Pastoral Care 11 Networking Introduction

The open framework of Pastoral Care allows greater flexibility in using the program across a network with many people accessing the program at the same time.

Before working through this document it is assumed that Pastoral Care is installed on all computers on the network that need Pastoral Care using the standalone installation document. Pastoral Care does not need to be installed on your file server, this document talks you through how to set-up the common area (file server) so that all computers installed with Pastoral Care will be able to access the Pastoral Care data files.

The only restrictions in network access are:
- Only one person at a time can edit any one family file. i.e. multiple users can edit different family files.
- Only one person can edit a single Roll Project at a time. (Different roll projects can be edited at the same time)
- Only one person can edit a single Finance Project at a time. (Different finance projects can be edited at the same time)
- Only one person can edit a single Weekly Statistics Project at a time. (Different Weekly Statistics projects can be edited at the same time)
- Only one person can edit a single Roster Event at a time. (Different Roster Events can be edited at the same time)
- Only one person can edit a single CarePlus compliance at a time.(Different CarePlus compliances can be edited at the same time)
- Only one person can edit a single Library at a time. (Different Libraries can be edited at the same time)
- Only one person can send SMS at a time (Another user can setup an SMS batch ready to send once the other user has completed sending their SMS messages)
- If someone is using any of the Pastoral Care Setup features, access into related areas will be restricted while setup editing is taking place.
- If someone is using a feature in Pastoral Care, access into its related setup area will be restricted.

Network Freedoms which are available
- Multiple users can edit multiple families simultaneously
- Multiple users can produce any reports simultaneously
- Unlimited network access (number of uses = infinity)
- All report areas and analysis areas can be accessed by multiple users simultaneously.

Understanding Networks

A network is a number of computers linked together by means of a cable, or a wireless communication device. If you have several computers at your church, and they are not networked together yet, we strongly advice that you seek assistance with someone in your church familiar with setting up and configuring a network.

Do not attempt to install Pastoral Care onto a network unless you are absolutely sure you have a network that is running correctly, and you understand the basics of networks.

Pastoral Care Network Requirements

Pastoral Care requires the following conditions to work on a network.

- Pastoral Care 11 installed on every computer that is going to use the program (Please refer to the standalone installation document on this CD)
- A common shared drive that is visible in the Windows Explorer as a Drive to all computers with Pastoral Care installed on them. (Not just visible in Network Neighbourhood!) This is made available via the mapping tool in Windows explorer. This is the most common reason why users are unable to get Pastoral Care to work on a network; they forget to map the network drive. Please note to activate the drop down menu in Windows 7 or Vista so that you can choose the 'Tools' menu to access the 'Mapping Network drive' option you need to press the 'ALT' key while in Windows Explorer. Windows XP has this dropdown menu displayed all the time.

Once Pastoral Care has installed your files on your network drive you need to ensure the following permissions are set on the PC_11 folder and sub folders.

- Permissions on that shared drive / folders must be such that all users on the network have read / write / execute permission on all folders in the PC_11 folder.
- `Delete' permissions are required to be set for the PC_11 folder.
- Pastoral Care 11 need NOT be installed on the server; it only needs to be installed on to each workstation or computer using the program.
- Pastoral Care 11 installation folder for the actual program is C:\Program Files\Pastoral Care 11 on the local computer; a user needs to have full permissions to this folder.
- Pastoral Care 11 creates a data folder on the local computer; this is where the data files are stored when Pastoral Care is not on a network and if Pastoral Care is on a network only some files are used in the local data folder. A user needs to have full read / write / delete permissions set for this local data folder which is located at C:\ Pastoral_Care_11_Data.

For those upgrading from a previous version of Pastoral Care

If you previously owned a version of Pastoral Care and it was setup in networking mode and you want Pastoral Care 11 to also work on a network then it is essential that you go through this document and setup Pastoral Care on a network in which you create the data folders for Pastoral Care 11 on your server. We have had churches when they get their latest version of Pastoral Care not creating new network data folders for the new edition but rather just point the new edition to the previous versions network folder. This is an incorrect way of setting up each new edition of Pastoral Care and will result in problems. Instructions will follow below with how to created new network folders, after you have setup Pastoral Care 11 correctly on the network you can then run the conversion program to convert your data from the previous version into the new Pastoral Care 11 format. The conversion program is located by pressing the Windows `Start' button, then `All Programs' then choose the 'Pastoral Care 11' program group.

Installing Pastoral Care on a Network

Follow these steps carefully.

1. Make sure that you have a common shared drive available to all computers that you want to install Pastoral Care on. If you are unsure how to do this, do NOT proceed any further without assistance from someone who knows how to set this up. (In our example, we will be using a shared drive called h:)
2. Install Pastoral Care on a single computer that you want as one of your "workstations" refer to the standalone installation document for this. <u>This is NOT your file server</u>.
3. Once loaded, choose Setup – Networking from the Main Menu. (See Below)
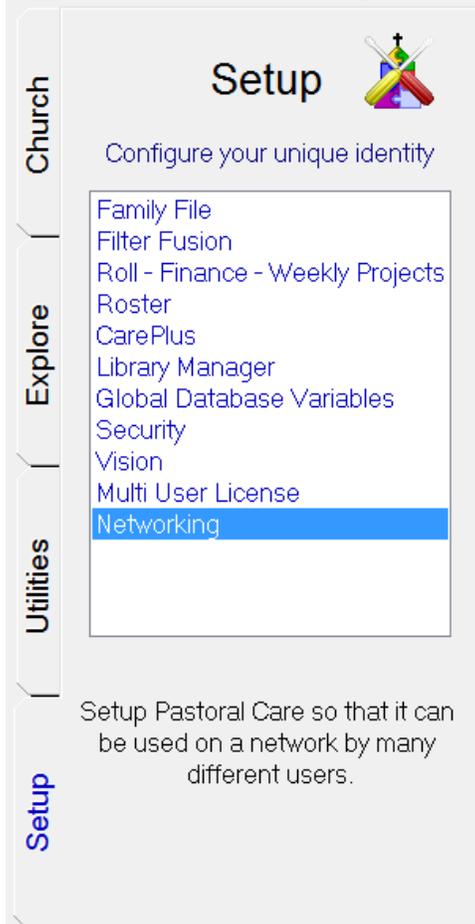
4. The Networking Setup panel is loaded.*
5. Choose the Network Setup Tab (top right hand side of your networking window. The following window is displayed.
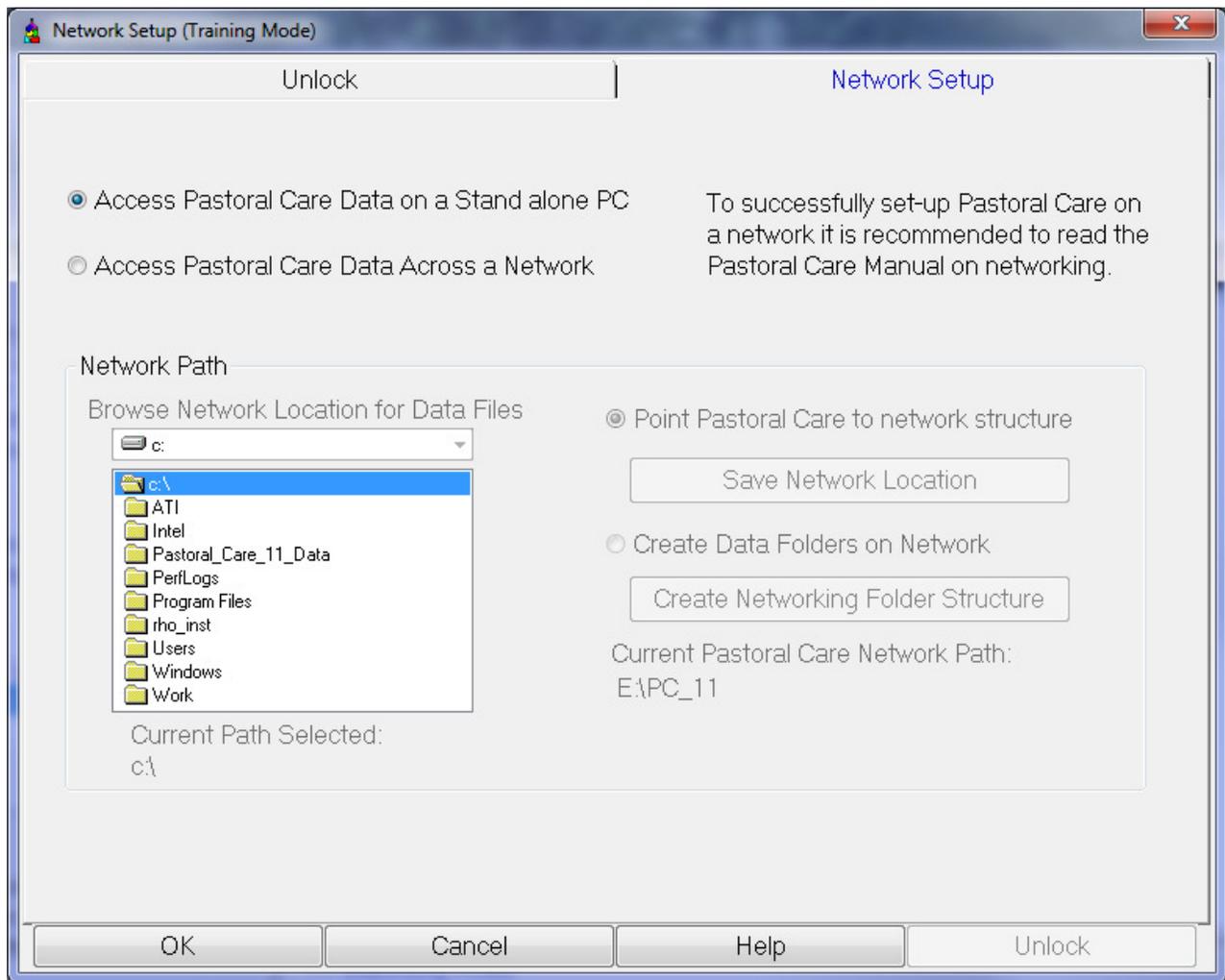
6. Choose the option "Access Pastoral care Data Across a Network".
7. Browse to the shared drive (In our case h:)
   If you can NOT see a network drive such as Drive:\\Servername\FolderName (in our case h:[\\Pastoral\h]) then do not proceed, a shared drive needs to be created, please seek assistance from your network administrator in your church for setting up a mapped drive to your server.
8. Choose the "Create Data Folders on Network" option.
9. Press the "Create Networking Folder Structure" button.

10. Your window should now look like this. (Note that Pastoral Care has created a folder structure on the h drive called PC_11)
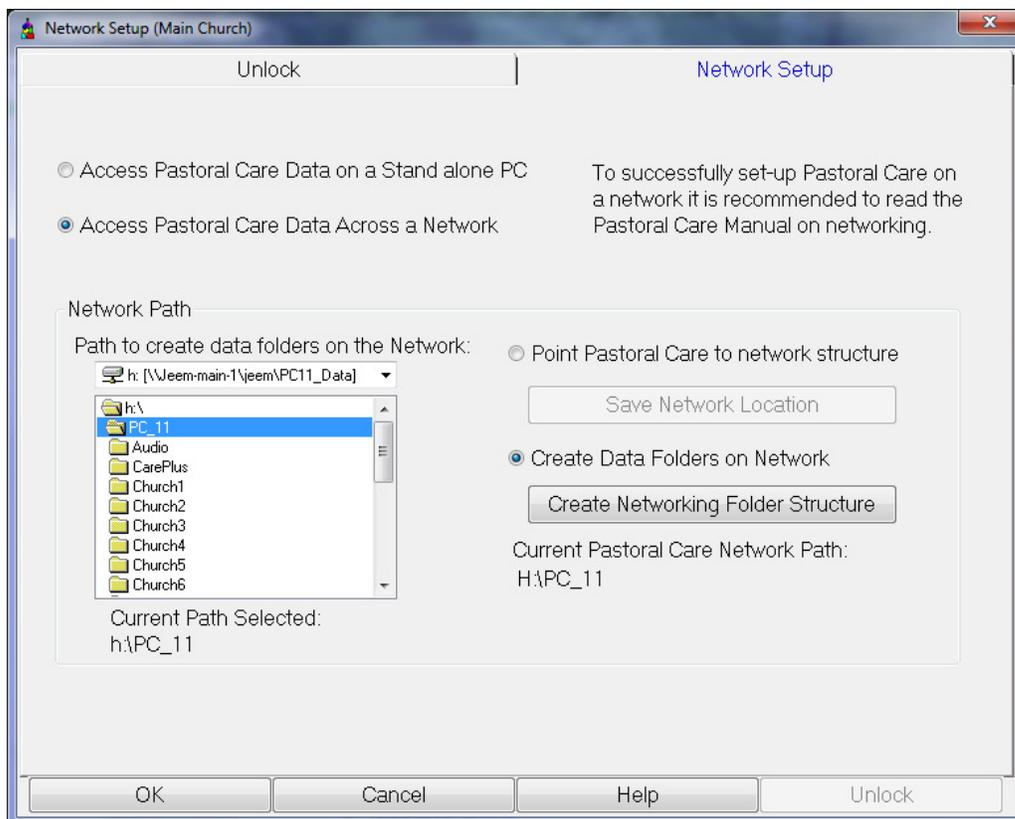
11. Press the OK button. This computer has just created your NETWORK FOLDERS for all other computers using Pastoral Care to use also.

STEPS 1 TO 12 MUST ONLY BE DONE ONCE FROM ONE COMPUTER. TO INSTALL ADDITIONAL COPIES OF PASTORAL CARE ON THE OTHER COMPUTERS SEE BELOW.

Installing additional copies of Pastoral Care onto the network.

To complete your network installation, the following procedure is required. These steps can only be completed after steps 1 – 12 above have been carried out ONCE on one computer.

   a. Install Pastoral Care on your next "workstation" or computer that you want to access Pastoral Care from. (refer to the standalone document on this CD)
   b. Go to Setup – Networking and choose the Network Setup Tab.
   c. Choose the option: "**Access Pastoral Care across a network**"
   d. Choose the option: "**Point Pastoral Care to network structure"**
   e. Use the drive and browser box on the left of the screen to browse to your shared drive (In our example h:)
   f. DOUBLE CLICK on the folder PC_11 (shown below). This will open the folder and reveal folders like Church1, Church2 etc) (See Below)
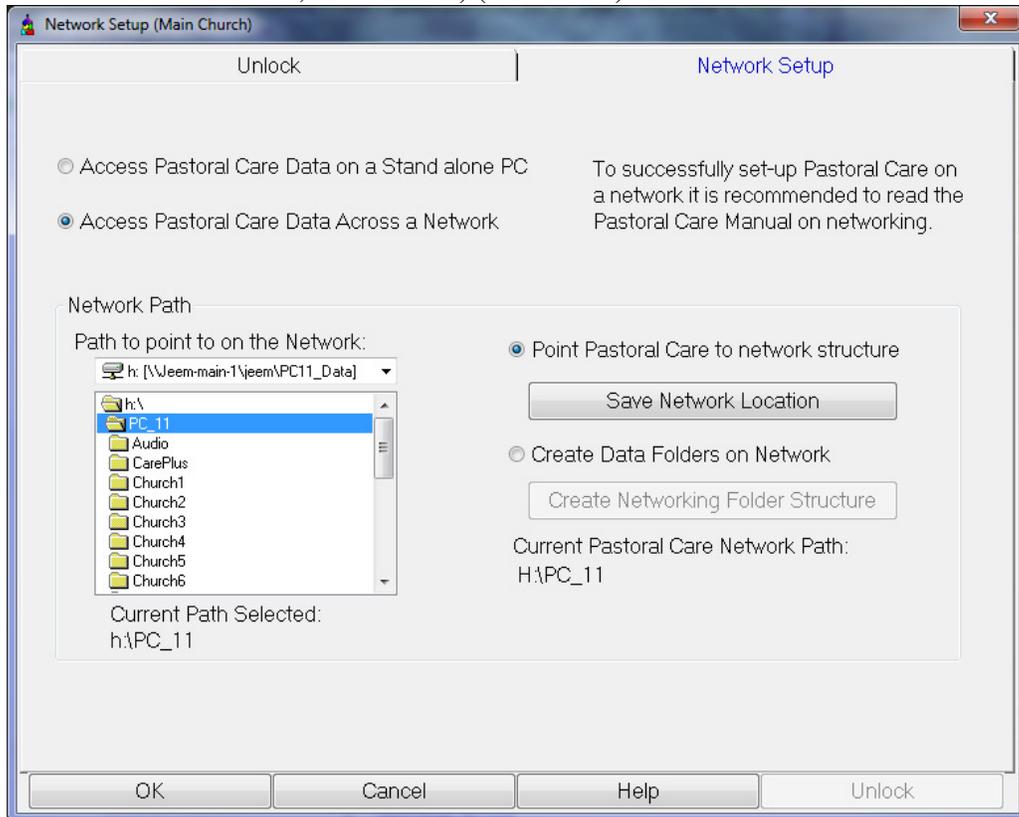
   g. Choose the option: "**Point Pastoral Care to Network Location**"
   h. Press the "**Save Network Location Button**"

Repeat steps a to 'h' for each computer on the network.

Trouble Shooting Pastoral Care Networking

If you are having trouble setting up the network make sure the following conditions exist.

Checking the Mapped Drive

ON THE REMOTE COMPUTER (not the server)
- a.   Start Windows Explorer
- b.   Look at your drives. You will have at least the following drives:
  C:
  D:
  If you have a CD ROM, D: will most likely be the CD ROM
- c.   Look further for your networked "mapped" drive. It MUST appear in the drive list as a drive, not in network neighborhood.
  For Example:
  ShareName on SERVER (E:)
  Files on ChurchMainServer (F:)
- d.   On that shared drive, you must be able to see a folder called "PC_11"
  If you cant see PC_11 on an actual mapped drive, then it is not set up correctly
- e.   If it is visible to the remote computer, then do the following tests.

    1.   Copy a file (any file, say a word document) to the PC_11 folder on the shared drive.
      eg: f:\PC_11
    2.   Right Click on the file you copied to the PC_11 folder and attempt to rename the file
    3.   Delete the file you copied to the PC_11 folder

If any of the steps 1,2 or 3 failed, then you do not have sufficient
permissions to set up Pastoral Care on the network. If you are using Windows 7, Vista or XP, you may need to be logged in as an ADMINISTRATOR to complete this task.

- f.   If you look at the shared drive in explorer and you see the folder PC_11 in the root directory of that shared drive then the drive is mapped correctly. If you see folders such as Church 1, Church 2, etc then you are mapped to far "down" the tree. You need to be able to see PC_11 in the root or Top Level of the shared Drive. (See picture Below)

Correct Mapping
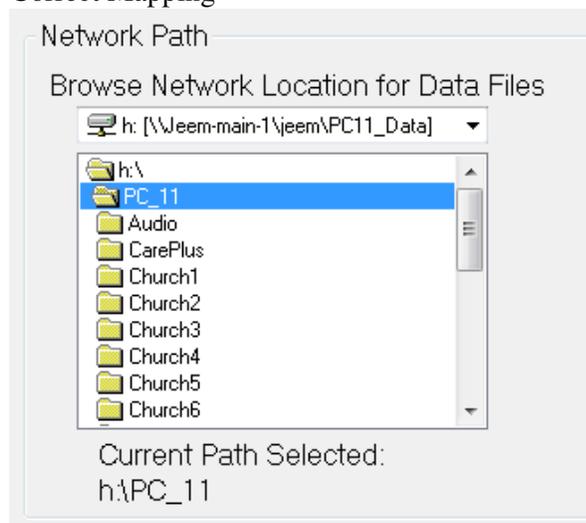
Transferring your data from Standalone to Network

When you set-up Pastoral Care on a network it duplicates the folder structure on the network that you have on a standalone edition. If you previously used Pastoral Care and then change over to a network setup then none of your family files will be on the network until you restore them. To do this turn your machine back to standalone mode and backup you family files to either a USB drive or use the browse option to store the backup files into a folder that you have created on your computer. After the files have been backed up setup Pastoral Care to network mode and then restore the backup files using the restore option.

In doing this process take note:

1) When either setting Pastoral Care to network mode or standalone mode you must exit Pastoral Care and then reenter it for the change to take place.
2) It is not recommended in using the Hard Disk Positions for backing up Pastoral Care when you want to transfer your family files from standalone to network mode because the hard disk positions for standalone are different from the hard positions in networking. Either backup your data files to USB drive or use the browse option to save it in a folder you have created.

Network Test Utility

If you are experiencing issue with getting Pastoral Care to work on your network then there is a utility installed with Pastoral Care that performs 14 tests, for all tests to be performed the previous test must pass so that the program can continue to perform the next test. This utility is located by pressing the Windows 'Start' button then 'All Programs' then choose the `Pastoral Care 11' group, within this group there is the utility called `Network Test'. If you are unable to resolve any of the issues using the Utility Test program then contact us via our Contact area at www.pastoralcare.com.au and inform us which test failed so that we can assist you.