



DIGITA PROFESSIONAL SUITE

NETWORK & STANDALONE INSTALLATION GUIDE

The Digita Professional Suite should be installed by a competent IT person.

Please pass this documentation to your IT department or the person installing the suite.

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OVERVIEW OF THE INSTALLATION PROCESS

The process is split into 3 parts.

- Installation
- Configuration
- Using the Software

This guide serves as an aid to get you started with installing the Digita Professional Suite.

The content of this guide is intended for a competent IT person who has the correct permissions, can access servers and file locations, and can install applications as required.

NOTE: After Installation is complete – please use the Configuration Guide to continue the process.

https://productdownloads.digita.com/digitadocs/Digita_Configuration_Guide.pdf

SCENARIOS

There are three installation scenarios that determine how you install and use the software:

STANDALONE

A Standalone installation on the user's workstation incorporating a local database.

A Standalone can also be used on single RDS (Remote Desktop Services) servers, however having SQL Server and the user sessions on the same system is not recommended unless sufficient resources are available (and if using SQL Server Standard, the memory allocation should be capped).



**Standalone
installation**



**Single RDS Installation
(if sufficiently resourced)**

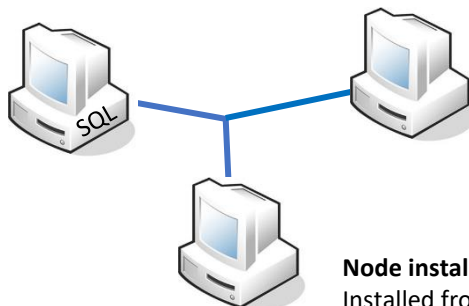
However, a standalone installation can replace a Network install as long as the database exists on the same server as the install. See the Network Server option for more information.

PEER TO PEER

This is a Standalone installation on the workstation where the database is to be located, and Node installations on each workstation that requires access to the software.

In this scenario the primary Standalone workstation should have the highest specification due to it being an active workstation, having SQL Server installed, and acting as a server to the other workstations.

**Standalone
installation**
Called: 'SERVER'



Node installation
Installed from:
\\SERVER\Digita\Application\Nodeins\

Node installation
Installed from: \\SERVER\Digita\Application\Nodeins\

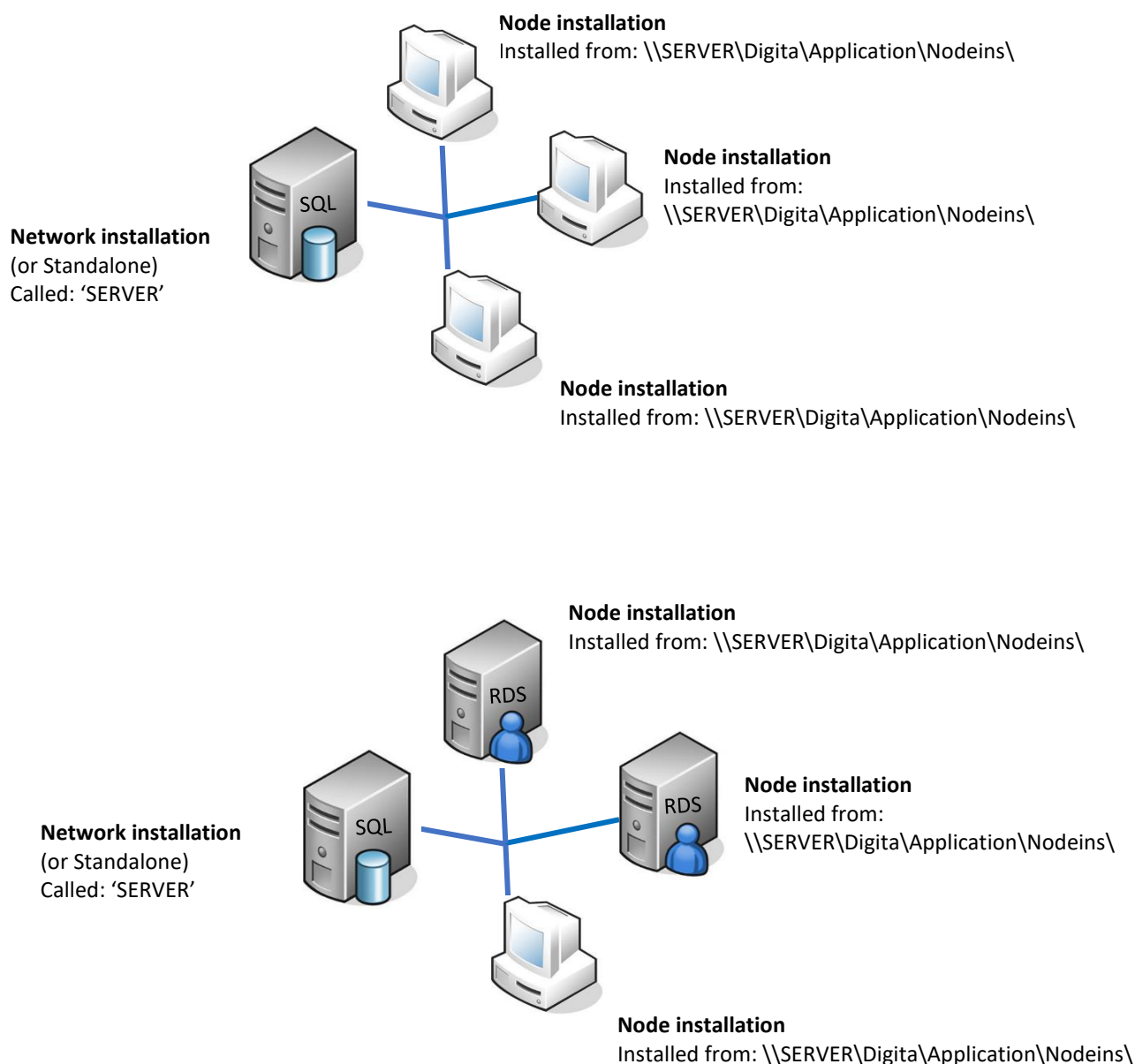
NETWORK SERVER

A Network Server installation on the server with a local or remote SQL Server database, providing Node installations to each workstation that requires access to the software.

The applications installed using the Network Server option cannot be launched on the server. If the applications need to be launched on the server, the Standalone option should be used. This can also be useful for verifying upgrades have been successfully completed, and general IT access for testing.

The use of an RDS server is ideal for staff working from home.

It is recommended that RDS (Remote Desktop Services) Servers are treated as client workstations.

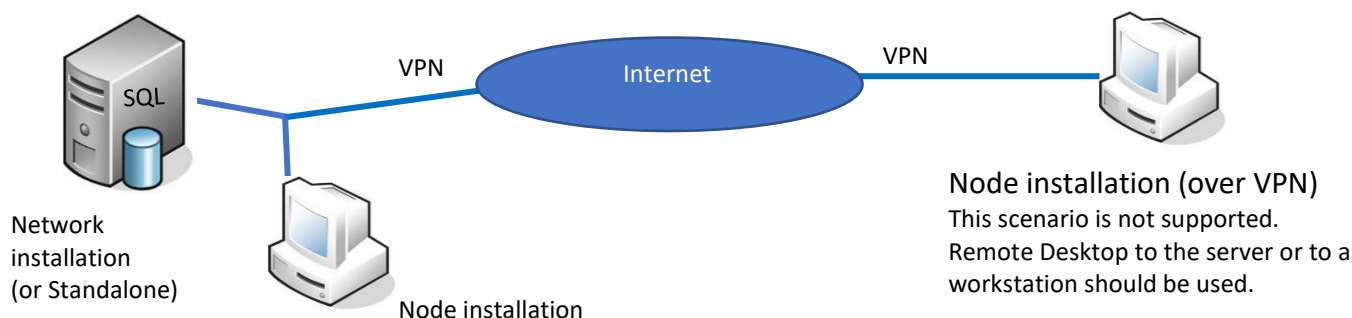


WORKING FROM HOME

In the scenario where a staff member takes their office computer home and use a Virtual Private Network (VPN) to access office resources, there is a temptation to think the Digita Applications will also work over the VPN. The software may appear to work, however due to the amount of SQL traffic over a home internet connection, there is a serious risk of data corruption and connection timeouts.

It is worth noting that in the office the node is likely only a few metres away from the SQL Server computer, at a network speed of 1Gb/s. Running the software client from home over the VPN, the node is the distance your home is to the office (often many miles), and at a small fraction of the office network speed, roughly 0.009Gb/s (estimate based on the most common broadband upload speed, set at the slowest end, 9Mb/s upload).

Therefore, running the software directly over a VPN is not a supported scenario.



For staff working from home, there are a few options available...

1. Use Remote Desktop to connect to an RDS server in the office or 'in the cloud' to run the software. This may or may not include using a VPN.
2. Use third-party remote access software or the RDP client to connect your home computer to your office workstation, which will then run the Digita software.
3. Use the offline 'mobile' method, where only limited clients at a time are exported from the server and imported to the 'standalone' workstation at home for remote working.
4. Use the 'Digita Virtual Office'.

In all four of the available options, no data is ever transmitted between the computer at home and SQL Server in the office.

PRE-REQUISITES & RECOMMENDATIONS

Our current hardware and software recommendations and compatibility guide can be downloaded from:
https://productdownloads.digita.com/digitadocs/Digita_HardwareRecommendations.pdf

STANDALONE/SERVER/WORKSTATION REGION SETTINGS

BEFORE installing the Digita Suite or SQL Server on a computer, double check the computer Region settings are set to United Kingdom, and all other Region settings are set to British English.

By default, computers have United States Region settings set, which uses an invalid date format for UK software.

Workstations with node installation on them can be changed easily after the software has been installed. This is not the case with a SQL Server installation.

SQL SERVER EXPRESS / STANDARD UPGRADE NOTES

To determine which version of SQL Server and Service Pack level you are currently using, download and run this on your SQL Server computer. <https://productdownloads.digita.com/digitavarious/SQLVersion.bat>

Alternatively, launch Practice Management on a workstation. Once logged in, click on the top 'Help' menu, select 'About Digita Practice Management'. Look for the SQL Server Version entry.

Upgrading SQL Server Express

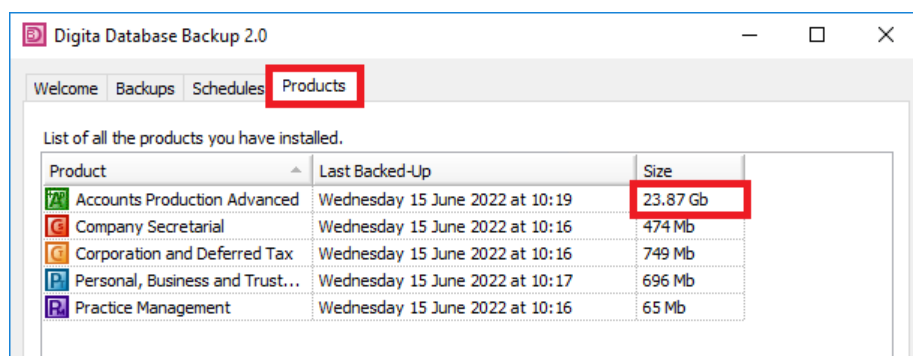
Older installation of SQL Server Express may need upgrading to a newer release.

Please follow the instructions in this guide linked below...

https://productdownloads.digita.com/digitadocs/SQL_Server_Express_Upgrade_Guide.pdf

Upgrading to SQL Server Standard/Enterprise

If any of the databases are over 10 Gb in size, upgrading to SQL Server Standard will be a requirement. To determine this, launch **Digita Database Backup Tool** on the server, select the 'Products' tab. The database sizes are listed here, as shown below.



Product	Last Backed-Up	Size
Accounts Production Advanced	Wednesday 15 June 2022 at 10:19	23.87 Gb
Company Secretarial	Wednesday 15 June 2022 at 10:16	474 Mb
Corporation and Deferred Tax	Wednesday 15 June 2022 at 10:16	749 Mb
Personal, Business and Trust...	Wednesday 15 June 2022 at 10:17	696 Mb
Practice Management	Wednesday 15 June 2022 at 10:16	65 Mb

Should the edition of SQL Server need upgrading, or the need to install SQL Server Standard as a new installation please follow the guide below....

https://productdownloads.digita.com/digitadocs/SQL_Server_Standard_Install_Upgrade_Guide.pdf

STANDALONE / NETWORK SERVER QUICK CHECKLIST

This is a brief check list of the most likely steps needed to install or upgrade the Digita Suite with SQL Server on a new or existing Computer or server.

UPGRADE

1. This is likely not necessary as it would have been done during the initial installation, however it has cropped up during upgrades. Check the 'Internet Options' Update from the Troubleshooting section: '6 - **Safety settings on this computer prohibit accessing a data source on another domain**' on page 50.
2. Upgrade the software, starting with the Preparation stage on page 9.
3. Server / Peer-to-Peer:
 - a. Open the applications from the Desktop or Start Menu (not task bar) on the node workstations to launch the upgrader. If that does not launch the installer, follow the workstation node installation procedures on page 18.
 - b. **Peer-to-Peer only:** If you get an error of 'Unable to find server directory', follow these details from the Troubleshooting section: **Failed the update process: Unable to find the server directory...**'7 - **Failed the update process: Unable to find the server directory...**' on page 51.

NEW INSTALLATION

1. 'Internet Options' Update from the Troubleshooting section: '6 - **Safety settings on this computer prohibit accessing a data source on another domain**' on page 50.
2. Installation of the software, starting with the Preparation stage on page 9.
3. Server / Peer-to-Peer:
 - a. Share the 'Digita' folder to allow workstations to install from it, page 35.
 - b. Allow the SQL Server service port 1433 through the firewall on the server or primary computer, page 37.
 - c. **Peer-to-Peer only:** Follow these details from the Troubleshooting section to avoid permissions issues on workstations: **Failed the update process: Unable to find the server directory...**'7 - **Failed the update process: Unable to find the server directory...**' on page 51.
 - d. Perform a workstation node installation, page 18.

STANDALONE / NETWORK SERVER NEW INSTALLATION & UPGRADE PREPARATION

Install from CD/DVD

Insert the installation disk into the machine - it should automatically initiate the installation process. If it does not, please run the “**DigitaAutoRun.exe**” file to initiate the installation process.

Continue onto the ‘Installation Process’ section.

Install from Download

If you have a download link: Click on the link, select ‘Save’ or ‘Save As’ to save to your ‘Downloads’ folder. Once downloaded, continue below.

If you do not have a download link: The latest full Digita Suite can be downloaded from this link. Click on the link, and your default browser will open presenting a download dialog.

https://productdownloads.digita.com/digitaunifiedinstallersuite/Digita_Suite.zip

On the download dialog, select ‘Save’ or ‘Save As’, and if prompted select to save in your ‘Downloads’ folder.

Once you have the download: Read the Synopsis below, or continue onto the next section for detailed instructions under ‘Extract and Run’.

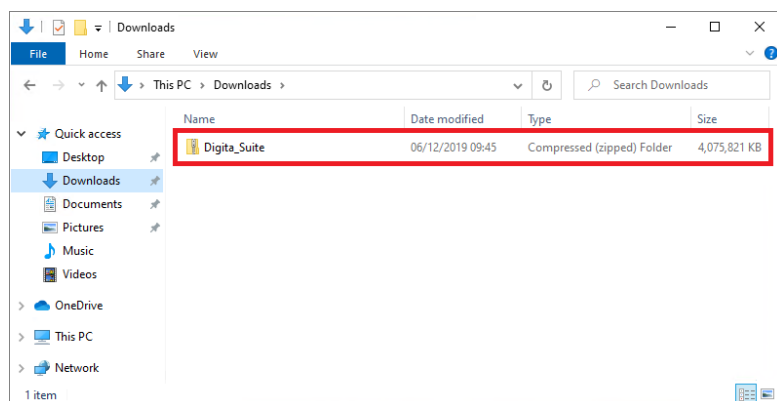
SYNOPSIS

Find the downloaded ZIP file (usually in the ‘Downloads’ folder). Right click on the file, then select ‘Extract All’. If you have third-party compression software, you can also use that. Once extracted, a folder should open, run the “**DigitaAutoRun.exe**” file to initiate the installation process.

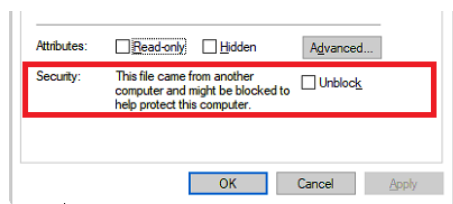
Continue to the ‘Installation Process’ Section.

Extract and Run

Once downloaded, open File Explorer and navigate to the Downloads folder.



Right click on the downloaded file, ‘Digita_Suite.zip’. Select ‘Properties’. If the dialog shows the unblock option, as shown below, tick the check box to unblock the file, and then click ‘Apply’.



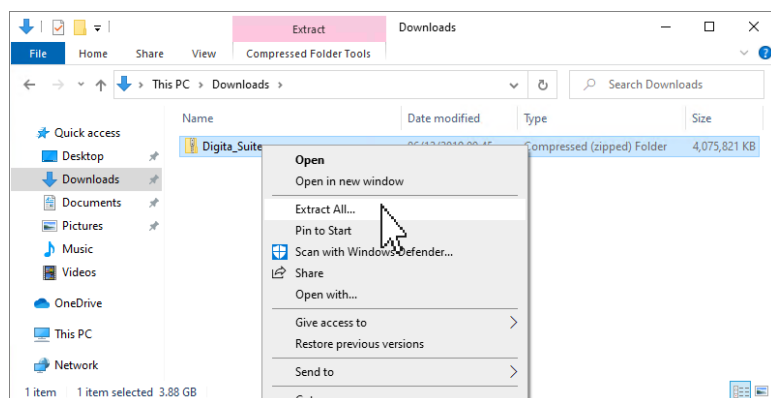
If the dialog does not show the ‘Security’ part on the dialog, just click ‘Cancel’.

The ZIP file must now be uncompressed. The Suite cannot be installed directly from within the ZIP file, it must be extracted/unzipped first.

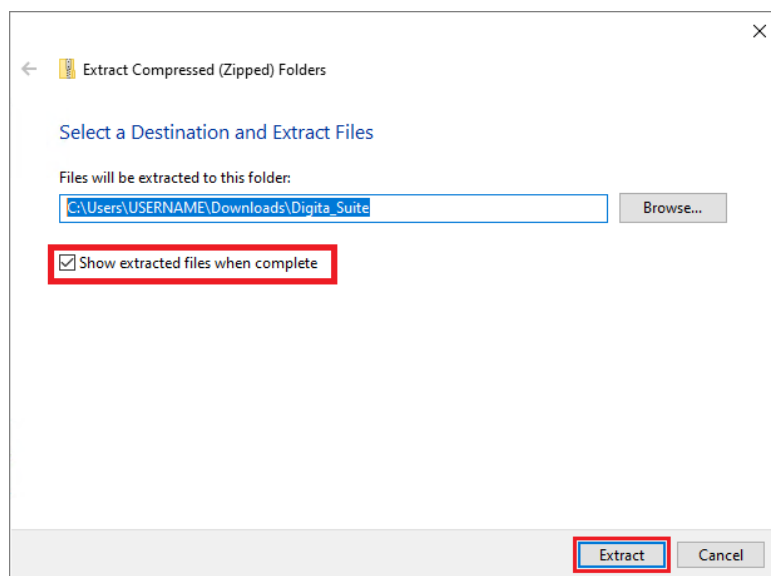
Please note the following points prior to installing the Suite:

File Location	Ensure the files are located on the same computer it is being installed on, not a network location.
Cloud Storage	<p>WHY?: The installer is HTML5 based, therefore would need to adhere to additional installation security restrictions.</p> <p>Ensure the extracted files are not located in a folder managed by Cloud Storage, ie Onedrive, Dropbox etc. If the installed folder path has Onedrive or Dropbox in the folder path, extract to another location before installing.</p>
Anti-Virus	<p>WHY?: The application may be in the process of uploading to the Cloud server, making the files temporarily unavailable on the local computer, disrupting the installation process..</p> <p>We recommend disabling your Antivirus software and it's auto-update service, for the duration of the Extraction and Installation processes.</p> <p>WHY?: It can interrupt the install process if it falsely detects a file it does not like, also the auto-update can continually cause the computer to require a reboot prior to installation.</p>

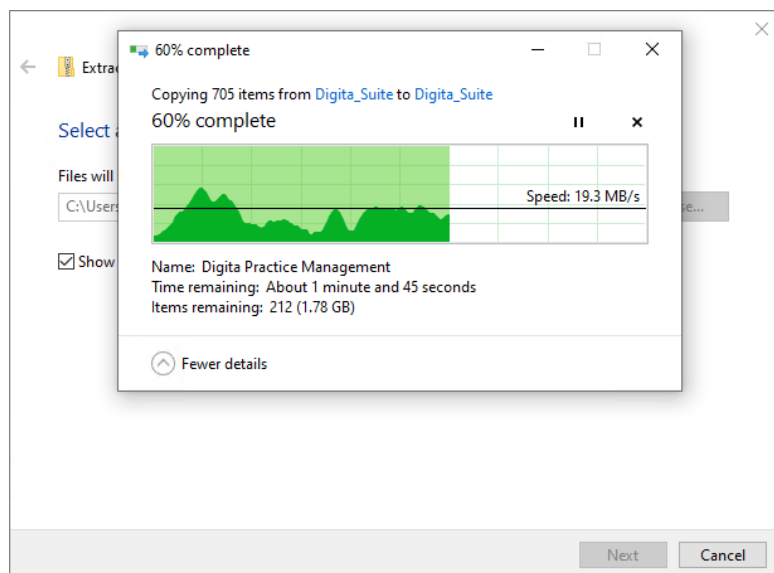
Right click on the ZIP file, then select 'Extract All...'. If you are using a third-party compression application, like 7-ZIP, WinRAR or WinZIP for example, you can use those to extract the content instead if you wish.



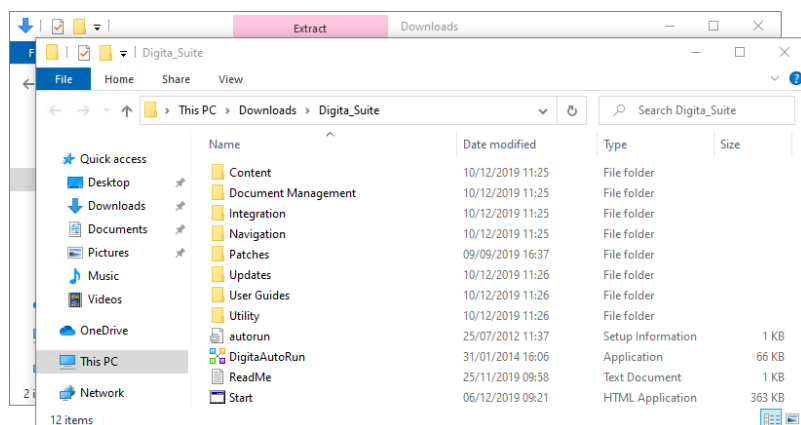
Ensure the check box is selected as shown below, then click 'Extract'.



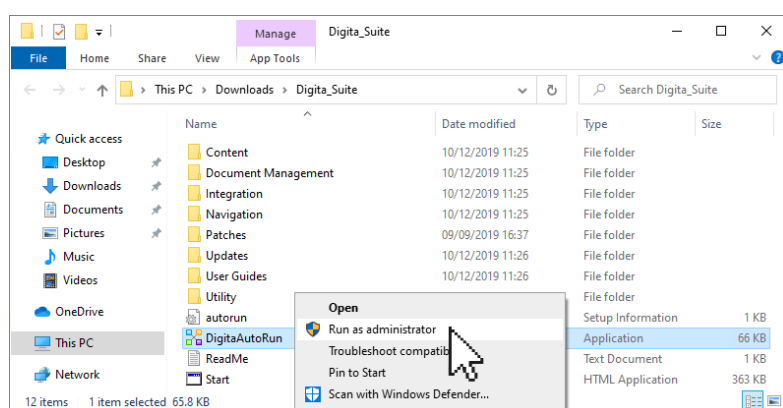
The contents of the downloaded ZIP file will now extract, and once completed will open a folder.



As noted by the check box, a folder will open showing the extracted files. Your third-party compression software may do the same, if not, look for the folder in the 'Downloads' folder (look for the traditional folder icon, not a custom icon').



Right click on 'DigitaAutorun.exe', then select 'Run as administrator'. The installer will then launch.



For the Installation Process, jump to the next page.
For the Upgrade Process, jump to page 22.

STANDALONE / NETWORK SERVER NEW INSTALLATION PROCESS

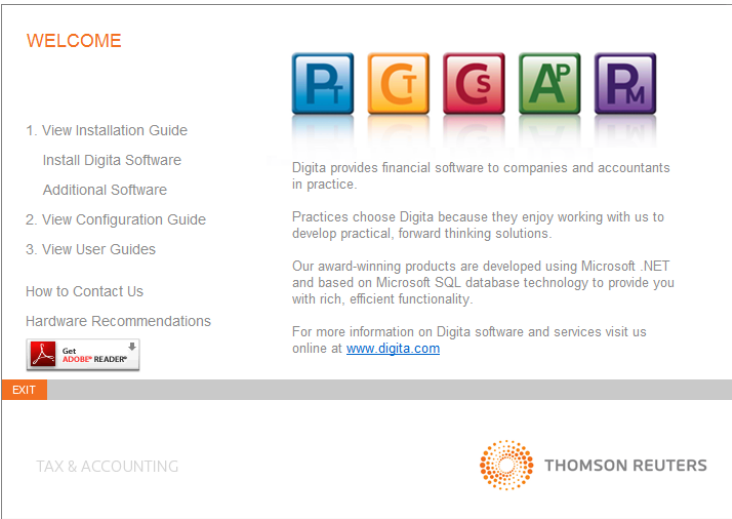
Before proceeding, please complete the following steps:

- 1. Apply ALL Windows Updates available
- 2. Permanently disable anti-virus live scan, as well as the auto-update service. It can be re-enabled after the software has been installed.
- 3. Reboot the computer.
- 4. Launch the installer by running 'DigitaAutorun.exe'.

NOTE these steps can be missed if required, however if the installer halts reporting a reboot is required, please follow the steps before trying again.

If this is the first time installing the Digita Suite, if you have not done so already, follow the instructions in the 'Troubleshooting' section: '6 - Safety settings on this computer prohibit accessing a data source on another domain' on page 50 before proceeding.

At the Welcome screen, click 'Install Digita Software':



At the Product Selection screen, specify the products that you wish to install, then click NEXT:



Key

- shows the application is currently installed and will be upgraded.
- shows currently running the latest version.
- shows the application is not currently installed, but will now install.

Known errors, jump to the page:

- 'Node installation detected' on page 48
- 'Digita Practice Management must be selected for the Digita products to work together as an integrated suite' on page 48

At the Installing Your Software screen, select the Standalone or Network Server installation type. Both installation types support Client Node Installations. Then specify the installation folder. By default, this folder will be "C:\Program Files (x86)\Digita\" on a 64-bit machine.

CONFIGURING A STANDALONE INSTALLATION

This installation type will install or connect to a Default Instance of Microsoft SQL Server on the local machine. It will install the Digita applications and configure them to be run directly on the machine. It is suitable for single machines, peer-to-peer networks, and where a single terminal server is used.

If a Default Instance of SQL is already present, you will be prompted to enter the existing SQL Server ‘SA’ account password. If a Default Instance is not present, you will be prompted to enter a new SQL Server ‘SA’ account password & confirm it underneath (this must meet your system password complexity requirements).

If you have selected to install Digita Accounts Production Advanced, you will first be taken to the product-specific installation screen:

ACCOUNTS PRODUCTION ADVANCED

Before installing Digita Accounts Production Advanced we need the following information:

Digita Accounts Production provides a comprehensive range of compliant financial reports.

Choose your Installation type:

Standalone

☒

?

Network Server

☐

?

Database Only

☐

?

Install SQL Express:☒

Database Name:AccountsProduction?

SA Password:.....?

Confirm:.....?

Installation Location:C:\Program Files (x86)\Digita?

Install Preconfigured DB:☒

BACK

NEXT

TAX & ACCOUNTING

THOMSON REUTERS

Select the Standalone installation type, enter (and confirm if required) your SQL Server ‘SA’ account password, and confirm the installation location, then click Next to be taken to the Digita Core Products screen.

Please note that leaving the ‘Install Preconfigured Database’ option ticked will install the pre-configured database (recommended).

DIGITA CORE PRODUCTS

INSTALLING YOUR SOFTWARE

Before installing Digita Core Products we need the following information:

View Installation Notes

SELECT SETUP TYPE

Standalone

☒

?

Network Server

☐

?

Database Only

☐

?

Install Folder:C:\Program Files (x86)\Digita?

Server Name:WORKSTATIONx?

SA Password:.....?

Confirm:.....?

ESSENTIAL MICROSOFT SYSTEM UPDATES

.NET Framework 4.6NOT REQUIRED?

SQL ServerINSTALL?

BACK

NEXT

TAX & ACCOUNTING

THOMSON REUTERS

Known errors, jump to the page:

•

You must enter the SA password so that the Digita Suite can install the product databases’ on page 49

•

‘ADO Security Warning. This website uses a data provider that may be unsafe’ on page 50

•

‘Safety settings on this computer prohibit accessing a data source on another domain’ on page 50

Click Next to proceed.

The wizard will check for the pre-requisite Microsoft components and proceed to install Microsoft .NET Framework and a Default Instance of Microsoft SQL 2017 Express (if required). It will then install the selected Digita applications.

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SALES
SUPPORT
GENERAL

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telephone: 03450 180 909
telephone: 03450 180 907

email: digita.sales@thomsonreuters.com
email: emea.support@thomsonreuters.com
visit: tax.thomsonreuters.co.uk

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CONFIGURING A NETWORK SERVER INSTALLATION

This installation type will install or connect to a Default Instance on the local machine. It is intended for servers only, and as the software cannot be opened directly on the machine it is not suitable for terminal servers (RDS Servers).

Known errors, jump to the page:

- 'You must enter the SA password so that the Digita Suite can install the product databases' on page 49
- 'ADO Security Warning. This website uses a data provider that may be unsafe' on page 50
- 'Safety settings on this computer prohibit accessing a data source on another domain' on page 50

Select the Network Server installation type, enter (and confirm if required) your SQL Server 'SA' account password, and confirm the installation location, then click Next to be taken to the Digita Core Products screen.

Please note that leaving the 'Initialise Database' option ticked will install the pre-configured database (recommended).

By default, the installer will populate the 'Server Name' box with the local machine name, this indicates it will connect to or create the Default Instance of SQL on the machine.

- If a Default Instance of SQL is already present, you will be prompted to enter the existing SQL Server 'SA' account password.
- If a Default Instance of SQL is not present, you will be prompted to enter a new SQL Server 'SA' account password & confirm it underneath (this must meet your system password complexity requirements).

Note If you enter any other server name, and/or append the server name to indicate the software points to an alternate SQL server or SQL Named Instance, e.g "SERVER\SQLINSTANCE", the installer will not attempt to verify the 'SA' account password and will not create the databases.

The Digita Database Backup tool will also not be available to manage the databases.

Named instances are not supported.

We recommended that the Digita software is installed in the Default instance as the software is written to look for this SQL Default instance name.

DIGITA CORE PRODUCTS
INSTALLING YOUR SOFTWARE

Before installing Digita Core Products we need the following information:

[View Installation Notes](#)

SELECT SETUP TYPE

☐ Standalone ?
☒ Network Server ?
☐ Database Only ?


Install Folder: C:\Program Files (x86)\Digita\ ?
 Server Name: SERVER x ?
 SA Password: ?
 Confirm: ?

ESSENTIAL MICROSOFT SYSTEM UPDATES

.NET Framework 4.6: NOT REQUIRED ?
 SQL Server: INSTALL ?

BACK **NEXT**

TAX & ACCOUNTING

 **THOMSON REUTERS**

Known errors, jump to the page:

- 'You must enter the SA password so that the Digita Suite can install the product databases' on page 49
- 'ADO Security Warning. This website uses a data provider that may be unsafe' on page 50
- 'Safety settings on this computer prohibit accessing a data source on another domain' on page 50

Click Next to proceed.

The wizard will check for the pre-requisite Microsoft components and proceed to install Microsoft .NET Framework and a Default Instance of Microsoft SQL 2017 Express (if required). It will then install the selected Digita applications.

COMPLETING THE INSTALLATION

Accept the terms of the Licence Agreement, then click Next to proceed:

LICENCE AGREEMENT

Please read the following licence agreement carefully. Select the 'I accept the terms of the licence agreement' and click NEXT if you wish to proceed.

PRINT

Customers who have bought this software product are already bound by the Terms & Conditions of Sale and Product Use at www.digita.com/terms ('the Terms'), which were incorporated into the Order Form. Please click 'I accept' then the NEXT button to carry on installing the product.

Where you wish to install this product in order to evaluate it you do so on the Terms except that payment is not required for the evaluation period. By clicking 'I accept' you confirm that you have read and agreed to the Terms, and that you are authorised to do so and to bind your company, partnership or other legal entity through which you do business to abide by the Terms. If you select 'I do not accept' then the setup cannot be completed.

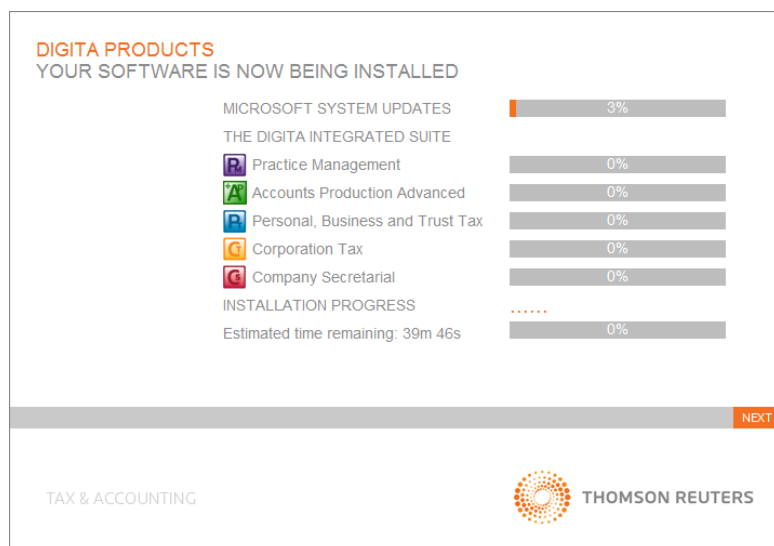
☒ I accept the terms of the licence agreement
☐ I do not accept the terms of the licence agreement

BACK **NEXT**

TAX & ACCOUNTING

 **THOMSON REUTERS**

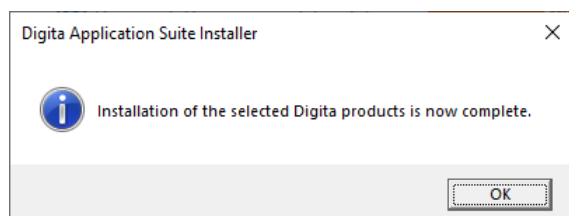
The process will then install Microsoft .NET & SQL Server if required, and the selected Digita applications. This process can take up to an hour dependant on the required components:



Known errors, jump to the page:

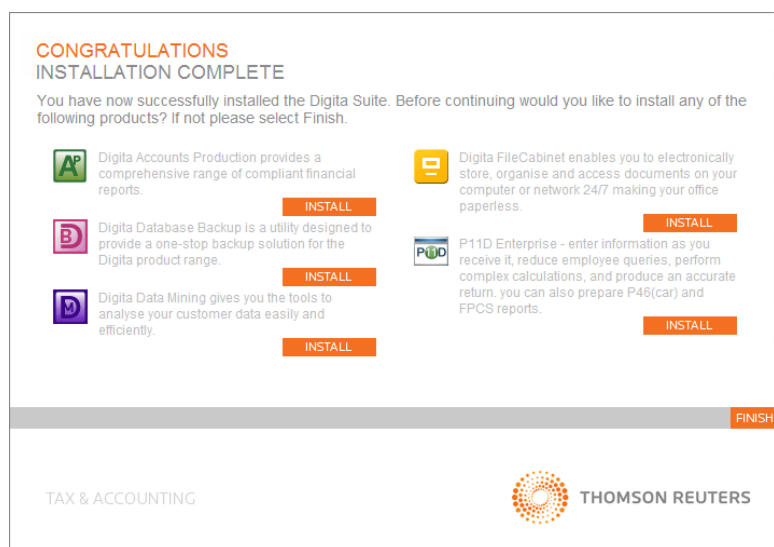
'SQL Server 2017 Express needs to be installed, but Windows is indicating that you need to reboot your PC' on page 49

The procedure will notify you upon completion:



ADDITIONAL SOFTWARE

Once the suite installation has completed, the following screen will be displayed:



From here you can opt to install the additional software packages.

Guidance on installing these applications is available separately.

CLIENT NODE (WORKSTATION) INSTALLATION & UPGRADE PROCESS

Before proceeding, please complete the following 4 steps. Please note **these steps can be missed if required, however if the installer halts reporting a reboot is required, you will need to follow the steps before trying again.**

1. Apply ALL Windows Updates available.
2. Permanently disable anti-virus live scan, as well as the auto-update service. Both can be re-enabled after the software has been installed.
3. Reboot the computer.

UPGRADES

Client workstations only need to launch the software from their Desktop icon, or Start Menu entry. The software will detect there is an update, and then trigger the upgrade process. This cannot be achieved from a Task bar or custom-made shortcut.

The upgrader dialogs will just be a series of 'Next' options until the installer has finished.

Please note, users will need to be local administrators for the software upgrade process.

If the Upgrader does not trigger upon launching the software, follow the 'Installation' process below. This will be required for 'Accounts Production' and 'Accounts Production Advanced' which does not automatically launch the upgrader.

ACCOUNTS PRODUCTION (v5) & ACCOUNTS PRODUCTION ADVANCED (v6)

Accounts Production and Accounts Production Advanced will need to be upgraded manually, which will mean navigating to the server 'Digita' share, 'Accounts Production' and 'Accounts Production Advanced' folders in turn, and then the 'Nodeins' folder. Right click on 'setup' and select 'Run as administrator' for each application.

IMPORTANT

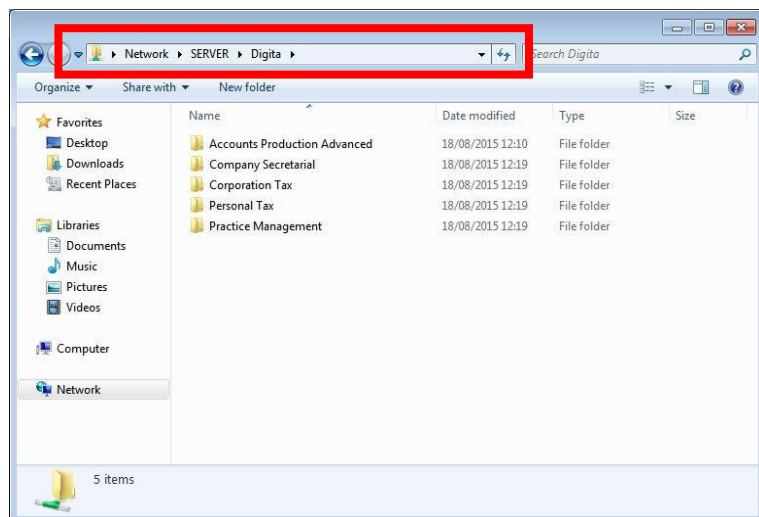
Ensure each Digita application, if installed, is upgraded to the same version as installed on the server or primary computer, starting with Practice Management. All applications will show an error at some point if any are different versions to that on the server / primary PC.

NEW INSTALLATIONS

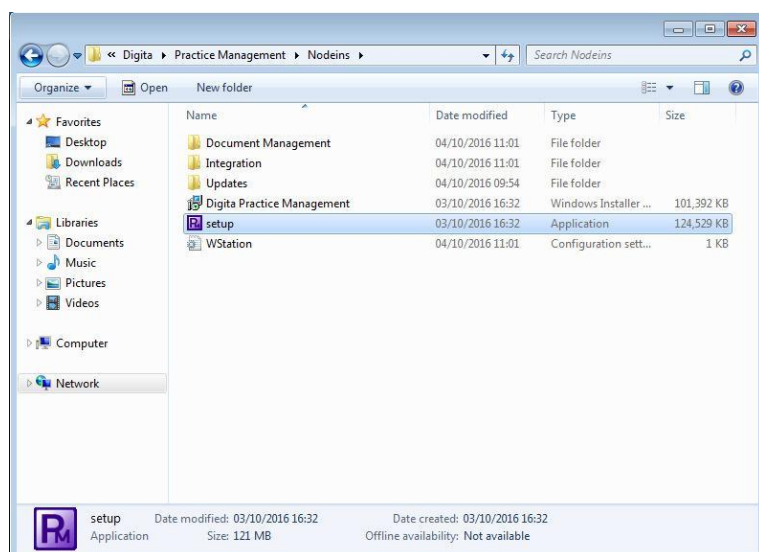
From each client workstation, browse across the network to the newly shared Digita folder on the Standalone machine / Network Server.

In the address bar at the top, type the following (where SERVER is the name of your main computer): `\\SERVER\Digita`
Then hit <enter>

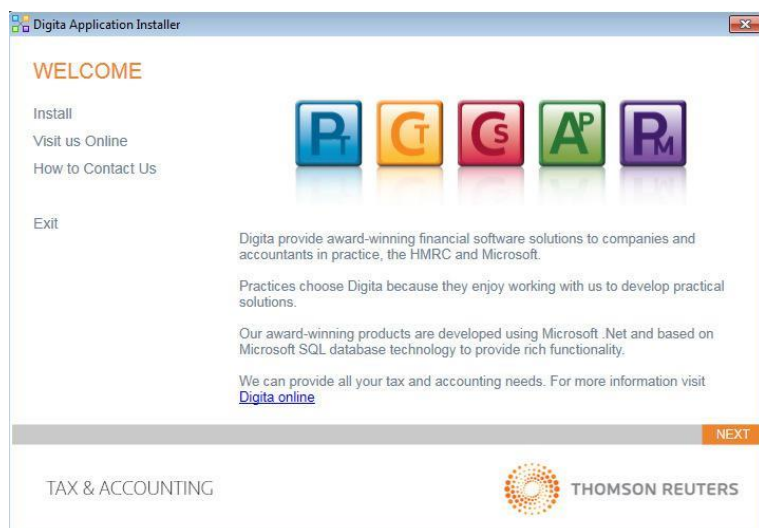
If starting from scratch, install Practice Management first as it's the heart of integration.



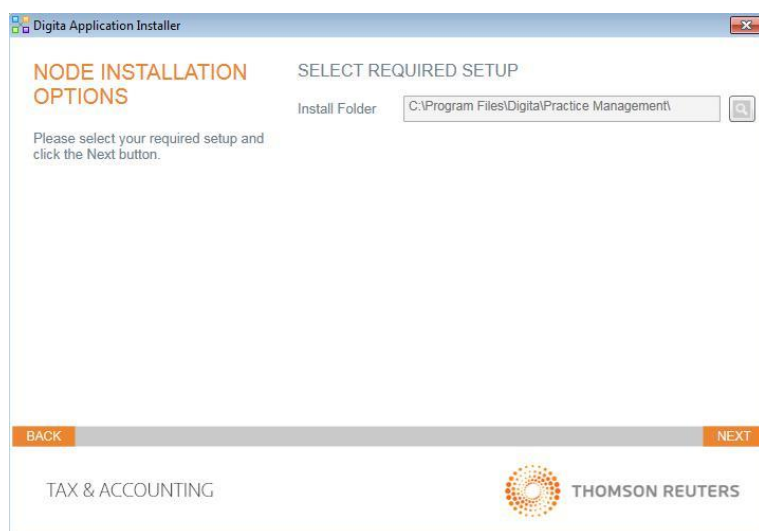
Each Digita application installed on the Standalone machine / Network Server will have a **"Nodeins"** subfolder, which contains the client installer. Locate and run the "Setup.XXX.exe (where XXX is the application abbreviation), "Setup.exe" or "Setup.bat" file from each program folder to initiate the installation of the required client programs:



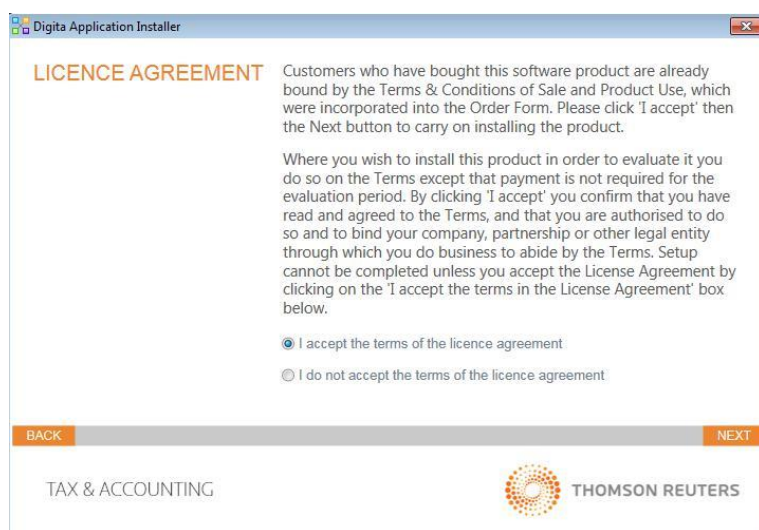
Click Install to proceed through the installation wizard, which will automatically configure the client software to connect to the database on the Standalone machine / Network Server:



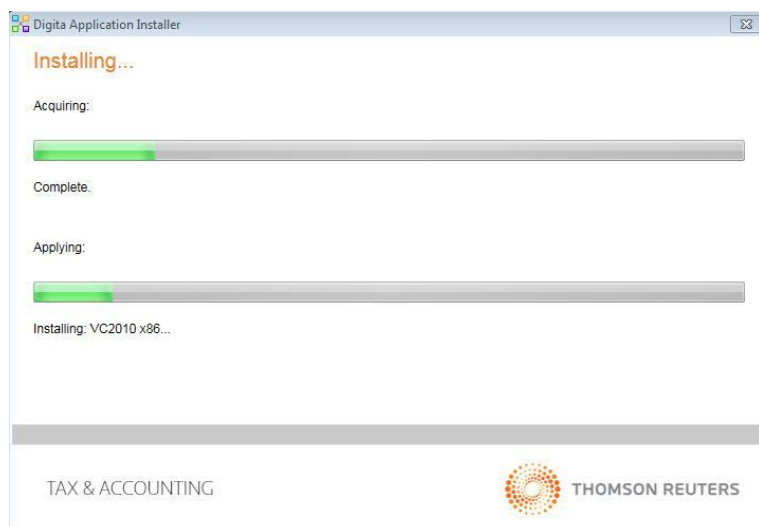
Review the Installation Folder and click Next:



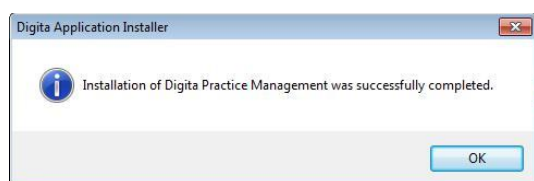
Review the Licence Agreement and click Next:



The wizard will then install and configure the client software to the machine:



You will be prompted when the installation is complete:



The client software is now installed to the workstation and can be run from the desktop shortcut, or via the appropriate program folder within All Programs > Digita.

STANDALONE / NETWORK SERVER UPGRADE PROCESS

Updates to the Digita applications are supplied by download and are applied in the same manner as the original installation – the installer is run on the Standalone machine or the Network Server where the main Digita installation resides.

BACKUPS

Prior to applying any software updates, ensure you have taken a backup of the Digita databases using the Digita Database Backup Tool (or Microsoft SQL Server Management Studio / third-party SQL database backup solution).

USERS OUT OF THE SOFTWARE?

It is important that no users are logged into the Digita applications at the time they are being upgraded, as this will also cause the process to fail. **Please see the guide on page 42 for more information on checking users are out of the software.**

ACCOUNTS PRODUCTION ADVANCED

You will need to run the Database Clean-up tool within the software before carrying out the upgrade, otherwise the upgrade will fail. Log in as 'Administrator', select 'Tools menu > Database Clean-up'.

Alternatively, there is an application and SQL script to perform the same function outside of the application. Look in the downloaded media for this path: \Content\DAPA\Script\

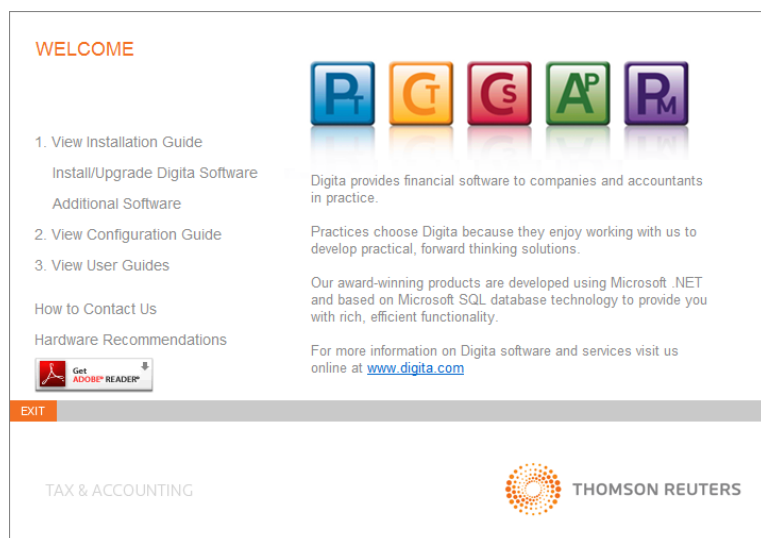
Run the .EXE file for ease, or if you are familiar with SQL Server Management Studio run the .SQL file against the 'AccountsProduction' database.

Before proceeding, please complete the following steps:

1. Apply ALL Windows Updates available.
2. Permanently disable anti-virus live scan, as well as the auto-update service. It can be re-enabled after the software has been installed.
3. Reboot the computer or server.
4. Launch the installer by running 'DigitaAutorun.exe'.

Upon launch, the process will check the existing software installation and configuration.

At the Welcome screen, select 'Install/Upgrade Digita Software':



At the Product Selection screen, you will be shown which programs can be updated, which are already up to date, and any that are not currently installed. Deselect any programs that you do not wish to be installed, then click Next:

DIGITA PRODUCTS
PRODUCT SELECTION

I WOULD LIKE TO INSTALL

OPTION 1
To install all products please tick
THE DIGITA INTEGRATED SUITE (default)

OPTION 2
To install individual products please tick
as appropriate
Then select NEXT to continue

View Installation Notes

BACK NEXT

TAX & ACCOUNTING

THOMSON REUTERS

THE DIGITA INTEGRATED SUITE

	<input checked="" type="checkbox"/> Accounts Production Advanced 6.24 +
	<input checked="" type="checkbox"/> Personal, Business & Trust Tax 19.1 ↑
	<input checked="" type="checkbox"/> Corporation Tax 19.2 ↑
	<input checked="" type="checkbox"/> Practice Management 19.1 ↑
	<input checked="" type="checkbox"/> Company Secretarial 19.0 =

Key

- shows the application is currently installed and will be upgraded.
- shows currently running the latest version.
- shows the application is not currently installed, but will now install.

At the next screen, accept the terms of the Licence Agreement, then click Next to proceed:

LICENCE AGREEMENT

Please read the following licence agreement carefully. Select the 'I accept the terms of the licence agreement' and click NEXT if you wish to proceed.

PRINT

Customers who have bought this software product are already bound by the Terms & Conditions of Sale and Product Use at www.digita.com/terms ('the Terms'), which were incorporated into the Order Form. Please click 'I accept' then the NEXT button to carry on installing the product.

Where you wish to install this product in order to evaluate it you do so on the Terms except that payment is not required for the evaluation period. By clicking 'I accept' you confirm that you have read and agreed to the Terms, and that you are authorised to do so and to bind your company, partnership or other legal entity through which you do business to abide by the Terms. If you select 'I do not accept' then the setup cannot be completed.

☒ I accept the terms of the licence agreement

☐ I do not accept the terms of the licence agreement

BACK NEXT

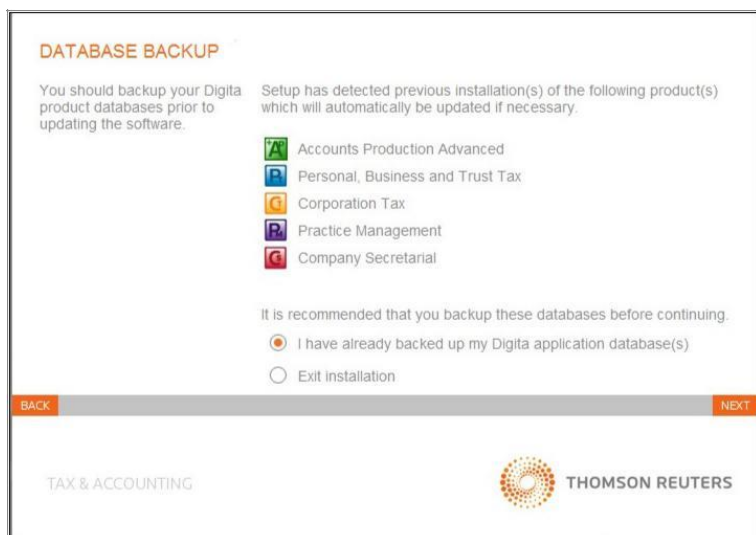
TAX & ACCOUNTING

THOMSON REUTERS

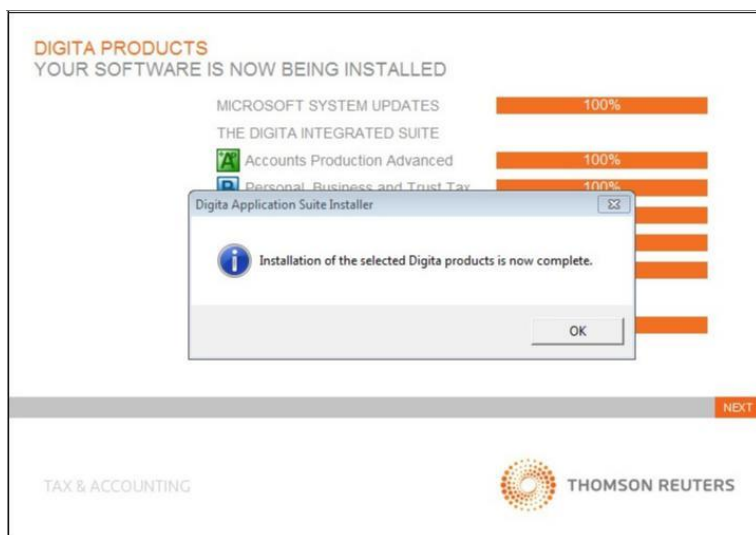
Known errors, jump to the page:

- 'ADO Security Warning. This website uses a data provider that may be unsafe' on page 50
- 'Safety settings on this computer prohibit accessing a data source on another domain' on page 50

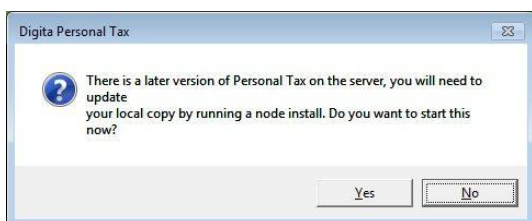
The Database Backup screen will prompt you to confirm you have backed up your databases. If you have backed up your databases, select that option and click Next:



The installation process will then run. Once complete, click OK and then Next, you can then exit the Suite Installer:



Once the main upgrade process has been completed, launch **Practice Management** first. With the exception of Accounts Production Advanced, any client workstations will automatically attempt to apply the update the next time the software is launched from the Desktop or Start Menu shortcut (not the Taskbar shortcut):



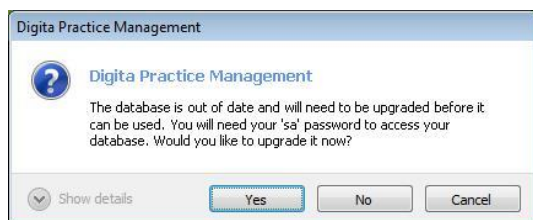
If Windows User Account Control (UAC) is enabled on the workstation, the following message may be encountered:



To elevate the installation process, right-click the desktop shortcut and select 'Run as Administrator'. This will provide access rights for the update to proceed.

To upgrade your Accounts Production Advanced workstations, you need to follow the new Client Node Installation process above as if you are installing the software for the first time.

When the software opens, you may be prompted to update the database. Some of the Digita applications will require you to enter your SQL Server 'SA' password to enable this to proceed:

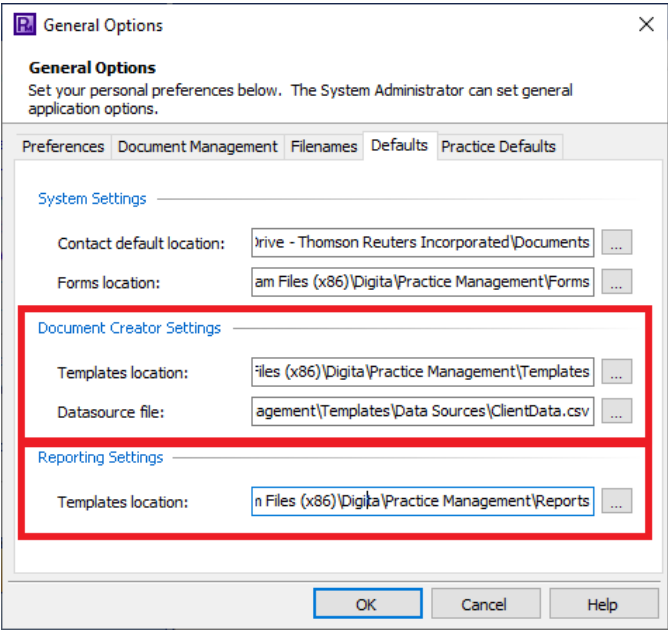


The database will then be upgraded to match the new software version. The Digita software upgrade procedure is complete.

PRACTICE MANAGEMENT PERMISSIONS

Following the installation of the Suite, whether a Standalone or Network Server install, if allowing workstation (Node installations) to connect over the network, the following server permissions will need to be amended.

On the server computer, the paths shown below for Document Creator ‘Template location’ and Reporting ‘Template Location’ will likely, or should be, network paths.... I.e. the path valid for a workstation to access the server. Due to this, workstations will need write access to those folders.



In the case of peer-to-peer, you may need to set ‘everybody’ modify permissions on the folder, otherwise Domain Users will need modify access to them both.

DEFAULT LOGIN DETAILS

The default login credentials are as follows:

Practice Management	Administrator account has a blank password.
Personal and Business Tax	Application, login with Pass and a blank password 'Database Security' application, default password is <i>administrator</i>
Corporation Tax **	Pass and Administrator accounts both have blank passwords
Company Secretarial	Administrator account has a blank password.
Accounts Production v5 **	Administrator account has a blank password.
Accounts Production Advanced v6 **	Administrator account has a blank password.
Data Mining	Administrator account has a blank password.

If any of these do not work, then a password has been set post installation.

** Please **do not** change the ‘Administrator’ account details or associate the ‘Administrator’ account with a Windows Authentication login. Setting a password on the account is highly recommended.

MOVING THE SOFTWARE & DATABASES TO A NEW PC OR SERVER

These instructions cover moving the primary computer or server to a new machine, including moving the databases.

The steps are split into three stages, Preparation, Backup and Restore.

Preparation on the New Computer

1. 'Internet Options' Update from the Troubleshooting section: '6 - Safety settings on this computer prohibit accessing a data source on another domain' on page 50.
2. Confirm the Edition of SQL Server required. See the SQL Server notes on page 7.
3. Follow the new installation checklist instructions to install the Suite on the new computer from page 9.
4. To enable Node installations:
 - a. Follow the section to enable SQL Server through the firewall on page 37.
 - b. Follow the section to set up the Digita shared folder on page 35.
 - c. **RECOMMENDED:** On a test computer, or first PC in the upgrade list, install a node from the new folder share to test the software with blank databases. Install Practice Management first. Details on page 18.

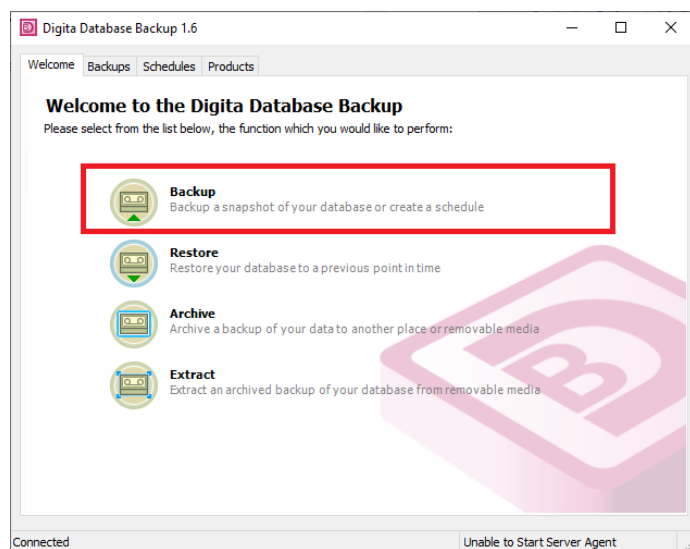
Backup the Old Computer

1. Contact Thomson Reuters to request an online license refresh. The new server install will require relicensing once the databases are restored. Please email Thomson Reuters Licensing Team at: Digita-Licensing@thomsonreuters.com please include your registered practice name or Digita ID in the email, or call our license department on 03450 180909 (option 5). The licenses will then be available for online activation when you need them.
2. Ensure there are no active connections to the databases on the old server. This may be easy to determine with a small group of users, or a standalone. However, for larger groups of users 'Activity Monitor' within 'SQL Server Management Studio' can be used. See the section on using the 'Activity Monitor' on page 42.
3. Backup the databases using the Database Backup Tool, archive the backups to a folder ready for moving to the new server. This stage will tell you if there are still active connections to the database being backed up.



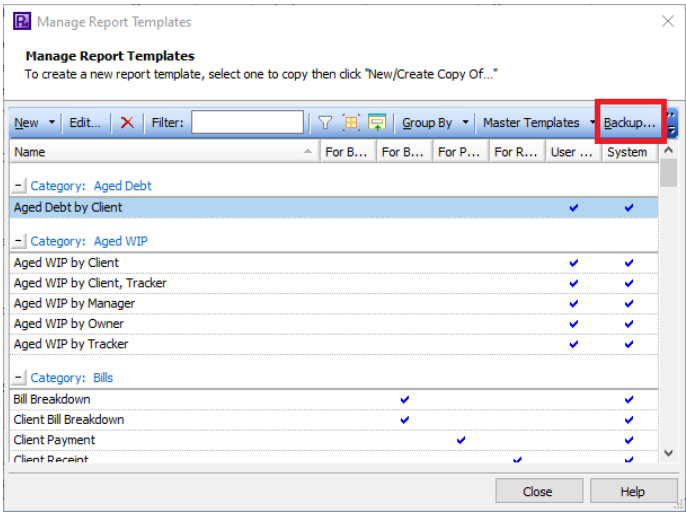
For more information, please look over the User Guide:

https://productdownloads.digita.com/digitadocs/DDB_User_Guide.pdf



4. Practice Management:

- a. Log in as Administrator.
- b. Backup the Report Templates. Navigate to 'Tools | Manage Reports | Manage Report Templates', select 'Backup'.



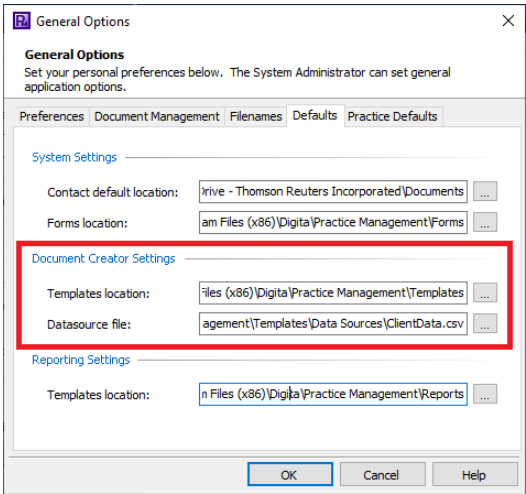
Save the file to the same folder as selected for the Database Backup Tool Archive backups.

- c. Backup the Word & Excel Templates.

On the old server, the default location is:

'C:\Program Files (x86)\Digita\Practice Management\Templates\'

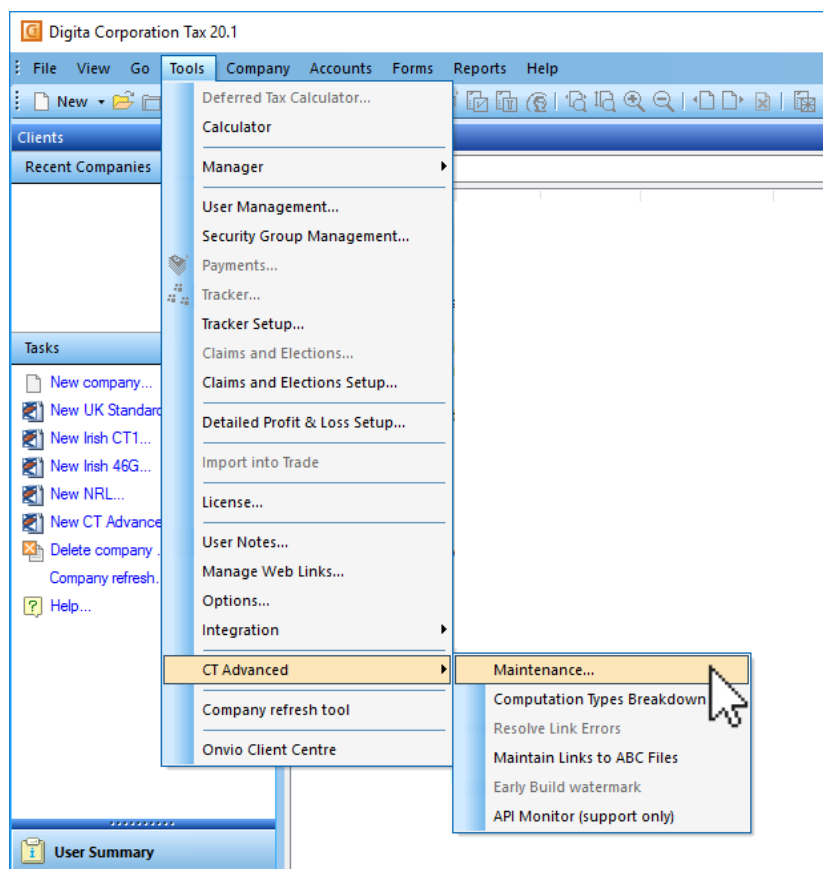
However, for the actual path within Practice Management, navigate to 'Tools | Options | General Options', select the 'Defaults' tab. Look at the **Document Creator Settings** 'Templates location' text box. If the path is a network path not to the old server, and still valid from the new server this backup step is not necessary.



In File Explorer, navigate to path shown, and copy across the Templates folder to the same folder as selected for the Database Backup Tool Archive backups.

5. Corporation Tax Advanced (CTA)

- a. If you are a CTA user, you will also have .ABC files to move.
- b. In order to find out where these files are stored, please follow the instructions below.
- c. Launch Digita Corporation Tax, log in as **Administrator**.
- d. Select: 'Tools | CT Advanced | Maintenance' as shown below.



- e. The dialog that opens will show you where your ABC files are located.
- f. Add all the files and folders to a compressed ZIP file so it can be easily uploaded. Compression software such as 7-Zip is recommended, but not limited to.

6. **RECOMMENDED:** Change the status of the old SQL Server databases to 'Offline' to prevent further connectivity. This may not be necessary for a small group of users, or a standalone. However it can prevent the wrong databases being updated.

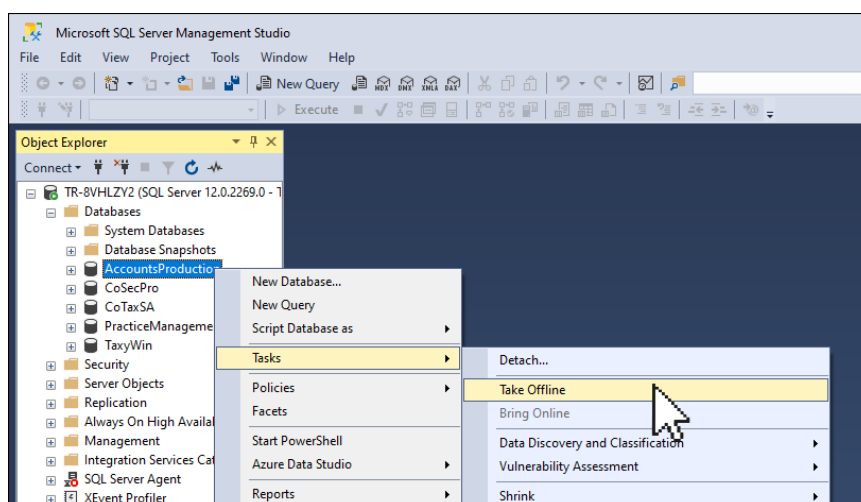
There are three methods to accomplish this on the OLD Server.

Using a Digita Script.

- Download and extract the script link below.
https://productdownloads.digita.com/digitavarious/Set_Databases_Offline_Online.zip
- Launch the .CMD file and follow onscreen prompts to set databases Offline.
- NOTE: This offline/online status can be changed and reverted back at any time.

Using SQL Server Management Studio

- More Information:
<https://www.google.com/search?q=SQL+Server+Management+Studio+set+offline>
- Log into SQL Server Management Studio using the 'SA' account, or your own Windows account if you have sufficient permissions in SQL Server.
- Right click on each database. Select 'Tasks > Take Offline'.



Using Services.

- If SQL Server is no longer required on the OLD Server, an alternative is to disable the SQL Server Service 'SQL Server (MSSQLSERVER)', within the 'Services'.
7. Copy the folder containing the database backups, the ABC files (if required), Reports backup and Templates backup to the new computer.

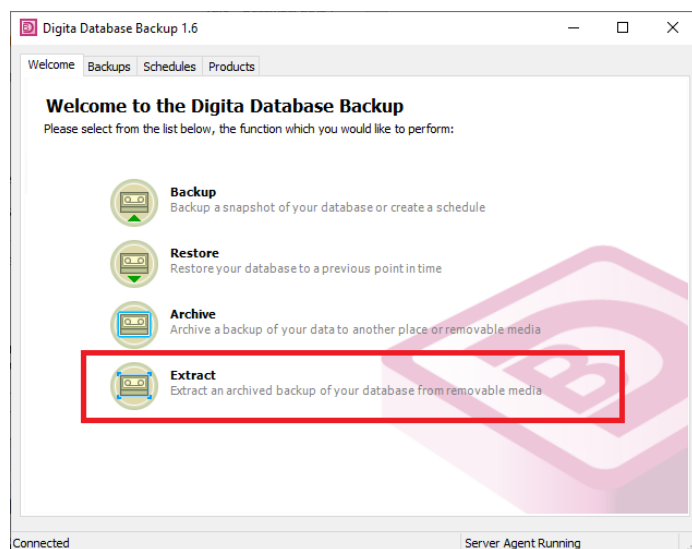
Restore on the New Computer

- Using the folder copied to the new computer, restore the databases into the new SQL Server using the Digita Database Backup Tool. Use the 'Extract' option to extract the Archive DDB files and restore the databases.



For more information, please look over the User Guide:

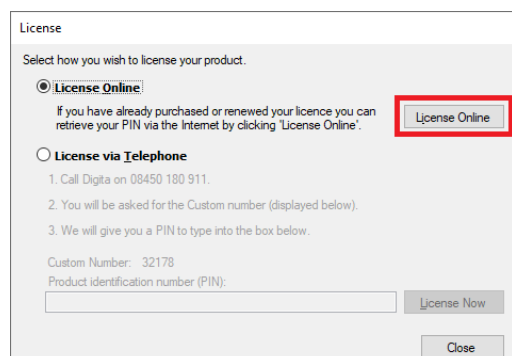
https://productdownloads.digita.com/digitadocs/DDB_User_Guide.pdf



Known errors, click on the page number

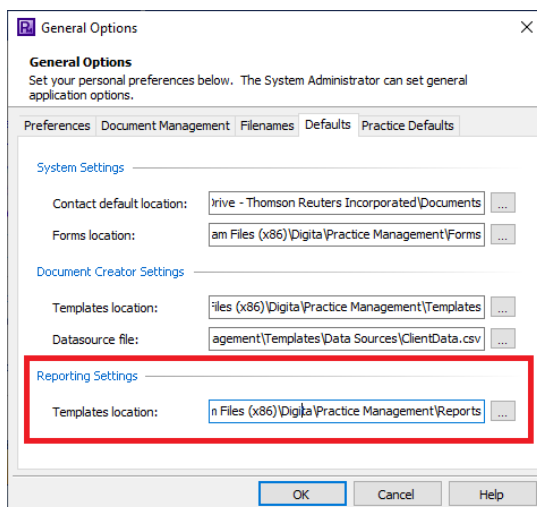
'A backup performed on Microsoft SQL Server v15.0 cannot be restored on v12.0' on page 55.

- Run the client software, select to license the software online when prompted. The licensing option is in the Tools menu for each application.

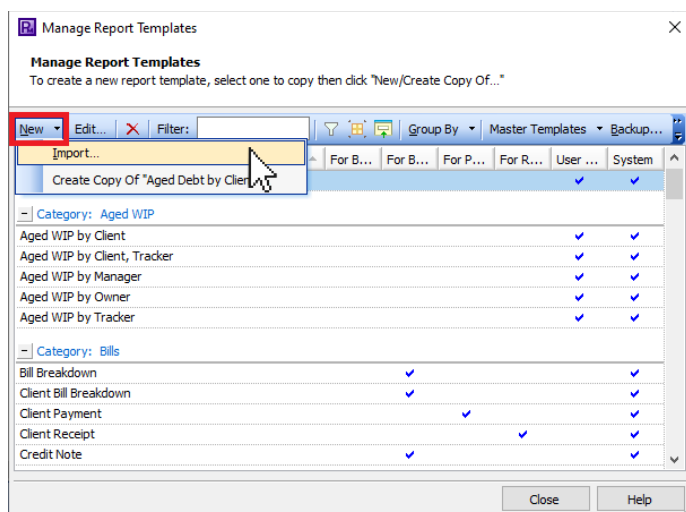


3. Practice Management:

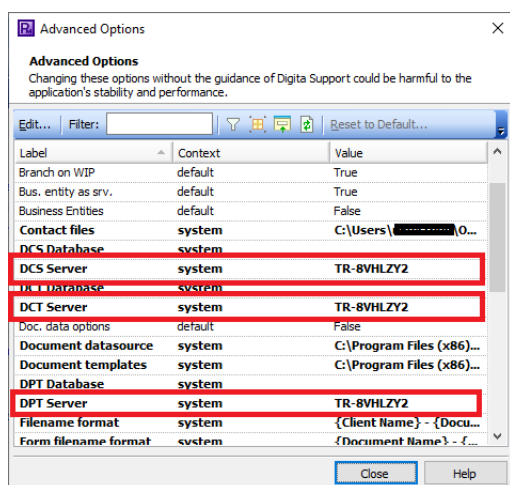
- a. Log in as Administrator.
- b. Check the Report Templates path is valid, the 'Reports' folder may need to be created and permissions updated to allow users to write to the folder. Note if this is a server install, the path entered needs to be accessible by all node installations.



- c. Restore the Report Template, Select 'Tools | Manage Reports | Manage Report Templates', select 'New | Import'. Then select the backup file.



- d. Select 'Tools | Options | Advanced Options'. Change the Server references to the new SQL Server name.



4. Corporation Tax Advanced (CTA)

- a. If you are a CTA user you will have .ABC files to restore.
- b. Copy the files to the new designated folder.
- c. Make sure you've logged in as the Administrator so that the menu options are viewable. Then open the company via **File | Open**. This time use the menu option **Tools | CT Advanced | Maintain Links to ABC Files**
- d. This gives you a screen where you can change the file path accordingly to the new location. You can select to either change all periods (which is most likely) or just one period by using the two options shown below.

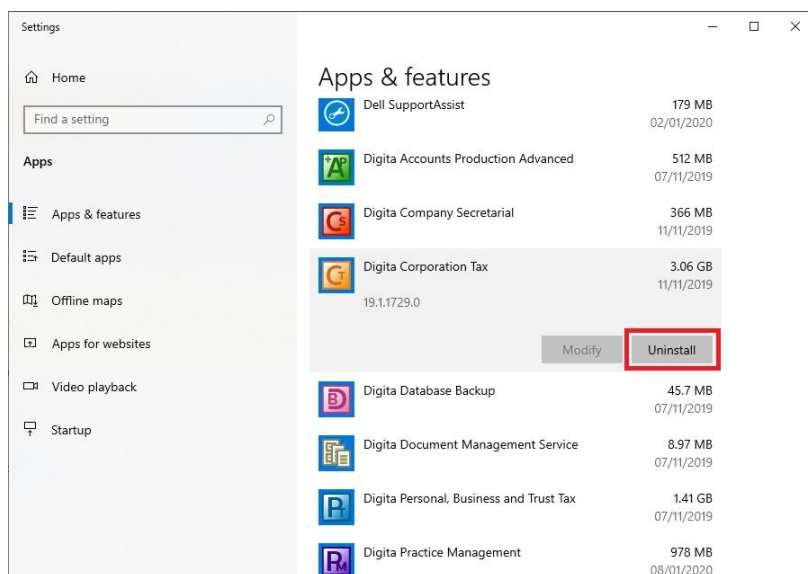
- ☐ Change the ABC file folder location for all periods in the company
☐ Change the ABC file linked to individual periods in the company

- e. Then simply click on the '...' button and browse to the new folder location. When done use the **Apply Changes** button at the bottom of the window.
- f. If you are altering the file path for just one year, you can use the Edit button for a period and browse directly to the location for that one year, before then applying the changes.
- g. If you need to do this on a global level for all companies, please follow the steps as above, but without opening a company at the beginning. This way the changes are applied to all companies in the database.

5. Practice Management - Smart Letters

- a. If Smart Letters are used, the paths to the documents are saved in the database. If this location is also moved, you will need to run a script to update the path to avoid the need to recreate them. Running a Smart Letter will confirm whether you need to continue with this update or not, if it works then you don't need this update.
- b. The script relies on the path for the both old and new document locations being identical other than the server name. (for example `\\SERVEROLD\Digita\Practice Management\Templates\`)
- c. Download The ZIP file, and extract to a folder on the new server or primary computer.
<https://productdownloads.digita.com/dpmfull/UpdateSmartLetters.zip>
- d. Edit 'SmartLetters.sql' in Notepad, add the old server name and the new server names overwriting the respective placeholder text, ie, replace SERVEROLD with the old server name etc. Then Save.
- e. Either use SQL Server Management Studio to run the SQL file, or launch the 'RUN.bat' to execute the script.
- f. The Smart Letters will now point to the new server.

6. **NODE (WORKSTATION) INSTALLS ONLY:** Uninstall the node installations from client workstations. Click the Start menu, type: **Add**, and select the option from the menu to 'Add or remove programs'.



7. **NODE (WORKSTATION) INSTALLS ONLY:** Reinstall from the new server 'Nodeins' folders, as detailed on page 18. Install Practice Management first, then the rest in any order.

At this stage, you should have the workstations installed from the new server, and accessing the new location databases.

Transfer Complete.

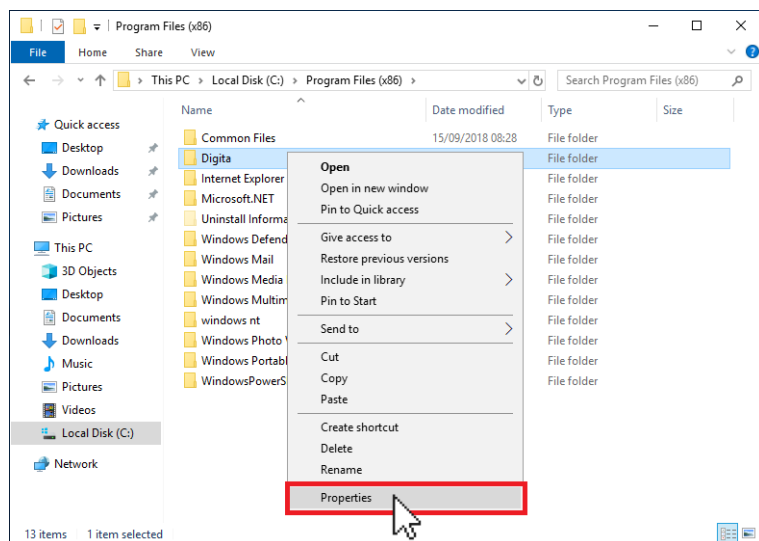
STANDALONE ONLY – Once you have reinstalled all the applications, ensure you have launched each application (Practice Management first) and can log in without seeing a login dialog. If you can, this means you have Windows Authentication set up correctly. However if you get a login prompt, you will need to login as an Administrator and update your application login details with your new Windows login.

Failure to correct the login issue may result in Integration issues.

SHARING THE DIGITA INSTALLATION FOLDER FOR CLIENT WORKSTATIONS

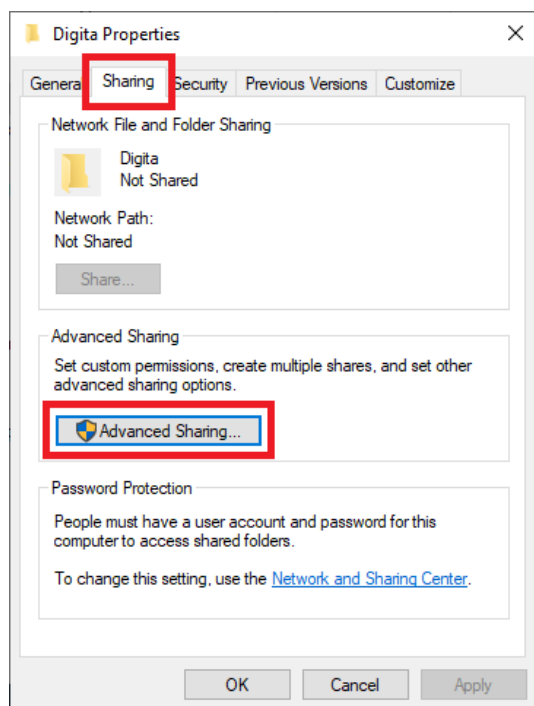
In order to install the client software to further workstations, the Digita folder on the Peer to Peer machine or Network Server must be shared.

Browse to the installation folder specified during the initial installation. By default, this will be "C:\Program Files (x86)\Digita\". Right-click the folder and select 'Properties':



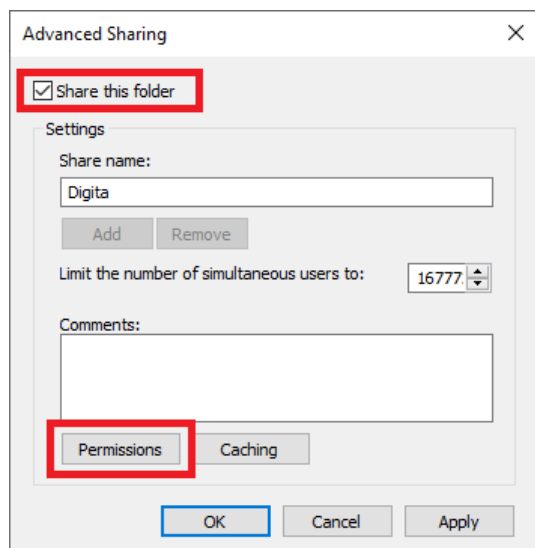
It is important that this folder is selected for sharing, and not the specific application folders or the 'Nodeins' folders.

At the Digita Properties screen, click the Sharing tab:

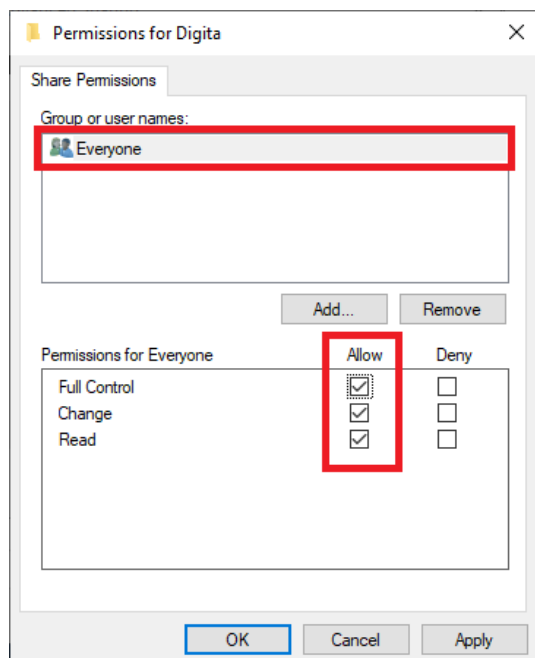


Click 'Advanced Sharing' and place a tick next to Share this folder. It is important that the share name is 'Digita' as the Accounts Production Advanced application pre-fills this path into the node setup BAT file.

Then click the Permissions button:



Highlight the "Everyone" group, and place a tick in the Full Control box:



Return to the 'Properties' dialog, select the 'Security' tab and add 'Everyone' to the permissions just as you have for the sharing. This is more important in Peer-To-Peer scenarios.

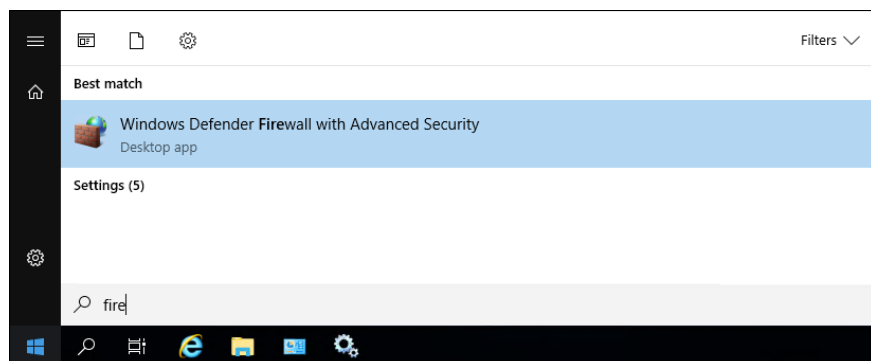
System Administrators can restrict permissions as required after the system has been confirmed working.

Click OK through each window to apply the changes.

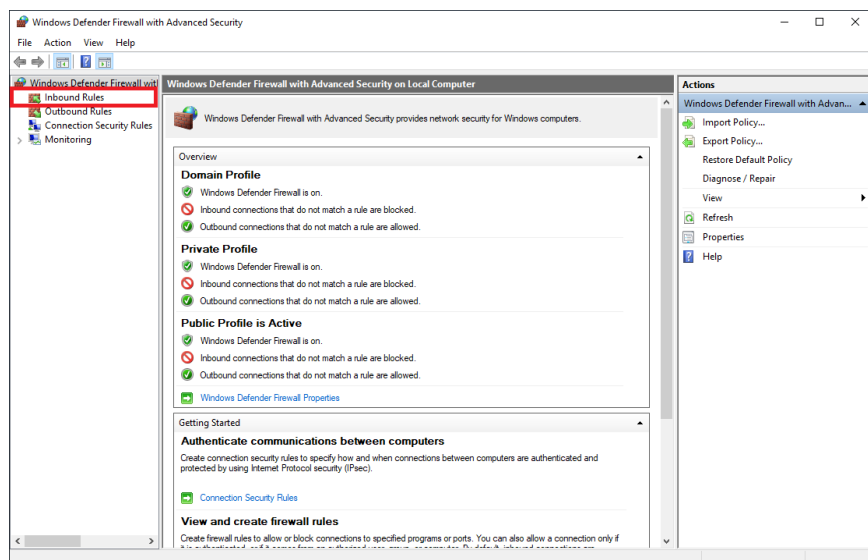
ADDING AN EXCEPTION TO THE WINDOWS FIREWALL

By default, the Windows Firewall blocks SQL data from being accessed on the machine where SQL Server resides. As such, an exception must be added to the Windows Firewall to allow the database to be accessed from client machines.

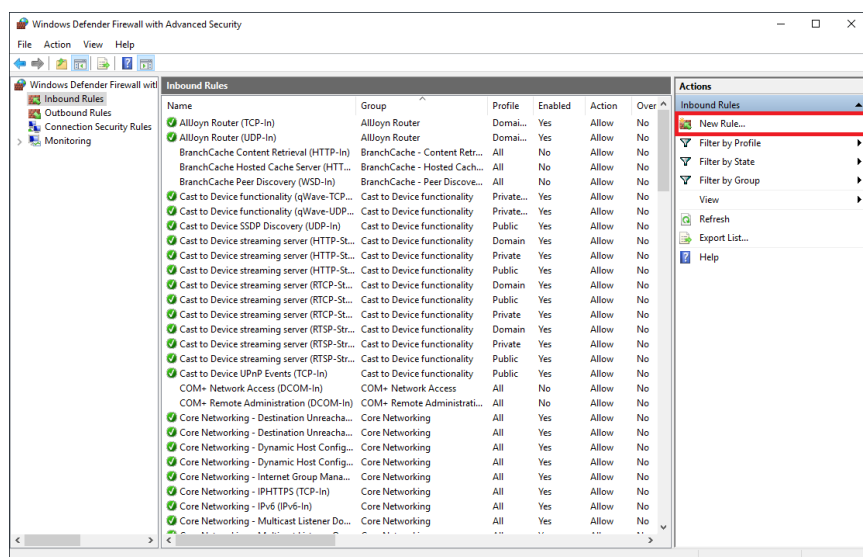
Open “Windows Firewall with Advanced Security” on the Standalone machine / Network server via Control Panel > System and Security > Windows Firewall or by typing ‘firewall’ into a search box:



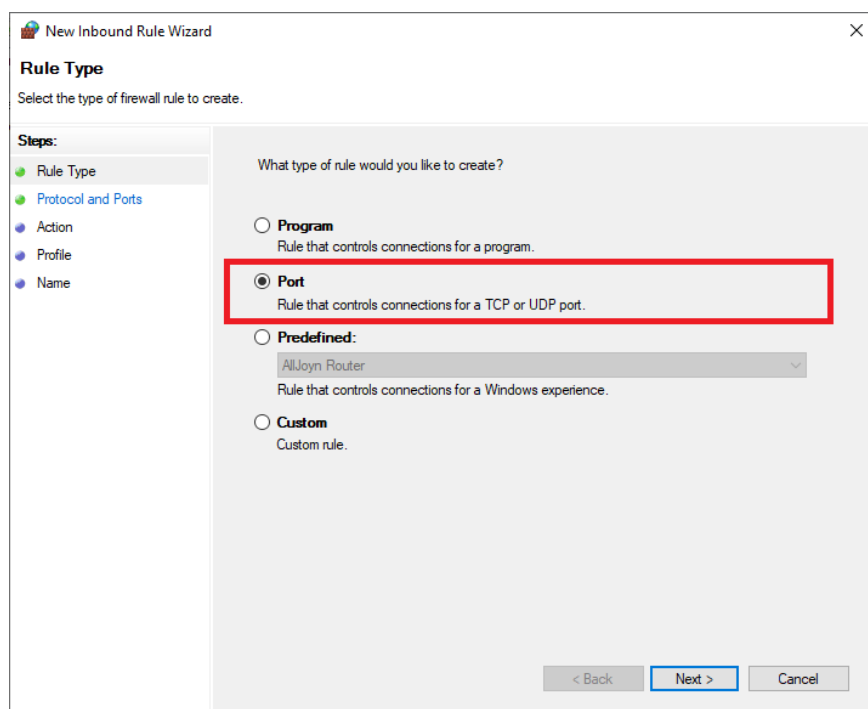
At the main screen, click ‘Inbound Rules’:



Next, click 'New Rule':



This will open the 'New Inbound Rule Wizard'. Highlight 'Port' then click Next:



Under 'Protocols and Ports' ensure TCP is selected, then enter 1433 in the 'Specific local ports' field:

New Inbound Rule Wizard

Protocol and Ports

Specify the protocols and ports to which this rule applies.

Steps:

- Rule Type
- Protocol and Ports
- Action
- Profile
- Name

Does this rule apply to TCP or UDP?

☒ TCP
☐ UDP

Does this rule apply to all local ports or specific local ports?

☐ All local ports
☒ Specific local ports:

Example: 80, 443, 5000-5010

< Back Next > Cancel

In the 'Action' screen ensure 'Allow the connection' is selected:

New Inbound Rule Wizard

Action

Specify the action to be taken when a connection matches the conditions specified in the rule.

Steps:

- Rule Type
- Protocol and Ports
- Action
- Profile
- Name

What action should be taken when a connection matches the specified conditions?

☒ **Allow the connection**
This includes connections that are protected with IPsec as well as those are not.

☐ **Allow the connection if it is secure**
This includes only connections that have been authenticated by using IPsec. Connections will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.

☐ **Block the connection**

< Back Next > Cancel

Dependent on your network infrastructure, select the appropriate profile to apply the rule to. If you are unsure about your infrastructure, we recommend you leave 'Domain' & 'Private' ticked, but untick 'Public':

The screenshot shows the 'New Inbound Rule Wizard' window at the 'Profile' step. The left sidebar lists the steps: Rule Type, Protocol and Ports, Action, Profile, and Name. The 'Profile' step is selected. The main area is titled 'When does this rule apply?' and contains three options: 'Domain' (checked), 'Private' (checked), and 'Public' (unchecked). Red arrows point to the 'Domain' and 'Private' checkboxes. The 'Public' checkbox is unchecked. At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'.

Note, laptops running on WiFi will likely be set as being on a 'Public' network, therefore access to the databases will be blocked if 'Public' is not checked as above. However please note, it is not recommended to operate the Digita software over a WiFi connection due to potential connectivity or database issues. WiFi is not supported.

Next, enter a name for the rule, we recommend 'SQL Server', or 'MSSQLSERVER' or 'DIGITA', but it is not relevant for the exception to function:

The screenshot shows the 'New Inbound Rule Wizard' window at the 'Name' step. The left sidebar lists the steps: Rule Type, Protocol and Ports, Action, Profile, and Name. The 'Name' step is selected. The main area is titled 'Specify the name and description of this rule.' and contains a 'Name:' label with a text box containing 'SQL Server'. Below it is a 'Description (optional):' label with a large empty text box. A red arrow points to the 'Name' text box. At the bottom, there are buttons for '< Back', 'Finish', and 'Cancel'.

Click Finish to apply the firewall rule.

DISABLING ANTI-VIRUS SOFTWARE

Anti-virus software can usually be disabled very easily by right clicking on the icon in the system tray, then selecting the disable option.

However, not all anti-virus applications are the same. Below is a list of search URLs to help you disable your specific anti-virus application.

Disabled McAfee

<https://www.google.com/search?q=disable+mcafee>

Disable Kaspersky

<https://www.google.com/search?q=disable+kaspersky>

Disable Avast

<https://www.google.com/search?q=disable+avast>

Disable Eset

<https://www.google.com/search?q=disable+eset>

Disable Norton

<https://www.google.com/search?q=disable+norton>

Disable Webroot

<https://www.google.com/search?q=disable+webroot>

Disable AVG

<https://www.google.com/search?q=disable+avg>

Disable BullGuard

<https://www.google.com/search?q=disable+bullguard>

Disable Bitdefender

<https://www.google.com/search?q=disable+bitdefender>

Disable Panda

<https://www.google.com/search?q=disable+panda>

Once the installation has completed, the anti-virus applications can be enabled again by reversing the change made from the instructions followed in the above links.

CHECK FOR DATABASE CONNECTIONS PRIOR TO UPGRADE

With no Digita applications open, there should be no connections to the databases. A single connection left on a database can cause upgrades to fail. Either a workstation with Practice Management open, or a stale database process can both cause upgrades to fail.

To ensure there are no active connections locking the database state prior to upgrade, use either a custom script we have created or 'Activity Monitor' from within SQL Server Management Studio.

Database Connections Script

Download the following ZIP file, then extract the contents to a folder.

<https://productdownloads.digita.com/digitavarious/Current Database Connections.zip>

Launch the extracted .CMD file for a list of connections to the databases. If there are any connections listed, it's likely your upgrade will fail as a result.

```

C:\WINDOWS\system32\cmd.exe
SQL Server Activity Table for Connections to Digita Databases.
*****

Current connections to the databases (not a live feed).

session_id login_name          Users_Computer      DB                  Application_Open
-----
56 CoTaxSAUser                TR-9LDDX33          CoTaxSA             Digita Corporation Tax
57 DPMUser                    TR-9LDDX33          PracticeManagement  Digita Practice Management
58 DPMUser                    TR-9LDDX33          PracticeManagement  Digita Practice Management
59 DOMAIN\Administrator       TR-9LDDX33          AccountsProduction  Microsoft SQL Server Manag
61 DACUser                    TR-9LDDX33          AccountsProduction  CoTaxSA.exe -> Digita Acco
62 DPTUser                    TR-9LDDX33          TaxyWin             Digita Worker Connection
63 DPTUser                    TR-9LDDX33          TaxyWin             Digita Personal, Business
64 DPMUser                    TR-9LDDX33          PracticeManagement  Digita Practice Management
65 DPTUser                    TR-9LDDX33          TaxyWin             .Net SqlClient Data Provid
66 DPTUser                    TR-9LDDX33          TaxyWin             Digita Worker Connection

(10 rows affected)

These connections must be closed before upgrading.
This list only shows connections to Digita Databases.

-- Press <Return> to refresh.
-- Press X <Return> to Exit

Select Option:
  
```

Note the 'Users_Computers' column can be used to identify the computer with the applications open.

Additional feature added to this script is presenting an option to display the DCT and DAPA Database Upgrader logs if present.

SQL Server Management Studio

If you do not have it installed, it can be downloaded directly from Microsoft.

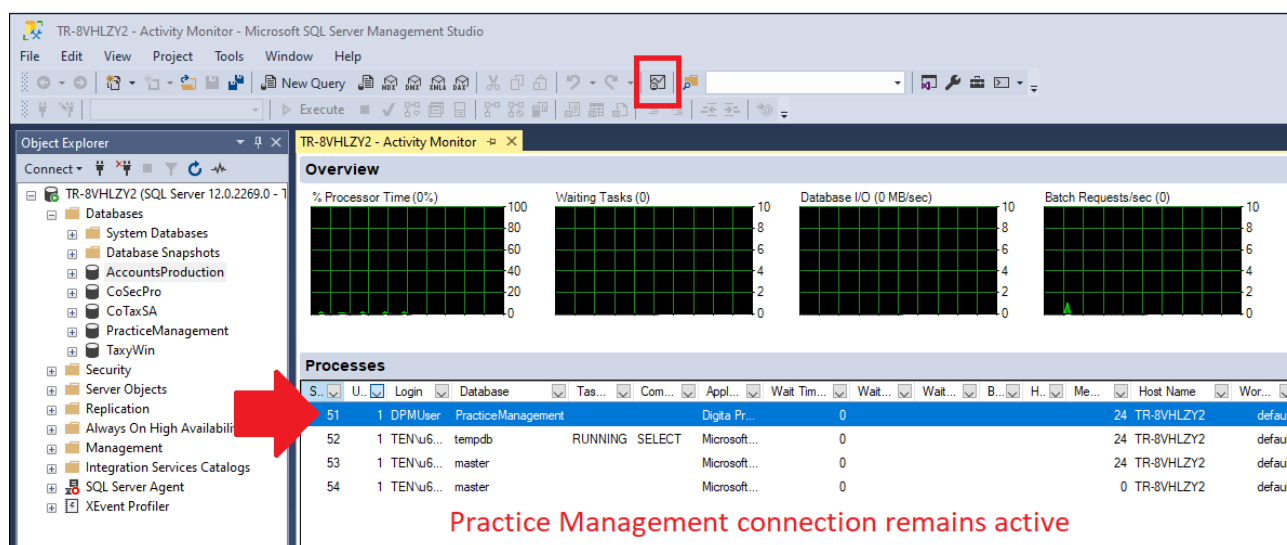
Please note however, Digita / Thomson Reuters do not provide technical support for issues relating to SQL Server Management Studio.

Download Link: <https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>

Launch SQL Server Management Studio from the Start menu, and log in. Expand Databases in the Object Explorer to confirm you are logged into the correct instance, you will see some or all of the databases shown below.

To open 'Activity Monitor', click on the icon shown in the middle of the Toolbar. The icon resembles a chart.

Expand 'Processes', and wait for a short while the data is displayed. The resultant list will show connections to each database from specific workstations.



The screenshot shows Practice Management open on workstation 'TR-8VHLZY2'.

Any connections to Digita databases can either be traced back to the workstation involved ('Host Name' column), and closed from directly on the workstation (recommended), or the connection can be 'killed' by right clicking on it and selecting 'Kill Process'.

IMPORTANT NOTE: If you select to 'Kill Process' from within Activity monitors, there is a chance the license lock might remain in the database and mis-report license usage. Using 'Kill Process' might also cause data corruption or loss if the workstation is in the process of updating the database. The 'Kill Process' feature should be a last resort.

The Login name used for Digita application connections will show as the SQL user used by the applications, therefore not helpful in determining who has the connection open.

BACKUP PROCEDURES

Taking care of your data should be considered an important stage of setting up Digita software. From accidentally deleting client records, to server failures or a ransomware attack, making sure your business can continue to function after the incident is paramount.

With the Suite installation, a Database Backup Tool is supplied to ensure reliable backups can be taken, and using the 'Archive' feature, save the backups to an external drive or Cloud Storage folder.

IMPORTANT – Backups taken using these Scripts should be regularly checked to ensure they are completing successfully. The instructions in this section are added to help define a backup process. Digita and Thomson Reuters are not able to set up, manage nor troubleshoot these backup Scripts, and are supplied without warranty or support. Digita and Thomson Reuters are not responsible for data loss as a result of unsuccessful backups.

Standard Backups



The Digita Suite comes with a backup tool called 'Digita Database Backup Tool'. The tool allows the Administrator to easily backup and restore Digita application SQL Server databases.

The application is only installed on the server or primary computer where SQL Server resides. Node installations are not able to have the Backup Tool installed.

More information on using the Backup Tool can be found here...

https://productdownloads.digita.com/digitadocs/DDB_User_Guide.pdf

Scheduling Backups

Scheduling backups is an easy process to set up, whether using SQL Server Express or Standard.

With SQL Server Standard, the Backup Tool has a Scheduling tab which is now enabled to allow the creation of a SQL Server backup schedule. However, the following scripts offer a more useful solution.

There are two scripts that can be used for scheduling backups, **Option 1** is the standard script and recommended for most users, and **Option 2** is an advanced script for Server Administrators who need more control.

Option 1. Database Backup using Database Backup Tool (Recommended)

1. Download the file linked below, save the file to your local hard drive.
<https://productdownloads.digita.com/digitavarious/DigitaBackupScript.zip>
2. Extract the 'DigitaBackup.bat' file from the ZIP.
3. Right click on 'DigitaBackup.bat' and select Edit.
4. Amend near the top of the script (USER CONFIG section) to specify your backup location. **
The text `\\%backdir%` must remain on the end of the path, for example `C:\Digita\Backups\\%backdir%`.
5. Save and close the file.
6. To test it, right click on the 'DigitaBackup.bat' and select 'Run as administrator'. Make sure the backup DDB files appear in the folder automatically created in the path you entered for the backup location.
7. Launch Windows Task Scheduler, then add a new task to run the BAT using 'Run as administrator' option.

Option 2. Database Backup using SQLCMD and Powershell (Advanced Users Only)

- Not Compatible with Windows Server 2012. Powershell needs to be enabled.
 - The Digita Database Backup Tool is not required.
 - For Server Administrators only to allow more control.
 - Review the 'Readme.txt' for configuration requirements.
1. Download the file linked below, save the file to your local hard drive.
<https://productdownloads.digita.com/digitavarious/DigitaSQLBackup.zip>
 2. There are two scripts, 'DigitaSQLBackup.bat' and 'DigitaSQLBackupRemote.bat'
 - a. 'DigitaSQLBackup.bat'
 - i. To be run on the SQL Server itself.
 - ii. Local paths pre-set to C:\Digita\Backups\
 - iii. Will run without any further configuration.
 - b. 'DigitaSQLBackupRemote.bat' – Not covered here, however more information in the supplied Readme.txt
 - i. Can be run from a workstation, however, it requires further configuration within the script.
 - ii. A shared path with write access must be used. The path must be valid for both from the SQL Server, and the workstation the script is run from.
 - iii. The backup and compression steps will take longer remotely from a workstation.
 3. Extract the 'DigitaSQLBackup.bat' file from the ZIP.
 4. Right click on 'DigitaSQLBackup.bat' and select Edit.
 5. OPTIONAL: Amend near the top of the script (USER CONFIG section) to specify your backup and destination locations. The text \%backdir% must remain on the end of both paths, the default is: 'C:\Digita\Backups%\%backdir%'. **
 6. Save and close the file.
 7. To test it, double click on the 'DigitaSQLBackup.bat'. Make sure the backup ZIP files appear in the destination folder automatically created in the path you entered for the destination location.
 8. Read the supplied 'readme.txt' for more information.
 9. Launch Windows Task Scheduler, then add a new task to run the BAT using 'Run as administrator' option.

Option 3. SQL Server Standard Maintenance Plan (SQL Server Standard users only)

- Available only to those subscribing to SQL Server Standard.
- Set up a Maintenance Plan using SQL Server Management Studio to schedule a backup routine.
- The Digita Database Backup Tool Scheduling tab interfaces directly with this part of SQL Server.
- A third-party file backup application can then backup the generated .BAK file for off-server off-site storage.

Option 4. A Third-Party SQL Server Backup Solution

- There are third-party backup solutions available. Speak to your IT Supplier for more information.

Prerequisites for Options 1 and 2:

1. A user account with Administrator privileges and a password (blank passwords not accepted) needed to create scheduled tasks.
2. Windows User Account Control may need to be disabled on the machine as it can cause the generation of prompts which cause the process to stall.
3. The Windows user used to automate its launch must have sufficient permissions in SQL Server to take backups.

** Database Destination Path

In both scripts, the location entered for the destination path should be a folder used for external backups. A suggestion would be to have a Cloud Storage application like Dropbox or OneDrive set up, and the script moving the archive files to a folder within it. Doing this will help protect your data by storing it off server, off site and safe.

Restoring Data

Restoring A Database

To restore a complete database, see the guide below.

- The Digita Database Backup Tool can be used to restore the required backup.
- More information on using the Backup Tool can be found here...
https://productdownloads.digita.com/digitadocs/DDB_User_Guide.pdf

Restoring Specific Data

To restore a specific client from Personal Tax, Corporation Tax or the Accounts Production applications, you can follow the guide below.

1. Backup Tool - Backup LIVE database.
 2. Backup Tool - Restore OLD database.
 3. Export/Check-out the records you need to recover.
 - a. DCT - Start Menu > Company Transfer Manager.
 - b. DPT - Start Menu > Client Transfer Manager.
 - c. DAP/DAPA - File menu > Check out.
 - d. DCS/DPM - No method available.
 4. Close the Application.
 5. Backup Tool - Restore LIVE database.
 6. Import/Check-in the records you have recovered.
 - a. DCT - Start Menu > Company Transfer Manager.
 - b. DPT - Start Menu > Client Transfer Manager.
 - c. DAP/DAPA - File menu > Check in.
 - d. DCS/DPM - No method available.
- Backup Tool Guide: https://productdownloads.digita.com/digitadocs/DDB_User_Guide.pdf

DATABASE OPTIMISATIONS

Following a successful installation, there are some scripts recommended to run on the databases either once only or on a regular basis. These scripts we have classed as optimisations, to improve speed and efficiency, and to avoid some potential known issues.

Database Maintenance

- This is a run-one-time only script.
- Its purpose is to apply the recommended settings to each Digita database within SQL Server.
- Download here: https://productdownloads.digita.com/digitavarious/DB_Maintenance.zip
- Once downloaded, extract the contents to a folder, then run the BAT file.
- The script will take seconds to run. The duration is not affected by the size of the databases.
- The script can be run while users are in the software, the databases themselves are not accessed.
- Changes applied:
 1. Change the 'Recovery Mode' to Simple.
 2. Shrink the Transaction Log file.
 3. Set 'Auto Shrink' to False.
 4. Set 'Auto Close' to False.
 5. Set 'Auto Create Statistics' to True.
 6. Set 'Auto Update Statistics' to True.

Digita Accounts Production Advanced (DAPA) Database Clean-Up

- Before each Accounts Production Advanced upgrade, the install instructions state to run the Clean-Up first.
- The clean-up is essentially the purging of data already marked for deletion; the application does not completely remove deleted data as it goes.
- However, running the clean-up script on a regular basis will not only keep the size of the DAPA database down, keep the database efficient, but also prevent a headache at upgrade time.
- Download here: <https://productdownloads.digita.com/digitavarious/DAPADBCleanupScript.zip>
- Once downloaded, extract the contents to a folder, then run the BAT file.
- The process can also be set up to run regularly in Windows Task Scheduler or in a SQL Server Maintenance Plan if you are using SQL Server Standard.

Re-Indexing all Databases

- Each Digita Suite database has constant updates and removals as information is added, moved, upgraded, created and deleted, in other words the data is continually changing.
- Relational databases, as used in SQL Server, use a mechanism called indexing to quickly find the required data in a table. It allows a query to list specific data without trawling through the thousands of records before it in the list.
- As data changes with updates and deletions, indexing accuracy can be affected with out-of-date indexes referenced. This will cause queries to take longer to return the required information.
- Performing a weekly re-index via a SQL Server Maintenance Plan, or the script below, will address the issue.
- Download here: <https://productdownloads.digita.com/digitavarious/Re-IndexDatabases.zip>
- Once downloaded, extract the contents to a folder, then run the required CMD file.
- The process can also be set up to run regularly in Windows Task Scheduler or in a SQL Server Maintenance Plan if you are using SQL Server Standard.

TROUBLESHOOTING KNOWN ISSUES

If you are experiencing a problem after following the installation guide, please check over these known issues section before contacting Digita Support.

If you still need to contact support, please download the following ZIP file, right click on the downloaded file and select 'Extract All'. Then launch the CMD file.

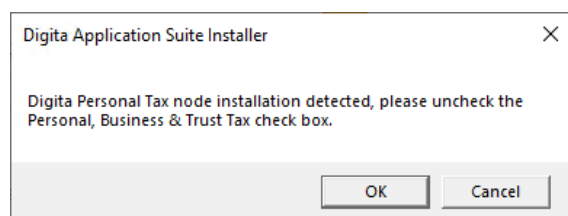
https://productdownloads.digita.com/digitavarious/Digita_System_Information.zip

Digita System Information: Once the diagnostic reports have been generated, a folder will pop up containing the system information files. Please attached these files to an email, then send to emea.support@thomsonreuters.com. Include with the email the installation log referenced in the error message (if applicable), a screenshot of the error (with 'Details' shown if applicable), and instructions on reproducing the issue you are experiencing.

The report will help speed up the fault resolution process. NOTE however, this report does not include installer logs. These can be found in the users TEMP folder.... enter %temp% in the File Explorer address bar.

1. Node installation detected

After clicking Next at the Product Selection screen, the following message is shown:



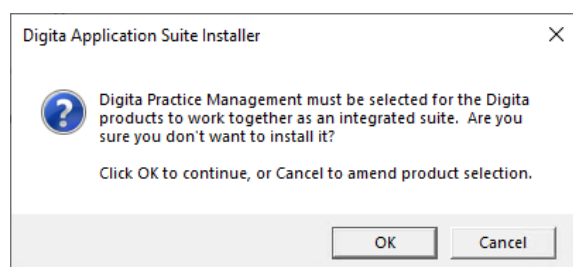
The message dialog indicates that you are trying to upgrade the applications on the workstation using the main installation media. This is not possible as the Digita applications installed on this workstation (Node) are installed directly from a server computer and not from the downloaded installation media.

In order to resolve the issue, you will need to log into the server computer where the databases are located and upgrade the software there, using the downloaded media. The workstations will then update when launched triggering the upgrader (with the exception of DAPA, which is a manual update).

Note the application referenced in the message could be any of the Suite applications.

2. Digita Practice Management must be selected for the Digita products to work together as an integrated suite

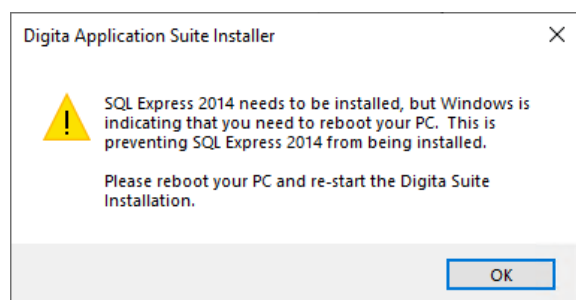
After clicking Next at the Product Selection screen, the following message is shown:



In order to integrate between Digita applications, Practice Management must be installed. If you wish your Digita programs to be integrated, click Cancel and go back to the Product Selection screen and ensure Practice Management is ticked. If you are only installing one Digita application, and / or do not require integration, click OK to continue without installing Practice Management. If you choose not to install Practice Management, you will need to disable integration within the Digita applications that you do install.

3. SQL Server 2017 Express needs to be installed, but Windows is indicating that you need to reboot your PC

Upon running the installation, a prompt to reboot is shown. This occurs even after a reboot has just occurred:



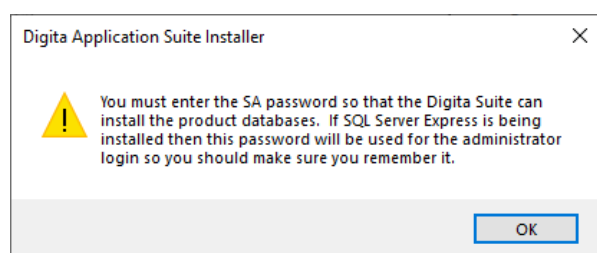
Note the version of SQL Server may be different, but the same solution still applies.

All available Windows updates must be applied to any machine prior to running a Digita installation. These updates often require a reboot to complete. Should you encounter this message, reboot the machine and re-run the Digita installation. Should the message reappear after a reboot, disable your anti-virus software as well as checking there are no further Windows Updates to apply. Navigate to 'Control Panel > System and Security > Windows Update' to check.

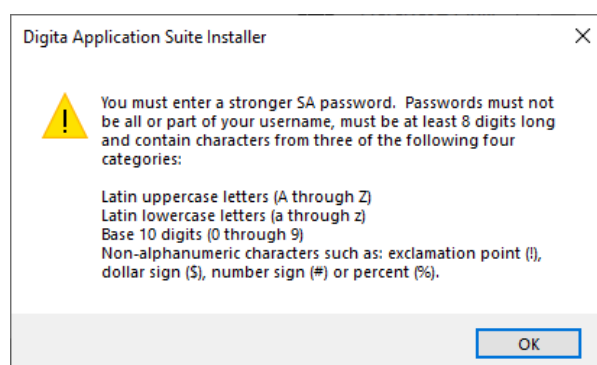
Anti-virus software can be a cause of the reboot problem as it updates itself on start-up, often requiring a restart to complete changes.

4. You must enter the SA password so that the Digita Suite can install the product databases

When the SA password box is left blank or is not sufficiently complex, one of the following messages is shown:

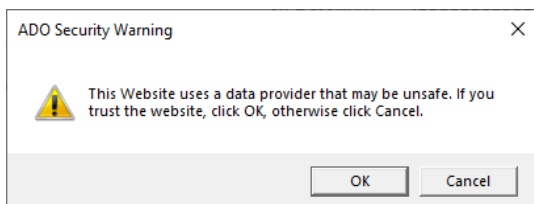


A blank SA password is not permitted. The password must comprise of at least 8 characters, including special characters. If the password has insufficient complexity, the message below will display.



5. ADO Security Warning. This website uses a data provider that may be unsafe

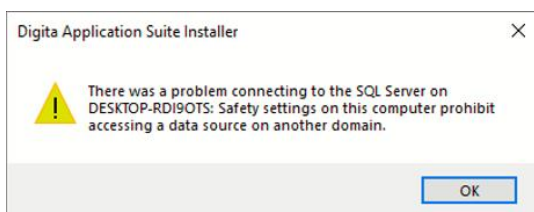
At various points during the installation you may see the following message:



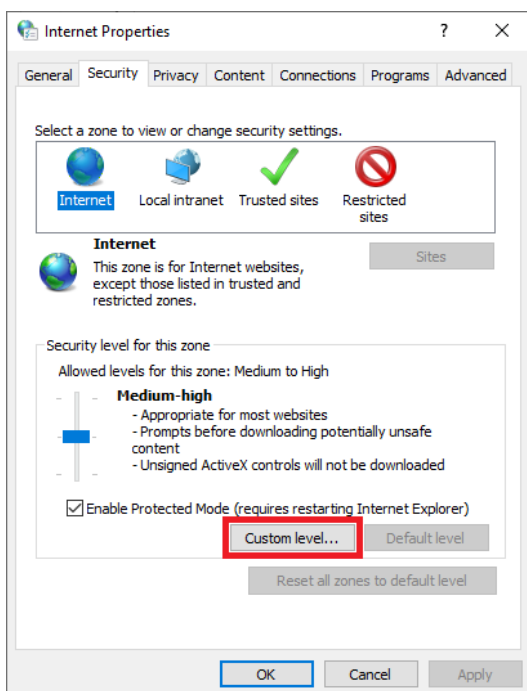
This message is because our installer uses HTML and some systems warn you about it being executed. Just press OK each time you see the message to continue.

6. Safety settings on this computer prohibit accessing a data source on another domain

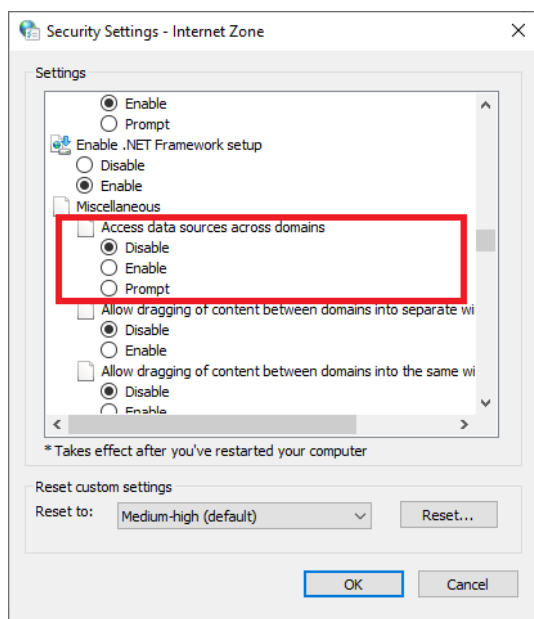
If you encounter the following message when selecting your server (or at any other time) you need to alter your Internet security settings:



To alter the settings, go to 'Control Panel' and select 'Internet Options'. Select the 'Security' tab and under the 'Select a zone...' section choose 'Internet'. Then click on the 'Custom level...' button.



In the 'Security Settings' window, scroll down to '**Miscellaneous > Access data sources across domains**', set this to '**Enable**' and click OK.



Then repeat for the '**Local intranet**' zone.

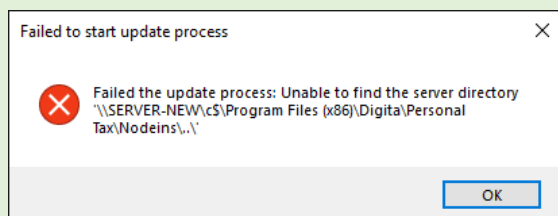
If this does not fix the error, there have been some occasions where this update also needs applying to the '**Trusted sites**' zone.

7. Failed the update process: Unable to find the server directory...

There are two common causes to this error. Notice the difference in the file paths in the error.

ERROR 1:

If you encounter the following message when launching an application on a workstation (a node installation), can you access the full folder path in the error?

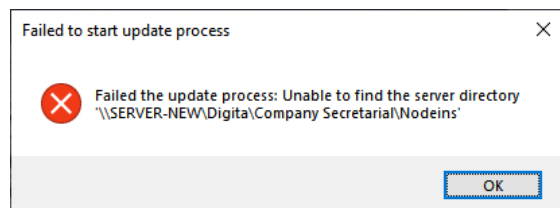


Notice in the path, the reference to 'C\$' and 'Program Files' folder. The C\$ share is an Administrator access only share, which users (not being administrators) will not have access to. The applications need server share access during general usage.

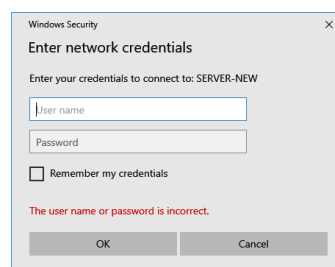
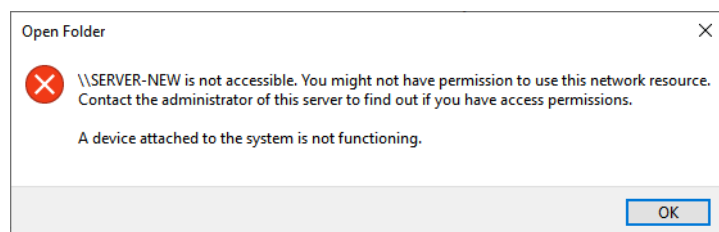
The solution is to set up the server share correctly as shown on page 35, then uninstall and reinstall all node installations from the new 'Digita' share.

ERROR 2:

If you encounter the following message when launching an application on a workstation (a node installation), can you access the full folder path in the error?



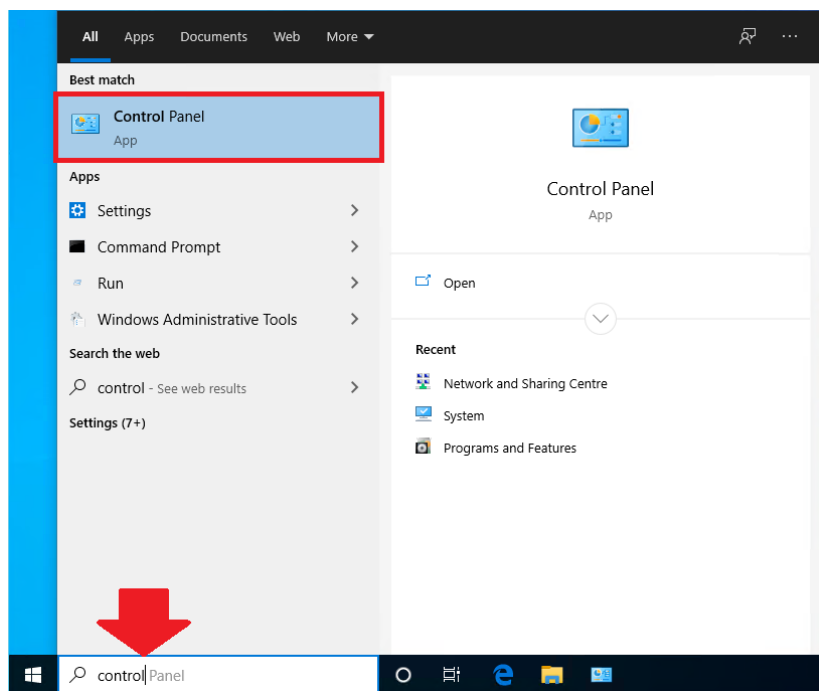
If you then use File Explorer to navigate to the server computer, you will get these dialogs.



This is because on a peer-to-peer set up, each computer has its own security environment, and each computer does not automatically allow access to any other computer as their logins are not recognised. Therefore when a node computer accesses the server computer, the login account is not recognised. This is not the case with a domain environment where the security accounts are located centrally on a server.

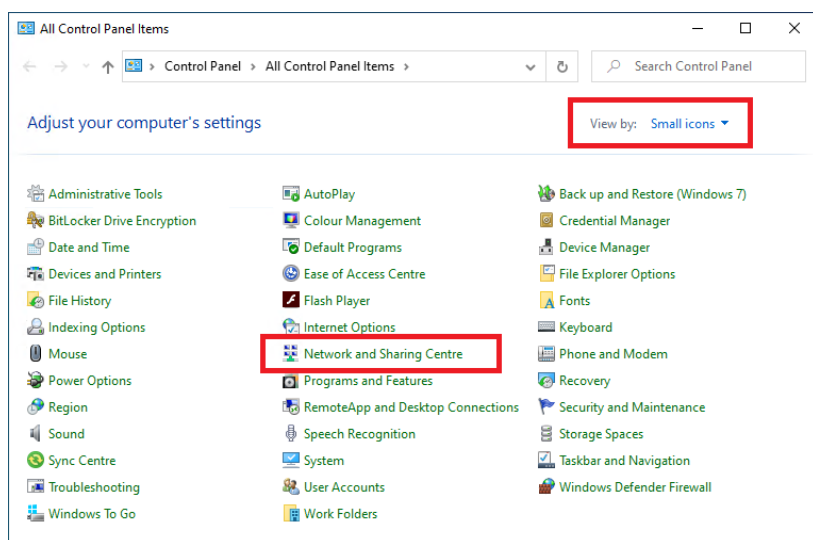
The solution is to disable share permissions on the primary computer.

On the primary PC where the databases are stored. Click on the Start button, and type 'Control Panel'.

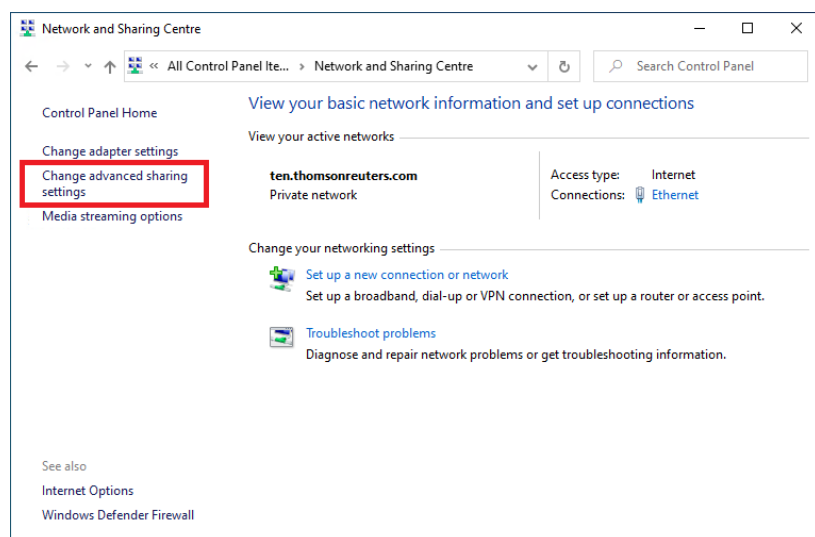


Launch 'Control Panel'. Select the 'Small icons' option on the top right drop-down menu.

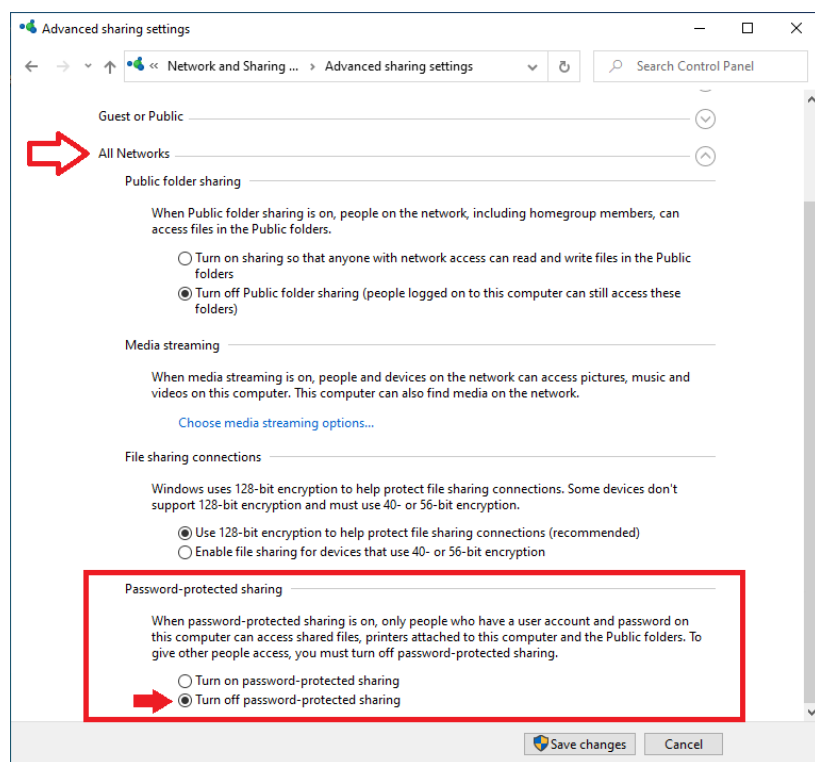
Then click on 'Network and Sharing Centre'.



Select 'Change advanced sharing settings' on the left.



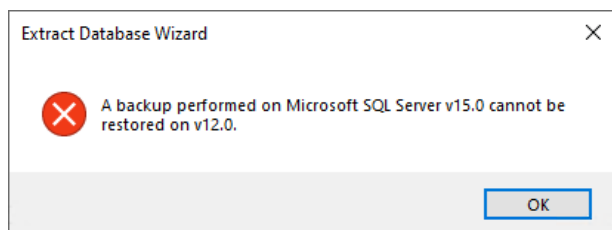
Expand the 'All Networks' section. Then, in the 'Password-protected sharing' section, select the 'Turn off' option.



The workstations will now not be prompted for a login, and the Digital applications will launch without any network permissions issues.

8. A backup performed on Microsoft SQL Server v15.0 cannot be restored on v12.0

When trying to restore a database backup using the Digita Database Backup Tool, the following error is displayed.



This message indicates the backup was taken on a newer version of SQL Server. In this dialog, v12.0 (SQL Server 2014) is installed and a v15.0 (SQL Server 2019) database is being restored.

VERSION	PRODUCT
v11.0	SQL Server 2012
v12.0	SQL Server 2014
v13.0	SQL Server 2016
v14.0	SQL Server 2017
v15.0	SQL Server 2019
v16.0	SQL Server 2022

The solution is to upgrade the installed version of SQL Server to a newer version.

SQL Server Express Upgrade Guide...

https://productdownloads.digita.com/digitadocs/SQL_Server_Express_Upgrade_Guide.pdf

SQL Server Standard Upgrade Guide...

https://productdownloads.digita.com/digitadocs/SQL_Server_Standard_Install_Upgrade_Guide.pdf

TROUBLESHOOTING PRINTER ISSUES

In this section we cover a select of know printer issues and solutions which you might find useful.

1. Print/Page Preview shows large text or odd layout.

The applications use Amyuni to export to PDF, however as the software cannot print direct to the Amyuni print driver the driver itself is never the default printer. The page layout is retrieved from the current printer set as default, therefore without a default printer set the layout can sometimes go wrong.

The solution is to set a physical printer as the Default printer, if you do not have a default printer, you can create a faux printer (driver without device) from any HP printer.

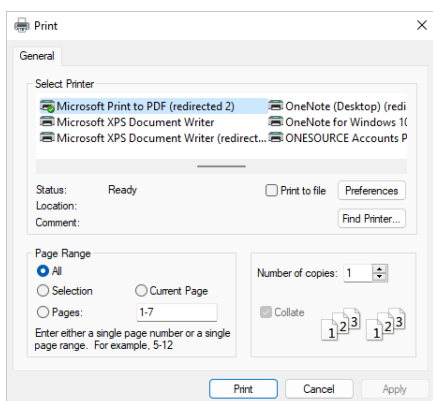
- Close all applications.
- Open Control Panel > Devices and Printers.
- Right click on a physical printer and select 'Set as default printer'.
- Launch the Digita applications and try the process again.

If you already have a printer set as default, check the paper type is set to A4.

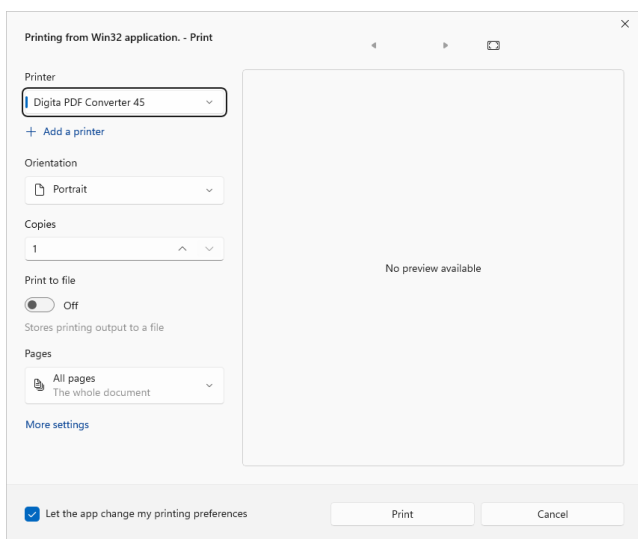
2. Windows 11 Build 22H2 now shows a new Printer dialog, how do I revert to the old dialog?

An update in Windows 11 22H2 has changed the default printer dialog, removing some functionality.

Typical standard Windows print dialogs show as below:



However, an update to Windows 11 Build 22H2 had upgraded the dialog to the following new layout, note the missing preview:



If you wish to revert to the legacy dialog, there is a registry update to change this dialog back. It is IMPORTANT to note, editing the Registry can be dangerous, putting your Windows installation at risk if an error is made.

Thomson Reuters and Digita take no responsibility for following these instructions which refer to a Microsoft feature change after a Microsoft update. It is included for reference, and sourced from a third-party site.

- a. Close all applications. Click Start > Run.
- b. Launch Regedit.
- c. Navigate to: HKEY_CURRENT_USER\Software\Microsoft\Print\UnifiedPrintDialog
- d. Right click, New > DWORD (32-bit) Value
- e. Rename it to: PreferLegacyPrintDialog
- f. Enter value: 1

Source URL: <https://www.winhelponline.com/blog/restore-legacy-print-dialog-windows-11/>

TOP 10 AVOIDABLE ISSUES

This is a list of the top 10 easily avoidable support issues Digita receive regarding installing the Suite.

1	Select 'Save' rather than 'Open' when downloading the latest Suite release ZIP file. This will ensure the downloaded file does not go into your Browser Cache.
2	Disable Anti-Virus Security Software including its auto-update feature permanently, then reboot. It can all be re-enable after the installation has completed.
3	When it comes time to update the workstations, Users must have local administrative privileges and network access in order to install or upgrade.
4	Apply all Windows Updates available and then reboot. Sometimes the PC needs a couple reboots.
5	Extract the ZIP file then run the installer from the extracted folder. Don't launch the installer from within the ZIP.
6	Users sometimes customise the install path, then uninstall and reinstall to a different path which is not the shared path. If the install path is customised, ensure it's documented for future reference.
7	New Standalone and Server installs need to update the Internet Options to allow 'accessing a data source on another domain' before starting the installation.
8	Ensure DAPA clean-up is run before upgrading. It should be run daily, as the more often it is run the quicker it will complete each time.
9	Allow the DAPA and CT installations to complete on its own. Some users cancel it thinking its crashed while progress bar is on 99%. If there is a problem, an error will appear.
10	DAPA node installations and upgrades must be run manually from the server 'Nodeins' folder, by running 'Setup.bat'. DAPA does not have an auto-update feature like the rest of the Suite.

UTILITY SCRIPTS

Provided in the Suite download now are some useful scripts for optimisation, information, and maintenance.

The file download links are located in the downloaded media, find them here: `\Utility\Scripts\`

The following scripts are Included....

Script	Description & Usage Notes
Amyuni PDF Converter Reinstallation	<ul style="list-style-type: none"> From KB: 000067981 Launch on Workstations where the software is used. When you have export to PDF issues, download and launch the BAT file to remove and reinstall the PDF Converter.
Current Database Connections	<ul style="list-style-type: none"> From Installation Guide A script to list current connections to the Digita Databases. Useful for upgrade time to ensure all users are out of the databases.
DAPA Clean-up BAT	<ul style="list-style-type: none"> From KB: 000067064 Launch on Server, or main PC where the databases are located. DAPA Database Clean-up script, this includes the script and the BAT file to execute the script.
DB Maintenance Correcting DB Settings	<ul style="list-style-type: none"> From KB: 000067107 Launch on Server, or main PC where the databases are located. This sets the correct settings for the SQL Server databases. The databases are not accessed, therefore can be run with users logged in. Changes the Recovery Mode to Simple, shrink the Transaction Log file, sets Auto Shrink and Auto close to False, sets Auto Create Statistics and Auto Update Statistics to True. This can occasionally free up disk space.
Digita Support Tool, for Node and Server	<ul style="list-style-type: none"> Support and Diagnostic information on the workstation installation and SQL Server. Tools for Node installations - Safe for users to use. Clear cache, install information, plus more. Tools for Server installations for Users - Safe for users to use. Database status, client connections, DB health checks, clear license locks, plus more. Tools for Server installations for Administrators - For IT Support, Offline/Online, Database repairs, change database owners, plus more. Much more information included with the downloaded tool.
Generate A System Report	<ul style="list-style-type: none"> Downloads a script called 'Digita_System_Information'. Extract and launch the script to create a report listing SQL information, Windows information, Digita database information, Digita application information and DCT and DAPA database upgrade logs. Should be run on the computer with a problem. PC Security will block this from running, select 'More Info' then 'Run anyway' to launch it. It is safe to run.
Internet Options Change	<ul style="list-style-type: none"> From Installation Guide and KB: 000067075 Launch on a computer where the main downloaded installer is run, before installation.

	<ul style="list-style-type: none"> • This sets the Internet Options via a registry update. The settings applied are the same as directed in the Installation Guide. • This script is useful where the Digita installations are performed using the 'Run as' command, ie using a different profile as logged in. Run this script in the same way to apply the change to that profile.
Re-Index all Databases	<ul style="list-style-type: none"> • From KB: 000067112 • Launch on the server, or main PC where the databases are located. • Databases performing slow? Try running the re-indexing script on the databases.
Rename Profile Data	<ul style="list-style-type: none"> • From KB: 000102548 • Launch on Workstations where the software is used. • Problems with applications crashing or running slow, try closing all applications and resetting the profile data. • This resets the Digita Suite applications back to the first time the software is installed and launched. • Note this removes 'last opened' history. No actual data is affected.
SQL Server Version Check	<ul style="list-style-type: none"> • From KB: 000066981 • Launch on Server, or main PC where the databases are located. • Run this to verify the version of SQL Server is being used. • PC Security will block this from running, select 'More Info' then 'Run anyway' to launch it. It is safe to run.