BGL.

Australia
Hong Kong
New Zealand
Singapore
United Kingdom

CAS

Corporate Affairs System

New System

Installation Instructions

Last updated June 2016

Table of Contents

System Requirements

Minimum requirements for full installation of CAS:

Component	Minimum Standalone or Workstation requirements	Minimum Server requirements
Operating System	Windows XP SP3	Windows 2003
	Windows Vista SP2 , Windows 7	Windows 2008 or higher
Processor	Pentium IV (Pentium 4 >=1 GHz) or faster processor	Dual Core Xeon Processor
Memory	2 GB of RAM	2 GB of RAM
		Additional RAM should be added for each Terminal user.
		BGL recommend an additional 100 MB RAM per user
Hard disk	1 GB Hard Disk	1 GB Hard Disk
DPI settings	Window XP - 96 DPI Windows 7 - Smaller (100%)	Terminal Server - 32/64 Bit 2003/2008 - 96 DPI
Display	32 Bit colour	32 Bit colour
	Screen resolution - 1024 x 768 or greater	Screen resolution - 1024 x 768 or greater
Other	For network-based Workstations *i.e. Client/Server systems the TCP/IP protocol is required or, alternatively, a protocol which supports Named Pipes.*	
Printing	Adobe Acrobat Reader Version 7 or higher Microsoft Internet Explorer Version 6 or higher	Adobe Acrobat Reader Version 7 or higher Microsoft Internet Explorer Version 6 or higher
Note :	*The requirements for memory and processors are indicative only, and more RAM or disk space may be required when running BGL products in conjunction with other software.*	

1. Overview

1.1 CD ROM Contents

This CD contains:

- ❑ BGL New System Software
  - ▪ CAS
  - ▪ Simple Fund
  - ▪ Simple Invest
  - ▪ Simple Ledger

- ❑ Demonstration videos
  - ▪ CAS
  - ▪ Simple Fund
  - ▪ Simple Invest
  - ▪ Simple Ledger
  - ▪ Portal

- ❑ Training manuals
  - ▪ CAS
  - ▪ Simple Fund

- ❑ Sample Reports
  - ▪ CAS
  - ▪ Simple Fund
  - ▪ Simple Invest
  - ▪ Simple Ledger

- ❑ System Tools
  - ▪ Adobe Acrobat Reader 9.3

1.2 Product Registration Numbers

When you first start your CAS program, it will ask you to input your Product Registration Number.

Manual Product Registration Numbers by contacting BGL

Product Registration Numbers can be issued over the phone if you are having problems with the automatic system. They are issued between the hours of 9.00am and 5.30pm Australian EST by calling BGL on 1300 654 401. Product Registration Numbers can be issued outside this time, however prior arrangements must be made.

Automatic Product Registration using the Internet

If you are connected to the internet, you can click on [Get Product Rego] from the BGL program Product Registration Screen. You will be required to enter your Client Centre Login, Product ID and a Firm Name that you have registered when purchasing the software. Please ensure your Product ID matches the details provided in the BGL Welcome Email. If you have not yet obtained your Client Centre Login details, please register by visiting the Client Centre Registration.

CAS will then automatically validate your Company and User Level.

Once you have obtained your Product Registration Number. Click the 🖫 Save Button.

1.3 Printer Driver

All BGL Products utilise Quick Reports® for all printing and previewing of all reports. It is **essential** you have the latest versions of your printer driver installed. Printer driver software updates are provided by all printer manufacturers *free of charge* and can usually be downloaded from the printer manufacturers Internet site. Please contact your printer supplier to ensure you have the latest printer driver software for your printers.

1.4 Networks

Network installation should be performed by a person familiar with your network operating system. Errors in network setups can make the network inaccessible to users.

BGL Corporate Solutions Pty Ltd takes no responsibility for the set up of your BGL applications or the integrity of your network when installations are performed by a person who has not been properly trained by the network operating system vendor.

Network users will require rights to search, open, read, write, delete and modify files (Full Control) in the CASWIN folder and all sub directories.

You will need to login to the network as the Administrator prior to commencing the installation procedures.

1.5 Product Logon

Each Product has a default username of **SUPERVISOR** that *does not require a password to login*. This account can be used to log into your software. Passwords and user accounts can be created in the Administration | User Maintenance screen. This is covered in Task 1.2 of the CAS Advanced Training manual.

2. Installation

2.1 Remove any demonstration software

Any CAS Demonstration software loaded must first be uninstalled. This is normally installed in C:\BGLSUITE\CASWIN and this folder can simply be deleted. However if you wish to first save any data from your Demonstration version, refer to BGL's Wiki Article 4256 – Uninstall the Demo version of CAS for instructions on how to save data before removing the demo.

2.2 Running your New System CD

Insert the CD in your CD drive and the installation program should start automatically. If the installation CD does open up automatically:

From the	**Windows Start button**.
Select	**Run**
Type	**D:\Index.html** *(where D is the Drive for your CD-ROM Drive)*
Click	**OK**

If you are unable to install an application through the new install browser, you can select the individual product directories on the CD-ROM and run **SETUP** for the product concerned. Applications are located on the CD in ***D:\bgldata\program\CASWIN***

2.3 Installing New System Applications

Installing BGL applications is completed in 3 steps.

Part A - Copy the program and data files for the application to your computer or network fileserver.

Part B - Sets up the application to operate on your computer (or workstation).

Part C – Updating CAS to the latest version

Part A – Server/Stand Alone Installation

This process copies the CAS program and data files to your computer or network fileserver.

1. You will need to click on the install link under the CAS heading to start the installation process.

2. At the **CAUTION** screen, ensure that you are running the new installation on the server (or if you are running on a standalone) and select *Yes* and *Next* to continue*.*

*Note: If you are running this on a workstation, please refer to **PART B – Workstation Setup***

3. At the **Welcome!** screen click *Next*
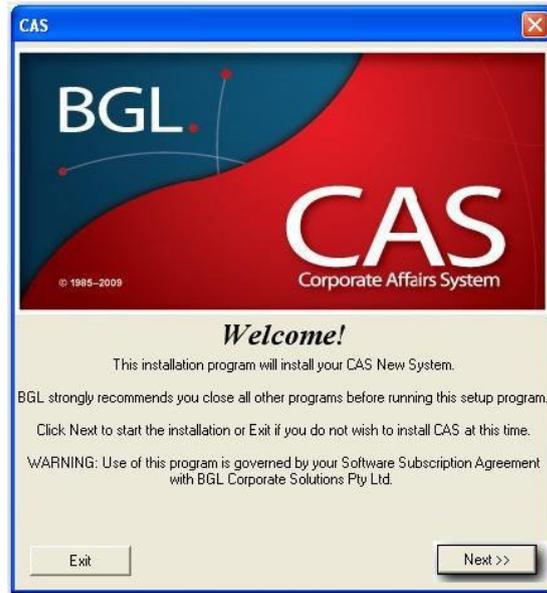
4. At the **Software Subscription Agreement**, read through the terms and conditions of your subscription. If you agree to these terms, click *I Agree* and click *Next*

5. At the *Select Destination Directory*, input **?:\CASWIN** where ? is the drive where CAS is to be installed. Click *Next*

Note: If CAS is being installed on a network server, it required a local drive to be selected *(do not select a mapped Network Drive).* If CAS is being installed on a standalone PC, the drive will be C.
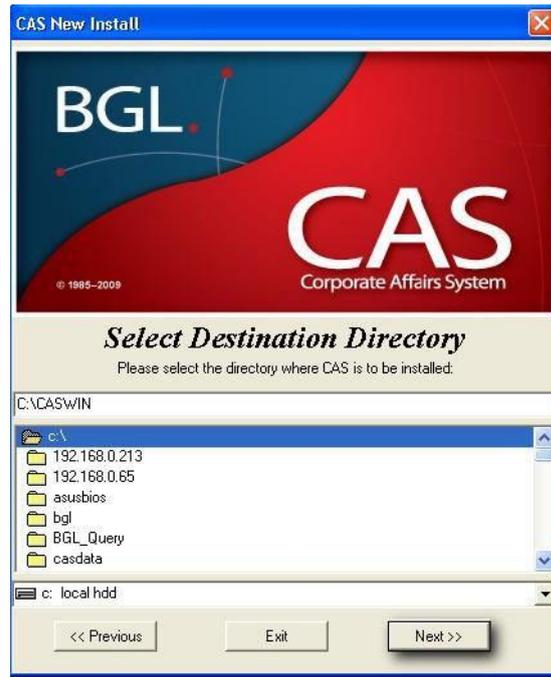
6. At the **Ready to Install** screen. Click *Install*. CAS and the necessary data files will now be installed.

7. At the **NexusDB will be installed screen**, click OK to accept the default location.

DO NOT INSTALL NEXUS INTO SFUND DIRECTORY
Important Note for Server Administrator: You must install Nexus on a local disk drive.

Please see Additional information for more details.

Please note: If you are on Windows Server 2008, Window Vista or Windows, this location will be C:\Nexus
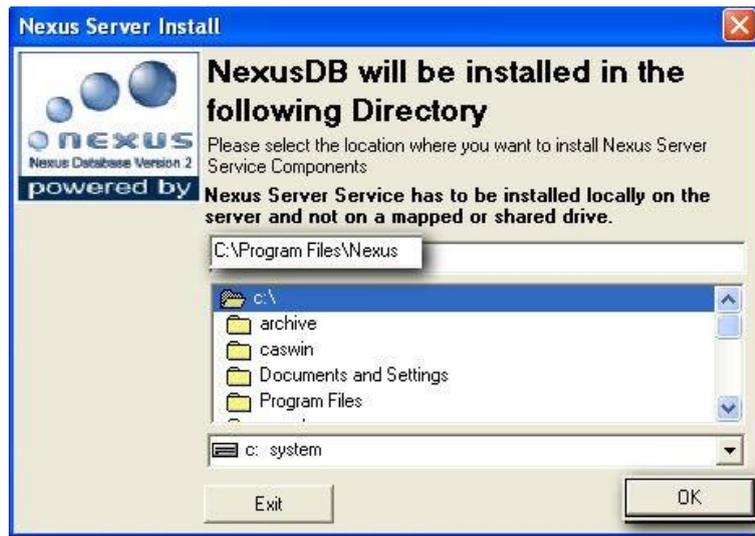
8. At the **Nexus Server Service Installed** screen – Information on where nexus has been installed will be displayed. Next click *OK* to install CAS.
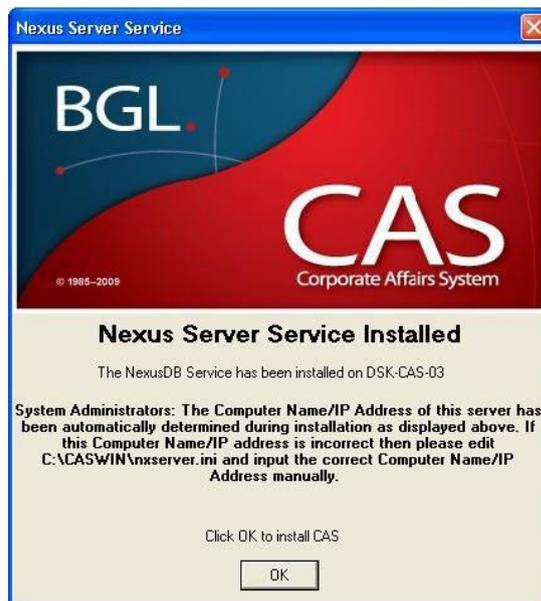
9. After the **file installation process**, you will have the option to set up the application to operate on the computer you are currently using. Click Yes to start BGL Workstation Setup process (?:\CASWIN\NETSETUP\NESTSET32.EXE). Otherwise click *No*.
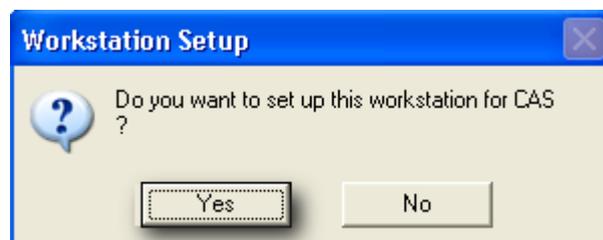
NOTE: **Once CAS** installation is completed successfully, you will need to run **CAS** to enter the Product Registration details **before** running the CAS update.

If you are *installing it on the server*, then CAS needs to be open on the server to enter the Product Registration details.

Starting CAS

1. To start CAS, select Corporate Affairs System (CAS) from the Corporate Affairs System group in your Start Menu.

2. Log in as Supervisor and no password is required.

3. At the *Welcome to Corporate Affairs System* screen, Enter in your Product ID number. Next ensure you have backed up your data and click Ok for CAS to start indexing the database files.

Version 2010.0 Update

Ver 2010.0 may include an update to BGL's Central Name and Address Database. As a result, if you operate any other BGL Products, you MUST also update those applications to the following releases:

Simple Fund Ver 2010.0
Simple Invest Ver 6.x
Simple Ledger Ver 3.x

BGL strongly recommends that ALL CAS data files are backed up BEFORE this update is completed.

BGL Product ID   ABC12345678
I have backed up ALL my CAS data   ☑

✔ Process   ✖ Abort

4. Once the file index is completed, CAS product registration screen will be displayed. You will need to enter your BGL Client centre login details, Firm name and BGL Product ID.

   Then click on **Get Product Rego**. Once registration number has been generated, click on Save.
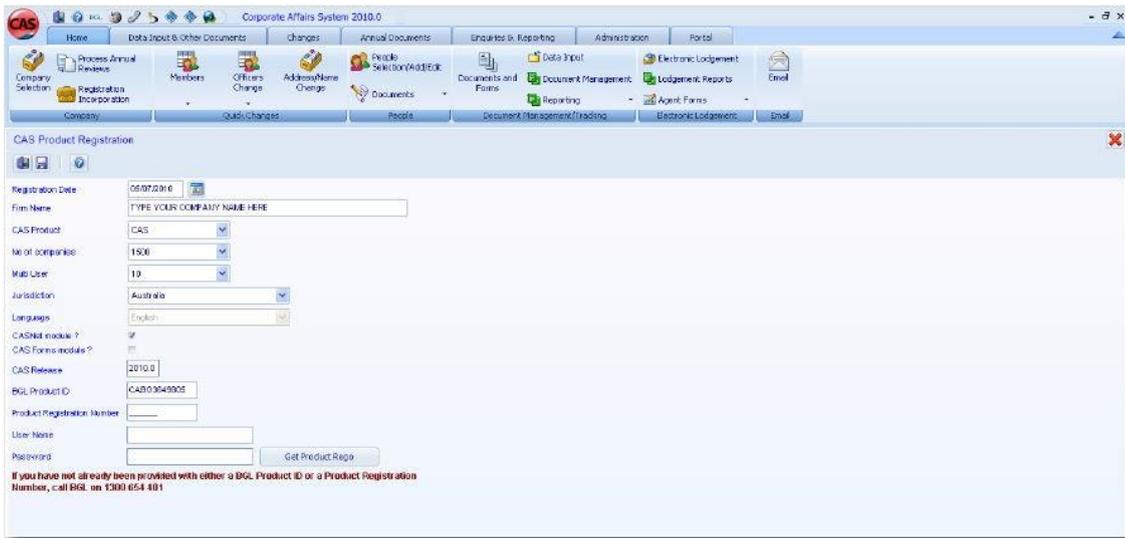
5. If you are not connected to the internet, then a confirm message will appear to input the Product registration manually.
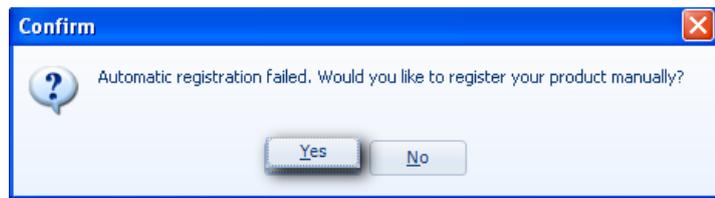
Part B – Workstation Installation

You must now run a set up process on each computer that is to operate CAS on.

1. At the **Windows Start menu on the Taskbar**:

Select	***File***
Select	***Run***
Type	**?:\CASWIN\NETSETUP\NETSET32**
	(where ? is the drive on which CAS has been installed)
Click	***OK***

2. BGL recommends the following responses to the installation process prompts:

➢ At the ***Welcome!*** Screen; ensure you have all other programs closed before running the setup and click ***next*** to continue the workstation install.

➢ At the *Installation* screen, CAS will be selected to be installed. Click *Install* to continue.

➢ The *Finish* screen will confirm that installation for workstation has been completed.

Part C – Updating CAS to the latest version

You will need to update CAS to the latest version.

1. Login into the BGL Client Centre (located at http://clients.bglcorp.com.au/) using your provided username and password. If you have not been provided with a username or password you can register at http://clients.bglcorp.com/?i=register

2. Once you have logged into BGL Client Centre, on the Left hand side of the page then Software Updates under CAS Updates. Download and install the latest update. The update installation will come with instructions which must be read in full before installing.
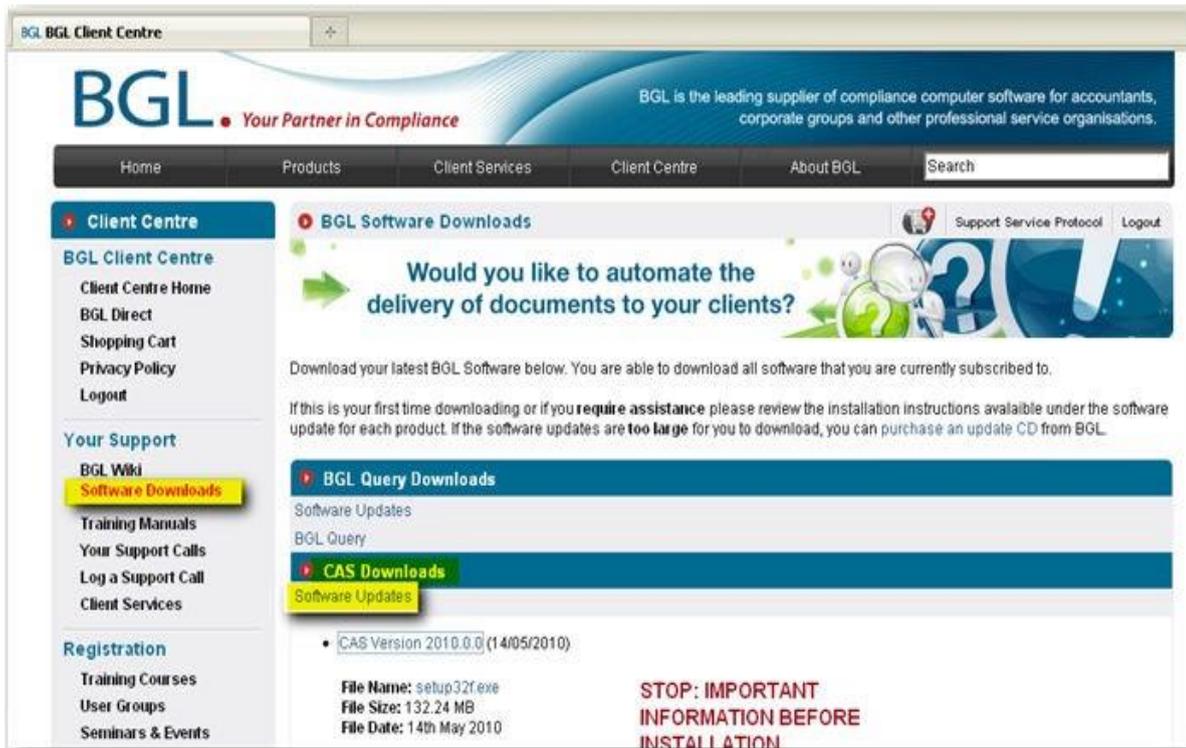
Data File Conversion

If you are converting to CAS from another package, now is the time to install CAS Data Files disk that contains your converted data files. This must be completed before you start CAS for the first time. There will be separate installation instructions in this package to guide you through the Data Files Installation process.

3. Workstation setup and Support

Diskless Workstations, Shared Windows, WinFrame or Terminal Server Installations

Please refer to BGL Wiki article 105 – Terminal Server Setup for further information on terminal server installation.

System Tools

BGL has included *Adobe Acrobat Reader V9.3* on this CD. *Adobe Acrobat Reader* is required by all products as forms are saved in Portable Document Format (PDF). If you do not have Adobe Acrobat or you have an earlier version of Adobe Acrobat installed on your computer, select Adobe Acrobat from the installation options.

Latest Software Versions

While BGL makes every effort to ensure the software versions on this CD are the most current, things do change. To ensure you have the latest version of your BGL applications, click *About* on the main screen and compare the version and date with those shown on our BGL website. If the version date on our Internet site is later than the date on the *About* screen, simply download the latest update from the website and follow the Installation Instructions shown on the Internet page.

On-line Help, Training Manuals, BGL Wiki

All BGL products include a very extensive help system. Click *Help* or press *[F1]* at any screen. On-line *Training Manuals* can be accessed from the CD. However, printed copies of the training manuals can also be purchased from BGL, or downloaded in PDF format from BGL's client centre. Click ***BGL Wiki*** from the main screen to search for common problems/solutions on the BGL Wiki articles on BGL's website.

Troubleshooting

If you are getting errors when running your BGL software product, such as "software not properly installed" ,please refer to the ***BGL Wiki articles*** for a solution from our Frequently Asked Questions.

4. Additional Information for System Administrators

Nexus Installation

The update disk will perform the several checks to determine if your nexus service is already installed to prevent multiple installations of Nexus. Once the check has been passed the Nexus Services will be installed and you will be prompted for the location of where you want to install Nexus.

We recommend you install NexusDB to the default C:\Program Files\Nexus.

Please Note: If you are on Window Server 2008, Windows Vista or Windows this location will be C:\Nexus.

DO NOT INSTALL NEXUS INTO CASWIN DIRECTORY.

Important Information:

(1) You **must** install Nexus on the same local drive as CAS is installed. So if you install the NexusDB into C:\Program Files\Nexus then the CAS data folder should also be setup on the same local drive e.g. C:\SFUND. If your data is stored on the D drive eg. D:\CAS and this is a Local Drive on the server than Nexus should also be installed on D Drive.

(2) **DO NOT INSTALL ON A MAPPED NETWORK DRIVE**

(3) If you use a Terminal Server to access the CAS data which as stored on a File Server, than this update and Nexus needs to be installed on the File Server **NOT** the Terminal Server.

(4) There should be no network redirector operating between the NexusDB and the database files. This is for both performance and stability reasons. You can of course continue to use shared paths on the workstations.

   ➤ At the Nexus Server Install screen, click **OK** to continue

The installer will then read your machine IP address and file location set in the step above and then copy these setting to a file called nxserver.ini which we be installed into the same location as your sfund32.exe file. The installation process will also run the NTRIGHTS.EXE application which will assign the username "/ndbuser" the log on service rights. Using the ndbuser account the installation will start the NXServer Service automatically.

Important Information: You will need to add full read/write permission to the CASWIN data folder for "/ndbuser" and all CAS Users. This is particularly important if the data is not located to the NexusDB server or you are installing Nexus on a different server from your Domain Controller.

➢ Once the service is started you will be shown the IP address of the Nexus Service and receive the following message.

Full computer Name

To find the **Full Computer Name,** right click on MY COMPUTER and select Properties. The **Full Computer Name** will be displayed on the Computer Name tab.
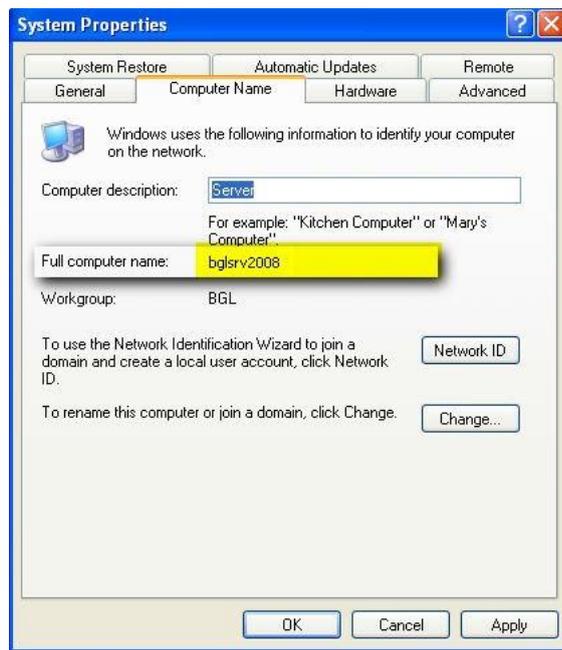
This **Full Computer Name** can then be copied into the IP address in the nxserver.ini
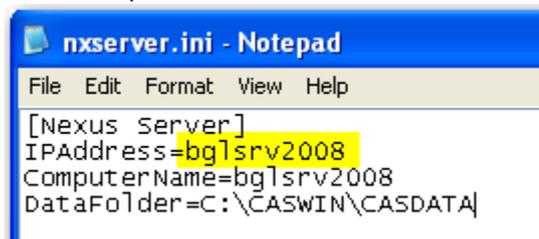
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NDBUSER User account

- ✓ A user account will be added to your local users called **NDBUSER**. This is required for the Nexus Service to run.
- ✓ Please ensure this user account has the correct access rights (Full Control) to the SFUND folder. This is very important when the product is shared from another location where nexus has not been installed.
- ✓ The ndbuser user account and all CAS users need to be given read/write access to the CASWIN folder

If you use a Domain Controller you will need to add NDUSER to Domain Administration Group.

The NDBUSER when installed is given the following NT rights:
1. Password never expires
2. Logon Service right
3. Deny logon locally

Firewall Configuration

For Windows XP SP2, Vista Machines and Windows 7 you will need to add nxServer.exe to the Windows Firewall exception List.

If you use other Firewalls you will only need to change the configuration of your firewall if you want to access the NexusDB server from outside the server's subnet.

If this is the case you will have to configure your firewall to allow connections through it on port 16000. This is the TCP/IP port the Nexus server uses by default. In this case clients outside the server's subnet can connect to the Nexus server if they know the server's address. This is usually this external IP address of the firewall. The firewall must be configured to route IP traffic on port 16000 to the machine the Nexus Server is running on. In this case no broadcast is performed but connections can be made to the server.

If you want the clients to find the server behind the firewall automatically (not recommended) then you will needs to make sure broadcasts make it through the firewall and the Nexus server must be configured to respond to broadcasts. So you will need to configure your firewall to pass the Nexus client's broadcasts to the server. Nexus Broadcasts use the UDP protocol but Nexus broadcasts don't know the port.

The Default installation of Nexus is to have "Respond to Broadcast? Selected this can be changed for each of the transports settings in the nxServer.nxdbworksettings located in the \\program files\nexus folder or using the nxServer.Exe interface as shown below.
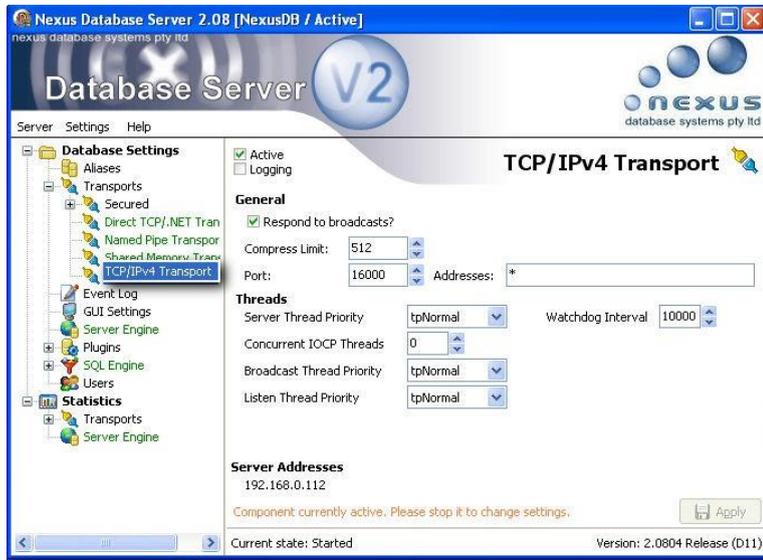
Changing Default Port used by Nexus

If you wish to change the default port which Nexus uses, this can be done by editing the file nxserver.ini located in the CASWIN directory. In the file under the IP Address, add a line which has 'PORT=*****' where '*****' is the port number you wish to use.

Eg.

```
[Nexus Server]
IPAddress=bglsrv2008
ComputerName=bglsrv2008
PORT=16001
DataFolder=C:\CASWIN\CASDATA
```

You will then need to do the following:

i)   Open the directory in which you installed Nexus. eg. C:\Program Files\Nexus

ii)   Run the file Stop NexusDB Server.cmd

iii)   Run the file nxServer.exe

iv)   Under Transports change the port on the TCP/IPv4 Transport
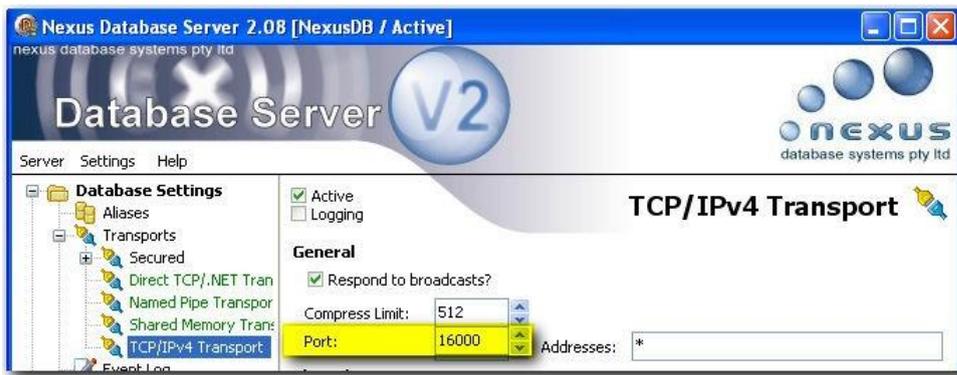
v)   Close and disconnect the nxServer.exe

vi)   Run the file Start NexusDB Server.cmd

5. Important Information for backups

The information below is for CAS version 11.0 or later.

Running unattended backups

- You may need to modify your backup scripts to prevent file in use error messages. In your Backup scripts **you must stop nexus service** (using the command: net stop nxDBServer) then run the backup application/script.
- Then restart the Nexus Service once the backup has completed using the command: net start nxDBServer. Alternatively you can use "bglzip32 2 Auto" command in your scripts to take a live backup of the Nexus Database Files.

Important Note:

The BGL backup\restore process will backup Nexus Database files only so before using this process you must ensure you have updated all files to CAS Current Release.

- The following will create a backup of CAS to the **\\CASWIN\CASDATA\CABACKUP** folder. This folder will then need to be included in your own external backup systems for disaster recovery purposes. The remainder of the files and folders in the \\CASWIN folder should then be excluded from the backup.

Backing up your data

There are a few ways you can perform a backup depending on the current backup method your IT Administrator have set up. Refer to BGL Wiki article 4090 - Backing up your data for more information.

Restoring a backup

There are a number of method which you can restore your data depend on the method which was used when the backup was performed. For more information, please refer to BGL Wiki Article 375 - Restoring a backup.