

Standalone Installation Guide V3.1



DORSET SOFTWARE

Recorder 6



JNCC

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Please note that there are full descriptions of more advanced techniques in the documentation provided for Networked installations. This includes information on the import wizard, mapping, setup optimisation and various SQL statements that may be useful for querying the database directly.



INTRODUCTION

This document is designed to assist you in installing *Recorder 6* on your standalone machine. A separate set of installation guidelines are available to users who wish to install on a network or who want to consider whether a networked or standalone solution is better for them.

Migrating from *Recorder 2002* to *Recorder 6*

Some people installing *Recorder 6* will be “upgrading” from *Recorder 2002*. Although *Recorder 6* and *Recorder 2002* are very similar, they have a different database behind the scenes and different registry settings. It is therefore not a process of upgrading from one programme to the other as was the case with *Recorder 2000* to *Recorder 2002*. The migration process is as follows;

1. Install *Recorder 6*
2. Transfer data from *Recorder 2002*
3. Uninstall *Recorder 2002*

Migration of data will only be possible if *Recorder 2002* is at version 2.3.1 or later. Please upgrade *Recorder 2002* as appropriate before installing *Recorder 6* or attempting a transfer. The upgrades required are available on the NBN website (<http://nbn.org.uk>).

The data transfer and *Recorder 2002* un-installation functionalities are available on the *Recorder 6* installation CD. For further information please refer to page 9.

System Requirements for a standalone installation

The following guidelines illustrate the specification of machines that will give reasonable performance in *Recorder 6*. It is possible to use lower specification machines although the performance is reduced. Using less than 256MB RAM on a machine running MSDE provides very poor performance in most cases.

Processor:	Intel Pentium 3 processor or later, 800MHz minimum
Memory:	512MB RAM
Hard disk:	3GB disk space minimum (10GB recommended)
Software:	Windows 98 (SP1) or later; Internet Explorer 5 or later

Note: A path to ‘My Documents’ is required in order to successfully install *Recorder 6*.

Permissions required for installation/running

Installing

To install *Recorder 6* and any add-ins, users need administrator rights. New installations require a reboot of the machine – this reboot must also be performed as an administrator.

The installation CD must remain within the machine for this reboot.

Data transfer from *Recorder 2002*

The data transfer requires administrator rights.

Running

To use *Recorder 6*, users only need standard access rights.



Upgrading

Whenever an upgrade is to be installed, it should be done through an administrator user account to avoid any potential problems due to limited user account access rights.



INSTALLING RECORDER 6

The following is a step-by step guide to installing Recorder 6 on your standalone machine.

1. Ensure that you have all of the necessary permissions etc. (see previous page)
2. Close all other programmes on your machine
3. Insert the Installation CD

The installation programme should start automatically. However if this does not happen please follow the instructions below;

- Using Windows explorer locate the setup.exe file on the installation CD (it is in the root folder)
- Either double click on the setup.exe or right click and choose “run”

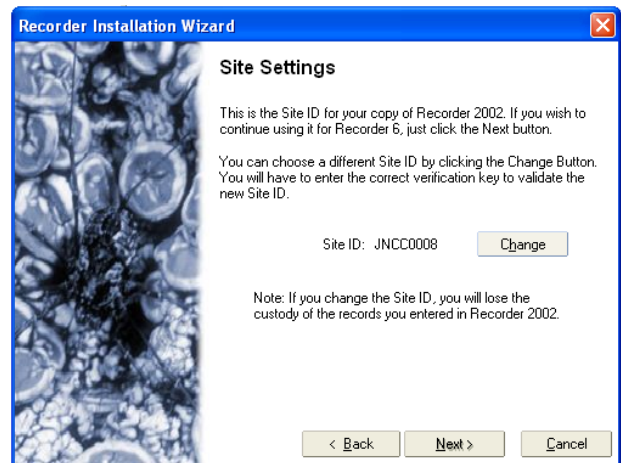
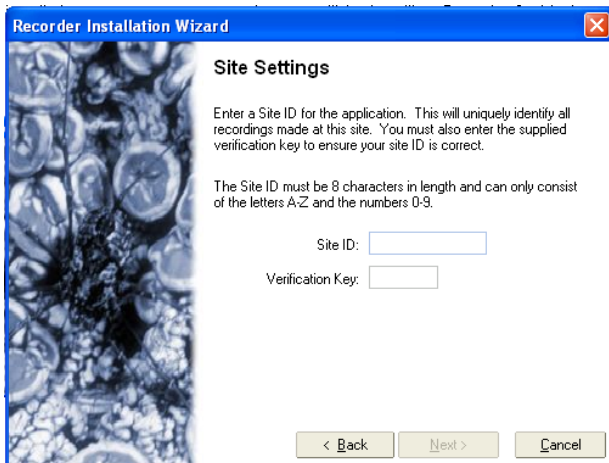
You should now have the following initial screen of the installation wizard in front of you:



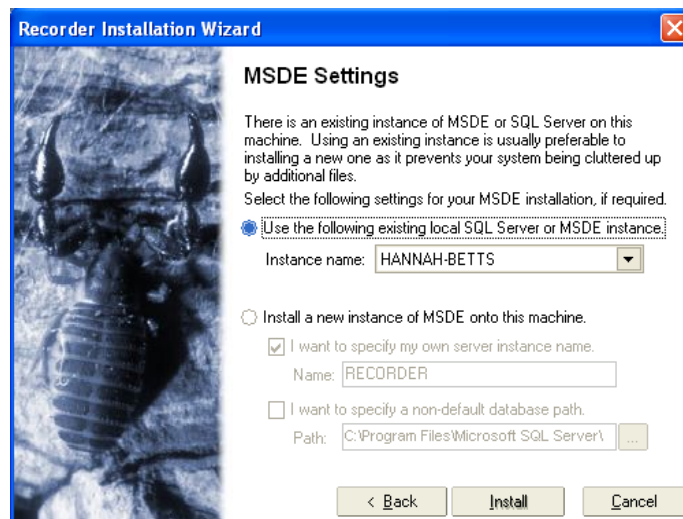
4. Choose option 1 “Install Recorder 6 on this machine”
5. Read the advice presented on the next page before pressing <Next>
6. You should then be presented with a screen asking you to identify the folder in which you want to install Recorder 6. By default you will be offered “C:\Program Files\Recorder 6\”. You may choose to install at a different location and should bear in mind the space that you require in the installation folder. Some users for instance have a D drive that is larger than their C drive and is therefore a more appropriate place to install the programme.



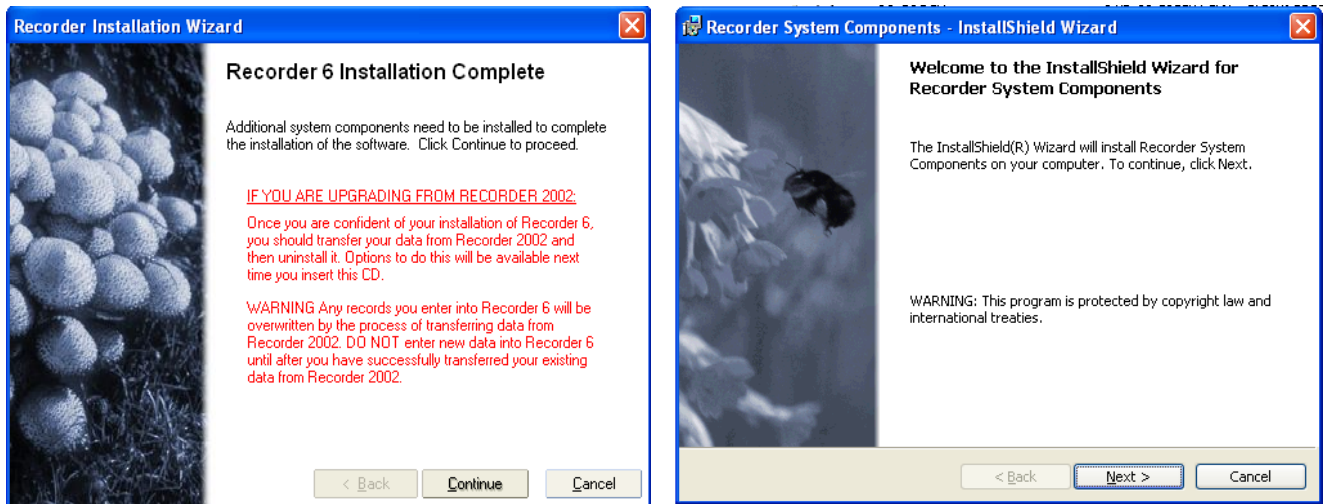
- You will then be presented with one of two “Site Settings” screens depending on whether you have *Recorder 2002* installed on your machine. If you have *Recorder 2002*, the *Recorder 6* installation programme assumes that you will be installing *Recorder 6* with the same siteID and fills in the form as shown below on the left. If this assumption is incorrect you are given the option to change it. If you choose to change to a different siteID or if you do not have a copy of *Recorder 2002* that the installation programme can pick up a siteID from, the “Site Settings” screen shown below on the right will be displayed. You will need to enter your 8 figure SiteID and your 4 figure verification key. This information is available from the documentation that you received with your initial purchase of the programme (either *Recorder 2002* or *Recorder 6*). If you don't know what your siteID or verification key are, please contact JNCC on 01733 866866 and ask to talk to the *Recorder* siteID administrator. Press <Next>



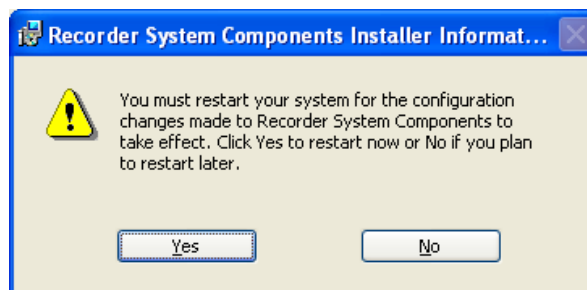
- You will then be asked to choose a spatial reference system. The default option is the ordnance survey UK grid which is appropriate for the majority of users. Users in Northern Ireland or the Republic of Ireland should switch to the Irish grid. Press <Next>
- The next page allows you to say where your MSDE database should be held. You may or may not already have an instance of MSDE on your machine already. If you do, you will be given the option to use that instance or alternatively define a new one. Again, you are given a default position and name for the instance, but may choose to locate it elsewhere and change the name. Be aware that this is where the majority of your data will be held and that it therefore needs plenty of room. Once you have chosen your options click on <install>. The instance of MSDE will be installed as you wait.



10. When the MSDE installation is complete (if required) the screen below on the left will be displayed. Read the message and click on <continue> to move to the screen on the right. Click on <next> to install the system components. When the message appears to indicate that it is complete click on <finish>

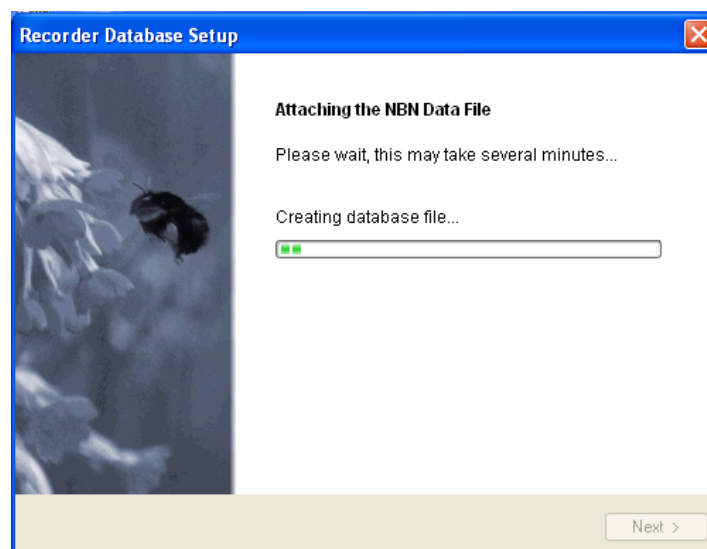


11. You will see the following message appear indicating that you need to reboot your machine.



- THE INSTALLATION CD MUST REMAIN IN YOUR MACHINE FOR THE REBOOT
- YOU MUST RETAIN ADMIN RIGHTS OVER THE MACHINE FOR THE REBOOT

When you reboot you will see the screen below will appear, followed by a message indicating that the installation is complete.



You have now finished your *Recorder 6* installation.



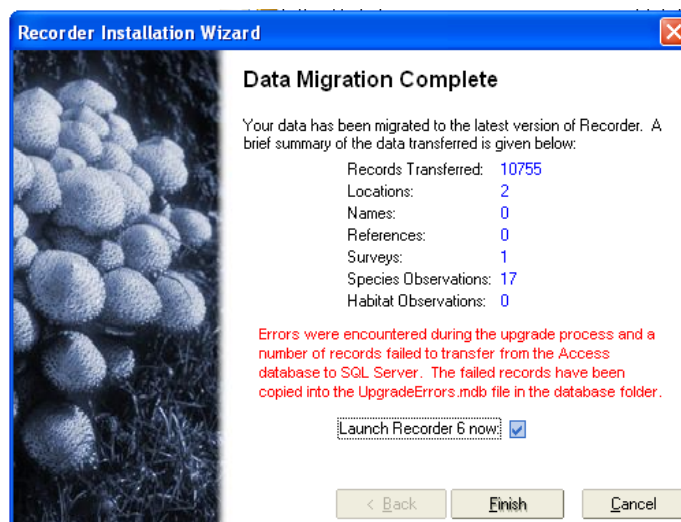
TRANSFERRING YOUR DATA FROM RECORDER 2002

To transfer your data from your copy of *Recorder 2002* to *Recorder 6* please;

1. Ensure that you have all of the necessary permissions etc. (see page 3)
2. Close all other programmes on your machine
3. Insert the Installation CD (see “Installing *Recorder 6*” on page 4 for further instructions if it does not start automatically)
4. Choose option 2 “Copy data from *Recorder 2002* to this copy of *Recorder 6*”
5. Read the important information on the screen and click <Next>
6. The next two screens displayed allow you to choose which elements you wish to transfer from your copy of *Recorder 2002*. The minimum for transfer is the database of records itself. In addition to this you can choose to transfer some or all of your supporting information such as rucksacks, recording cards, mapping files etc. by putting a tick in the appropriate boxes to the left of the screen.
7. Once you have selected all of the information you wish to transfer click on <transfer>

Note: The transfer process may take some time to run, depending on how much data you have to transfer.

8. Once the transfer is complete the following screen will appear (see below). This screen provides information about the records that have been transferred. If any errors have been found it is advisable to investigate them and correct the data before re-attempting the transfer. Your re-seller should be able to assist you with this if you are unsure about how to proceed.



9. Once you are happy with your installation of *Recorder 6*, uninstall *Recorder 2002* using option 3 on the *Recorder 6* installation CD.

The *Recorder 2002* Access database may be backed up as a zip file to another location, so that the original data is saved before everything is removed. Ensure all files and other data that need to be kept are moved to a different location, as the whole *Recorder 2002* folder is deleted.

Note: The transfer process copies an empty database from the CD before transferring data from *Recorder 2002*. This means you need to perform the transfer *before* entering data into *Recorder 6*



and (if necessary) upgrade your copy of Recorder 6 to the latest version *after* transferring data from *Recorder 2002*.



BACKING UP YOUR SYSTEM

Unlike in *Recorder 2002*, backups of the database cannot simply be made by copying the database and saving it. Therefore; in addition to regularly saving your folders you should also create a backup database and regularly **update or replace it**.

There are 2 main reasons why regular backing up of MSDE databases is essential:

- In the event of a critical failure (for example a hard disk failure) it allows the database to be restored so that only data entered since the backup is lost.
- The transaction log created by SQL Server is emptied when the database is backed up. Without a backup operation it will continue to grow in size.

To backup your database

1. Open *Recorder 6* and ensure all windows are closed
2. Go to Tools - Database Tools - Backup database

A message will appear informing you that it is complete.

By default, the backup will be made in the folder where you have chosen to have your database (c:\Programme files\Microsoft SQL Server MSSQL\Data if you have chosen an entirely standard installation). However, you should probably store your backup on a machine or a device other than the one that holds the working database (if the computer crashes both the original and the backup database will be lost). You can manage this by either;

- Copying your backup onto a CD or removable hardware device after it has been made
- Change the position of the backup to another location such as a network drive.

To change your backup location

1. Open *Recorder 6* and ensure all windows are closed
2. Go to Tools - Database Tools - View or change backup location
3. Choose the location that you want to backup to and click <OK>

To restore from backup

1. Open *Recorder 6* and ensure all windows are closed
2. Go to Tools - Database Tools - Restore database

A message will appear informing you that it is complete.

Uninstalling Recorder 6

The *Recorder 6* installer comes with an uninstaller function that will clear all the installed and user added files automatically, and will remove the registry settings. If you wish to retain any files that have been added or created within the *Recorder 6* installation folder such as rucksacks, templates, recording cards, or any other user file, please take a copy of them before you proceed with uninstalling. If a default instance of MSDE has been created during installation, the instance will be removed, but the data folder and files will remain. The files and folders will need to be manually removed. Similarly, if you installed using a full copy of SQL Server, you will need to detach the NBN database and remove the .mdf and .ldf files manually.



The *Recorder 6* Uninstall is available through **Control Panel ► Add/Remove Programs**. It is listed as “*Recorder (remove only)*”.

Recorder 6 installations prior to 6.7.2

To uninstall *Recorder 6* installations for versions installed at 6.6.8 or earlier:

1. Locate the install folder for *Recorder 6*, usually Program Files*Recorder 6*.
2. Unregister all installed addins by running the following from “**Start menu ► Run...**” (⌘ + R) for each OCX and DLL file present in the Addins folder, located under the main *Recorder 6* install folder:

```
regsvr32 /u <folder name>\<addin name>
```

where <folder name> is the full path to the location of the Addins folder below the main *Recorder 6* installation folder, and <addin name> is the name of an OCX or DLL file. Dismiss all messages as and when they appear.

Please note that there is no adverse effect in not performing this step. This is intended to clean up the registry properly to remove redundant information that would only clog up the system.

3. Before deleting the *Recorder 6* main folder, ensure any data that needs to be kept is moved to another location.
4. Delete the main *Recorder 6* folder.

From “**Start menu ► Run...**” run **RegEdit**.

Locate and delete the key *HKEY_CURRENT_USER\Software\Dorset Software\Recorder 6*

Locate and delete the key *HKEY_LOCAL_MACHINE\Software\Dorset Software\Recorder 6*

Recorder 2002 installations - use Recorder 6 CD.

Recorder 6 now comes with everything required to remove an existing *Recorder 2002* installation. To uninstall *Recorder 2002*:

1. Insert the *Recorder 6* installation CD and run the Setup program.
2. Select the “**Remove Recorder 2002 from your machine**” option from the menu.
3. Follow the on-screen instructions.

The *Recorder 2002* Access database may be backed up as a zip file to another location, so that the original data is saved before everything is removed. Ensure all files and other data that needs to be kept are moved to a different location, as the whole *Recorder 2002* folder is deleted.



CREATING A REPORTING DATABASE

There are various reasons to create a separate database for reporting in *Recorder 6* and various methods available. However, the majority of these are applicable mainly for networked users and are therefore not detailed here. For more information on this please refer to “Network Installation Guide”.

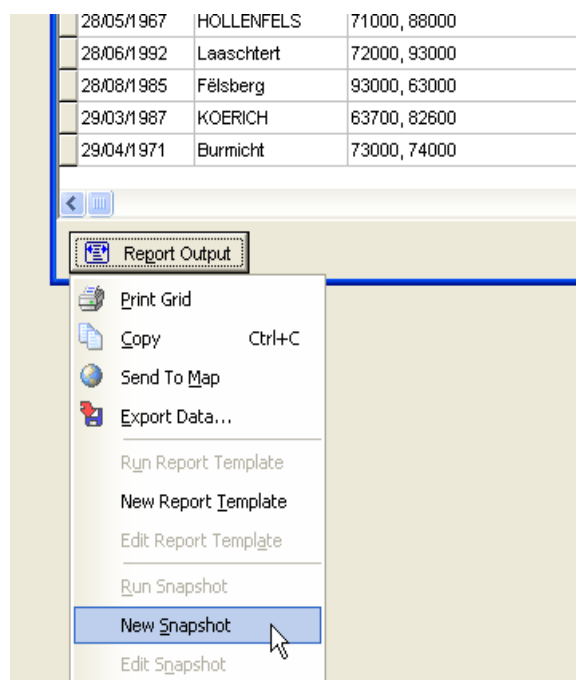
The main reason why a standalone user may wish to create a reporting database is so that they can do their reporting using a simplified data model. This aids both bespoke reporting and the analysis of *Recorder* data other software (such as GIS software). The creation of such a database is achieved through the Snapshot wizard.

Using the Snapshot Wizard

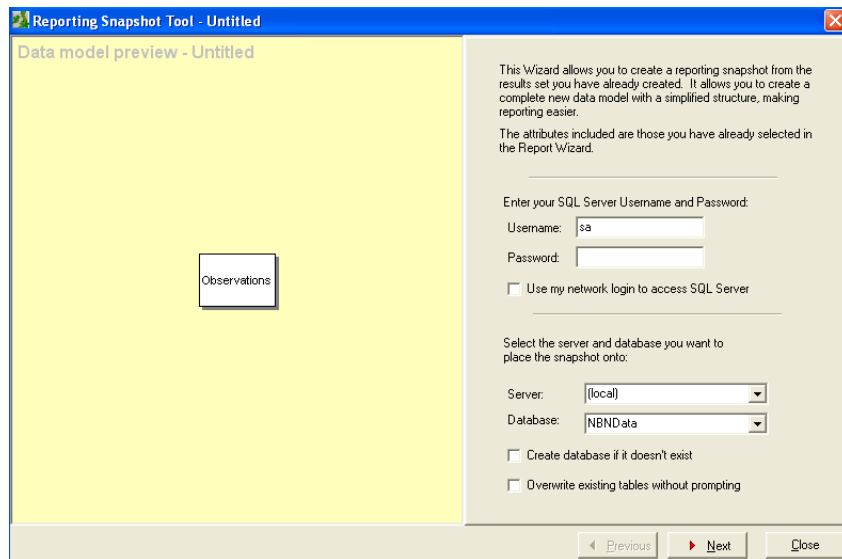
The Snapshot Wizard in *Recorder 6* is designed to provide a simpler version of the data model containing a subset of records that can be used for reporting using another package, such as Microsoft Access, GIS software or Crystal Reports.

The Snapshot Wizard allows the user to output the data into a new table (or tables) from the existing database into a different database or even onto a different server. The user can also choose to have anything from 1 to 8 tables in the snapshot depending on how they want the data to be organised.

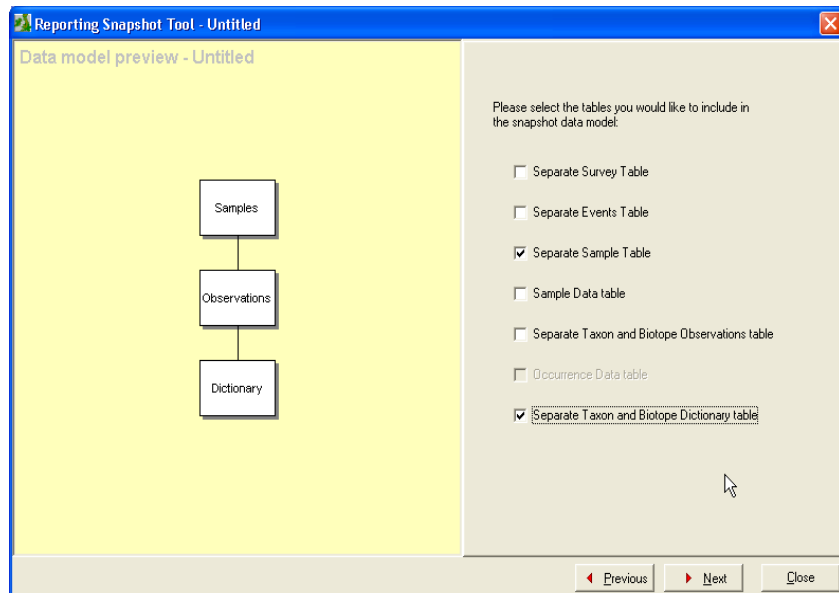
1. The Report Wizard can be used to identify the records that are to be included in the snapshot. For example, you may want to report on all data in protected sites, or on particular species. You can of course create a report that contains all of your records if that is what you want. Don't worry in particular about which attributes you choose to display in the report, all of the relevant fields will be exported in the snapshot anyway.
2. Select New Snapshot option available from the Report Output button on the bottom left of the Report Wizard results screen (see below):



- Provide the snapshot tool with the login information required and the details of where you want the snapshot to be saved. For a standalone user using a copy of MSDE the username will be sa and there will be no password. Using the network login will not work.



- Design the snapshot by selecting from the list the tables you wish to include in the data model output of the Snapshot Wizard:



- The next screen of the wizard allows you to change the names of the tables that will be used for the snapshot. Whilst changing them to something that you will remember is fine, you should be very careful that renaming them does not cause other tables (with the same name) to be overwritten unintentionally.
- You can then run the snapshot.
- Once the snapshot has been run, you have the option to save the details of the snapshot in the same way in which you can save a report. If you choose to save the snapshot, it will be able to “refresh” it and take into account any additions or changes at the touch of a button by selecting that the snapshot from Reports - Run on the main menu.

Note: Snapshots are held as MDF files. These can be linked to other software (such as GIS software) through a standard ODBC connection.



DETAILS OF A “STANDARD” STANDALONE INSTALLATION

Installation folders

C:\Program Files\Microsoft SQL Server

If the default installation option to install an MSDE instance is selected, then it is placed in this folder.

C:\Program Files\Microsoft SQL Server\MSSQL\Data

By default, the SQL Server database files are placed in here. This includes a *.mdf (data) and *.ldf (log) file for each database created. As well as the nbndata database, there are other system databases in this folder required by SQL Server (master, model, msdb, tempdb).

If the user chooses a non-standard server instance name, then the path would be C:\Program Files\Microsoft SQL Server\MSSQL\$<instance name>\Data.

C:\Program Files\Recorder 6\

This is the root folder for the application installation. It contains the following files:

Files		Description
Recorder.exe		Application splash screen, main executable and un-installation application. Note that the un-installation application should be accessed from Control Panel.
Recorder.ex_		
Uninstall.exe		
C4dll.dll	CnvTIF5.gll	Library files required by the MapServer5 Turbo mapping system used within Recorder.
CnvBmp5.gll	CnvVpf5.gll	
CnvBNA5.gll	CnvWMF5.gll	
CnvDlg5.gll	mfc42.dll	
CnvDXF5.gll	MS5.dll	
CnvMIF5.gll	MS5Cnv.dll	
CnvNTF5.gll	MS5User.dll	
CnvSHP5.gll	msvcrt.dll	

C:\Program Files\Recorder 6\Addins

The folder in which Addin files are installed.

C:\Program Files\Recorder 6\Addins\Images

The folder in which images for Addins are installed.

C:\Program Files\Recorder 6\Base Maps

This folder contains files required for each base map available within Recorder.

A base map file for use by Recorder consists of a *.gsf file (the mapping engine MapServer's proprietary format) plus a *.ini file that defines the associated system. There are other files with the same name but different extensions that MapServer creates which contain database and indexing



information, normally *.gdb, *.gix, *.mdx. All of these files are necessary for the map to work, not just the gsf file itself. The ini file contains 2 lines:

```
Description=xxxx - description of the base map displayed in the Map Options dialog.
```

```
System=xxxx - spatial reference format that this map is based on (OSGB, OSNI, LTLN or an addin system).
```

Recorder is also able to use an ESRI Shape file (*.shp) as a base map, in which case the file is converted to a gsf file when the base map is initialised.

C:\Program Files\Recorder 6\Database

In *Recorder 6* installations, this contains a Microsoft Access 97 database file called nbndata.mdb. This contains ODBC links to each table in the MSDE database. This is not used by the application at all, but is provided for 2 reasons:

- Some legacy Addins written for *Recorder 2002* are able to continue functioning without modification by accessing data via this file.
- Users who own a copy of Access and are used to writing custom reports and queries within the Access environment are able to continue do so.

Note: When security of the *Recorder 6* database is paramount then this file should be deleted, as it offers unsecure access to the data. Even if this is password protected the level of security is significantly reduced as tools to extract passwords from Access databases are freely available on the internet.

C:\Program Files\Recorder 6\Dtd

This folder contains the document type definition (nbndata.dtd) that defines the structure of the XML document used for exchanging data. In addition, it contains the exportstart.xml file which provides a template for the header of the XML file.

C:\Program Files\Recorder 6\Help

This contains the REC20HLP.CHM file which provides HTML help for the application. It also contains other support files required by this help file.

The following HTML files are used to provide descriptive text for each page in the Import Wizard: AbundanceQualifiersMatch.htm, AssociatedSpeciesMatch.htm, AssociationTypesMatch.htm, BiotopesMatch.htm, ColumnTypes.htm, FileSelect.htm, FixedWidths.htm, Import.htm, ImportAnalysis.htm, LocationsMatch.htm, MissingData.htm, NamesMatch.htm, RecordTypesMatch.htm, ReferencesMatch.htm, SpeciesMatch.htm, SpecimenTypesMatch.htm, SubstratesMatch.htm.

C:\Program Files\Recorder 6\Images

This folder contains images used by the application: AboutR2K_2.bmp, BlankIcon.bmp, cdicon.cmp, Default.bmp, Logo.bmp (used by the splash screen), NBNIcon.bmp.

The following files are used to provide images on each page of the Import Wizard: Columns.jpg, Data.jpg, Import.jpg, Match.jpg, Settings.jpg.

C:\Program Files\Recorder 6\Map Files

The Map Files folder holds details of initialised maps, including all the information needed to display maps as they were defined. Base map and any background layers are identified by a file placed in this folder (*.gds). This also includes links to the polygon layers, but not the polygon layers themselves. Refreshing an existing map through the Map Options screen recreates the contents of the map file folder for a selected map and re-links the existing object sheets where required.

Note that the *.gds file name is the primary key of the record in the Base_Map table that this file is associated with.

C:\Program Files\Recorder 6\Object Sheet

This folder contains MapServer 5 Turbo files required for each polygon layer created on any map.



C:\Program Files\Recorder 6\User Files\Import Templates

This folder contains any saved files that provide a template for the Import Wizard.

C:\Program Files\Recorder 6\User Files\Polygon Filter

This folder contains any saved files for the Polygon Filter facility in the Report Wizard.

C:\Program Files\Recorder 6\User Files\Recording Cards

This folder contains saved Recording Cards.

C:\Program Files\Recorder 6\User Files\Reports

This folder contains saved reports generated by the Report Wizard. It includes links to the template or snapshot file associated with a report but not the actual template or snapshot. In addition, XML files placed in this folder provide custom reports available to *Recorder*. The XML definition is described elsewhere.

C:\Program Files\Recorder 6\User Files\Rucksacks

This folder contains saved Rucksacks.

C:\Program Files\Recorder 6\User Files\Snapshots

This folder contains saved snapshot files for the Snapshot Wizard.

C:\Program Files\Recorder 6\User Files\Templates

This folder contains saved report layout templates.

C:\Program Files\Recorder 6\User Files\User Dictionary Images

This folder is initially empty, but provides a location in which to store user images or other files that are to be linked to the Taxon or Biotope dictionaries as custom facts.

Registry settings

Registry Key	Description
HKEY_LOCAL_MACHINE\Software\Dorset Software\Recorder 6	Root path to settings that apply to the machine. Contains database connection information.
HKEY_LOCAL_MACHINE\Software\Dorset Software\Recorder 6\Installed Addins	Contains 1 key per Addin installed, where the name is the OLE automation name of the COM object. Describes the Class ID of the COM object enabling <i>Recorder</i> to load it.
HKEY_CURRENT_USER\Software\Dorset Software\Recorder 6\Settings	Main folder for user specific settings. Note that if this key does not exist when <i>Recorder</i> is started, it will be recreated with default values.
HKEY_CURRENT_USER\Software\Dorset Software\Recorder 6\Forms	Used to remember the last used position of each form in <i>Recorder</i> , with a subkey created for each form previously used. Note that if this folder does not exist when <i>Recorder</i> is started then forms will initially load in their default position.

