



Avanti On-Premise Multi-User Installation Guide

This guide will walk you through the steps needed to install a multi-user edition of Avanti.

Important

This guide is for setting up Avanti as an On-Premise system which means it operates on the IT infrastructure that is physically located and managed on your own premises. This requires that all of the software and data is stored and maintained on your in-house computers and works over your own private local network which must be setup correctly prior to following this guide.

This guide does not apply if you have a Cloud subscription to Avanti. If you require a cloud and internet-based setup for your Avanti system you must contact us before proceeding.

There are two types of installation required for installing a multi-user edition.

- Server
- Client

The Server is the computer that you want to act as the file server by storing all of your data and providing other computers on the network access to your data. The Server is a PC that runs the Windows operating system, is held and managed locally on your premises and is connected to Client PCs through your own local network.

The Clients are all of the other Windows PCs that you want to access the data from. The Avanti Client software should be installed on all of the Client computers which connect to the Server computer over your local network to access your data.

There is no limit to the number of computers that you can install the Avanti Client software on which are connected to the Server computer on your network. However the number of named users which you can set-up in the system is limited to the number of user licenses you have purchased in your subscription. Each named user is limited to one concurrent connection to the Server.

The Server computer can also be used as a Client enabling you to use Avanti on the same computer which serves your data. You do not need to install any additional software other than the Server software to do this. However if you regularly have more than 3-4 users simultaneously accessing the data on the Server then we recommend you utilise the Server

computer as a dedicated file server.

Getting Started

Installing and setting up Avanti multi-user as your core business system is straightforward however there is more to it than simply installing a standalone application on your PC and there are some technical requirements which may make the process tricky for the less tech-savvy. Therefore unless you're confident in setting up networked software we recommend you have an IT or networking professional with you to help when installing and setting up your Avanti multi-user system.

Prerequisites

The setting up of your local network and the configuration of the on-premise Server and Client computers for Avanti multi-user to run on is a prerequisite for installing and using Avanti multi-user. You will need to ensure this is done either by yourself or by a networking professional prior to installing the Avanti software. As per our support policy (see below) we cannot provide or advise on IT infrastructure setup required to run Avanti on-premise.

Multi-User Support Policy

The instructions given in this setup guide provide everything you need to successfully install and configure your Avanti multi-user system. Everything we have learned from supporting customers in setting up Avanti multi-user is contained in this guide and there is no instance we have experienced in which, provided that these instructions are followed precisely as explained, the multi-user software could not be set-up correctly. Therefore any issues which prevent the successful setup and running of Avanti multi-user, following the correct implementation of these instructions, are due entirely to network setup issues and/or server setup issues which are beyond the scope of what our support services can advise on. If, after following these instructions precisely as explained, you are experiencing problems running Avanti multi-user you should contact a networking professional to assist you.

Firewall Settings

Avanti accesses the Server from the Client machines through a specific network port. In many configurations the installed firewall will not open or will actively block this port by default, preventing the Client machines from connecting to the database on the Server. Before setting up the system you should ensure that port **3050** is open on your Server machine **and** all client machines to ensure that a firewall is not blocking port **3050**. The process of carrying this out is straightforward and there are many resources online to help you however if you are unsure of how to do this please consult an IT professional.

Upgrading from the Standalone edition.

If you have previously installed and have been using the standalone edition of Avanti on what is now going to be your Server computer or on one of the computers you intend to

use as a Client, we recommend that you backup your existing Avanti data and then you should uninstall your existing Standalone edition before following the instructions to install Avanti multi-user. Ensure you backup your data and any other necessary files such as your documents before installing the Server (or Client) software (your document files are stored in the Documents sub-folder in the main Avanti folder). If you do uninstall the standalone edition ensure that the Avanti folder has been completely removed following uninstall and if not delete it manually. After you have completely setup your Avanti Multi-User system we recommend you restore your backup from your Server PC rather than a Client PC.

Server

There are two steps to installing Avanti on your Server computer :

- Installing the Database Server
- Installing the Avanti Server Software

Installing the Database Server

Avanti utilises a Database Server called Firebird to access and store your data. Firebird is an extremely powerful database which is used in thousands of critical business applications across the world. All editions of Avanti, including the standalone edition and the multi-user Client edition, utilise the Firebird database however they use a lightweight, embedded version which is installed with Avanti and works seamlessly and invisibly in the background. In the case of the Server, which has to handle any number of concurrent connections, we need to use the Firebird SuperServer edition which has it's own installation process.

Quick Info

We chose Firebird as the database back-end for Avanti because it's extremely powerful, robust, reliable and scalable but also very lightweight meaning it takes up very little of your system's resources and requires no maintenance. Firebird is one of Avanti's secret weapons! If you require more information on the Firebird Database Server please refer to this link : <http://www.firebirdsql.org/>

To install the **Firebird Database Server** on your Server computer, you must download the software using the *Database Server* link provided in your order confirmation email.

Once the download is complete, run or open the file and the installation process will begin.

The first prompt will ask you to confirm the language to use. The default is English so just click **OK**.

Click **Next** when the Welcome page is displayed. The next page is the standard license agreement. Click the *I accept the agreement* option and click **Next**.

The next page is a ReadMe page which you can skip by clicking **Next**.

On the Destination Location page leave as the default (unless you absolutely have to install it somewhere else in which case use the Browse button to select the location) and click Next.

On the next page it asks which components need to be installed. Leave them as they are except for the option which says *Developer and admin tools components*. Avanti doesn't need these and as they will take up 9.4MB on your system, you should untick the box next

to it to ensure it is not installed. Then click **Next**.

On the next page just click **Next** to accept the default.

On the next page, entitled *Select Additional Tasks*, there are a number of options available. All of these defaults are fine for what we need to do so accept them as they are by clicking **Next**.

You're now ready to install the Firebird Database Server so just click **Install**.

It will take a matter of seconds to install and once completed you will get an Information page for which you can just click **Next**.

Finally you are given two checkboxes. Leave the *Start Firebird Service now* checkbox ticked and untick the *After installation – What Next checkbox*. This ensures you can start installing and using Avanti without having to re-start your Server computer.

Under some circumstances you may however not be given the options explained in the paragraph above and simply be asked if you want to re-start your computer. In this case you should select to re-start the computer and proceed with the remainder of these instructions once the server machine has re-started.

Click **Finish** and you've installed the Firebird Database Server.

Installing The Avanti Server Software

You start by downloading the Avanti Server installation by following the *Avanti Server* link in your order confirmation email.

Once downloaded and saved on your Server computer, run or open the file and the Avanti Server installation process will begin. This is self-explanatory and you can click **Next** on each page to accept the defaults, changing the installation location if required.

The Avanti Server software is ready to go!

Setting Up The Server

In order for Client computers to access the information on the Server computer it is vital that you share the folder where Avanti is installed on the Server so that the Client computers have Read/Write access to it, including the ability to create and delete folders and files within it. If you do not do this, the software will not have access to the resources it needs and when you use the software on a Client computer it may not operate how you would expect and/or display error messages. This is a networking task and is beyond the scope of this document to explain and can differ depending on the version of Windows that your Server computer is running. Generally however it can be as simple as opening up

Windows Explorer, right-clicking the folder where Avanti is installed and selecting the *Sharing* or *Share With ...* option.

When you share the folder where Avanti is installed on the Server, all sub-folders will generally also be shared with the same access rights, however it is important that you check that they are. Make sure all sub-folders are shared (in particular the Users sub-folder) and that the software and/or Windows user accounts that will be logged on to use the Server have the necessary rights to read and write existing files as well as the rights to create and delete both sub-folders and files within all Avanti folders. If you are experiencing difficulty with making these settings please consult a networking professional.

Next, run the Avanti software on your Server, before proceeding to setup your Client machines, and follow the steps explained below.

The first time you run Avanti you will be asked to enter the unique Serial Number which has been provided in your Order Confirmation details. Enter this the first time you are asked. Once entered click the **OK** button. Your Serial Number will then be recorded and registered.

You will next be asked to enter your Multi-User License Key. This is again provided in your Order Confirmation details. This will register the number of named users you can have registered with the system and allow you to proceed.

Once confirmed you will be asked to select whether you want to create a new company, restore from a backup or use the sample company. For purposes of set-up you should select the Sample Company option. This window will appear each time you run the software until you set-up a new company or restore a backup.

Finally you will be asked to create an initial user account. You should enter a User ID and Password so that you can log into the system in future. Ensure you remember the details you enter. This initial user account counts as one of your named users registered to use the system. Once entered click the Save & Close button.

If the above is entered correctly you can proceed to use the system on the Server.

Client

A Client is a computer that you can run the software on and which accesses all of the data and resources it needs from the Server computer. To do this it must have access to the Server computer through a network and for the Server computer to allow the Client the access rights to read and write to the resources and files it needs and also to create new folders and files and to delete folders and files.

Installing The Avanti Client Software

You start by downloading the client installation file using the Avanti Client link provided in your order confirmation email.

Once downloaded and saved on your client computer, run or open the file and the Avanti Client installation process will begin. This is self-explanatory and you can click Next on each page to accept the defaults, changing the installation location if required.

You will need to repeat this process for each client computer you want to access your information from.

Setting Up The Client

Setting up the software on Client computers is very straightforward and simply involves telling the Client where it needs to look to access the data and other resources on the Server computer.

Once the software is installed, run it and you will be asked for the information required to access the data on the Server machine. The system will ask for three pieces of information.

- 1) Name of the Server computer.
- 2) The local path on the Server computer where Avanti is installed.
- 3) The full network path (URI) to where Avanti is installed on the Server computer.

The first two settings are used together to give access to the data on your Server. It requires the name of the Server computer and the local path to the data on the Server computer.

The name of the Server computer can easily be obtained by going to your Server computer, clicking the Windows Start button, look for the *My Computer* or *Computer* option (depending on the version of Windows used on your Server), right-click on it and select Properties from menu. Look for the **Full Computer Name** property and make a note of it (you may see both a Computer Name and a Full Computer Name – always use the **Full Computer Name**). Go to your Client computer and enter it into the Server Name box in the Setup Server Location window.

The Server Data Path box wants the local path to the data on your Server machine. This requires that you supply the location of the data as it is defined locally on the Server machine. For example if you have installed Avanti on the Server machine to [C:\Avanti](#) (as per the installation default) then you need to enter [C:\Avanti](#) into this box. DO NOT enter a mapped path or URI to the Server in this setting – it must be the location as the Server sees it.

From a Client machine you cannot see the path as it is seen locally on the Server and

therefore you cannot browse or perform a lookup to it. Therefore go to your Server machine, use Windows Explorer to browse to the main folder where Avanti is installed and make a note of it. Return to your Client computer and enter it into the Server Data Path box.

Finally you are asked for the full network path (called a URI) to where the required files are located on your Server computer. In this case you can browse through the network to locate the files on your server by clicking the lookup button on the right of the Server Network Path box. You can generally access the Server path by going through the *My Network Places* or *Network* option (depending the version of Windows you are using) and browsing through to the Server computer.

A network path (URI) is in the format [\\Server-PC\Avanti](#)

Once you have defined these settings click the **Test Connection** button and this will attempt to connect to the data on your Server using the settings provided. This will return a message with either Connection Successful or Connection Unsuccessful. If it returns a message with Connection Successful then you're good to go and you can click the OK button. If it returns a message with Connection Unsuccessful then you need to go back and check your settings again. If you continue to have problems connecting you should run through the points explained in the Trouble-Shooting section later in this guide.

Once you have connected to the data on your Server computer the application will run and you can proceed with using the software.

Copying Client Setup

You must repeat the above on each Client computer that you want to access the data on the Server from. However if you wish you can copy the connection information (as outlined above) from the first Client computer to the others.

On the Client computer that you have successfully set-up and connected to the Server, go to the Data sub-folder of the main Avanti folder (e.g. C:\Avanti\Data). There is a file in this folder called `_CONTROL.CFG`. This file holds the Server access information you have defined. Make a copy of this file i.e. onto a pen drive/memory stick and after you have installed the software on each subsequent Client computer copy it into the Data sub-folder of the main Avanti folder and select to overwrite the existing file. By doing this, when you run Avanti on each subsequent Client computer, Avanti will detect the settings and automatically access the data on the Server computer without any additional set-up required (providing network access from the Client computer to the Server is set-up correctly).

Trouble-Shooting

If you are having trouble connecting from the Client machine to the Server or are experiencing problems using the software on a Client after following all of the instructions above you should run through this Trouble-Shooting checklist to ensure you haven't missed anything.

- 1) Ensure all sub-folders in the main Avanti folder are Shared. If they are not then the software will not be able to access the resources it needs to run correctly. As some sub-folders also contain additional folders ensure that when you share sub-folders that you also select to share all folders within each sub-folder.
- 2) All Client computers and the User Accounts that are using the software to access Avanti must have read/write access to all files and sub-folders in the Avanti folder on your Server. In addition they must have access rights to create and delete files and folders. Check all User Account access rights to the Avanti folder and ALL sub-folders within it to ensure they have the necessary access.
- 3) Ensure that you have the correct Server Name. You should take the name of the Server computer directly from the My Computer/Computer properties on the Server computer and use the **Full Computer Name** property exactly as it is displayed. If you see a Computer Name property and a Full Computer Name, always use the **Full Computer Name** for your Server Name.
- 4) In the Server Data Path box ensure you enter the path to the data as it is stored locally on the Server. For example if the software is installed locally on the Server as [C:\Avanti](#) then enter [C:\Avanti](#). **DO NOT** enter a mapped path to the Server – it must be the location as the Server sees it.
- 5) In the Server Network Path specify the full URI which points to the main Avanti folder on the Server. Supply the URI path directly to the Avanti folder and do not point it to a sub-folder such as Data. For example [\\MyServerPC\Avanti](#) is correct but [\\MyServerPC\Avanti\Data](#) is incorrect. A tell-tale sign that not all sub-folders in the Avanti folder have been shared on the Server is when you attempt to browse to the location and you cannot see all sub-folders to select from.
- 6) Avanti uses Port **3050** to access the database running on the Server machine. Ensure that the firewall settings on your Server and all Client computers are not blocking Avanti from accessing this port. Do not simply switch off your firewall to try to achieve this, you must leave your firewall on and unblock the specific port.
- 7) Restart your Server machine and ensure that the Firebird database server is running. Generally if the Avanti software runs correctly on the Server machine then the Firebird database server must be running however to be absolutely sure open the

Windows Task Manager and look in both the Processes or Services tabs for Firebird Server and ensure it's status is Running.

- 8) If you are having issues running the software directly on the Server before setting up any client machines, you should install, setup and connect a Client machine to the Server as explained earlier in the document.
- 9) On the Server PC, check that you do not have remnants of a previous standalone installation which may be affecting Client connections. Go into the folder where Avanti is installed on your Server PC and look for any files that have a **.dll** extension. If there are any files that have the **.dll** extension, ensure that you close the software if it's running and delete these files.

If you are still experiencing problems with your set-up after following these points as explained then the issue is a general network, server set-up or firewall issue. In this circumstance we strongly recommend you contact a networking professional. As explained in our Multi-User Support Policy, networking issues are outside the scope of what our support services can advise on and therefore we do not provide direct support on installing and configuring your Avanti multi-user system beyond this document.

Using Avanti Multi-User

Setting Up Additional User Accounts

Each User Account can be signed-in to the system once. Therefore to use the system in Multi-User mode you must set-up additional user accounts. The number of user accounts you can set-up is dependant on the number of user licenses you have purchased as each user license represents one named user.

To set-up additional user accounts you should open up the Avanti application, select **File** from the main menu, select **User Setup** and **Add New User**.

As well as giving a user a unique ID, Name and Password you can also define which elements of the system they are allowed access to. The most important option is **System Setup**.

System Setup will give a user access to company, system and user level options. For example with System Setup ticked, a user can go in and view and change user settings, company preferences and settings about how the system functions. We recommend only one or two users have access to this type of information and therefore it is very important that you untick the System Setup box for any user who does not need access to this level of information.

Once you have entered the user details and set their access levels, click **Save & Close** or **Save & New** if you need to additional user accounts.

Unlocking User Accounts

Each user account in Avanti is only able to have one connection to the software at any time. When a user logs in to the system it marks that user account as being in the system. When you close the software it will mark them as being signed out. In the event that the system is closed or shut down unexpectedly the software will not have the opportunity to mark the user account as being signed-out. Therefore in this case when they next try to sign-in, the software will automatically refuse them access to the system as it considers them to be signed-in on another computer.

To cater for such a situation the software provides a User Account Unlock facility.

The facility to unlock users is available in two places, the first is the Sign-In window and the second is the **Unlock User Accounts** option on the Utilities menu.

To unlock user accounts your user account must have access rights to do so. In the User Setup form the System Setup checkbox must be ticked for your user account.

Please note : If your user account has System Setup access rights then, should your own

user account become locked, you will have the option to sign-in regardless. In this case if you do choose to sign-in, any other active connections you have open elsewhere will terminate.

To use the Unlock facility in the Sign-in window when you first run Avanti, enter your User ID and Password but do not click the Login button. After confirming your Password (by pressing TAB or ENTER on the Password box) a small lock image will be displayed on the bottom right of the sign-in form. Click this image to open up another window which will enable you to unlock users who are marked as being sign-in.

Simply untick the box next to any user who is locked-in. **DO NOT** untick users who are actively signed-in and using the system as it will cause their connection to close and for the software running on their computer to terminate.

Click OK when you are finished.

Refreshing Data

Any data you see on your screen when using Avanti is never completely live or synchronised with the information in your database. The data you see is a "snapshot" of the data as it was when you requested it. Once the data "snapshot" is returned from the database you are then working on and looking at data which is no longer live.

Using the system in standalone mode this makes very little difference as you are the only one updating your information anyway. However in multi-user mode, because potentially any number of other users could be updating the data simultaneously, it is likely that the data you are seeing on your screen is out-of-date at some point. The answer is to ensure you regularly Refresh the data on your screen. Refreshing will grab an up-to-date snapshot of the data to your screen so you have the live information. On most forms in Avanti, especially reports and enquiry screens, you have a Refresh button. On all screens where Refresh is available you can also press F5 and a renewed snapshot of the data will be collected from the database and displayed for you.

For example you have the Sales section list on-screen. Another user goes in and adds a new invoice. For you to see this new invoice in the Sales section you will need to refresh by pressing F5.

There are times when the system will automatically perform a refresh for you. For example when you make an update the system will refresh the relevant data for you which will pull in all changes made by other users.

Why not live, realtime data? Providing constant updates to every user whenever data changes on the server would use up massive resources and have a serious impact on the software's performance.