



**COUGAR
MOUNTAIN
SOFTWARE**

DENALI

CLIENT INSTALLATION GUIDE

Microsoft®
GOLD CERTIFIED

Partner

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Chapter

1

Client Installation

Installing Denali on Your Client Machines

DENALI

This chapter covers the process you will use to install Denali on your client machine(s). Our goal is to provide you the best possible information to help ensure a smooth installation of Denali. Refer to this chapter throughout the process or you can click the **Help** button in any of the installation windows to see more information about the various options in that window. If after you complete the installation process you have any suggestions or comments about this documentation, we welcome you to share them with us at documentation@cougarmtn.com.

Installing Denali on Your Client Machines

We highly recommend you install Denali on your server machine first to help avoid connection issues during the client-only installation. Begin this part of the process by accessing the Denali installation file from the flash drive. Double-click the .iso file to start the installation.

Follow the on-screen instructions until the **Installation Options** window appears.

Step 1: Selecting Which Components to Install

Because you are installing Denali for use with a server system and you already installed your server components on a separate machine, select **Client** in this window.

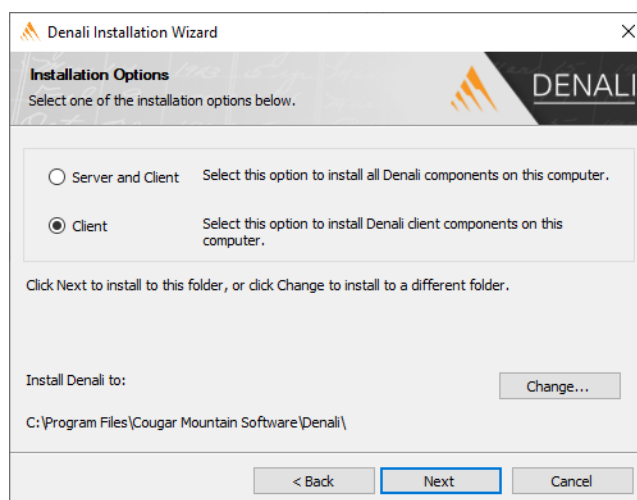


Figure 1: *Denali InstallShield Wizard - Installation Options window*

If you want to install the 32-bit version of Denali on a 64-bit machine, type Alt+A to open the **Advanced Settings** window.

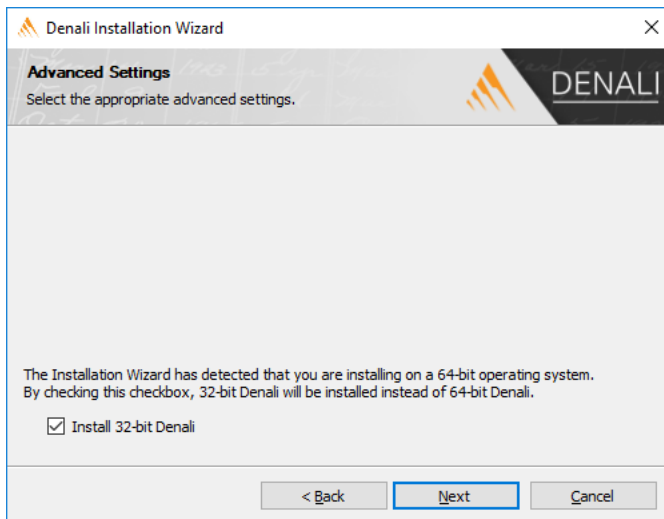


Figure 2: *Denali InstallShield Wizard - Advanced Settings window*

Select the check box to install 32-bit Denali. Click **Next**.

Step 2: Installing the Components

In the **Ready to Install Denali** window, click the **Install** button.

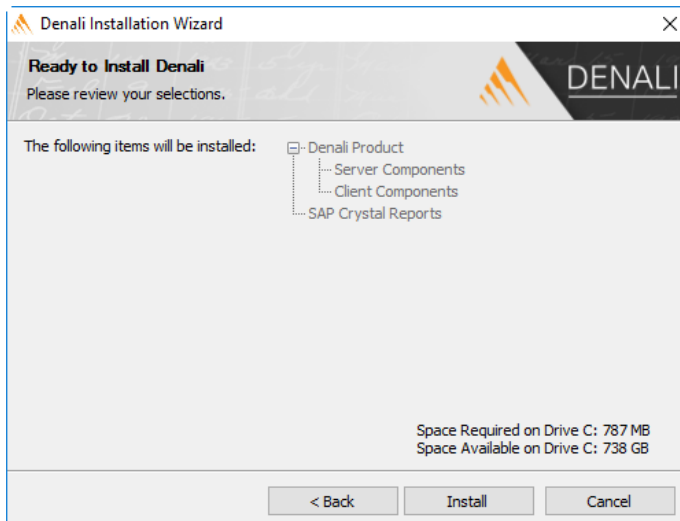


Figure 3: *Denali InstallShield Wizard - Ready to Install Denali Components window*

The window displays the components that will be installed.

Step 3: Completing the Client Installation

When the installation of the client components is finished, the **InstallShield Wizard Complete** window appears.

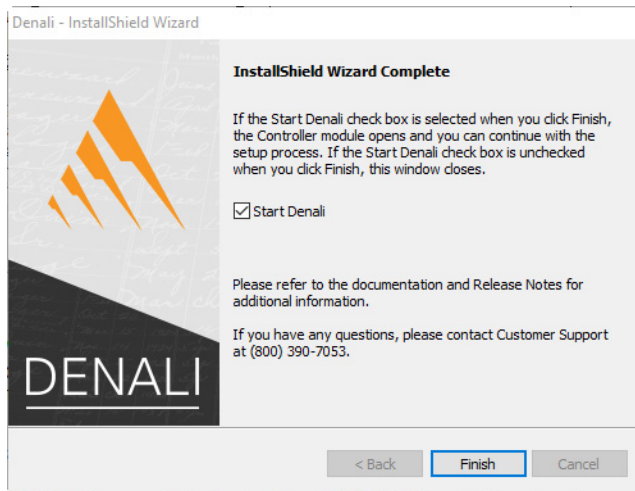


Figure 4: *Denali InstallShield Wizard - InstallShield Wizard Complete window*

After you click the **Finish** button, the system will begin the final process to set up Denali.

Step 4: Connecting to the Denali Database

When you chose to finish the client installation in the previous step, you initiated the system to launch Denali. During this initial launch process, the system will go through a few steps to complete the setup. The first step is to verify that the Denali database is installed. In most cases, after you launch Denali on the first client machine, several of the windows will not reappear when you set up your additional client machines.

In the **Primary Database Connection Settings** window you need to change the SQL Server name to match the server computer name and instance name. The default information in this window is based on your system, not the server. Be sure to enter the server computer name and instance name using a slash as a separator. It would look something like this:
`<CPUNAME>\CMSDENALI.`

To verify the server name, you need to be on the server system.

- 1 Click **Start > All Programs > Denali by Cougar Mountain > Denali Utilities > Client Utilities**.
- 2 From the Denali client Utilities menu, select **Primary Server Location**.
- 3 In the **Select Registry Location** window, leave the default of **Machine Key (HKEY_LOCAL_MACHINE)** and select **OK**.

The information that appears in the Server field should be used on all the Client machines. If you don't have access to this information, contact your IT specialist.

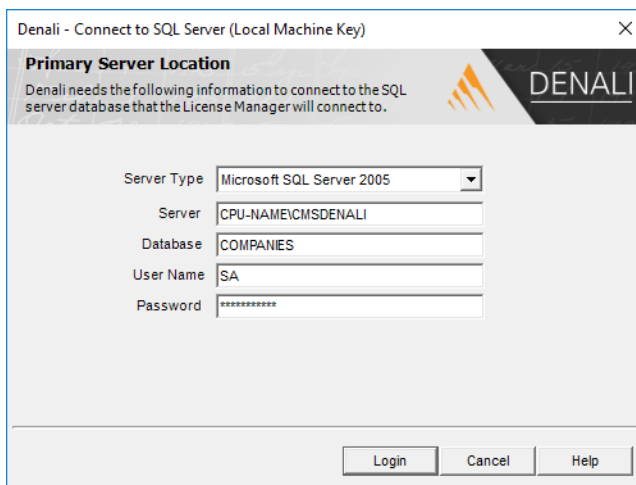


Figure 5: Denali Primary Server Location window

Once you enter the information in this window and click **Login**, the system will save the settings to the registry and validate the connection to the database server. If this connection is successful, the system will continue to the next part of the process, which is to set up your organization (see “Step 5: Installing the Demonstration Data” on page 8).

If the connection is unsuccessful, a message box will appear that indicates the problem. For reference purposes, you can print the error information by selecting the **Print** button. See “Problems with the Installation?” on page 12 for additional information.

Step 5: Installing the Demonstration Data

If you installed demonstration data when you performed the server installation, you can skip this step for the client installation.

After your primary database is installed it is time to install an organization. In the message that appears, select to either create your new organization or install the demonstration data. You must have at least one organization set up before you can use Denali.

If you are new to Denali, we highly advise you install the demonstration database. One benefit of the demonstration data is that you can use it to practice entering records and transactions so that you can familiarize yourself with the program. You can also use it to train employees so that your actual data is unaffected in the event of data entry errors. You might even set up this or another sample organization with the actual stock items and codes that you will use in your own organization so that you can determine the best setup before creating your database. You can copy these items and codes to your own organization so you don't have to create them twice. For more information on the demonstration data or for assistance setting up your own custom organization, refer to the online help and the Getting Started and Controller guides.

Once the installation of the demonstration data is complete, the **CMS Select Organization** window appears and you can select the organization you wish to open.

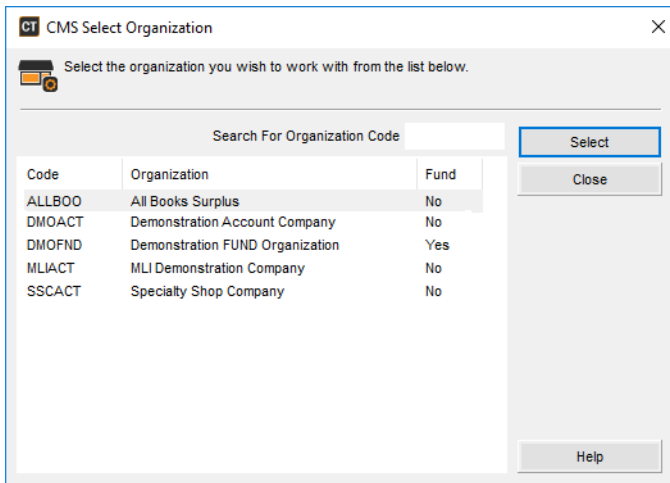


Figure 6: CMS Select Organization window

Whether you have other client machines to set up or you are ready to begin using Denali, refer to the final information in “Step 6: Completing the Denali Setup” on page 9.

If you upgrade to Denali from CMS Professional, refer to the Conversion guide for additional information and instructions before you begin to create your new organization.

Step 6: Completing the Denali Setup

You are now finished installing Denali on your client machine. At this point, you should be ready to either install Denali on your other clients, or use your product. Remember to install any companion products (third-party software), such as Aatrix or TSheets, that you purchased to use with Denali.

Keep in mind that although Denali has a high level of security built into the software, it is still necessary to properly set your system security on all server and client machines.

It's important to create an exception in your anti-virus software to skip the Denali, SQL Server, and Aatrix folders when you perform virus scans. This will prevent components from being deleted which leads to problems in the software. The default locations for the folders are:

- 32-bit Denali: C:\Program Files\Cougar Mountain Software\Denali
- 64-bit Denali: C:\Program Files (x86)\Cougar Mountain Software\Denali
- 32-bit Aatrix: C:\Program Files\Aatrix
- 64-bit Aatrix: C:\Program Files (x86)\Aatrix
- SQL Server: C:\Program Files\Microsoft SQL Server\MSSQL10_50.CMSDENALI\MSSQL\DATA

If you want to set up desktop shortcuts to the Sales or Purchase Order modules, use CMSMA.exe for Sales and CMSPO.exe for Purchase Order.

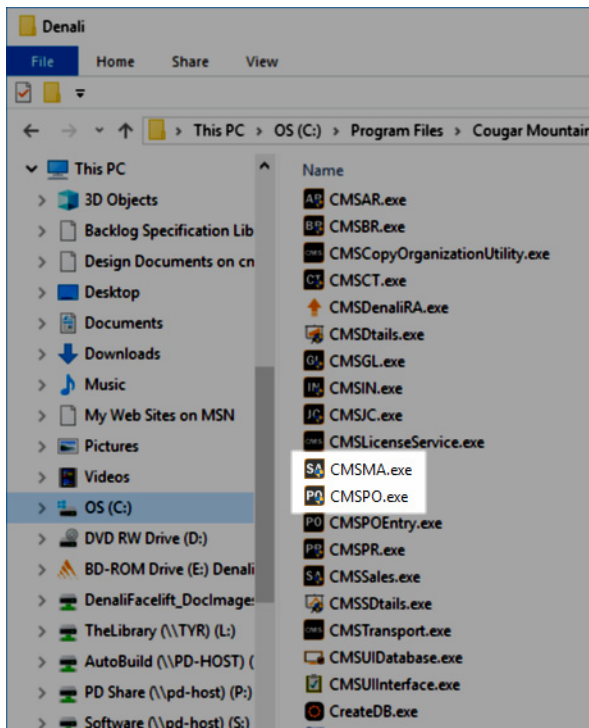


Figure 7: Denali software folder

If you are ready to start using Denali, we highly recommend you review the following documentation first:

- Getting Started guide
- *Integration Guide*
- *New Features Guide*
- *Release Notes*

Cougar Mountain also provides an extensive online help system that you can access from within the software by selecting the **Help** button or pressing F1 in any window. You can also access the web help at cougarmtnservice.com/help/index.html. Refer to “Troubleshooting and Available Help Resources” on page 11 for more information on your resources available.

Chapter

2

Troubleshooting and Available Help Resources

Problems with the Installation?

Need Additional Help?

The purpose of this chapter is to provide additional assistance if you encounter a problem during the installation process or need additional help. We provide various means to obtain help before you contact Customer Support and also offer a few training options to further enhance your knowledge of Denali.

Problems with the Installation?

At times, problems or errors can occur that are simple to fix without contacting Customer Support. Here we indicate some common problems and ways to correct them. If you would like to offer suggestions for additions to our Troubleshooting section, please email us at documentation@cougarmtn.com.

If you have this type of problem:	We recommend you try this:
I am unable to locate my primary database login password.	Contact Cougar Mountain Customer Support for assistance at (800) 390-7053.
The system is prompting me for my server login information when I launch Denali, even though during installation I chose to have this information written to the registry.	Check the server. You will receive the prompt window anytime the client machine cannot find the server. This could be due to it being offline or temporarily unavailable. If you upgraded your version of Denali, you need to reconnect the client machine to the server. To do this, select from the Start menu, Denali by Cougar Mountain > Denali Utilities > Client Utilities > Primary Server Location .
A message that indicates my client machine is trying to locate the server appeared.	This indicates that the server is unavailable. This occurs anytime the server is shut down. Once the server machine is available, your client will automatically connect. If your client does not connect within a reasonable amount of time, you might want to consult your System Administrator.
I want to enhance my network security by setting share rights.	One option is to set the share rights for the server drive to read-only.

Manual Removal of SXMLPARS.dll From the Global Assembly Cache

Refer to the instructions in this section if you receive one of the following errors after installing Denali on a server with at least one client.

- Unable to load one or more of the requested types. Retrieve the LoaderExceptions property for more information.
- Error connecting to CMSDenaliXMLParser (SXMLPARS.dll). Please contact your system administrator to ensure CMSDenaliXMLParser is running.

The cause of these errors is that the CMSDenaliXMLParser is placed in the Global Assembly Cache (GAC) and is not removed from the GAC when removing the CMSDenaliXMLParser application proxy from Component Services. You need to manually remove this application proxy from the GAC and reinstall the application proxy in the Component Services.

To resolve this issue with the application proxy:

- 1** To uninstall the proxy, select **Start > All Programs > Denali by Cougar Mountain > Denali Utilities > Server Utilities**.
- 2** Click the **Window Utilities** button and then select the **GAC Viewer** button.
- 3** In the **assembly** window, locate the assembly **SXMLPARS** from the list, right click the file, and select **Uninstall** from the drop-down menu.
- 4** Select **Yes**. When the uninstall completes, close the **assembly** window and then close the **Denali Windows Utilities** and **Denali Server Utilities** menus.
- 5** To reinstall the proxy, select **Start > All Programs > Denali by Cougar Mountain > Denali Utilities > right click on Server Utilities** and select **Properties**.
- 6** In the **Target** field, place the cursor at the end of the string, press the spacebar once, and then type - *icp*.
- 7** Select **OK** and then launch Denali.

If you still receive one of the previously listed errors, contact Customer Support at (800) 390-7053 for assistance.

Need Additional Help?

Cougar Mountain strives to provide the greatest amount of assistance possible to our users to ensure a positive experience. This section describes the various ways in which you can access the different levels of available help.

Documentation Help

You can find additional help when you access the online help system, the PDFs, and review the *Release Notes*. To access the online help, you can click the question mark icon or select **Help > Contents** from the menu bar. To access the PDFs, you can click on the Documentation page of the Customer Service Site at service.cougarmtn.com.

Online Help

Cougar Mountain Software has an online help system within the software that focuses on helping the user understand how to accomplish various tasks. The online help system is connected to the software and can be accessed while in the software; it is not accessed through the Internet. You can access the online help by clicking the **Help** menu from the menu bar and then selecting **Contents**. This help option can also be accessed by selecting the icon (question mark) on the toolbar in any Denali module.

Release Notes

Cougar Mountain Software provides release notes that include last-minute changes and technical issues that are not covered in other documentation. When you begin the installation process you can access the *Release Notes* from the main installation window.

If you already completed the installation process, you can access them from the Documentation page of the Customer Service Site at service.cougarmtn.com

Customer Support

If you come across a problem or an error message that you cannot resolve, call our Customer Support Specialists. Cougar Mountain Software maintains a full-time Customer Support staff specially trained to answer questions and solve problems about installation and operation of the software. You can receive technical support over the phone from Cougar Mountain Software, or you may be referred to a Cougar Mountain dealer in your area that can provide personalized local support. Cougar Mountain Software offers several annual support contract plans that allow you to get help when you need it.

The Customer Support department is open Monday through Friday. Depending on the call volume and anticipated wait time, you will either be transferred directly to the next available specialist, or you will be placed in a queue for your call to be returned by the next available specialist. You may also request a Customer Support Specialist to contact you through our online support (see “Contacting Customer Support” on page 14 for information). Visit our Customer Support Center online at: www.cougarmtn.com/support.

You can also visit the customer service site at <http://service.cougarmtn.com> to search for software updates that you can download. We provide this option so you can obtain the latest updates at your convenience. Your user name and password are located on a label on the back of the Denali folder you received from Cougar Mountain when you purchased the package.

Information to Gather Before Contacting Customer Support

When you contact Cougar Mountain Customer Support, please have your support number ready. This is typically your telephone number, with the area code first. You will also need to know your operating system, the Cougar Mountain product(s) you have purchased and installed, and the version of the product. To find your software version, in any Denali module, select **Help > About Cougar Mountain Software** from the menu bar. If you are not sure of any of this information, Customer Support can help.

Contacting Customer Support

Refer to the following table for various options available to contact a Customer Support Specialist for answers to your questions, or solutions to your software problems. You may also use one of these options to purchase an annual support contract, which will ensure you get the help you need when you need it most.

Support type:	Contact via:
Contact a Customer Support Specialist	(800) 390-7053
Purchase an annual contract	(800) 388-3038
Email questions to a Customer Support Specialist	techsupport@cougarmtn.com
Complete the online Call Back Request form to have a Customer Support Specialist contact you	www.cougarmtn.com/support Click on the Contact Customer Support link

Training

While Cougar Mountain Software is a comprehensive business accounting solution, the information you can get from the software will only be as good as the information you put in, and the more you know about the software's features and functions, the more you will be able to take advantage of all that the software has to offer. For this reason, we consider training to be a critical part of the learning process. We offer several different types of training—one or more is sure to meet your educational needs, time constraints, and budget. Contact Cougar Mountain Sales at (800) 388-3038 for your training needs.

Online Training

To ensure you get the most out of your accounting software, it is important that you understand all its capabilities. For this reason, as part of our Software Assurance program, we include the opportunity for you to participate in e-learning. This educational resource is offered online through the Cougar Mountain Customer Service Center (CSC) website (<http://service.cougarmtn.com>). Depending on the subscription you purchase, you can access a wealth of short presentations on various features of Cougar Mountain software. Because these presentations are accessed online, you can view a topic whenever it is convenient for you and/or your employees. For more information on this resource, contact your account executive at (800) 388-3038.

Classroom Training in Boise

We offer training classes on a regular basis at our corporate headquarters in beautiful Boise, Idaho. If you have only a few people to train, this is a great way to learn all that the software has to offer and how you can use it to its full potential. One of the benefits of coming to our training classes is that you will hear from other users of the software, which might remind you of issues that are important to you as well. Another benefit is that it removes you from the day-to-day tasks at your own office and allows you to concentrate more fully on the learning process. You can use this as a powerful tool to “train the trainer” – once the staff member(s) who attended the training arrive back home, they can teach other staff members the aspects of the software that they will need to know.

On-Site Training at Your Business

If you have more than a few people to train, you may want to consider on-site training. In this scenario, one of our professional trainers travels to your site and works with your employees. One advantage to this type of training is that you can train as many people as necessary without incurring additional costs and you can have specific people participate for specific sessions depending on their job duties. For example, during the training for Payroll, only those associated with handling your business' payroll need to be present. This will enable your organization less interruption in daily productivity. Another advantage of on-site training is that you can work with your own data and business practices while focusing on the specific needs of your business.

Telephone Training

Training can also be done over the telephone. Using network streaming technology, you and your employees can work with one of our professional trainers to focus on whatever specific parts of the software you choose. The trainer will be able to see your computer screen and you will be able to see theirs. This way you can work with either your own data or the demonstration data to learn how to best utilize the software for your business. This is a great solution if you have one or two modules that are new to you, and you want thorough training on them without travelling to our training facility or having a trainer come to you.

C

Client An individual machine that includes the entry point to the application. This is the user interface side of the client/server architecture. The client can be on the same or a separate machine than the server, but it must communicate with the server in order for Denali to function.

Client Components The client components handle information that is located on an individual workstation. These components install automatically if you select to install the client on any machine.

Context-Sensitive Help Online explanatory text that is relevant to the current active window. Help is available throughout the software and changes with the screen and cursor position to coincide with the window. A **Help** button is available in most windows and the default help key is F1. (See also the *Online Help* definition.)

D

Database For Denali, the database refers to the SQL server that holds the tables used by the software to store your company data.

Dedicated Server A type of installation in which the server components are installed on one computer and the client components are installed on a separate computer(s).

Demonstration Company This company database allows you to practice using the software in an environment where your company records will not be affected.

L

License Manager This ensures that the number of users in the system does not exceed the number of purchased licenses. The License Manager uses the Product Key to verify the purchased modules and the User Key to identify the number of users permitted to access Denali at one time.

M

Module One of the functional applications of Denali. The modules are Controller, General Ledger, Accounts Receivable, Accounts Payable, Sales (Order Entry/Point of Sale), Inventory, Payroll, Purchase Order, and Bank Reconciliation.

O

Online Help Online instructional text that is relevant to the specific operation being performed. This help is designed based on the task at hand and can be accessed throughout

the software. Select the question mark button on the toolbar or **Help > Contents** in any of the installed modules. (See also the *Context-Sensitive Help* definition.)

P

- Primary Database** This includes a framework for all the companies you create and/or install, as well as information such as the list of companies you create. This database is created automatically during the installation process.
- Product Key** This key defines the modules you purchased and controls which modules are installed. It also contains product and version information.

S

- Server** This side of the client/server architecture processes queries made by the client. The server can be on the same machine as the client or on a separate machine, but the two must communicate.
- Server Components** The server components handle information requests made by the client. This can include looking up stock items or codes, retrieving information for reports, and posting. These components install automatically if you select to install the server on any machine.
- Server Port** This is used to tell the license server and client components which TCP/IP port the license server is listening to on the server machine.
- SQL** Structured Query Language. Denali uses this database language to retrieve and manage data.
- SQL Express** The SQL database used by Denali.
- SQL Management Studio Express** This tool allows users to manage their SQL database information. Only experienced users should attempt to access the database in this way.
- Stand-alone** In this type of installation the server and client are installed on the same machine.

U

- User Key** This key is the identification number you receive when you purchase the software. It includes how many users are licensed to use Denali at one time. You will only receive this key if you purchase more than one user license.

W

- Workstation** see *Client*.

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