click on it to run it as admin.**
3. Select "Configure Settings" from the left-hand side of the screen
Verify web address - http://update.basgov.com/NY_Clerk_UP2D8
4. Set the Update Repository path to the designated NY Clerk Updates folder. Do this by hitting the yellow browse folder or by copy and pasting the correct file path into the field.
 - a. *Note: A default path and folder will have been configured during the install. However, **all workstations must be pointed to the same shared Update Repository path which can be created on the host machine or server.** Each workstation must then be pointed to the shared folder through the UP2D8 program. This shared repository requires full control in the security setup, by right clicking on the folder and going into the properties.*
5. Click "Save"
6. Create a new shortcut using the "Create Shortcuts" button on the bottom left corner of the screen.
7. Return to the Updates page and "Check for Updates"

Release key is **lacesout** ← This changes every update

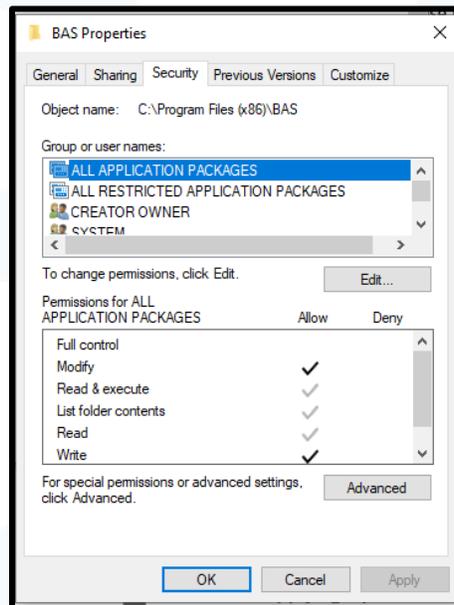


8. Finally, launch the clerk program using the new shortcut. Updates will apply to the program. *Note: **Be sure to run as administrator to apply updates.***

B. Workstation Install/Re-Install

(The NY_Clerk database is hosted on another workstation or server.)

1. Download the lite installer from the FTP site to the local workstation.
2. Make sure .NET 3.5 is installed on the workstation
3. Create a **BAS** directory inside of **C:\Program Files (x86)**. Right click on the BAS directory and click on **Properties** and then on the **Security** tab. You'll want to make sure that the **All Application Packages, All Restricted Application Packages, Users, and Trusted Installers** groups are set to the **Modify** permission.



4. Transfer the NY Clerk installer to the BAS Directory.
5. Run the NY Clerk installer as admin.
 - a. NY Clerk installer password is **wampum**.
 - b. You can leave the installer type as **Typical Install**.
 - c. Enter the SQL Server name in the *SQL Server* field (ex. **computername\sqlexpress**).
 - d. Enter the database name in the *Database* field (*NY_Clerk* is the BAS default).

- e. Add the Update path to the Update repository field from the server /host workstation. This should be a UNC path and never a mapped drive as this may cause issues with the downloads. (ex. [\\SERVERNAME\BAS_Shares\Clerk\Updates](#)) You can also browse to the server by opening a new explorer window and typing [\\SERVERNAME](#) to see



the correct path for the Clerk updates. Further instructions can be found on [Page 11](#) of this document.

- f. Click Install to finish the installation.
 - g. Run the Launch Clerk icon on the desktop as admin to apply the updates.
6. The installation is complete.

Applying Updates – Workstation(s)

IMPORTANT

Due to recent procedure changes in the way the up2d8 component handles updates, extra attention must be paid to the Clerk version following installation.

All users must sign out of the Clerk software before doing any updates. Not doing so may cause corruptions in the database or other issues we may have to bill to resolve.

The initial version of Clerk is 7.8.9 it is essential that all workstations are updated before continuing to use the software.

Note: A shared update repository should exist on the server or host machine. All workstations must be pointed to the same shared Update Repository path. This shared repository requires full control in the security setup, which may be configured by right clicking on the folder and going into the properties.

1. Open the NY Clerk folder which can be found in the path specified in step 5 of the installation instructions on the previous page.
2. Locate the UP2D8 application and **right click on it to run it as admin.**
3. Once open select "Configure Settings" from the left-hand side of the screen
4. Browse to the shared update folder using the browser folder next to "Update Repository". Or copy and paste the appropriate file path into the field.
5. Save the changes.
6. Create a new shortcut using the "Create Shortcuts" button on the bottom left corner of the screen.
7. Finally, launch the clerk program using the new shortcut. Updates will apply to the program. *Note: Be sure to run as administrator to apply updates.*



**IF UPDATES DO NOT APPLY AFTER FOLLOWING THESE STEPS
CONTACT EGT at (518) 371-6869**

C. Migrations

Prior to following the steps below, follow steps 1-17 on the **Server/Host Workstation Install** [section](#).

Restoring the Database:

1. Save the backup from the old server into a folder on the C: drive of the new host machine.
2. While in SQL Server, right click on the *Database* folder and select Restore → Database.
3. Enter NY_Clerk into the *To Database:* field.
4. Select the backup to be restored:
 - a. Select the radial button *From Device*
 - b. Click the "... " button
 - c. Hit "Add"
 - d. Browse to the location of the backup which was transferred to the new host machine
 - e. Click "OK"
5. The file will appear listed in the bottom portion of the window. Check the box next to the file.
6. Click "Ok" on the bottom of the window. The file will be restored.

Configuring the Database:

1. Expand the *Database* folder.
2. Locate and expand the NY_Clerk folder.
3. Expand the *Security* folder within NY_Clerk. Then expand the *Users* folder.
4. Right click on the *Clerk* user and delete the user.
5. Scroll down to the main *Security* folder (located lower on the database tree and aligned with the main database file at the top of the sql tree). Expand the folder to display the *Logins* folder.
6. Right click on *Logins* → New Login.
7. Type Clerk into the *Login Name:* field.

8. Next, select SQL Server authentication. Enter the password: BASWord. Re-type the password in the Confirm password field.
9. Uncheck *Enforce password policy*.
10. In the upper-left portion of the screen open User Mapping.
11. Select the NY_Clerk database.
12. Check db_owner in the bottom portion of the window.
13. Hit "OK".

Verify the Version

Verify that the database and program are configured properly by logging into the software and verifying the version number.

- a. System Version is displayed in the bottom right-hand corner of the login screen.
- b. Versions are also viewable by logging in and going to Help → About.

Additional System Configuration

Setting a Default Printer

- Printer settings will need to be configured. To set a default printer go to:
System Manager → Printer Setup
- On the right side of the window select a printer from the dropdown. Then select:
Tools → Default Other Printers in List to this one.
- If more than one printer is used, begin by setting a default printer and then select the individual form(s) from the left window and change the printer as needed. Hit "OK" to complete the changes.

Setting RTFs

RTF forms are set by the user in the Dog, General Licensing and Marriage modules. It is required that the paths to the RTFs are set correctly in order to run reports including dog renewal/delinquent letters. *Note: This will need to be done on each workstation. If multiple workstations are used it is recommended to use a shared folder containing the RTFs.*

To set RTF paths in the Dog module:

- Enter the Dog Module.
- Go to: System Manager → Settings → Module Control File
- At the top of the module file select the "Other" tab.
- A series of letters and their paths will display in the middle of the screen. Hit the "Browse" button next to each file path and browse to the NY_Clerk directory from step 5 during the install. *Note: the system may automatically do this.*
- Select each letter according to name. (ex. Dog Renewal = DogRenewal0106.rtf)
- Hit "Accept" at the bottom of the module control file when finished.

To set RTF paths in the General Licensing module:

- Enter the General Licensing Module.
- Go to: Tools → Lookup Files → License Types
- Highlight a license on the left side of the window then hit *Prgm Names*.
- Hit "Browse" in the new window. Browse to the NY_Clerk directory from step 5 during the install. *Note: the system may automatically do this.*
- Select the rtf named *Generic.rtf*.
Note: Handicap.rtf should be selected when setting the handicap expiration letter.
- Hit "OK". Repeat the process for each license type. Hit "Save" and "Close" when finished.

To set RTF path in Marriage module:

- Enter the Marriage Module.
- Go to: System Manager → Settings → Module Control File
- A "Browse" button will be present in the middle-right of the screen. Hit "Browse" and browse to the NY_Clerk directory from step 5 during the install. *Note: the system may automatically do this.*
- Select the rtf named *MarrLtr2.rtf*.
- Hit "Accept" at the bottom of the module control file when finished

Form Alignments

Marriage, Death and Birth forms will need to be aligned to print properly on their corresponding forms.

To do this:

- Enter the Printer setup window and highlight the correct form.
- Double check that the printer, orientation and paper source are correct. After, these items have been confirmed the user may begin adjusting the margins.
- The fields used to do this are located toward the bottom of the screen and are labeled "Top:" and "Left:"

Increasing the top margin moves the form down. Alternatively, decreasing the margin moves the form up. The left margin is the same. Increasing the left margin moves the form right, while decreasing the margin moves the form left. *It often takes several attempts to get an alignment right, so it is recommended that plain or scrape paper be used instead of forms during the test printing.*