Exact Globe & Exact Globe+

User Guide

Getting Started

Product Update 502

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CONTENTS

WELCOME TO EXACT GLOBE NEXT AND EXACT GLOBE+!

This guide provides the information you need to work effectively with Exact Globe Next and Exact Globe+. It is part of the series of user manuals for Exact Globe Next and Exact Globe+. The goal of this documentation is to help you to get quickly acquainted with the product and the possibilities it offers. It will help all users, especially those without much experience with our software, to get started with and benefit from the product straightaway. Exact Globe Next and Exact Globe+ is an integrated software solution; its modules of related business processes function together in an integrated manner. Besides the user manuals, there are several information sources, related to the software, available to you. You can access online help documents on Exact Globe Next and Exact Globe+ functionalities while working with the software by just pressing the F1 key. The list of help document also contains release notes related to the product. They inform you of the improvements and functional additions in the various releases of the product.

You can also access the help documents, release notes and other related documents online through the Exact Customer Portal on *www.exact.com*. The Customer Portal is a protected part of the Exact internet site, which has been specially developed to provide you with information and to help you get the maximum yield from your software. This portal informs you about our contacts, downloads, FAQs, and the latest product news. We invite you to use the portal as often as you wish!

Thank you for using Exact Globe Next and Exact Globe+ and this user manual!

> **Note:**
> This user manual contains information applicable to both Exact Globe and Exact Globe+. However, the screens displayed are Exact Globe screens.

1. INTRODUCTION TO EXACT GLOBE NEXT AND EXACT GLOBE+

This section provides an introduction to Exact Globe Next and Exact Globe+ and how it has developed since its primitive version during the Microsoft DOS days. Today, it is a truly integrated multi-functionality business software solution. The topics covered are as follows:

- Software market in the last 20 years
- Chronological developments
- Exact Globe Next and Exact Globe+

1.1 SOFTWARE MARKET IN THE LAST 20 YEARS

The software market for business solutions has evolved dramatically over the past two decades. This has been the consequence of technological advancements, in particular, the rapid increase in data storage capacity and the processing speed of computers, the migration from the use of standalone computers to networked computers and the internet, and the transformation of computing landscape from DOS to Windows.

In addition to technological advancements, the business software market has also been driven by the ever increasing demanding expectations of the users. What used to be just meant for recording financial data electronically is now expected to facilitate optimization of business processes, improve monitoring and controlling operations, and provide real-time information for strategic planning.

As a leader in providing business software solutions, Exact always keeps itself abreast with the latest developments in technological advancements and market demands, with the sole purpose of providing its customers with only best-in-class solutions that align with contemporary best practices.

Stages of software development have always been characterized by what the prevailing technology can offer. The upgrading of Exact products is no exception and follows the different advancement phases of information technology. The following describes the chronological developments of the Exact products.

1.2 CHRONOLOGICAL DEVELOPMENTS

The DOS era started software development and it was succeeded by Windows. Exact has existed since the DOS era and therefore, its products have also undergone the similar transformation.

1.2.1 Exact for DOS

Exact for DOS, the first range of products to be developed by Exact, was first developed as **E-Account** to meet the needs in the market to computerize financial accounts. **E-Account** was well received and customers progressively requested more and more functionalities. To serve the customers better, various modules were added to the original **E-Account**. However the capability of computers and that of database software were quite limited then, so the additional modules were executed separate from the core **E-Account**. While links were used to enable data transfers from one component to another, the elimination of duplicated data entry required extra processes.

With the advent of Windows, the limitations of DOS became apparent. The graphic capability of DOS was so limited that even simple graphical layouts and the use of certain fonts were impossible, not to mention, graphical user interface. Furthermore, the support of DOS applications by newer operating systems came to an end when Microsoft Windows XP arrived. It was inevitable that Exact for Windows had to be developed.

1.2.2 Exact for Windows

The emergence of Exact for Windows primarily represented a step forward in technology for the product. The trends then were a preference for using Windows and a growing need for more information and hence, larger databases. Exact for Windows aligned to these trends. It conformed to the graphical user interface standards of Windows and incorporated extensive layouts with attractive graphics, pictures, and fonts. To meet the demand to process a larger database, worsened by the use of graphical data, Exact for Windows was among the pioneers to store databases on the server to allow fast access and reliable storage via the client-server technique.

The move from Exact for DOS to Exact for Windows was basically a technological evolution. Exact was aware that many system design issues of business information systems were not addressed. These system design issues did not only concern Exact products alone, but rather, they were generic issues concerning every business information system. These issues were due to most generic systems which were (and are still) not fully-integrated and as such, they provided:

- many isolated, non-integrated subsystems.
- many applications but little and fragmented information.
- many data in many isolated, non-integrated databases, but little and fragmented information.

In other words, they involved very high investments on the many subsystems, applications and databases, but very low returns on useful information. Such generic systems were not cost-effective and there would be hardly any return on investment, if at all.

1.2.3 Exact Globe 2000, Exact Globe 2003, and Exact Globe Next/Exact Globe+

To resolve these issues, Exact realized that just by developing Exact for Windows 3.x and higher would not bring forth the desired solution. A revolutionary out-of-the-box approach to the system design was needed. The revolutionary solution must have the users in mind and provide them with business operations efficiency to achieve true cost reduction. And Exact eventually came up with such a revolutionary solution and called it "One-X".

One-X was based on the idea of oneness of database. The one database would be centrally stored and it would be accessible to everyone real-time directly without any unwanted processes to store and retrieve the information. And this revolutionary One-X architecture was incorporated in the third-generation Exact Globe 2000 onwards.

1.3 EXACT GLOBE NEXT/EXACT GLOBE+

Exact Globe Next/Exact Globe+ became the next upgrade of the Exact Globe version. Its design was refined to abide closer to the One-X principle, and in addition, many enhancements were incorporated. These enhancements are described in the following.

Real time information. Quick decisions.

The ultimate purpose of using information systems is to obtain real-time, complete, accurate information to facilitate business decision-making. Exact Globe Next/Exact Globe+ ensures real-time availability of precise information to quicken the business decision-making process. In fact, it offers more than that by giving users a glimpse into the future. Via the system, the cash flow position of the immediate future is readily available based on the current committed sales and purchases. Such forecasts further enhance effective control and management.

One source. Accurate information.

The accuracy of information has always been a concern for many companies. Frequently, different sources give rise to conflicting information. The unique One-X architecture of Exact Globe Next/Exact Globe+ requires all information be structured and stored in one central location accessible to everyone to minimize errors due to misinterpretations.

Digital archive. Easy access.

The digital archive makes its information available wherever it is needed. No errors are introduced as original source documents are directly available. Time spent to retrieve information is also minimal.

Integrated system. Straightforward process.

The search and reference options available facilitate easy linking of financial entries, and assist in performing checks and preparing periodic reports. Related processes are integrated and many entries are processed automatically and entered into the respective financial accounts. The **Accountancy** functionality available makes communication on financial figures with the accountant a straightforward affair.

More functionalities. Total solution.

Exact Globe Next/Exact Globe+ has incorporated additional functionalities as well as infused enhancements to the existing modules in its predecessor, hence giving the user a total solution to manage their business.

- Customer Relationship Management
- Production
- Service Management
- Internal Use
- Material Planning
- Human Resource Management and Payroll

2. INSTALLATION

This section covers the system and software requirements for Exact Globe Next/Exact Globe+, and how the software application is installed.

The topics covered are:

- System and general requirements for Exact Globe Next/Exact Globe+
- Standalone workstation installation
- Installation of Microsoft SQL Server Express via Create company wizard
- Network installation

Installation of Microsoft SQL Server 2014, Microsoft SQL Server 2016, or Microsoft SQL Server 2017.

2.1 SYSTEM AND GENERAL REQUIREMENTS FOR EXACT GLOBE NEXT/EXACT GLOBE+

Third party software products, such as Microsoft Windows, Microsoft Office, Microsoft SQL Server, and Exact Synergy Enterprise have their own system requirements which might be different from the system requirements of Exact Globe Next/Exact Globe+. Therefore, these should be taken into account during the installation of Exact Globe Next/Exact Globe+. Moreover, Exact products follow the Microsoft support lifecycle policy. In this policy, Microsoft provides guidelines for product support availability throughout a product lifecycle. For more information, see *Microsoft Support Lifecycle Policy (21.439.810)* in Exact Synergy Enterprise.

2.1.1 System requirements for Exact Globe Next/Exact Globe+

Exact Globe Next/Exact Globe+ can be installed on standalone and networked systems. The minimum and preferred system requirements are shown in the following table:

Stand-alone scenario

Requirements for a workstation in a stand-alone environment

	Supported system requirements
Operating system	Windows 10 *or* Windows 11
Processor	X86 and X64 at 1.0 Ghz
Internal memory	Memory requirements of OS + 512 MB RAM + 1 GB RAM for SQL
Free hard disk space	1.5 GB for a full installation including the help files
Network connection	100 mbit\s
Additional component	WCF Data Services 5.0
MS Office version	32-bit version of Microsoft Office 2016 *or* 32-bit version of Microsoft Office 2019 *or* 32-bit and 64-bit version of Microsoft Office 2021 (Globe+ only) *or* 32-bit version of Microsoft 365 Apps for enterprise **Note:** Globe+ also supports 64-bit
MS SQL Server version	Microsoft SQL Server 2014 *or* Microsoft SQL Server 2016 *or* Microsoft SQL Server 2017 *or* Microsoft SQL Server 2019 *or* Microsoft SQL Server 2022
Monitor resolution	Minimum 1024 x 768, maximum 2560 x 1440 **Note:** The aspect ratio should be 4:3 for optimum performance.

Server and workstations

Requirements for a dedicated database server

	Supported system requirements
Operating system	Microsoft Windows Server 2012 TS *or* Microsoft Windows Server 2012 R2 *or* Microsoft Windows Server 2016 *or* Microsoft Windows Server 2019 *or* Microsoft Windows Server 2022
MS SQL Server version	Microsoft SQL Server 2014 *or* Microsoft SQL Server 2016 *or* Microsoft SQL Server 2017 *or* Microsoft SQL Server 2019 *or* Microsoft SQL Server 2022
Processor	X86 and X64 at 1.5 Ghz
Internal memory	OS + 1 GB RAM
Free hard disk space	The free hard disk space on the drive where the databases are stored should be 1.5 times the annual database growth. The free hard disk space on the drive where the operating system is installed and the drive where the tempdb of SQL Server is located should be at least 5 GB in total.
Network connection	100 mbit\s
Additional component	WCF Data Services 5.0

Requirements for a workstation in a network environment

	Minimal system requirements
Operating system	Windows 10 *or* Windows 11
Processor	X86 and X64 at 1.0 Ghz
Additional component	WCF Data Services 5.0
Internal memory	Memory requirements of OS + 512 MB RAM
Free hard disk space	1.5 GB for a full installation including the help files
Network connection	100 mbit\s
MS Office version	32-bit Microsoft Office 2016 *or* 32-bit Microsoft Office 2019 *or* 32-bit and 64-bit Microsoft Office 2021 (Globe+ only) *or* 32-bit Microsoft 365 Apps for enterprise **Note:** Globe+ also supports 64-bit
Monitor resolution	Minimum 1024 x 768, maximum 2560 x 1440 **Note:** The aspect ratio should be 4:3 for optimum performance.

Note:
The system requirements detailed here are based on workstations in a networked environment that are not running any versions of Microsoft SQL Server.

Remote Desktop Servers

Requirements for dedicated Remote Desktop Servers

	Minimal system requirements
Operating system	Windows Server 2012 with Remote Desktop Services *or* Windows Server 2012 R2 *or* Windows Server 2016 *or* Windows Server 2019 *or* Windows Server 2022
Processor	X86 or X64 at 1.0Ghz (minimum requirement)
Internal memory	Memory requirements of OS and 128 MB RAM per user
Free hard disk space	
Network connection	256 kbps for every 4 users (other applications not included)

Exact Globe Next/Exact Globe+ with extended functionality

Requirements for Exact Globe Next/Exact Globe+ with extended functionality

Minimal system requirements	
General server requirements	- Microsoft Visual C++ Runtime 2008 (x86) Redistributable Service Pack 1 - Microsoft MSMQ (Server Core features) - Microsoft Windows Communication features (HTTP and non-HTTP activation) - Microsoft Internet Information Services 6.0 or 7.0 and above - Microsoft SQL Server 2014. 2016, 2019, or 2022
General client requirements	Microsoft Visual C++ Runtime 2008 (x86) Redistributable Service Pack 1
Internal memory	2GB RAM **Note:** An additional (extra) 2GB memory is required for scenarios where the Web Server (IIS), Reporting Server (SSRS), and Data Integration (DI) share the same database (SQL) server. If the Web Server (IIS), Reporting Server (SSRS), and Data Integration are installed on standalone machines, those machines will require a minimum of 2GB memory.
Monitor	Minimum 1280 x 1024, maximum 2560 x 1440 **Note:** The aspect ratio should be 4:3 for optimum performance
Web browser	Microsoft Edge
Additional components	- Exact Synergy Enterprise - Event Manager - Reporting Services

2.1.2 General requirements and additional information for installing and using Exact Globe Next/Exact Globe+

The following are general requirements and additional information for installing and using Exact Globe Next/Exact Globe+:

1. Microsoft Visual C++ Runtime 2008 (x86) Redistributable Service Pack 1 is required (this feature is automatically installed if not present in the target server and target client). For more information, see Microsoft Download Center - Microsoft Visual C++ 2008 Service Pack 1 Redistributable Package ATL Security Update at *http://www.microsoft.com/en-us/download/details.aspx?id=11895*.
2. Windows XP Service Pack 3 update is needed for Windows XP workstation.
3. Use scalable hardware.
4. For support of Exact Globe Next/Exact Globe+ in a WAN environment see *Support of Exact Globe and Exact e-Synergy in a LAN and WAN environment (Doc ID: 10.287.204)* in Exact Synergy Enterprise.
5. For support of Clustered SQL Server environment see *Support of Exact Globe in a clustered SQL server environment (Doc ID: 10.573.735)* in Exact Synergy Enterprise.
6. Virtual platforms (for example, VMware and HyperV) are supported by Exact Globe Next/Exact Globe+ in combination with MSRDC (Microsoft Remote Desktop Client) from a supported Microsoft platform. For all other combinations, see *Corporate statement for VMware in combination with Exact's products (Doc ID: 16.037.327)* in Exact Synergy Enterprise.
7. The system requirements are based on the usage of Exact Globe Next/Exact Globe+ only. If other applications are used on the same machines, the requirements should be increased.
8. System requirements for Terminal Servers are based on dedicated Terminal Servers, which means no other applications are running. In case other applications are running as well, the hardware specifications should be increased accordingly.
9. Every new service pack is supported automatically by Exact, unless explicitly announced otherwise.
10. In a networked environment, a Microsoft Active Directory (domain) needs to be present. The workstations, the SQL server, and the Windows Terminal Server need to be part of the same active directory.
11. Microsoft Office 2003 Standard Edition does not support the **CRM Word Merge** functionality due to limited functionality of this Standard Edition.
12. The system requirements of Exact Event Manager can be found in *System Requirements for Exact Event Manager (Doc ID: 20.854.166)* in Exact Synergy Enterprise.
13. For support of Exact Globe Next/Exact Globe+, Exact Synergy, and Exact Synergy Enterprise virtualizing Microsoft SQL Server on a Storage Area Network, see *Corporate statement for using a virtualized Microsoft SQL Server in combination with Exact products (Doc ID: 21.603.931)* in Exact Synergy Enterprise.
14. If you are using Exact Integration, make sure you have the correct version of Exact Globe Next/Exact Globe+ and Exact Synergy Enterprise installed for Exact Integration to work. For more information, see *Support Matrix - Exact Integration (Doc ID: 22.290.420)* in Exact Synergy Enterprise.
15. Exact follows the Microsoft support lifecycle policy. In this policy, guidelines are provided by Microsoft for product support availability throughout a product lifecycle. For more information, see *Microsoft Support Lifecycle Policy (Doc ID: 21.439.810)* in Exact Synergy Enterprise.
16. Regularly back up the administrations or databases and store the backup on a different media device (not the machine where Microsoft SQL Server is installed).
17. Perform regular database maintenance.
18. Internet connection is mandatory for Exact Globe Next/Exact Globe+.
19. Microsoft SQL TDE is supported.

2.2 STANDALONE WORKSTATION INSTALLATION

The installation of Exact Globe Next/Exact Globe+ on the workstation is described here. Note that for a standalone system, *Microsoft SQL Server Express* also needs to be installed on the standalone workstation. For more information, see *2.3 Installation of Microsoft SQL Server Express via Create Company Wizard*.

To install Exact Globe Next/Exact Globe+ on standalone systems:

1. Insert the installation CD in the CD-ROM drive.
2. Open the folder **EG2003E_416_CDSet** from the CD-ROM drive. The folder contains options of setup files in different languages, as shown in the following table:

Setup file name	Default language
Setup_AE.exe	American English
Setup_DE.exe	German
Setup_ES.exe	Spanish
Setup_FR.exe	French
Setup_NL.exe	Dutch

3. Double-click the setup file of the required language.
4. In the **Exact Workstation Installation** screen, select **CD workstation installation** at **Install mode**.
5. At **Local installation directory**, type or select the physical path of the local installation directory.

6. Click **OK**.
7. A message will be displayed requesting for confirmation. Click **Yes** to continue.
8. Once the installation has completed, select **Yes** to launch Exact Globe Next/Exact Globe+ immediately or **No** to exit without launching Exact Globe Next/Exact Globe+.

2.3 NETWORK INSTALLATION

The following procedure is meant for installing Exact Globe Next/Exact Globe+ on network servers. Once the installation has completed, proceed with the installation of Exact Globe Next/Exact Globe+ on the workstations.

To install Exact Globe Next/Exact Globe+ on the network server:

1. Insert the Exact Globe Next/Exact Globe+ installation CD in the CD-ROM drive.
2. Open the folder **EG2003E_416_CDSet** from the CD-ROM drive. The folder contains options of setup files in different languages, as shown in the following table:

Setup file name	Default language
NetSetup_AE.exe	American English
NetSetup_DE.exe	German
NetSetup_ES.exe	Spanish
NetSetup_FR.exe	French
NetSetup_NL.exe	Dutch

3. Double-click the setup file of the required language.
4. In the **Exact Network Installation** screen, select **CD network installation** at **Install mode**.
5. At **Local installation directory**, type or select the physical path of the local installation directory.

6. Click **OK**.
7. A message will be displayed requesting for confirmation. Click **Yes** to continue.
8. Once the installation has completed, click **OK** to exit.

2.3.1 Installing Exact Globe Next/Exact Globe+ on workstations in a networked environment

Once the installation of Exact Globe Next/Exact Globe+ is completed on the server, you can proceed to launch the setup wizard on the networked workstations.

To install Exact Globe Next/Exact Globe+ on workstations in a networked environment:

1. On the networked workstation, browse to locate the local directory path where Exact Globe Next/Exact Globe+ is installed on the server, and then double-click to open the folder.
2. Double-click the **wsetup.exe** file within the folder. The **Exact Workstation Installation** screen will be displayed.
3. At **Install mode**, select **LAN workstation installation** at **Install mode**.
4. At **Local installation directory**, type or select the physical path of the local installation directory.

5. Click **OK** to proceed.
6. A message will be displayed requesting for confirmation. Click **Yes** to continue.
7. Once the installation has completed, restart the networked workstation. Exact Globe Next/Exact Globe+ is ready for use.

2.4 INSTALLATION OF MICROSOFT SQL SERVER 2014, MICROSOFT SQL SERVER 2016, OR MICROSOFT SQL SERVER 2017

Depending on the size of the network, either Microsoft SQL Server 2014, or Microsoft SQL Server 2016, or Microsoft SQL Server 2017 needs to be installed on the server. The following sections describe the installation of the database software.

2.4.1 Installing Microsoft SQL Server 2014

Microsoft SQL Server 2014 can be installed based on the following steps.

To install Microsoft SQL Server 2014:

1. Log in as an administrator on the server (of a workstation in case of a standalone installation).
2. Insert the SQL Server installation DVD into your DVD drive. When the autorun is not performed, open the DVD drive in Windows Explorer and start the installation by clicking **Setup.exe**.
3. The **SQL Server Installation Center** screen will be displayed. In this screen, you can view and execute several installation tasks.

4. Click **Installation** on the left panel. Next, click **New SQL Server stand-alone installation or add features to an existing installation**.

5. In the **Product Key** screen, type the product key at **Enter the product key** if the product key is not filled automatically. Click **Next** to continue. The screen with the license terms will be displayed.

6.   To continue, select **I accept the license terms** and click **Next**.

7. Checks will be performed to identify possible problems when installing the SQL Server Setup support files. The SQL Server Setup support files are needed for the installation of MS SQL Server 2014 and are automatically installed via this installation wizard. Click **Show details >>** to view the details of these checks. When all checks are passed, the results are displayed in this screen. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

Note:

It is possible that some warnings are displayed regarding the firewall. In spite of the warnings, it is still possible to continue with the installation. Depending on the situation, it may or may not be necessary to close the installation wizard and restart. When all checks are passed, this screen will close automatically and the next screen will be displayed.

8. The installation wizard will check for updates and install the available update files. As soon as this is done, the screen will close automatically and the next screen will be displayed:

9. Checks will be performed to identify potential problems that might occur during the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

Note:
Depending on the situation, it may or may not be necessary to close the installation wizard and restart.

10. Click **Next** to continue. However, the **Next** button is available only when no checks have failed.

11. In the **Setup Role** screen, define if you want to install all components of the SQL Server with default values. Select **SQL Server Feature Installation** and click **Next** to continue.

12. Select the features to install. When you select a feature, the corresponding information about this feature will be displayed on the right. Select the following features:

- Database Engine Services
- Reporting Services — Native (applicable only when you are using SQL Server Reporting services and/or Exact Globe Next/Exact Globe+ with extended functionality)
- Client Tools Connectivity
- Integration Services
- Documentation Components
- Management Tools — Basic
- Management Tools — Complete

Besides selecting the features, you do not have to change anything else. Click **Next** to continue.

13. Checks will be performed to identify issues that might block the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.
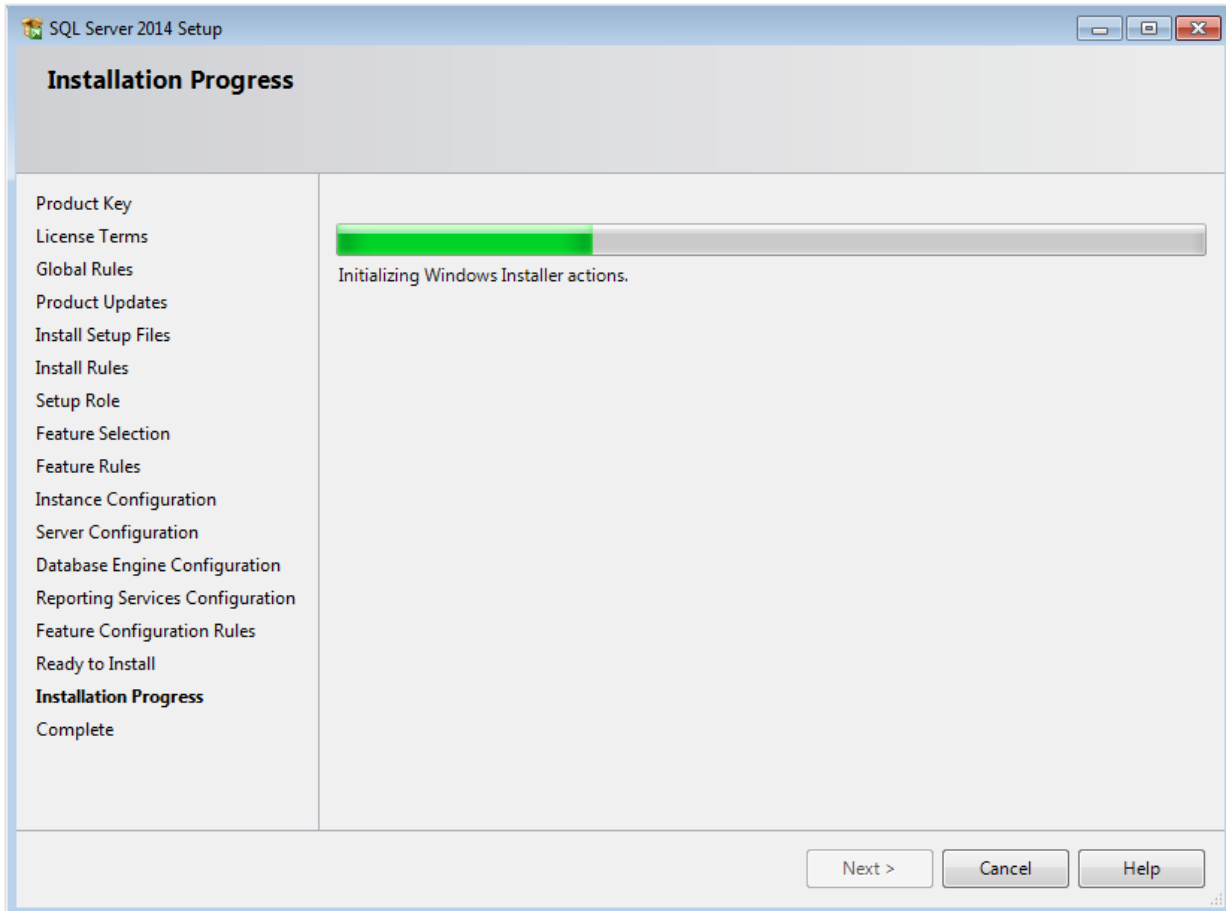
> **Note:**
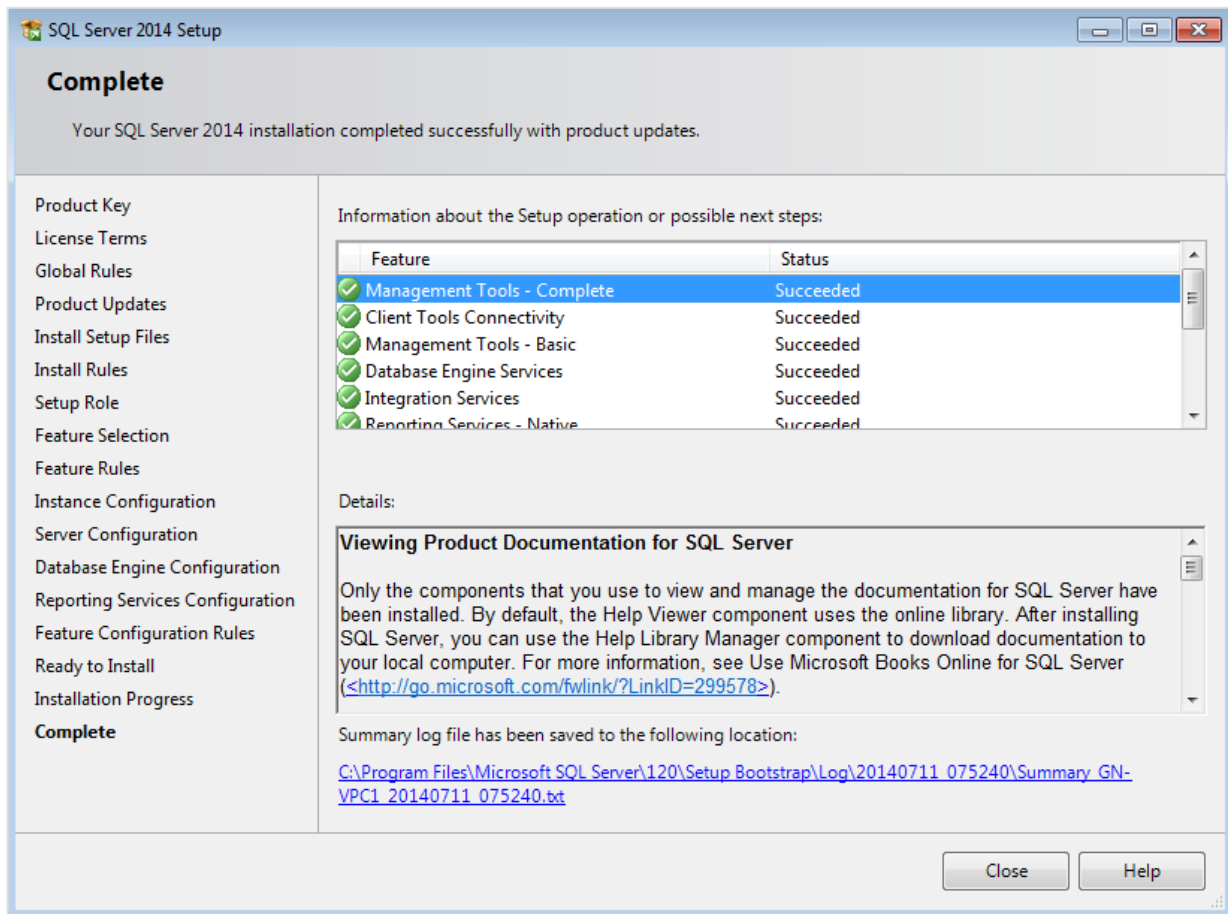> Depending on the situation, it may or may not be necessary to close the installation wizard and restart.

14. Click **Next** to continue. However, the **Next** button is available only when no checks have failed.

15. When the actions in the previous screen are completed, the screen will close automatically and the next screen will be displayed. In the **Instance Configuration** screen, define a name for the instance. This is the name for your SQL Server. Click **Next** to continue.

Note:
- **New installation —** When it is a new installation, there is no SQL Server present in your system yet. In this case, select **Default instance**. There is no need to change anything else in the screen. At the bottom of the screen, you can see if there are already other SQL Server instances present. When this is a new installation in a system where no SQL Server is present yet, this part of the screen is empty.
- **Installing new instance —** When there are existing SQL Server installations present, you have to select **Named instance** and define a name in the box next to it, for example "SQL2014". The name defined here has to be unique and cannot be the same as any of the names of the other instances that are already present on your system. The field **Instance ID** will be filled automatically and you do not have to change this manually. At the bottom of the screen, you can see if any other instances are present.

16. In this screen, under the **Service Accounts** tab, you can define which account you want to use for starting the MS SQL Server 2014 services. For a standard installation, accept the data as suggested in the screen. Keep in mind that when you select a user for which the password regularly changes, you will also have to change the password in the services every time. If you forget to change the password in the services, the services cannot be started and you will not be able to use the SQL Server until you have updated the password in the services, and have started the services. Depending on the account selected at **Account Name**, you have to enter the corresponding password at **Password**.

17. In the **Startup Type** column, you can define that the service has to start automatically when the system starts. The **SQL Server Database Engine** is the SQL Server itself. This service should always be started in order to use the SQL Server.
The **SQL Server Browser** service is a service that is used for identifying the ports that the installation of SQL Server listens to. This service needs to be started to enable network access. The **Startup Type** option of this service should be **Automatic**. The account name of this service cannot be changed.

18. Under the **Collation** tab, you can define the collation (character set) settings. For Western European countries, you can accept the collation as displayed in the screen. Click **Next** to continue. The following screen will be displayed:

19. Under the **Server Configuration** tab, define how you would like to log on to the SQL Server. When you are working with Exact Synergy Enterprise and/or Exact Globe Next/Exact Globe+ with extended functionality, select **Mixed Mode (SQL Server authentication and Windows authentication)**. Type your password at **Enter password** and **Confirm password**. This password is a password that will be used for the SA user; this default user is the System Administrator within the SQL Server. If you select **Windows authentication mode**, you do not have to type a password.

Note:
Regardless of which Exact product you use, you will always have to define one user or more at the bottom of the screen. These users will be administrators on the SQL Server. You have to select at least one user. This user will be the administrator on the SQL Server and can also add other users later on.

20. Click **Add Current User** to add the users that are currently performing the installation as an administrator. Click **Add** to add other users or **Remove** to remove selected users.

21. Click **Next** to continue.

22. In this screen, define if you want to configure the reporting services feature now or if you want to configure it later. Select **Install only** to install the feature and configure it later. Click **Next** to continue.

23. In the **Feature Configuration Rules** screen, checks will be performed for problems that might occur during the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

> **Note:**
> Depending on the situation, it may or may not be necessary to close the installation wizard and restart.

24. Click **Next** to continue. However, this button is available only when no checks have failed.

25. In the **Ready to Install** screen, a summary of the defined installation criteria will be displayed. Click **Install** to start the installation.

26. The screen displaying the progress of the installation will displayed. The installation might take some time.

27. As soon as the installation has completed successfully, the installed components are displayed with a green icon. Click **Close** to close the wizard.
28. To be able to access the SQL Server via a network, you have to activate some protocols. When working with a network environment, you have to check if the protocols are activated. If required, activate the protocols.

   - Start (on the server where MS SQL Server 2014 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **Microsoft SQL Server 2014**. Click **Configuration Tools**, and then **SQL Server Configuration Manager**.
   - Click **SQL Server Network Configuration**.
   - Select **Protocols for xxxx**. ("xxxx" has to be replaced by the name you have defined for the SQL server during installation).

- Right-click the protocols **Named Pipes** and **TCP/IP** and click **Enable** to enable these protocols.

29. You might also need to start the **SQL Server Browser** service. This service is used for identifying the ports that the installation of SQL Server listens to. When this service is not started, you can use the SQL Server only locally. To check if this service is started, follow these steps:

- Start (on the server where MS SQL Server 2014 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **SQL Server 2014**. Click **Configuration Tools**, and then **SQL Server Configuration Manager**.
- Click **SQL Server Services**.
- On the right side, the **SQL Server Browser** service is displayed.

Note:
When it is not started, the icon is red. When it is started, the icon is green. Ensure that the service starts automatically so that every time the system is restarted, the service will also start.

- Right-click **SQL Server Browser** and select **Properties**.
- In the **Properties** screen, click the **Service** tab.
- At **Start Mode**, select **Automatic**, as displayed in the following screen:

- Click **Apply** to apply the changes. The **SQL Server Browser** service will now start automatically every time the system is started.
- Next, start **SQL Server Browser**.
- In the **SQL Server Browser Properties** screen, click the **Log On** tab.
- Click **Start** to start the service. When the **Start** button is inactive, the **SQL Server Browser** service is already started and you do not have to start it.

> **Note:**
> When you have a firewall, you have to configure the firewall to allow connections with SQL Server 2014. The default port for SQL Server 2014 is 1433. The SQL browser used UDP port 1434.

2.4.2   Microsoft SQL Server Management Studio for SQL Server 2014

A proper setup should allow users who can log in the network to access to the SQL server. To do that, you will need to configure the SQL Server Management Studio.

To configure SQL Server Management Studio for SQL Server 2014:

1. Go to Start → All Programs → Microsoft SQL Server 2014 → SQL Server Management Studio.
2. A message will be displayed requesting for your connection to the specific server. Select the SQL 2014 server name. Depending on how you configure the connection mode during the SQL Server installation, select the type of authentication at **Authentication**. Type the user name and password at **User name** and **Password**.

3. Click **Connect**.
4. In the **Object Explorer** pane, expand the **Security** folder, and then expand **Logins**. A list of users who are currently logged in to the SQL server will be displayed.

5. Right-click the **Logins** folder and click **New Login….**

6. In the **Login - New** screen, click **Search** to select a user or group from a domain, and then click **OK** to add the new login.

7. Select either **Windows authentication** or **SQL Server authentication** as the required type of authentication. Type the password at **Password**.
8. Click **OK**.

2.4.3 Installing Microsoft SQL Server 2016

Microsoft SQL Server 2016 can be installed based on the following steps.

To install SQL Server 2016:

1. Log in as an administrator on the server (of a workstation in case of a standalone installation).
2. Insert the SQL Server installation DVD into your DVD drive. When the autorun is not performed, open the DVD drive in Windows Explorer and start the installation by clicking **Setup.exe**.
3. The **SQL Server Installation Center** screen will be displayed. In this screen, you can view and execute several installation tasks.

4. Click **Installation** on the left panel. Next, click **New SQL Server stand-alone installation or add features to an existing installation**.

5. In the **Product Key** screen, type the product key at **Enter the product key** if the product key is not filled automatically. Click **Next** to continue. The screen with the license terms will be displayed.

6. To continue, select **I accept the license terms** and click **Next**.

7. Checks will be performed to identify possible problems when installing the SQL Server Setup support files. The SQL Server Setup support files are needed for the installation of MS SQL Server 2016 and are automatically installed via this installation wizard. Click **Show details >>** to view the details of these checks. When all checks are passed, the results are displayed in this screen. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

> **Note:**
> It is possible that some warnings are displayed regarding the firewall. In spite of the warnings, it is still possible to continue with the installation. Depending on the situation, it may or may not be necessary to close the installation wizard and restart. When all checks are passed, this screen will close automatically and the next screen will be displayed.

8.   The **Product Updates** screen allows you to check for new update files online. However, you can click **Skip Scan** to skip this step. Click **Next** to continue.

9. The installation wizard will check for updates and install the available update files. As soon as this is done, the screen will close automatically and the next screen will be displayed:

10. Checks will be performed to identify potential problems that might occur during the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.
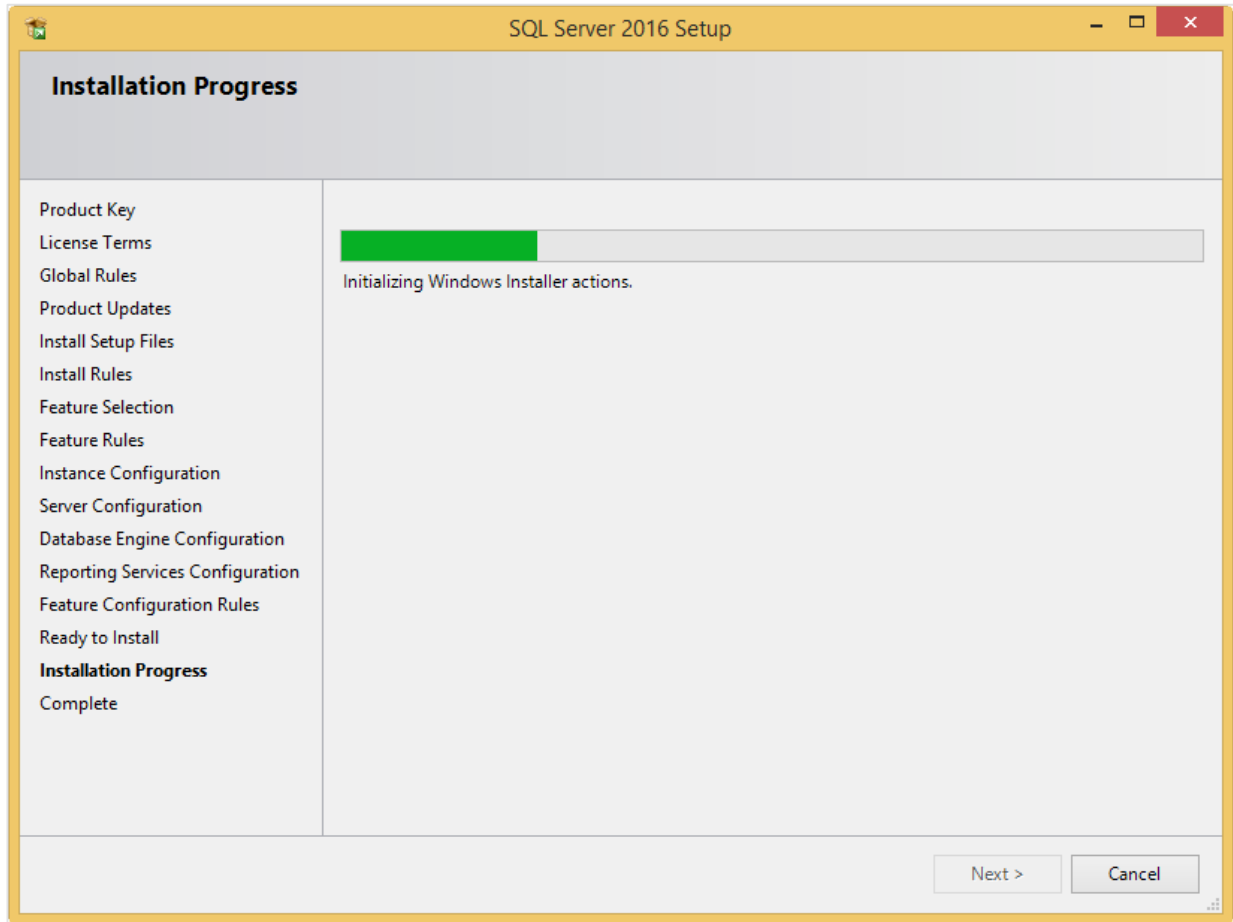
Note:
Depending on the situation, it may or may not be necessary to close the installation wizard and restart.
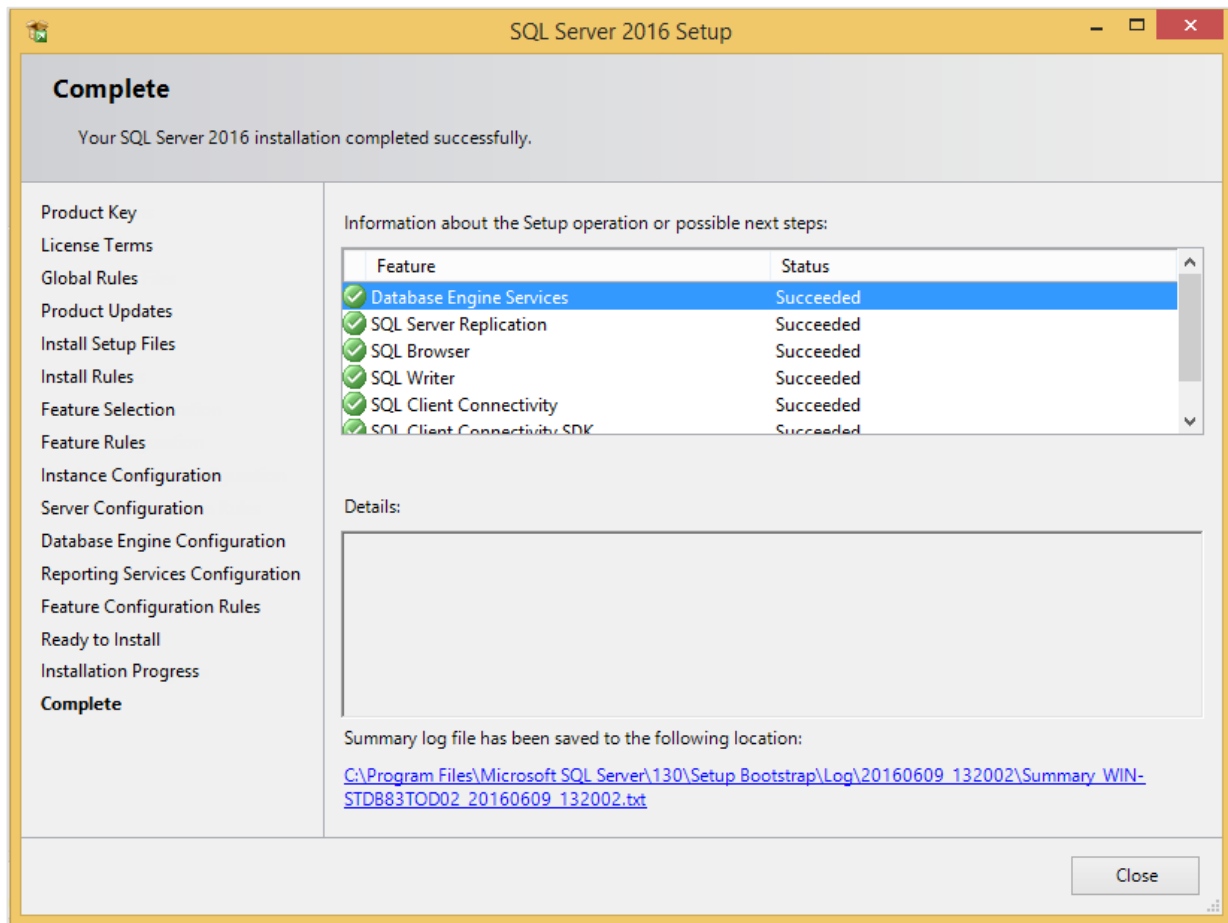
11. Click **Next** to continue. However, the **Next** button is available only when no checks have failed.

12. Select the features to install. When you select a feature, the corresponding information about this feature will be displayed on the right. Select the following features:

- Database Engine Services
- Reporting Services — Native (applicable only when you are using SQL Server Reporting services and/or Exact Globe Next/Exact Globe+ with extended functionality)
- Client Tools Connectivity
- Integration Services
- Documentation Components

Besides selecting the features, you do not have to change anything else. Click **Next** to continue.

13. Checks will be performed to identify issues that might block the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

> **Note:**
> Depending on the situation, it may or may not be necessary to close the installation wizard and restart.

14. Click **Next** to continue. However, the **Next** button is available only when no checks have failed.
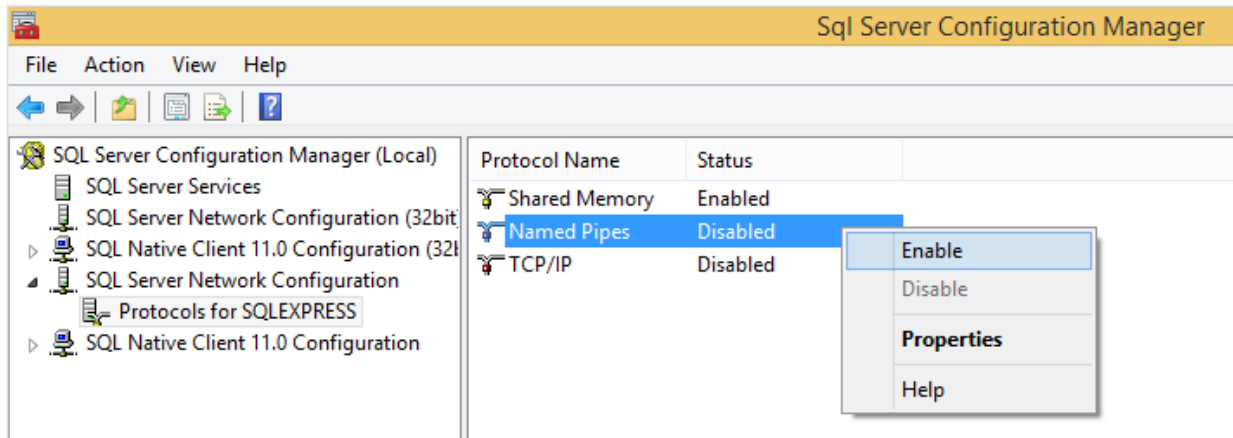
15. When the actions in the previous screen are completed, the screen will close automatically and the next screen will be displayed. In the **Instance Configuration** screen, define a name for the instance. This is the name for your SQL Server. Click **Next** to continue.

Note:
- **New installation** — When it is a new installation, there is no SQL Server present in your system yet. In this case, select **Default instance**. There is no need to change anything else in the screen. At the bottom of the screen, you can see if there are already other SQL Server instances present. When this is a new installation in a system where no SQL Server is present yet, this part of the screen is empty.
- **Installing new instance** — When there are existing SQL Server installations present, you have to select **Named instance** and define a name in the box next to it, for example "SQL2016". The name defined here has to be unique and cannot be the same as any of the names of the other instances that are already present on your system. The field **Instance ID** will be filled automatically and you do not have to change this manually. At the bottom of the screen, you can see if any other instances are present.

16. In this screen, under the **Service Accounts** tab, you can define which account you want to use for starting the MS SQL Server 2016 services. For a standard installation, accept the data as suggested in the screen. Keep in mind that when you select a user for which the password regularly changes, you will also have to change the password in the services every time. If you forget to change the password in the services, the services cannot be started and you will not be able to use the SQL Server until you have updated the password in the services, and have started the services. Depending on the account selected at **Account Name**, you have to enter the corresponding password at **Password**.

17. In the **Startup Type** column, you can define that the service has to start automatically when the system starts. The **SQL Server Database Engine** is the SQL Server itself. This service should always be started in order to use the SQL Server. The **SQL Server Browser** service is a service that is used for identifying the ports that the installation of SQL Server listens to. This service needs to be started to enable network access. The **Startup Type** option of this service should be **Automatic**. The account name of this service cannot be changed.

18. Under the **Collation** tab, you can define the collation (character set) settings. For Western European countries, you can accept the collation as displayed in the screen. Click **Next** to continue. The following screen will be displayed:

19. Under the **Server Configuration** tab, define how you would like to log on to the SQL Server. When you are working with Exact Synergy Enterprise and/or Exact Globe Next/Exact Globe+ with extended functionality, select **Mixed Mode (SQL Server authentication and Windows authentication)**. Type your password at **Enter password** and **Confirm password**. This password is a password that will be used for the SA user; this default user is the System Administrator within the SQL Server. If you select **Windows authentication mode**, you do not have to type a password.

Note:
Regardless of which Exact product you use, you will always have to define one user or more at the bottom of the screen. These users will be administrators on the SQL Server. You have to select at least one user. This user will be the administrator on the SQL Server and can also add other users later on.

20. Click **Add Current User** to add the users that are currently performing the installation as an administrator. Click **Add** to add other users or **Remove** to remove selected users.

21. Click **Next** to continue.

> **Note:**
> The following screen will be displayed only if you have selected the **Reporting Services – Native** feature.

22. In this screen, define if you want to configure the reporting services feature now or if you want to configure it later. Select **Install only** to install the feature and configure it later. Click **Next** to continue.

23. In the **Feature Configuration Rules** screen, checks will be performed for problems that might occur during the installation. Click **Show details >>** to view the details of these checks. When a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error. After solving the issue, click **Re-run** to perform the checks again.

> **Note:**
> Depending on the situation, it may or may not be necessary to close the installation wizard and restart.

24. Click **Next** to continue. However, this button is available only when no checks have failed.

25. In the **Ready to Install** screen, a summary of the defined installation criteria will be displayed. Click **Install** to start the installation.

26. The screen displaying the progress of the installation will displayed. The installation might take some time.

27. As soon as the installation has completed successfully, the installed components are displayed with a green icon. Click **Close** to close the wizard.
28. To be able to access the SQL Server via a network, you have to activate some protocols. When working with a network environment, you have to check if the protocols are activated. If required, activate the protocols.

- Start (on the server where MS SQL Server 2016 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **Microsoft SQL Server 2016**. Click **Configuration Tools**, and then **SQL Server 2016 Configuration Manager**.
- Click **SQL Server Network Configuration**.
- Select **Protocols for xxxx** ("xxxx" has to be replaced by the name you have defined for the SQL Server during installation).
- Right-click the protocols **Named Pipes** and **TCP/IP** and click **Enable** to enable these protocols.

29. You might also need to start the **SQL Server Browser** service. This service is used for identifying the ports that the installation of SQL Server listens to. When this service is not started, you can use the SQL Server only locally. To check if this service is started, follow these steps:

- Start (on the server where MS SQL Server 2016 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **SQL Server 2016**. Click **Configuration Tools**, and then **SQL 2016 Server Configuration Manager**.
- Click **SQL Server Services**.
- On the right side, the **SQL Server Browser** service is displayed.

Note:
When it is not started, the icon is red. When it is started, the icon is green. Ensure that the service starts automatically so that every time the system is restarted, the service will also start.

- Right-click **SQL Server Browser** and select **Properties**.
- In the **SQL Server Browser Properties** screen, click the **Service** tab.
- At **Start Mode**, select **Automatic**, as displayed in the following screen:

- Click **Apply** to apply the changes. The **SQL Server Browser** service will now start automatically every time the system is started.
- Next, start **SQL Server Browser**.
- In the **SQL Server Browser Properties** screen, click the **Log On** tab.
- Click **Start** to start the service. When the **Start** button is inactive, the **SQL Server Browser** service is already started and you do not have to start it.

> **Note:**
> When you have a firewall, you have to configure the firewall to allow connections with SQL Server 2016. The default port for SQL Server 2014 is 1433. The SQL browser used UDP port 1434.

Installing SQL Management Studio for SQL Server 2016

The next step is to install SQL Server Management Studio. SQL Server Management Studio is an application for managing the SQL Server. With SQL Server Management Studio, you can create and restore backups, change database settings, and give users SQL Server rights.

- Log in as an administrator on the system where you have installed SQL Server 2016.
- The setup file for SQL Server Management Studio can be downloaded from the Microsoft website (*https://msdn.microsoft.com/library/mt238290.aspx*). Place this file on the system where MS SQL Server 2016 is installed.
- Start the installation by double-clicking the downloaded file.

The following screen will be displayed:

Click **Install** to start the installation.

During the installation, you can follow the progress of the installation. The following screens will be displayed. The installation can take some time.

When the installation is completed, the following screen will be displayed. You have to restart the system to complete the setup.

JUNE 2016

Microsoft SQL Server Management Studio

Restart required in order to complete setup.

All specified components have been installed successfully.

The computer needs to be restarted before setup can continue.

Restart   Close

2.4.4 Installing and updating Microsoft SQL Server 2017 and 2019

Installing Microsoft SQL Server 2017 and 2019

This section describes the installation of SQL Server 2017 and 2019 Standard Edition. The installation procedure for the Enterprise Edition is similar, but some screens may differ.

Before installing SQL Server 2017, you should have, at the very least Exact Globe Next/Exact Globe+ product update 416 to work with SQL Server 2017.

Before installing SQL Server 2019, you should have, at the very least Exact Globe Next/Exact Globe+ product update 420 and Exact Synergy Enterprise product update 265 to work with SQL Server 2019.

In the following steps, it is assumed that you are installing the SQL server as a new installation or as a new instance:

- For a new installation, there is no MS SQL Server software present in your system. After the installation, you will have one MS SQL Server.
- When installing a new instance, install MS SQL Server next to your current MS SQL Server version. After the installation, you will have multiple MS SQL Servers; the one you have just installed, and the existing one(s) present in your system.

The steps for installing a new instance are almost the same as the steps for installing the SQL server in a system where no other versions of SQL server are present. Where applicable, the difference(s) will be highlighted in this section.

The next step is installing SQL Server 2017 or 2019. In a standalone environment, you have to perform the following steps on the workstation where you work with Exact Globe Next/Exact Globe+. In all other cases, you have to perform the following steps on the server.

When working in a standalone environment, you will have one computer on which you are working with Exact Globe Next/Exact Globe+. On this computer, both Exact Globe Next/Exact Globe+ and the SQL server are installed. This is seen as a standalone even when your computer is part of a network, as all software needed to work with Exact Globe Next/Exact Globe+ are installed on this computer.

Before installing the SQL server, check the system requirements for the specific SQL server edition at *https://msdn.microsoft.com/en-us/library/ms143506(v=sql.140).aspx*.

When these requirements are met, you can start installing SQL Server 2017 or 2019.

To install Microsoft SQL Server 2017 or 2019:

1. Log in as an administrator on the server (of a workstation for the standalone installation).
2. Insert the SQL server installation DVD into your DVD drive. When the autorun is not performed, open the DVD drive in Windows Explorer and start the installation by clicking **Setup.exe**.

3. The **SQL Server Installation Center** screen will be displayed. In this screen, you can view and execute several installation tasks.

4. Click **Installation** on the left panel. Next, click **New SQL Server Stand-alone installation or add features to an existing installation**.

5. In the **Product Key** screen, type the product key at **Enter the product key** if the product key is not filled automatically. Click **Next** to continue. The screen with the license terms will be displayed.

6. To continue, select **I accept the license terms** and click **Next**.

7. Checks will be performed to identify possible problems when installing the SQL Server Setup support files. The SQL Server Setup support files are needed for the installation of MS SQL Server 2017 and 2019, and are automatically installed via this installation wizard. Click **Show details >>** to view the details of these checks. If all the checks have passed, the results will be displayed in this screen. However, if a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and error(s). After solving the issue, click **Re-run** to perform the checks again.
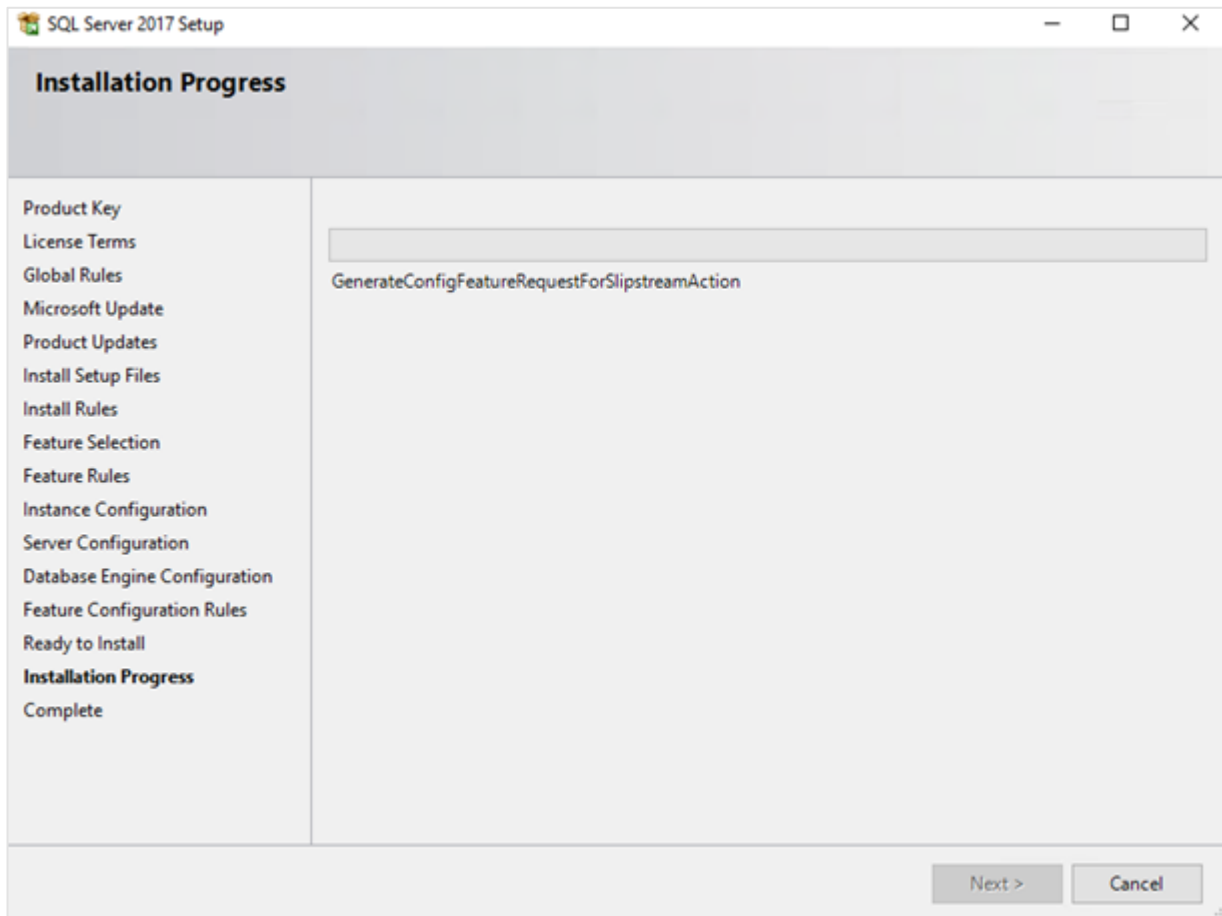
Note:
It is possible that some warnings are displayed regarding the firewall. In spite of the warnings, it is still possible to continue with the installation. Depending on the situation, it is not necessary to close the installation wizard and restart. If all checks have passed, this screen will close automatically, and the next screen will be displayed.

8. The **Microsoft Update** screen allows you to check for new update files online. If you select this option and click **Next**, the **Product Updates** screen will be displayed whereby you can download the files. However, if you did not select this option, the **Install Setup Files** screen will be displayed.

9. The installation wizard will check for the updates, and install the available update files. Once completed, the screen will close automatically, and the next screen will be displayed:

10. Checks will be performed to identify the potential problems that might occur during the installation. Click **Show details >>** to view the details of the checks. If a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and error(s). Once the issue is solved, click **Re-run** to perform the checks again.

Note:
Depending on the situation, it is not necessary to close the installation wizard and restart.

11. Click **Next** to continue. The **Next** button is enabled only if no checks have failed.

12. Select the features that you want to install. When you select a feature, the corresponding information about the feature will be displayed on the right. Select the following features:

- Database Engine Services
- Client Tools Connectivity
- Integration Services
- Full-Text and semantic extractions for Search: If you want to use the SQL full text search to search for feeds in the timeline of Exact Synergy Enterprise, this component should be selected. If you have not selected this component during the installation of the SQL server, you can install it at a later time.

Besides selecting the features, you do not have to change anything else. Click **Next** to continue.

13. Checks will be performed to identify the issues that might block the installation. Click **Show details >>** to view the details of the checks. If a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and error(s). After solving the issue, click **Re-run** to perform the check again.

Note:
Depending on the situation, it is not necessary to close the installation wizard and restart.

14. Click **Next** to continue. However, the **Next** button is enabled only if no checks have failed.

15. When the actions in the previous screen are completed, the screen will close automatically, and the next screen will be displayed. In the **Instance Configuration** screen, define a name for the instance. This is the name for your SQL server. Click **Next** to continue.

Note:

- New installation — When it is a new installation, there is no SQL Server present in your system. In this case, select Default instance. You do not have to change anything else in the screen. At the bottom of the screen, you can see if there are other SQL server instances present. If this is a new installation in the system whereby there is no SQL Server, this section will be blank.

- Installing a new instance — When there are existing SQL server installations present, you have to select Named instance, and define a name for the instance, for example "SQL2017". The name must be unique, and cannot be the same as the name of the other instances that are already present in your system. The Instance ID field will be filled automatically, and you do not have to change this manually. At the bottom of the screen, you can see if any other instances are present.

---

16. In the **Server Configuration** screen, under the **Service Accounts** tab, you can define which account you want to use to start the MS SQL Server 2017 or 2019 services. For standard installation, accept the data as displayed in the screen. However, when you select a user for which the password regularly changes, you will also have to change the password in the services each time the password changes. If you forget to change the password in the services, the services cannot be started, and you will not be able to use the SQL Server until you have updated the password in the services, and have started the services. Depending on the account selected at **Account Name**, you have to define the password at **Password**.

17. In the **Startup Type** column, you can define to start the service automatically when the system starts. The **SQL Server Database Engine** is the SQL Server. This service should always be started to be able to use the SQL Server.
The **SQL Server Browser** service is a service that is used to identify the ports that the installation of the SQL Server listens to. This service must be started to enable the network access. The **Startup Type** option for this service should be **Automatic**. The account name of this service cannot be changed.

18. Under the **Collation** tab, you can define the collation (character set) settings. For Western European countries, you can accept the collation as displayed in the screen. Click **Next** to continue. The following screen will be displayed:

19. Under the **Server Configuration** tab, define how you want to log in to the SQL server. If you are working with Exact Synergy Enterprise and/or Exact Globe Next/Exact Globe+ with extended functionality, select **Mixed Mode (SQL Server authentication and Windows authentication)**. Type your password at **Enter password** and **Confirm password**. This password will be the password that will be used for the SA user; this default user is the System Administrator within the SQL server. If you select **Windows authentication mode**, you do not have to type the password.

> **Note:**
> Regardless of which Exact product you are using, you will always have to define one or more users at the bottom of the screen. These users will be the administrators for the SQL server. You have to select at least one user. This user will be the administrator for the SQL server, and can also add other users later on.

20. Click **Add Current User** to add the users that are currently performing the installation as an administrator. Click **Add** to add other users, or **Remove** to remove the selected users.
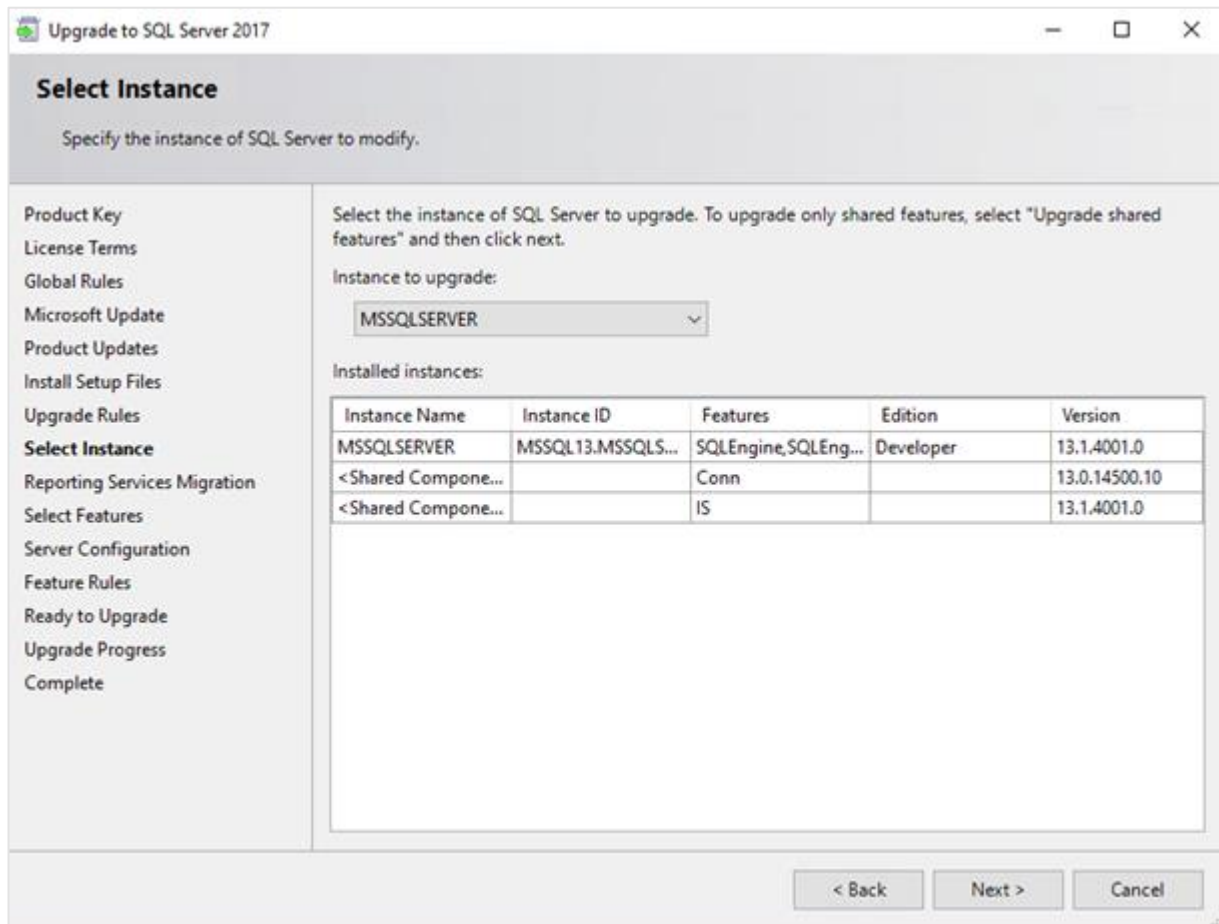
21. Click **Next** to continue.

22. In the **Feature Configuration Rules** screen, checks will be performed for the problems that might occur during the installation. Click **Show details >>** to view the details of these checks. If a check has failed, a red icon will be displayed. You can click the link in the **Status** column for more information about the check and the error(s). After solving the issue, click **Re-run** to perform the checks again.
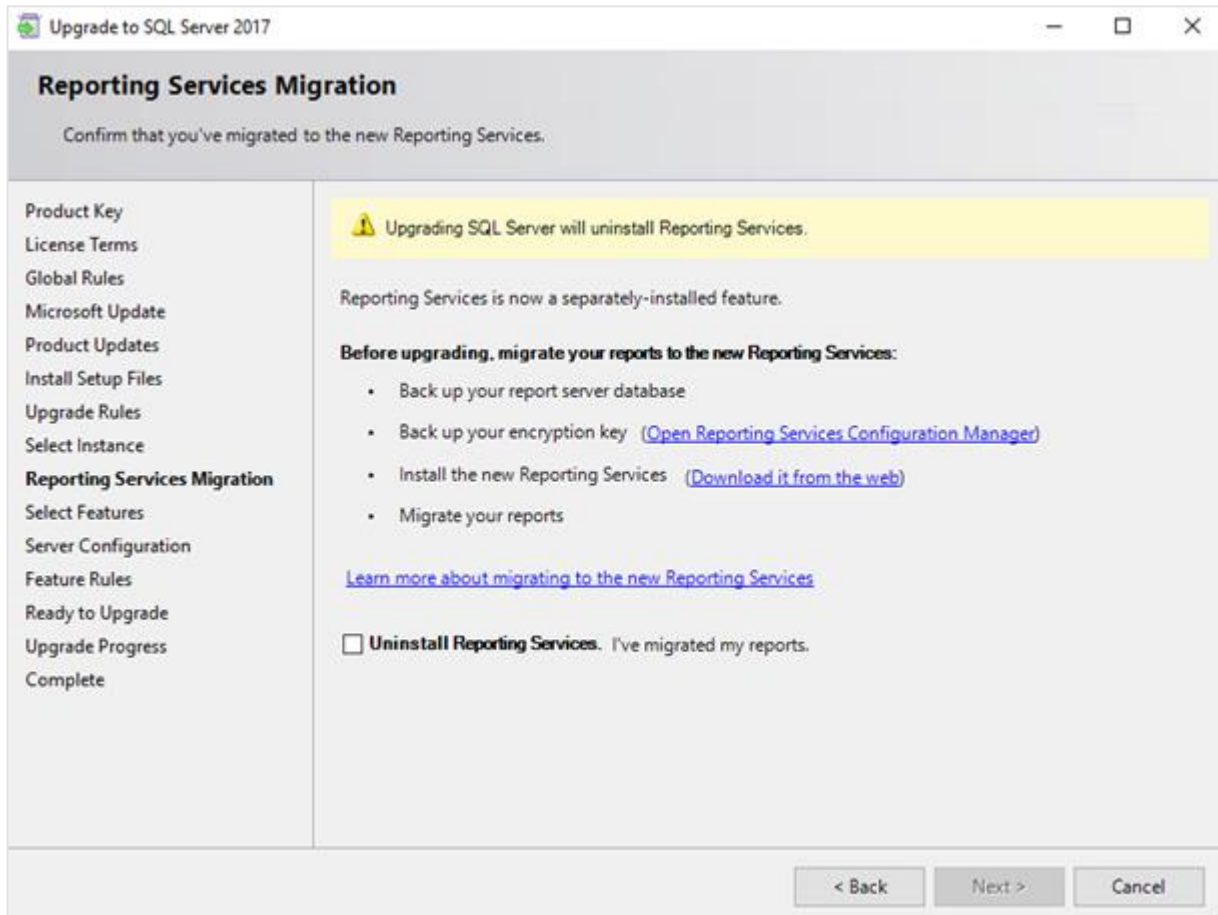
Note:
Depending on the situation, it is not necessary to close the installation wizard and restart.

23. Click **Next** to continue. However, this button is enabled only if no checks have failed.

24. In the **Ready to Install** screen, a summary of the defined installation criteria will be displayed. Click **Install** to start the installation.

25. The screen displaying the progress of the installation will be displayed. The installation might take some time.
26. As soon as the installation has completed successfully, the installed components will be displayed with a green icon. Click **Close** to close the wizard.

27. To be able to access the SQL server via a network, you have to activate some protocols. When working with a network environment, you have to check if the protocols are activated. If required, activate the protocols.

    - Start (on the server where MS SQL Server 2017 is installed) **SQL Server Configuration Manager**. In Windows, go to Start, select **All Programs**, followed by **Microsoft SQL Server 2017**. Click **Configuration Tools**, and then **SQL Server 2017 Configuration Manager**.
    - Click SQL Server Network Configuration.
    - Select **Protocols for xxxx**. ("xxxx" has to be replaced by the name you have defined for the SQL Server during the installation).
    - Right-click the **Named Pipes** and **TCP/IP** protocols, and click **Enable** to enable these protocols.

28. You might also need to start the **SQL Server Browser** service. This service is used to identify the ports that the installation of SQL server listens to. If this service is not started, you can use the SQL server only locally. To check if this service is started, do the following:

    - Start (on the server where MS SQL Server 2017 or 2019 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **SQL Server 2017**. Click **Configuration Tools**, and then **SQL 2017 Server Configuration Manager**.
    - Click **SQL Server Services**.
    - On the right side, the **SQL Server Browser** service is displayed.

> **Note:**
> If it is not started, the icon is red. However, if it is started, the icon is green. Ensure that the service starts automatically so that every time the system is restarted, the service will also start.

    - Right-click **SQL Server Browser**, and select **Properties**.
    - In the **SQL Server Browser Properties** screen, click the **Service** tab.

- At **Start Mode**, select **Automatic**, as displayed in the following screen:

- Click **Apply** to apply the changes. The **SQL Server Browser** service will now start automatically every time the system is started.
- Next, start SQL Server Browser.
- In the **SQL Server Browser Properties** screen, click the **Log On** tab.
- Click **Start** to start the service. When the **Start** button is inactive, the **SQL Server Browser** service is already started, and you do not have to start it.

Note:
If you have a firewall, you have to configure the firewall to allow the firewall to connect with SQL Server 2017 or 2019. The default port for SQL Server 2017 and 2019 is 1433. The SQL browser uses UDP port 1434.

Updating Microsoft SQL Server 2017 and 2019

Before updating SQL Server 2017 or 2019, ensure the existing SQL server supports updates. For a list of supported upgrade scenarios, see *https://msdn.microsoft.com/en-us/sql/database-engine/install-windows/supported-version-and-edition-upgrades-2017.*

Note:
Back up all your databases.

To upgrade Microsoft SQL Server 2017 and 2019:

1. Log in as an administrator on the server (of the workstation for a standalone installation).
2. Insert the SQL server installation DVD into the DVD drive. If the autorun does not execute, open the DVD drive in Windows Explorer and start the installation by clicking **Setup.ext**. The following screen will be displayed:

3. Click **Installation** on the left panel, and then click **Upgrade from a previous version of SQL Server** on the right panel. The following screen will be displayed:

4. Select the **Enter the product key** option and type the product key if the product key is not filled automatically. Click **Next** to continue. The following screen will be displayed:

5. Select the **I accept the license terms** check box, and then click **Next**. The following screen will be displayed:

6. Checks will be performed to identify the possible problems when installing the SQL Server Setup support files. The SQL Server Setup support files are needed for the installation of SQL Server 2017 and 2019, and are automatically installed via this installation wizard. Click **Show details >>** to view the details of the checks. If all the checks are passed, the results will be displayed in the **Global Rules** screen. However, if a check has failed, a red icon will be displayed. You can click the hyperlink in the **Status** column to view the details of the check and error(s). Once the error is fixed, click **Re-run** to perform the checks again.

> **Note:**
> Some warnings about the firewall might be displayed. Despite the warnings, you can still continue with the installation. Depending on the situation, it is not necessary to close the installation wizard and restart. If all the checks are passed, the **Global Rules** screen will close automatically and the following screen will be displayed:

7. The **Microsoft Update** screen allows you to check for new update files online. If you select the **Use Microsoft Update to check for updates (recommended)** check box, the **Product Updates** screen will be displayed whereby you can download the files. Otherwise, the **Install Setup Files** screen will be displayed.

8. The installation wizard will check for updates and install the available update files. Once the files are updated, the screen will close automatically and the next screen will be displayed:

9. In the **Upgrade Rules** screen, checks will be performed to identify the problems that might occur during the installation. Click **Show details >>** to view the details of the checks. If a check has failed, a red icon will be displayed. You can click the hyperlink in the **Status** column for more information on the check and error(s). Once the issue is solved, click **Re-run** to perform the checks again.

Note:
Depending on the situation, it is not necessary to close the installation wizard and restart.

10. Click **Next** and the following screen will be displayed:

11. At **Select Instance**, select the instance of the SQL server that you want to upgrade. The instance(s) will be displayed under the **Installed instances** section. The **Instance Name** column displays the name of the instance. The **Version** column displays the version of the instance. Version numbers that start with 12 apply to SQL Server 2014, and version numbers that start with 13 apply to SQL Server 2016. The **<Shared Components>** line applies to the extra components of the SQL server that are installed, such as SQL Server Management Studio. Click **Next** and the following screen will be displayed:

12. The **Reporting Services Migration** screen is displayed only if the reporting services component is installed for the previous SQL server version.

> **Note:**
> If Reporting Services is installed, this will be removed during the upgrade. Before you continue, back up your report server database, and your encryption key. Furthermore, Reporting Services for SQL Server 2017 and 2019 is done via a separate installation, and you have to migrate the reports.

Once you have made a backup of the report server database, and the encryption key, you can select the **Uninstall Reporting Service** check box, and click **Next** to continue.

13. The **Select Features** screen displays the components that will be upgraded. By default, the components that will be upgraded will be selected. You cannot change anything in the screen. This screen will close automatically.

14. In the **Instance Configuration** screen, you can define the name and instance ID of the SQL server instance. Since you are upgrading the SQL server, you will not be able to change the name of the SQL instance. The SQL instance will use the same name. You do not have to change the instance ID and you can accept the value displayed in the screen. Click **Next** and the following screen will be displayed:

15. Under the **Service Accounts** tab in the **Server Configuration** screen, you can define the account that you want to use to start the SQL Server 2017 or 2019 services. You do not have to change anything. Click **Next** and the following screen will be displayed:

16. The **Full-text Upgrade** screen is displayed only if the **Full-Text and semantic extractions for Search component of SQL server** is installed. This screen allows you to select an upgrade option for this component. This component is applicable if you use the SQL full text search to search for feeds in the timeline in Exact Synergy Enterprise. For this Exact Synergy Enterprise functionality, it is not important which option is selected. If you are using the SQL full text search component for other purposes, check with your system administrator to determine which option to select. Click **Next** to continue.

17. In the **Feature Rules** screen, checks will be performed to identify the problems that might occur during the installation. Click **Show details >>** to view the details of the checks. When a check has failed, a red icon will be displayed. You can click the hyperlink in the **Status** column for more information on the check and error(s). After you have fixed the issue, click **Re-run** to perform the checks again. The screen will automatically close after all the checks are successful.

Note:
Depending on the situation, it is not necessary to close the installation wizard and restart.

18. In the **Ready to Upgrade** screen, the list of upgrade and installation criteria will be displayed. Click **Upgrade** to start the upgrade and installation.

19. The **Upgrade Progress** screen displays the progress of the installation.
20. Once the installation has completed successfully, the installed components will be displayed with a green icon. Click **Close** to exit.

21. To be able to access the SQL server via a network, you have to activate some protocols. When working with a network environment, you have to check if the protocols are activated. If required, activate the protocols.

- Start (on the server where MS SQL Server 2017 or 2019 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **Microsoft SQL Server 2017**. Click **Configuration Tools**, and then **SQL Server 2017 Configuration Manager**.
- Click **SQL Server Network Configuration**.
- Select **Protocols for xxxx**. ("xxxx" has to be replaced by the name you have defined for the SQL server during installation).
- Right-click the protocols **Named Pipes** and **TCP/IP** and click **Enable** to enable these protocols.

22. You might also need to start the **SQL Server Browser** service. This service is used for identifying the ports that the installation of SQL server listens to. When this service is not started, you can use the SQL server only locally. To check if this service is started, follow these steps:

- Start (on the server where MS SQL Server 2017 or 2019 is installed) **SQL Server Configuration Manager**. In Windows, go to **Start**, select **All Programs**, followed by **SQL Server 2017**. Click **Configuration Tools**, and then **SQL 2017 Server Configuration Manager**.
- Click **SQL Server Services**.
- On the right side, the **SQL Server Browser** service is displayed.

Note:
When it is not started, the icon is red. When it is started, the icon is green. Ensure that the service starts automatically so that every time the system is restarted, the service will also start.

- Right-click **SQL Server Browser** and select **Properties**.
- In the **SQL Server Browser Properties** screen, click the **Service** tab.
- At **Start Mode**, select **Automatic**, as displayed in the following screen:

- Click **Apply** to apply the changes. The **SQL Server Browser** service will now start automatically every time the system is started.
- Next, start **SQL Server Browser**.
- In the **SQL Server Browser Properties** screen, click the **Log On** tab.

23. Click **Start** to start the service. When the **Start** button is inactive, the **SQL Server Browser** service is already started and you do not have to start it.

Note:
When you have a firewall, you have to configure the firewall to allow connections with SQL Server 2017 or 2019. The default port for SQL Server 2017 and 2019 is 1433. The SQL browser used UDP port 1434.

Preparing your database to use Microsoft SQL Server 2017 or 2019

To change the compatibility level of your upgraded databases:

1. Go to Start ➔ All Programs ➔ Microsoft SQL Server 2017/2019 ➔ Microsoft SQL Server Management Studio.
2. Connect to the SQL server.
3. Expand the tree view until you see the databases.
4. Right-click a company database and select **Properties**.
5. In the **Database Properties** screen, select **Options** on the left panel and select **SQL Server 2017 (140)** at **Compatibility level** on the right panel, and then click **OK**.

Note:
You have to change the **Compatibility level** for every company database.

Installing SQL Server Management Studio for Microsoft SQL Server 2017 or 2019

To install SQL Server Management Studio:

The next step is to install SQL Server Management Studio. SQL Server Management Studio is an application for managing the SQL server. With SQL Server Management Studio, you can create and restore backups, change the database settings, and give the users SQL server rights. However, if you already have an older version of SQL Server Management Studio installed, it is advisable to install the most recent version of SQL Server Management Studio. The new version will be installed with the previous version so both versions can be used.

- Log in as an administrator on the system where you have installed SQL Server 2017 or 2019.
- The setup file for SQL Server Management Studio can be downloaded from the Microsoft website (*https://msdn.microsoft.com/library/mt238290.aspx*). Save this file on the system where MS SQL Server 2017 is installed.
- Start the installation by double-clicking the downloaded file.

The following screen will be displayed:

Click **Install** to start the installation.

During the installation, you can follow the progress of the installation. The following screens will be displayed. The installation might take some time.

RELEASE 17.5

Microsoft SQL Server Management Studio

Package Progress

Microsoft SQL Server 2012 Native Client

Overall Progress

Cancel

Once the installation is completed, the following screen will be displayed. You have to restart the system to complete the setup.

2.4.5   Installing SQL Server Reporting Services (SSRS)

SQL Server Reporting Services (SSRS) is a server-based report generating software system from Microsoft. SSRS is part of Microsoft SQL Server, and can be used by the Reporting Services Integration functionality in Exact Synergy Enterprise. SSRS is also used by the dashboards in Exact Globe Next/Exact Globe+ with extended functionality.

From SQL Server 2017 onwards, SSRS must be installed via a separate installer. The following describes the SSRS installation.

> **Note:**
> Before installing SSRS, it is advisable to check whether SSRS is already installed in your system.

To check SSRS:

To check if SSRS is already installed in your system, do the following:

1. Log in to the server that has Microsoft SQL Server installed.
2. Search in the Start menu for "Report Server Configuration Manager".
3. If the "Report Server Configuration Manager" is available, this means the reporting services feature is already installed. However, if "Report Server Configuration Manager" is not available, install the reporting services feature.

To install SSRS:

1. Download the setup file from *https://www.microsoft.com/en-us/download/details.aspx?id=55252*.
2. Log in as an administrator on the server where the SQL server is installed.

3. Open **SQLServerReportingServices.exe**. The following screen will be displayed:

4. Click **Install Reporting Services**. The following screen will be displayed:

5. Select the **Enter the product key** option, and type the product key for SQL Server 2017.

6. Click **Next**. The following screen will be displayed:

7. In the **Review the license terms** screen, read the license terms. If you agree with the license terms, select the **I accept the license terms** check box.

8. Click **Next**. The following screen will be displayed:

Microsoft SQL Server 2017 Reporting Services
(October 2017)

Install Database Engine

You'll need an instance of SQL Server Database Engine to store the report server database.

◉ Install Reporting Services only

You'll need to have or install a Database Engine instance on this server or on a different server.

Learn more about supported Database Engine versions and editions

9. Click **Next**. The following screen will be displayed:

10. Select the location to install SSRS.

11. Click **Install**. The following screen will be displayed:

12. Once the installation is completed, the following screen will be displayed:

13. Restart the system.

If you upgraded from the previous version of the SQL server to SQL Server 2017, and have a backup of your report server database and encryption, you have to select or restore the files in Report Server Configuration Manager.

- Firstly, restore the backup of the report server database via SQL Server Management Studio.
- Start **Report Server Configuration Manager**, and connect to the SQL server.
- In **Report Server Configuration Manager**, select the report server database in the **Database** menu, and restore the backup of the encryption key in the **Encryption keys** menu.

2.5 SETTING UP MICROSOFT AZURE SQL DATABASE

Exact Globe Next/Exact Globe+ supports the Microsoft Azure SQL database.

To restore a migrated database in the Microsoft Azure SQL database with Exact Globe Next/Exact Globe+:

1. In Exact Globe Next/Exact Globe+, go to ☰ → System → Backup/Restore/Copy company. The following screen will be displayed:

2. Click **Next**. The following screen will be displayed:

3. Select the **Setup Microsoft Azure SQL Database** option.

4. Click **Next**. The following screen will be displayed:

5. Type the relevant information at the following fields:

    - **Server name —** Type the Microsoft Azure SQL database server name. This is mandatory.
    - **Database name —** Type the Microsoft Azure SQL database name. This is mandatory.
    - **Login name —** Type the user name for the Microsoft Azure SQL database server. This is the user with administrator rights to the Microsoft Azure SQL database server. This is mandatory.
    - **Password —** Type the password for the user that is entered at the **Login name** field. This is mandatory.
6. Click **Next**. The entered information will be verified.

7. Once successfully verified, a screen with the **Action**, **Server**, **Database**, and **Company** information will be displayed.

> **Note:**
> These fields cannot be edited.

8. Click **Finish** to start the Microsoft Azure SQL database setup.
9. When the processing is done, the message "The migrated Exact Globe company is restored successfully" will be displayed.
10. Click **Close** to close the screen.

After the database is restored, the details of the restored database will be saved in the **cloudDB.xml** file that is located in the Exact Globe Next/Exact Globe+ installation folder.

> **Note:**
> The following functionalities in Exact Globe Next/Exact Globe+ are not fully supported in the Microsoft Azure PaaS (FiD, Microsoft Azure SQL database) environment:
> - Building blocks
> - SDK
> - Payroll module
> - WMS
> - EGN+

To activate the Microsoft Azure SQL database:

1. Go to the following website:

    http://msdn.microsoft.com/en-us/subscriptions/aa336858.aspx

2.   Click the **My Account** tab. The following page will be displayed:

3.   Type your Microsoft Azure SQL database username and password. Click **Sign in**. The following page will be displayed:

4. Under the **Microsoft Azure** section, click **Activate Microsoft Azure**. The following page will be displayed:

5. Define the fields, and then select the I agree to the Windows Azure agreement, Offer Details, and Privacy Statement check box.
6. Click **Sign up**. The following page will be displayed once the activation is completed:

7. Click **Portal** to display the **Microsoft Azure** page. The following page will be displayed:

3. COMPANY DATABASES

Among the tasks necessary to get started with Exact Globe Next/Exact Globe+ is to create the database for the company. This section describes the topics relating to creating company databases.

- Creating company databases
- Navigating within Exact Globe Next/Exact Globe+
- Creating users, roles, and rights

3.1   CREATING COMPANY DATABASES

Once the installation in the previous chapter has been completed, you can begin work with your company database as soon as you have created one. To do so, you will need a license file, and then you can configure the database administration settings.

To create company databases:

1. Launch Exact Globe Next/Exact Globe+.
2. Go to ☰→ System → Create company.
3. In the **Create company wizard** screen, select an option from the following:

   - **My computer** (the computer's name and the SQL server version are displayed) — Select this option to install the new company database in the user's computer.
   - **Server** — Type the SQL server path to install the new company database in the selected server.

4. Click **Next**.

5.   Define the following information for the new company:

- At **Company no.**, type a unique number (ranging from 000 to 999).
- At **Description**, type a description for the new company. The maximum character allowed is 60.
- At **Database directory**, type or select the directory path of the company database to be created in.
- At **License file**, type or select the location of the downloaded the license file. Otherwise, select **Download from customer portal** to download the license from the customer portal. For more information, see *Downloading license files* at *3.1 Creating Company Databases*.

6.   Click **Next.**

7. Read the license agreement terms. To accept, select **I accept the terms in the license agreement**.

8. Click **Next**.

9. Next, you will need to configure the administration settings for the new company database. For more information, see *Setting up Administrator role and company data* at *3.1 Creating Company Databases.*

3.1.1 Downloading license files

When the **License file** option has been selected in the previous section (see Step 5 of *To create company databases*), the license file needs to be downloaded. Exact Globe Next/Exact Globe+ licenses can be downloaded from the internet via the Exact Customer Portal or the Exact Globe Next/Exact Globe+ software. For more information, see *4.3 License Renewal.* If you would like to download or renew your license(s) via the Exact Customer Portal, please contact our support personnel for more information.

To download Exact Globe Next/Exact Globe+ license files:

1. Click 🔍 at the end of the **License file** field, as shown in the following screen:

2. The following screen will be displayed:

3. Click **Download** to download a license file to the computer.

4. Type the customer code and password at **Customer code** and **Password**, and then click **Download**.

> **Note:**
> Notifications on login details will be sent to the customers via emails shortly after the purchases.

5. Click **Select** to locate the downloaded license file from the computer.
6. Once the license has been updated by the system, the message "Completed successfully" will be displayed. Click **OK**.

3.1.2 Setting up Administrator role and company data

Once you have selected **I accept the terms in the license agreement** (see Steps 8 and 9 of *To create company databases*), you will be guided to the following screen where administration configuration for the new company database will take place.

To set up Administrator role for new companies databases:

1. In the **Create company wizard** screen, type a unique number (ranging from 1 to 999999999) at the **Employee ID** field.
2. The **Login name** field displays the actual network login name of the user using Exact Globe Next/Exact Globe+.
3. At **Legislation** and **Language**, select the required legislation and language for the database.
4. Select an option to create the company database from the following:

   - **Company with master data** — Select this option to create a company database with predefined master data, including a standard general ledger account scheme and standard journals.
   - **Empty company** — Select this option to create a company database without any predefined master data.
   - **Demo company** — Select this option to create a company with a demo database.
   - **Import data** — Select this option to create a company by importing data from previous Exact Globe Next/Exact Globe+ versions.
   - **Copy company** — Select this option to create a company database with master data imported from another database.

5. Click **Next** to continue.

6. Click **Finish**, and the company database will be generated.

7. Click **OK**.

<div style="background:red">

Note:

You may be prompted to log in to open databases. Enter login details using the network login name when required. When you install product update 406 (from 24 October, 2013 onwards) or 407, and open a company database for the first time, you will be automatically prompted to install the ESI tool. Click **Accept**. The ESI tool will be installed in the folder C:\Users\Public\Exact ESI of the workstation (this is done in the background), and then the company database will be displayed. You may start the ESI tool at ☰ → System → ESI tool. A series of step-by-step instructions will be displayed to guide you throughout data analyzing and the configuring processes. The instructions displayed are available only in English, and your consent on the anonymous information collection is a must before the ESI tool can begin to gather and analyze your current settings. For more information, see *3.2.1 Main menu*, and Exact System Information Tool (*Doc ID:* 17.712.656) in Exact Synergy Enterprise.

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3.2 NAVIGATING WITHIN EXACT GLOBE NEXT/EXACT GLOBE+

Exact Globe Next/Exact Globe+ provides a comprehensive set of menus and buttons for users to navigate around. The main menu, main buttons, and application menu are described in the following sections.

3.2.1 Main menu

Exact Globe Next/Exact Globe+ comes with a menu of options, such as **System**, **Language**, **Preferences**, **Printer**, and **About** when you click ☰ on the top left of the main menu. The descriptions of the menu options are explained in the following sections.

System

The functions of the submenu options are described in the following:

- **Create company** — Select this option to create a company. For more information, see *3.1 Creating Company Databases.*

- **Delete company** — Select this option to delete a company database, as shown in the following screen:

- **Backup/Restore/Copy company** — Select this option to backup, restore, or copy company database. For more information, see *4.1 Backing Up, Restoring, and Copying Company Databases*.
- **Update** — Select this option to update Exact Globe Next/Exact Globe+.

- **Update Exact Globe Next**/Exact Globe+ **license** — Select this option to update the software license. For more information, see *Downloading license files* at *3.1 Creating Company Databases*.
- **ESI Tool** — Select this option to install the **Exact System Information** tool. This tool enables you to easily retrieve and adjust the Windows, SQL, and Database settings for optimum performance. This tool will also automatically send statistical information about the Exact tables and index usage to Exact. For this tool to function properly, you need run this tool on the SQL server using a Windows administrator account or its equivalent. For more information, see *Exact System Information Tool (Doc ID: 17.712.656)* in Exact Synergy Enterprise.

- **ESI Tool - Uninstall** — Select this option to uninstall the **Exact System Information** tool. It also automatically discontinues the anonymous information gathering task to be sent to Exact. This option is available only after the ESI tool has been installed.

Language

This submenu allows you to change the language.

Preferences

The functions of the submenu options are described in the following:

- **Hotkeys** — Select this option to display the hot keys.

- **Customise company colors** — Select this option to customize the company colors. The following screen will be displayed:

Colour	Company	Company name	Server
🎨 ⌄	603	Copy of MacBean Coffeeworld	GOHJ175745-2
🎨 ⌄	900	Viking Computers: E-Projects/Manufacturing	GOHJ175745-2

Customise company colors

Done

Printer

The functions of the submenu options are described in the following:

603 Doc +

- ⚙ System
- 🌐 Language
- 🔧 Preferences
- 🖨 Printer
- ⓘ About
- 🖊 Customer portal ⧉
- ✖ Exit

Form printer

Printer settings

- **Form printer** — Select this option to set up the form printer. The following screen will be displayed:

- **Printer settings —** Select this option to view and edit the printer settings. The following screen will be displayed:

About

This menu option displays the information about the version of Exact Globe Next/Exact Globe+ used and the licenses involved.

Open company

The ＋ tab allows you to open a company. Click the ＋ tab, and then select a company from the list or click **Advanced** if the company is not displayed in the list. The following screen will be displayed if **Advanced** is clicked. Select a server and company at **Server** and **Company** respectively, and then click **Open**.

Favorites

You can click ⭐ on the top right of the screen to view the list of favorite screens. To add the main header to the favorite list, click ＋ **Add section** and type the name of the main header. To edit the main header, click ✏ **Edit**. Click ⇕ **Drag to reorder favorites** to move the main header and ✖ **Remove** to delete the main header. To add a screen to the favorite list, click ⭐ beside the menu path.

3.2.2 Application menus

Many other application menus are available within the manuals of Exact Globe Next/Exact Globe+. The common icon options are described in the following:

New — Click this icon to create items, data, files, and others.

Open — Click this icon to open records, database, files, and others.

Save — Click this icon to save records, data, files, and others.

Undo — Click this icon to undo the last change.

Cut — Click this icon to cut away the highlighted data and save it in the clipboard. The data can then be pasted elsewhere.

Copy — Click this icon to copy the highlighted data and save it in the clipboard. The data can then be pasted elsewhere.

Paste — Click this icon to paste the data from the clipboard to the desired location.

Up — Click this icon to move up the previous line, page, record, and others.

Down — Click this icon to move down the next line, page, record, and others.

Hierarchical positions — Click this icon to display the hierarchical structure, for example, the organization chart.

Word merge — Click this icon to perform the Microsoft Word mail merge function.

Assets — Click this icon to access the information related to assets.

Internal use — Click this icon to access the information related to internal use.

Purchase contracts — Click this icon to access the information related to purchase contracts.

Sales invoices — Click this icon to access the information related to sales invoices.

Sales orders — Click this icon to access the information related to sales orders.

Help — Click this icon to access the help files within the system or via internet.

Eurocalculator — Click this icon to view the currency converter.

Insert line — Click this icon to insert a line.

Delete line — Click this icon to delete the selected line.

Browse — Click this icon to search for items and others.

Columns — Click this icon to insert a column.

Print — Click this icon to print the sales order, purchase order, and others.

Zoom in — Click this icon to view the information of the item and others.

Notes — Click this icon to view and/or insert the notes for the sales order, purchase order, and others.

Attachments — Click this icon to attach files.

Card — Click this icon to view the transaction card.

Refresh — Click this icon to refresh the screen.

Export — Click this icon to export the item and others to Microsoft Excel.

MRP — Click this icon to view the MRP of the item.

Find — Click this icon to do a search.

Categories — Click this icon to view the chart of general ledger categories.

INTRASTAT data — Click this icon to view the INTRASTAT data.

3.3 CREATING USERS, ROLES, AND RIGHTS

For the system to be deployed fully, the system, database administrator, and users must first be created in the system. The users, who are employees of the user company, must be assigned to the appropriate roles and rights for security accesses and for them to perform their duties properly. The following describes how the administrator and users are created, and how roles and rights are assigned to them.

3.3.1 Administrator

When creating the company database, the user creating the database is automatically assigned as the administrator of the database. The administrator can then create and assign roles and rights for the other users.

3.3.2 Creating users

The employees of the user company have to be included as users of the database and the system. Each of these employees is known as a person in the system. They are created and maintained in the system via HR → People → Maintain.

People

⭐ Maintain

List

Select / Search

⌄ Security roles

User rights

Organisation chart

Labels

Note:
Exact Globe Next/Exact Globe+ uses a security system that is integrated with that of Microsoft Windows. Therefore, it is necessary that the employee user names in Exact Globe Next/Exact Globe+ are identical to their network user names.

To create users:

1. Go to HR → People → Maintain.
2. Click **New**.
3. Define the required fields.
4. Click **Save**, and then **Close** to exit.

3.3.3 Creating roles

Roles are generally reflective of the job functions of the employees or people in the company. Certain roles are entitled to certain rights for employees or people concerned to access to the required information and to perform the required tasks. The system has provided a number of default roles, and additional roles can be created. Roles are created and maintained via System → HR & Security → Security roles → Maintain or HR → People → Security roles → Maintain. Examples of default roles are Administrator, HR, Purchase agent, Representative and System administrator, as shown in the following screen. These default roles are marked with the green ticks in the **Default role** column.

To create roles:

1. Go to System → HR & Security → Security roles → Maintain. Alternatively, go to HR → People → Security roles → Maintain.
2. Click **New**.
3. At **Role** and **Description**, type a unique code and description for the role.
4. Select the **Visible** check box to make the role visible for selection when assigning the role to users.
5. Under the **Users** tab, click ➕ **Add** to add users to the role, as shown in the following screen:

6. Under the **Rights** tab, expand **Menu** and **Functions** in the left column to assign rights to access to certain menu paths (for example, the **Invoice** or **Order** module) and functions (for example, **Sales** or **Inventory**). Each module and function displays the breakdown of the selected modules and functions in the right column. For example, when the module **Order** is selected in the left column, you can specify who can access the **Entries** menu path or **Reports** menu path in the right column. Likewise, when the function **Sales** is selected in the left column, you can specify who can perform which tasks, such as **View cost price / purchase price** or **To change the sales price during order entry** by clicking the check boxes next to the required rights in the right column, as shown in the following screen:

7. Under the **Role bar** tab, expand the modules in the **Menu** column. The functions for the selected module will be displayed in the center column, as shown in the following screen:

> **Note:**
> You can make use of the **Role bar** tab to create shortcuts for frequently used functions for other users who are assigned to that role.

8. Click **>** to add the required functions to the **Role bar** column. Hold the CTRL key down while clicking >, to select a number of functions at one go. To add all functions, click **>>.** To remove all functions from the **Role bar** column, click **<<**. To rename the menu paths of the selected functions in the **Role bar** column, right-click the required function, and then select **Rename function**.
9. Click **Save**, and then **Close** to exit.

3.3.4 Copying roles

When working with a number of companies, roles can be copied from one company to another. Therefore, a standard role structure needs only to be created once. To copy company databases, see *To copy company databases* at *4.1 Backing Up, Restoring, and Copying Company Databases*.

3.3.5 User rights

The rights assigned to the users can be viewed at System → HR & Security → User rights or HR → People → User rights. Rights are assigned according to roles. Users of the same roles have the same rights. An example is shown in the following screen:

Two options are available in the left column. They are **Menu** and **Functions** for menu paths and function rights. The middle column shows the lower-level menu paths or functions of the selected menu path or function in left column. Click ⊞ to expand the menu or function and ⊟ to collapse it to locate the required menu path or function in the left and middle columns. Once the required menu path or function is selected, the users who have the access rights are listed in the right column.

4. MANAGEMENT

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In the previous chapter, how a company database is created has been covered. In this chapter, how this company database, or simply company for short, is being managed — backed up, restored, and copied — is described, together with other related topics.

- Backing up, restoring, and copying company databases
- Updating to the latest version of Exact Globe Next/Exact Globe+
- License renewal

4.1   BACKING UP, RESTORING, AND COPYING COMPANY DATABASES

As a user-friendly solution, Exact Globe Next/Exact Globe+ provides an easy-to-use functionality for backing up, restoring, and copying company databases. The functionalities are available via ☰ →
System → Backup/Restore/Copy company as displayed in the following screen:

Click **Next**, and the following screen will be displayed, indicating clearly the four functions available.

4.1.1 Some important information

Before working on backups, the following information should be noted:

- Each company database (or company for short) is assigned with a unique number ranging from 000 to 999, therefore its backup is also unique to that company and the backup cannot be copied and renamed into another company. The backup can only be restored into the original company database.
- It is essential not to create a backup when the company database is in use. Attempts to do so will result in the following warning message, "Can't create backup. Data in use: Selecting 'Next' will disconnect all active users. This may result in loss of data."
- The backups of Exact Globe 2000 and Exact Globe Next/Exact Globe+ are not interchangeable, for example, the backup of one version cannot be restored in another version.

To create backups:
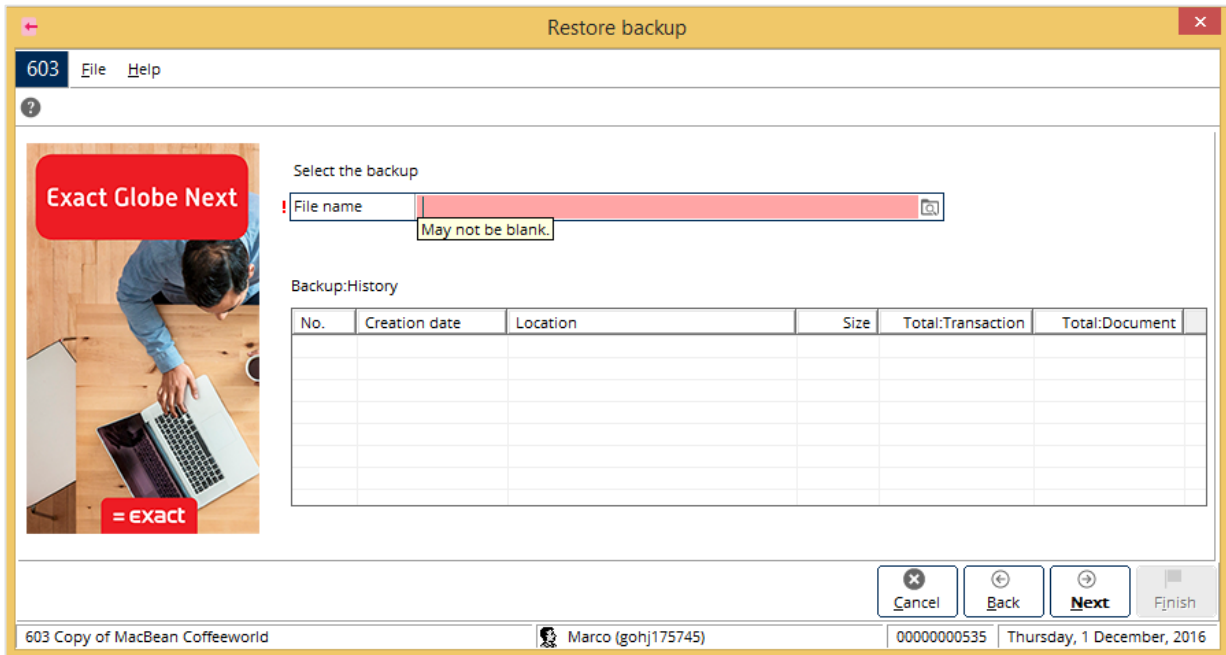
1. Go to ≡ → System → Backup/Restore/Copy company, and then click **Next**.
2. Select **Create backup**, and then click **Next**, as shown in the following screen:

3. A message will be displayed informing you to upgrade to Microsoft SQL Server 2005 or higher to be able to use Exact Globe Next/Exact Globe+.
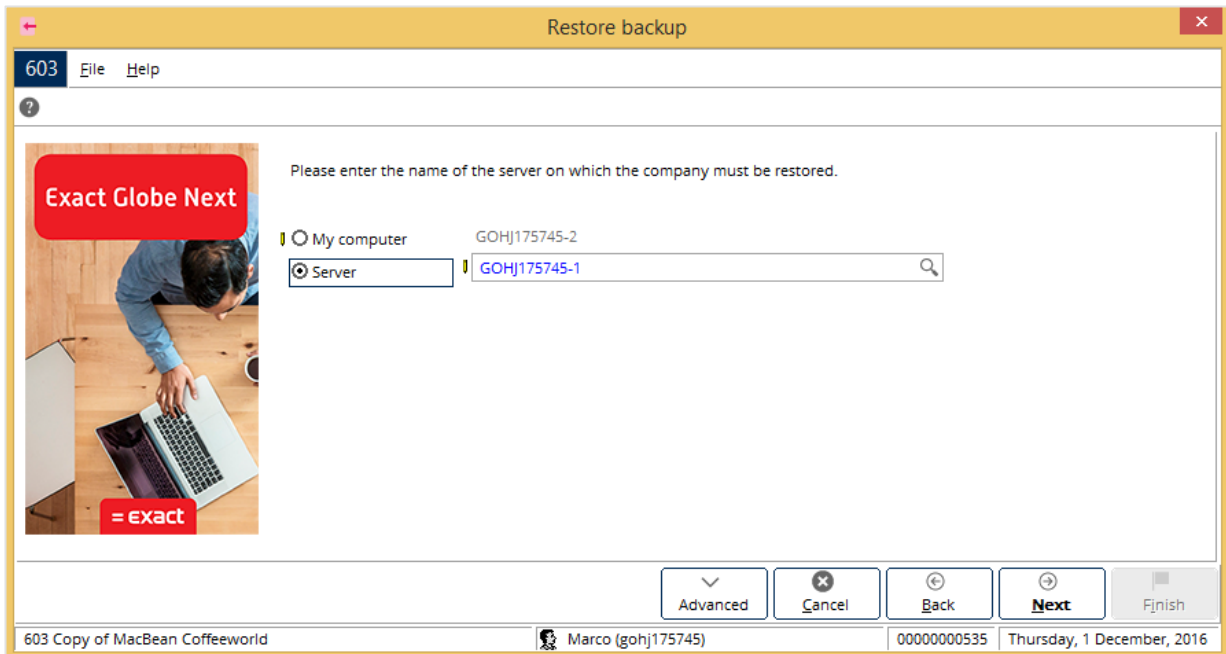
4. Click **OK**. The following screen will be displayed:

5. At **Companies**, select the company database which needs to be backed up.
6. Define the required fields, as described in the following:

    - **Name** — This indicates today's date followed by the name of the selected company at **Companies**.
    - **Directory** — Type or select the location where you want to store the database backup file.
    - **Database directory** — This indicates the database directory where the database is created.

If the required company database is not found on the local server, click the **Advanced** button to display additional sections, as shown in the following screen:

- **Windows authentication** — Select this check box to use the network login to create the database backup in the selected server.
- **Login name** — Type another login name using an authentication other than **Windows authentication** to create the database backup in the selected server. This field is available only if the **Windows authentication** check box is not selected.
- **Password** — Type the password for the login name predefined at **Login name**. This field is available only if the **Windows authentication** check box is not selected.
- **Server** — Type or select the server where you want to create the database backup file.
- **Company** — Type or select the company for which you want to create the database backup file in the server predefined at **Server**.

7. Click **Finish** to start the backup process. The backup with the **ebu** file extension will be created in the specified directory. The process takes some time, and the message "Backup successful." will be displayed once the process has completed.
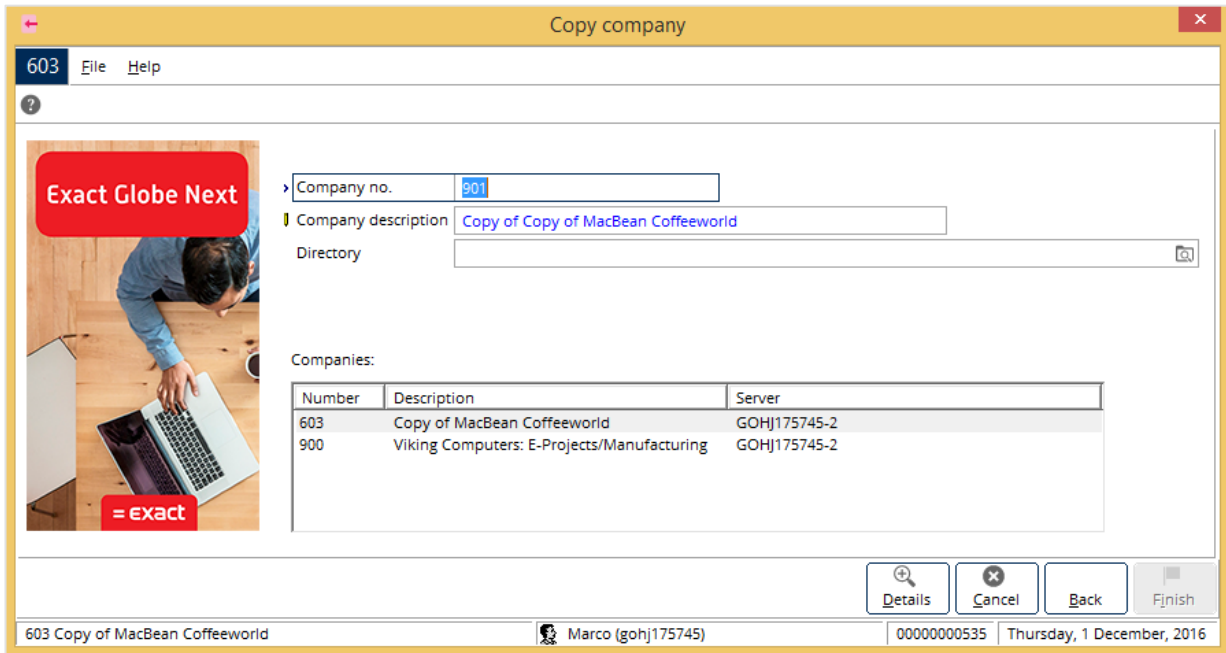
8. Click **Close** to exit.

To restore backups:

1. Go to ▤ → System → Backup/Restore/Copy company, and then click **Next**.
2. Select **Restore backup**, and then click **Next**. The following screen will be displayed:

3. A message will be displayed informing you to upgrade to Microsoft SQL Server 2005 or higher to be able to use Exact Globe Next/Exact Globe+.
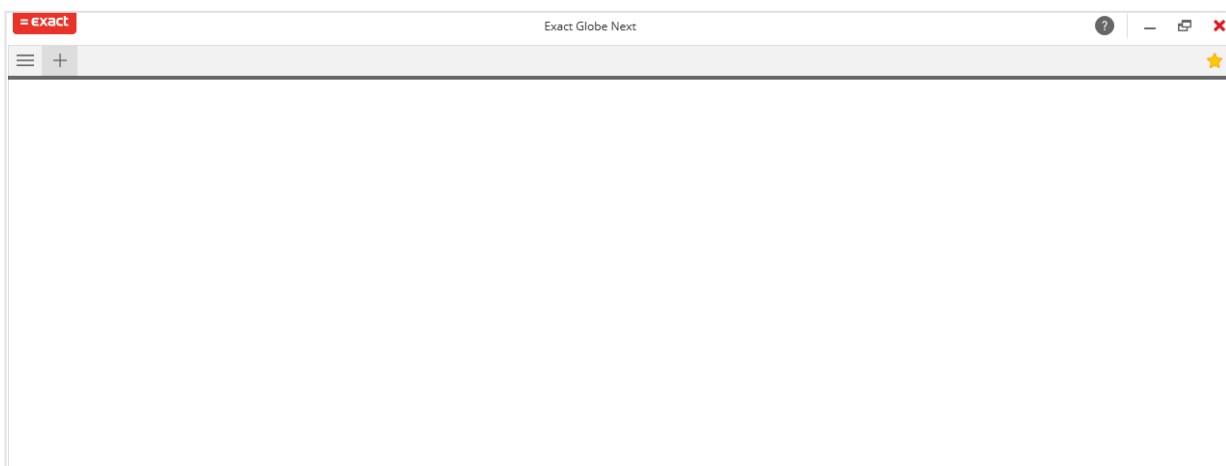
4. Click **OK**. The following screen will be displayed:

5. At **File name**, type or select required backup file to restore it. The backup file extension is **.ebu**. The **Backup: History** section displays all the backup files you have created. These backup files can also be selected. When you select any of the backup files from this section, the selected backup file will be displayed at **File name**.

6. Click **Next**. The following screen will be displayed:

7. Select the location to where you want to restore the backup, as described in the following:

- **My computer** — Select this option to restore the backup on the user's computer. The user's computer name is displayed.
- **Server** — Select this option to restore the backup on the server.

Additional fields will be displayed, if you have clicked the **Advanced** button, as described in the following:

- **Windows authentication** — Select this check box to use the network login to restore the backup on the selected server.
- **Login name** — Type another login name using an authentication other than **Windows authentication** to restore the backup on the selected server. This field is available only if the **Windows authentication** check box is not selected.
- **Password** — Type the password for the login name predefined at **Login name**. This field is available only if the **Windows authentication** check box is not selected.

8. Click **Next**. The following screen will be displayed:

9. The company database number of the selected backup file to be restored will be displayed at **Company**.
10. At **Database directory**, type or select the server location where the database backup will be restored.

> **Note:**
> If you have selected a different server on which to restore the backup file, the **Server directory** field will be displayed. Type or select the server where the backup will be restored on. The server directory must correspond with the selected database directory at **Database directory**.

11. Click **Next**. The following screen will be displayed:

12. Click **Finish**. The restoration process will begin. If the message "This company already exists. Overwrite?" is displayed, click **Yes** to proceed.
13. The process takes some time, and the message " Backup restored." will be displayed once the process has completed.
14. Click **Close** to exit.

To copy company databases:

1. Go to ☰ → System → Backup/Restore/Copy company, and then click **Next**.
2. Select **Copy company**, and then click **Next**.

3. A message will be displayed informing you to upgrade to Microsoft SQL Server 2005 or higher to be able to use Exact Globe Next/Exact Globe+.

4. Click **OK**. The following screen will be displayed:

5. At **Company no.**, type an identification number for the company database. By default, the system displays the next available company database number.
6. At **Company description**, type the description for the company database to be copied. By default, "Copy of" followed by the name of the company selected at **Companies**, will be displayed.
7. At **Directory**, type or select the location to where you want to store the copied database.
8. Click **Finish**. The copying process will begin.
9. The message "Completed: Copy from xxxxxxxxx to xxxxxxxxx " will be displayed once the process has completed.
10. Click **Finish**, and then **Close** to exit.

The copied company database can be opened via ╋ at the menu bar, as shown in the following screen:

4.2 UPDATING TO THE LATEST VERSION OF EXACT GLOBE NEXT/EXACT GLOBE+

Exact provides the users of Exact Globe Next/Exact Globe+ the convenience of updating the product 24 hours a day via the internet, ensuring the customers have the latest version of the product. The latest product update documents are also available online. It is advisable to read them to know what new features and improvements have been incorporated.

There are two ways with which you can update your product:

- Network updating — where the product on workstations are updated via the server.
- Workstation updating — where product updates are done on individual workstations.

4.2.1   Network updating

The updating is done in two stages. Firstly, the server must have internet access. Then the server updates the networked workstations, which do not need internet access.

On the server

On the server, go to the Exact Globe Next/Exact Globe+ folder and double-click **NetUpdater.exe**. In the **Exact Internet Installer** screen, define the fields as described in the following:

- **Product line** — This field displays the product name.
- **Install mode** — Select **Internet network installation update** for network updating.
- **Web site** — This field displays the web site address where the update files are available.
- **User Name** — Type the user name for the user account.
- **Password** — Type the password for the user account. The password is case-sensitive.
- **Domain** — Type the domain for the user account.
- **Release** — Select the required updated release of Exact Globe Next/Exact Globe+.
-
- **Installation directory** — Select the directory where Exact Globe Next/Exact Globe+ is installed.
- **Update software** — Select either of the following options to update the product:

  - During download
  - After download

- **Download demo company** — Select this check box to download the updated demo company database.
- **Download offline help files** — Select this check box to download the updated offline help files. This is recommended so that the latest batch of help documents is available.
- **Language** — Select the language of the help files downloaded. Select **(All)** to download help files for all languages.
- **Country** — Select the legislation of the country that is needed for the software. Select **(All)** to include the legislation for all countries.

After you have selected the installation mode at **Install mode**, and defined all the fields in the **Please enter your credentials** section, click **Authenticate**. The **Installation** section will be enabled. Once you have defined all the fields, and **OK** is clicked, the system checks the number of files to be downloaded and prompts the user whether to proceed with the updating process with a message. Click **Yes** to proceed with updating.

To update with the installation CD, if available, run the **NetSetup_xx.exe** (xx being the language code in the installation CD). For more information, see *2.2. Standalone Workstation Installation*. The rest of the updating process is as described earlier.

On the workstations

On the workstations, the software should have updated automatically. To check this, start up the workstation, and then launch Exact Globe Next/Exact Globe+. Check if the updated version is being used via ≡ → About.

Once updating is completed, the system will prompt whether to launch Exact Globe Next/Exact Globe+.

4.2.2 Workstation updating

The updating is done directly on the workstations via the internet. Unlike the earlier network updating method, the workstations must have internet access. To start the update, launch Exact Globe Next/Exact Globe+ on the workstation. Click ☰ → System → Update, and the following screen will be displayed:

Click **Internet** to update via the internet. The **Exact Internet Installer** screen will be displayed. Follow the procedures as described at *Network updating*. The update process is exactly the same except for the following fields:

- **Install mode** — Select **Internet workstation installation** (instead of **Internet network installation update**).
- **Installation directory** — Select the location where Exact Globe Next/Exact Globe+ is installed on the workstation and not on the server (for example, C:\Program Files\Exact Software).

Proceed with the updating process similar to that for network updating. Again, updating via a CD is possible, just run the **NetSetup_xx.exe** and proceed as described earlier.

4.3   LICENSE RENEWAL

The license of Exact Globe Next/Exact Globe+ comes in the form of a file with the **elc** file extension. An **elc** license file will only enable specific modules of Exact Globe Next/Exact Globe+ purchased by the specific customer. Each **elc** file or license has an expiry date. Fourteen days before the expiry date, a message will be displayed when Exact Globe Next/Exact Globe+ starts up. This serves as a reminder to the users that the license expiry date is about due. The license has to be renewed or updated to ensure continuity of the use of the modules.

Depending on the number of licenses held, the license(s) can be renewed through:

- Exact Globe Next/Exact Globe+ for single license, or
- Exact Customer Portal for multiple licenses.

4.3.1 License renewal via Exact Globe Next/Exact Globe+

Launch Exact Globe Next/Exact Globe+ and open the company for which the license is to be renewed. Go to ☰ → System → Update Exact Globe Next/Exact Globe+ license, and the following **License** screen will be displayed:

Click **Download from customer portal** to download the new license from the Exact Customer Portal. The following screen will be displayed. Define the following fields:

- **Customer code** — The default customer code will be displayed. Type another code if necessary.
- **Password** — Type the password that corresponds to the customer code to access to the Exact Customer Portal to download the new license.

Click **Download from customer portal** to download the new license to the default location of the **My Documents** folder.

After the license file has been downloaded, return to the **License** screen. Click **Select**, and then in the **My Documents** directory folder, select the license file. Click **Open** to open the file. Now, the license is renewed or updated.

4.3.2   License renewal via Exact Customer Portal

Log on to Exact Customer Portal by clicking the **Customer Portal** link at the top of the Exact web site at *www.exact.com*.

A logon screen will be displayed. Type the user name and password at **User name** and **Password**. At **Domain**, type "eweb". If the **Domain** field is not displayed, type "eweb\" before the user name, for example, "eweb\112543". Click **OK**. For more information on obtaining the customer password, see *Password and logging on* at *5.5 The Exact Customer Portal*.

Click the **My account** link at the top of the web site, and then click **My Licenses**. In the **Contract** column, click the required license link with the active status.

Under the **Status** section, click the license voucher link at **Document**. The **Attachments** section will be displayed at the bottom of the page. Click the **Download** link to download the license file. Do not to change the **elc** file extension of the license because Exact Globe Next/Exact Globe+ looks for the **elc** file when installing the license. Select a directory to which the new license file will be downloaded.

After the new license file has been downloaded, launch Exact Globe Next/Exact Globe+ and open the company database for which the license is to be renewed. Go to ≡ → System → Update Exact Globe Next/Exact Globe+ license. The **License** screen will be displayed. Click **Select from your files**, and then select the license file. Click **Open** to open the file. Now, the license is renewed or updated.

What if the license is not updated?

Once the license file update has been completed successfully, the system will notify the user. But in the rare occasions that the system notifies otherwise, for example, when the license file is not updated, customers are advised to:

- contact your local Exact Support desk for further assistance. You can find the contact information of your local Exact office on the Exact web site (*www.exact.com*) and Exact Customer Portal, or
- contact any Exact resellers they are affiliated to, or
- submit a request for service via the Exact Customer Portal.

5. SUPPORT FOR EXACT GLOBE NEXT/EXACT GLOBE+

Exact always views customer support very seriously. Therefore, support for Exact Globe Next/Exact Globe+ is available in many forms. First of all, the help function called up by pressing the F1 key, is available extensively throughout the software. Round-the-clock support is available from the Exact Customer Portal at *http://customers.exact.nl.* Besides getting the latest support possible on the internet, customers are provided with personal support service directly from Exact branch offices or from the many affiliated Exact resellers. As a customer, you can be rest assured that whenever you have any queries or requests, we are ever ready with the answers and solutions.

The topics covered in this chapter are:

- Help function
- Release notes
- Maintenance agreement
- Personalized services
- The Exact Customer Portal
- FAQs about the Exact Customer Portal

5.1 HELP FUNCTION

Exact Globe Next/Exact Globe+ has incorporated the use of the help function in practically all its menu paths and functions. While you are at a particular menu path or function, press F1 for more information. The system will link the user to a list of related documents that provide comprehensive information about the functionality (menu path or function). For example, the following screen shows a list of online help documents related to purchase orders for Exact Globe Next/Exact Globe+**.**

5.1.1   Release notes and help documents

Generally, the list includes release notes and help documents. The release notes provide information on the improvements done on the functionality of the progressive batches or releases of the software. The help documents provide information about functionality. These can take the forms of FAQs (frequently asked questions) or How-to documents.

5.1.2 Toolbar buttons

The functions of the buttons at the top of the screen are described in the following:

- **Back** — Click this button to go back to the previous screen.
- **Forward** — Click this button to go forward to the next screen.
- **Start page** — Click this button to go to the web start page for a module related to the functionality. A start page is the table-of-contents page with links to documentation on all the functions related to a module. It is therefore, a good starting point to navigate to search for the information needed. An example of a start page for Exact Globe Next/Exact Globe+ is shown in the following:

Exact Globe Next - Help (My computer)

Back   **Forward**   **Start page**   **Print**

Exact Globe

Exact Globe Next startpage

Welcome to Exact Globe Next startpage. This page provides you with a common platform where you can find general information on, and the links to all the packages and modules of these product lines under Exact Software. Also on this page, you will be able to find information on how to install, update, and manage your software. To learn more about a specific module or package, click the relevant hyperlink.

Financial modules

Logistics modules

General modules

Installation and management

For more news and sharing on Exact product lines and support, see *Exact Support Blog*.

Related documents

- Exact Synergy Enterprise User Guide Startpage (English)

- **Print** — Click this to print the selected documents.

5.1.3 Search and language

In the **Help** screen, type the keywords of the required information at the search field, for example, "update license", and then click **S-Search.** The search results will be displayed, as shown in the following. You can select the required language of the documents to be displayed (depending on the availability of the language choices) at **Language**, and sort the search results by date or descriptions at **Sort by**.

Click the **Internet** hyperlink at the top right corner of the **Help** screen to link to the online help page, and then click **Search**. The **Documents: Search** screen will be displayed, as shown in the following:

Various search criteria are available, including **Text** and **Creator**. Click **Advanced** to search for documents based on **Category**, **Type**, **Project**, **Item**, **Assortment**, and others.

5.2 RELEASE NOTES

Exact Globe Next/Exact Globe+ is regularly upgraded in batches or releases to serve the customers better. Release notes are published to inform customers about the changes in every new batch. They can be accessed via the following menu path, screens, or web site:

- F1 (under the **Release notes** section)
- The **Exact Internet Installer** and **Exact Workstation Installation** screens during installation or updating by clicking **Release notes**. For more information, see *2.2 Standalone Workstation Installation* and *4.2 Updating to the Latest Version of Exact Globe Next/Exact Globe+*.
- Exact web site at *www.exact.com*.

The first option accesses the offline list of release notes for the last update in the system, while the latter two options access the online list of release notes of the latest batch via the internet.

5.3   MAINTENANCE AGREEMENT

To make full use of the services provided by Exact, we strongly recommend our customers to enter into maintenance agreements with us. By entering into a maintenance agreement with us, not only are you guaranteed of our full technical support, but you will also have free access to our latest version of the Exact products that you have purchased.

To enter into a maintenance agreement with us, just complete the License and maintenance registration card in the enclosed booklet entitled, "Exact license and maintenance conditions", and send it to Exact.

5.4 PERSONALIZED SERVICES

While we endeavor to make our manuals and references as useful as possible, should you still have queries after referring to them, we would advise you to contact us. The various ways to reach Exact for personalized services are as follows:

5.4.1 Support through phone

Contact your local Exact Support desk for further assistance. You can find the contact information of your local Exact office on the Exact web site and Exact Customer Portal.

5.4.2 Support through the internet

Our experience tells us that it is not always convenient for our customers to call during the day. Therefore, we provide support over the internet. Send your queries through our web site at *www.exact.com* at any time convenient to you, and our Support staff members, who are experienced in and knowledgeable about the relevant aspects of the software, will answer your queries. Exact is committed to provide a proper answer or workable solution to any query within one hour during office hours (08:30 a.m. to 05:30 p.m. CET, Monday to Friday).

To access the support, click **Contact** at the top header of the main web site, as shown in the following:

The following contact web page will be displayed:

Select a country and click **Support question**, **Sales question**, **Service question**, or **General question**.

5.4.3 Support through local Exact offices and resellers

Exact has appointed over 400 authorized Exact resellers all over the world. These resellers have support specialists who have been trained and certified by Exact so that a high standard of service for our products is guaranteed. If you are a customer of our resellers, go to them for technical support. Besides providing high-quality software support, these centers can also offer consultancy, sales, and hardware support services.

The following web page relating to Exact resellers worldwide is available by clicking **Exact Worldwide** at the top right corner of the main web site at *www.exact.com*, as shown in the following:

The following web page will be displayed. Select the required location link.

Alternatively, go to **Where we are** under the **Contact** section at the bottom of the page, as shown in the following:

The following web page will be displayed.

Select the required location link. The following web page will be displayed:

Click the office link, or the map location to display contact information on your local Exact or Exact reseller office.

5.5 THE EXACT CUSTOMER PORTAL

There is a Customer Portal link on the Exact web site *www.exact.com*. Customers have a full range of services and support from the Exact Customer Portal.

The services and support include:

- Receiving queries. 24 hours a day, 7 days a week, on the internet.
- Extensive and useful information that you can search for.
- Answers to FAQs.
- News about the latest products and versions by Exact.
- Access to your own and your customers' databases for information and maintenance.

The details of some of the services and support available at the Exact Customer Portal are described in the following sections.

5.5.1 Password and logging on

A password is needed to log on to the Customer Portal. Any request including the password, can be made through a phone call to your local Exact office, or through the **Contact** form available on the Exact web site at *www.exact.com*. For more information, see *5.4 Personalized Services*.

Once the customer code and password are available, log on to the Exact web site, and then click the **Customer Portal** link. A logon page will be displayed. At **User name**, type the customer code, for example, "112543", and then type the password. At **Domain**, type "eweb". Note that the password is case-sensitive. If the **Domain** field is not visible, type "eweb\" before the customer code at **User name**, as shown in the following:

Click **OK**. The **Customer Portal** page will be displayed:

There are five main links (at the top of the web page), and they are **Home**, **Support**, **My Account**, **Links**, **and Contact**. The **Links** hyperlink accesses the latest news about Exact products and their versions, and services. The **Contact** link accesses the lists of customer support. Other links are described in the following sections.

5.5.2 Searching for requests and documents

Among the extensive search features on the **Customer Portal** page are the **My Requests** search and **My Documents** search. The two search links can be selected under the **My Account** hyperlink, as shown in the following:

Exact Synergy Enterprise is another sophisticated software application developed by Exact which provides an integrated workflow solution that supports the Customer Portal and other portals for resellers, suppliers, and employees.

The search functions for requests and documents work as follows:

Go to My Account → My Requests or My Account → My Documents, define the search criteria under the **Criteria** section, and then click **Refresh** to search for the request or document.

5.5.3 My account data

Another useful feature provided on the **Customer Portal** page is the **My Account** link for Exact customers to access their accounts with Exact. Click **My Account**, and then click **My Account Card** to access the customer card, as shown in the following:

This customer card can be edited by clicking **Edit** and the web page will be displayed as follows:

5.6   FAQS ABOUT THE EXACT CUSTOMER PORTAL

The answers to some of the frequently asked questions relating to the optimized use of the Exact Customer Portal page are detailed in the following sections.

How do I set the language?

Click **My Account**, and then click **My Account Card**. Under the **Contacts** section, select your name and click **Edit.** Select a language at **Language** under the **Contacts** section and click **Save**.

How do I change the password?

On the toolbar, click ▭ beside your name, and then click **Change Password**.

Define the fields, and then click **Save**.

Note:
Passwords are case-sensitive. Hence, ensure the right cases are used when entering passwords.

How do I create and maintain contact persons?

To create contact persons:

1. Click **My Account**, and then click **My Account Card**. Under the **Contacts** section, select **Add**.

Contacts		All	Add
Dhr.	Rob Klijsen - Pre Sales		👤
Mevr.	Agneszka Preizner -- - --		
Dhr.	Michiel Bos - --		
Dhr.	Demo - DEMO		

2. On the **Contact: New** page, define the fields, and then click **Save**.

To edit contact persons:

1. Click **My Account**, and then click **My Account Card**.
2. Under the **Contacts** section, click the required contact person.

Contacts		All	Add
Dhr.	Rob Klijsen - Pre Sales		👤
Mevr.	Agneszka Preizner -- - --		
Dhr.	Michiel Bos - --		
Dhr.	Demo - DEMO		

3. Make necessary changes and click **Save**.

How do I get online support?

Click **Support** at the top of the page, and then click **Ask Support a question**. Alternatively, click **Ask Support at question** at the bottom of the homepage.

You can also create a support request by clicking **My Account**, and then clicking **My Requests**. On the **Workflow** page, click **New**. Select **Support request** under the **Support** request type in the **All request types** section. On the **Request: New** page, click **New**. Define the fields, and then click **Submit**.

How do I view a few web pages together?

Go to **File** on the browser page, and then click **Duplicate tab**. Alternatively, select **New tab** or **New window**. The same web page will be opened in a new window or new tab, allowing you to see as many web pages as you like at one time.
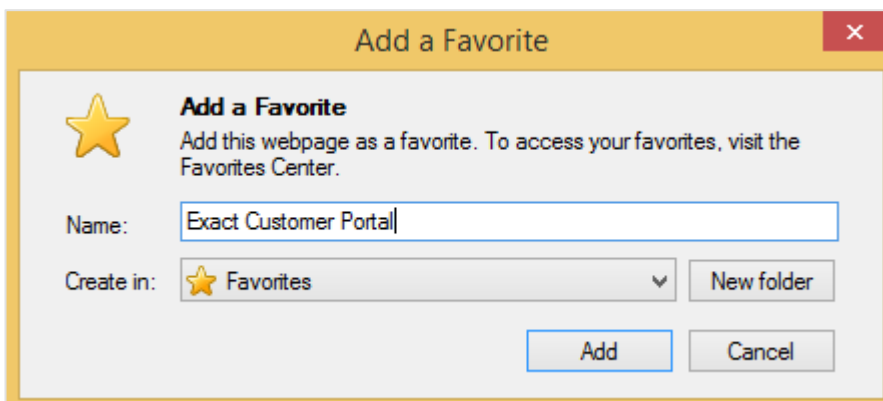

How do I add the Exact Customer Portal to Favorites?

The Exact Customer Portal is a very useful source of information and downloads for Exact Globe Next/Exact Globe+. It will be convenient if it is added as a favorite site for easy access. To do that, on the Customer Portal homepage, select **Favorites** on the Microsoft Edge toolbar or go to **Favorites** at the top menu, and then select **Add to Favorites…**. The following page will be displayed:

At **Name**, type an appropriate name for the web site, for example, "Exact Customer Portal", and then click **OK** to complete the process. After that, you can access the Customer Portal by selecting **Favorites** at the top menu, and then selecting **Exact Customer Portal**.

APPENDIX A: PRODUCT UPDATE CHANGES

Product Update	Chapter
405	All chapters
406	2.1, 2.5.3
407	2.1.1, 2.2, 2.4, 3.1.2, 3.2.1
408	2.1.1, 2.2, 2.4
409	2, 2.1.1, 2.1.2, 2.2, 2.4, 2.5, 2.5.2, 2.5.4, 2.5.5
411	2.1.1, 2.2, 2.3, 2.4, 2.4.1, 3.1, 3.1.1, 3.1.2, 3.2.1, 3.2.2, 3.3.2, 3.3.3, 3.3.5, 4.1, 4.1.1, 4.2.1, 4.2.2, 4.3.1, 4.3.2, 5.1, 5.1.2, 5.1.3, 5.2, 5.4.2, 5.4.3, 5.5, 5.5.1, 5.5.2, 5.5.3, 5.6
412	2.1.1, 2.6, 3.2.1, 3.3.3, 4.1
413	2.1.1, 2.5.4, 2.5.6, 3.1, 3.1.1, 3.1.2, 4.1.1, 4.2.1, 5.1.3, 5.4.2, 5.5.3, 5.6
414	2.1.1, 2.2, 2.3, 2.4, 2.4.1
415	2.1.1
416	2.2, 2.4, 2.4.1, 2.5, 2.5.2, 2.5.4, 2.5.6, 2.5.7, 2.5.8, 4.2.1
417	2.1.1
418	2.1.1, 2.5
419	2.1.1
420	2.1.1, 3.1, 3.1.1
421	2.1.1, 2.1.2, 2.5.5
422	2.1.1
500	2.1.1, 2.1.2
501	2.1.1, 5.6
502	2.1.1, 2.5