PEARL INSTALLATION

TECHNICAL REQUIREMENTS

HIGHLIGHTS

- **Workstations:** Windows Vista, 7, 8, 8.1 and 10. Minimum 4 GB RAM highly recommended.
- **Microsoft Office:** Office 2003 Professional or higher; 32-bit only (64-bit will not work with Pearl); Office 365 strongly discouraged.
- **Server:** Windows Server 2003, 2008, 2012 or 2016. NAS (network-attached storage) strongly discouraged.
- **Network:** LAN or Remote Desktop/RemoteApp recommended; no WAN/VPN. Wireless network connections discouraged. Exempt Pearl.mdb from virus scanning.
- **Backups:** Have a good nightly backup system and test restorations regularly.

DESKTOP/LAPTOP OPERATING SYSTEM

Pearl is a Microsoft Access database file. You must use a Windows PC or Windows server to run Pearl; it does not run on Macintosh computers. An option for Mac users is to purchase a Windows server and connect to it using a separate program like Parallels (www.parallels.com) or Windows' Remote Desktop Connection Client (http://www.microsoft.com/mac/products/remote-desktop). Our time to assist you in configuring a Macintosh computer is billable. Please also note that we do not regularly test Pearl in these MAC environments.

We currently have clients using the following desktop/ laptop operating systems: Windows Vista, 7, 8, 8.1 and 10. Please contact us if you will be using Pearl with desktop operating systems other than these.

Note: There are several standard settings that need to be changed to allow Pearl to use the files it needs to run properly. Please let us know if you would like us to direct you to a list of these changes.

It is the responsibility of the client to be sure they have installed the most recent service pack releases for whatever Desktop/Laptop Operating System they are using.

SOFTWARE

You'll need the Microsoft Office Professional suite of programs (Access, Excel, Outlook, and Word). It is **critical** to purchase the suite of programs together. Installing a stand-alone version of Access on computers which have Office Home or Standard is an <u>unsupported</u> configuration.

In addition, it is problematic for multiple versions of Office to be installed on the same computer, and Microsoft cautions against that as a rule. Installing a different version of Access instead of the Access which is included in the Office Professional suite (such as Access 2003 with Office 2010 Home Edition) is an unsupported configuration.

> *IMPORTANT: Office 365 (32-bit) will work for most Pearl functions, but Pearl merge letter functionality is broken even with the workarounds needed for standard license Office Professional 2013 or 2016. For this reason we recommend against getting Office 365 at this time.*

We have found that different workstations can have a mix of different versions of the Office Professional suite, if the following two conditions are met:

- The version must be Office Professional 2003 through Office Professional 2016.

- Each workstation must have only one version of Office installed. That means one workstation can have Office 2003 and another workstation can have Office 2010, but there must be no other versions on either machine.

Assuming that your server allows remote access (Remote Desktop or RemoteApp), you'll need to install Microsoft Office Professional on the server so that people can run Pearl if they work remotely. If you will be using Pearl in a mixed Office version setting – for example some users have Office 2003 installed and others have Office 2007 installed, please call us to discuss your file format options for Pearl. Again, it is the responsibility of the client to be sure they have installed the most recent Microsoft Service Pack Releases for the version of Office that they are using with Pearl. Pearl has been tested and works with Office 2003, Office 2007 and the 32-bit version of Office 2010, 2013 or 2016 (do not install the 64-bit version of Office Professional at this time).

> **IMPORTANT:** *Office 2010 or higher: DO NOT try to use Pearl at this time with a 64 bit version of Office. When installing Office 2010 or higher, opt for the 32-bit version even on 64-bit Windows as recommended by Microsoft.*
> *Also please note you CAN use Pearl with a 64-bit version of the Windows operating system.*

Note: If you will be using Pearl with Office 2007 or higher, there are several standard settings that need to be changed to allow Pearl to function most efficiently. Please let us know if you would like us to direct you to a list of these changes.

SERVER ENVIRONMENT REQUIREMENTS:

If you will have multiple Pearl users, we recommend that you store Pearl on a server, but we don't recommend a specific brand. We recommend you DO NOT use a NAS (Network Attached Storage) style server.   While good for storing data, a NAS Server is not designed to be a general purpose server; these types of servers often have a stripped-down operating system that is not robust enough for some of the more process-intense functionality that Pearl features require.

You'll need space on the server for Pearl and its associated files (help and system files, merge letters, attachments). Bromelkamp's Pearl folder is large at 3.5 GB (we keep a lot of files and testing databases); new clients don't need that much space.   Currently we have clients using Pearl with the following server software: Windows Server 2003, 2008, 2012 and 2016. Please contact us if you will be using Pearl with server operating systems other than these.

> BASED ON TRUSTED SOURCES AND OUR EXPERIENCE, WE RECOMMEND THE FOLLOWING:
> Disable virus scanning on Access databases, including the Pearl database file. Virus scanning adversely affects the speed of the database and can cause database corruption.

The Pearl database will be stored in a folder named Pearl on your server or PC. If you have a network, typically a mapped drive (e.g. P:) is assigned to the Pearl folder, for example, P:\Pearl\Pearl.mdb. If you store Pearl on your PC, the Pearl folder will be on your local drive, as in C:\Pearl\Pearl.mdb. **This mapping must be the same for all computers that use the Pearl database.**

Note: if you map a drive to Pearl's location, do not include periods in the file path that is mapped. Pearl's merge letters may not work if there is a dot in the file path of the mapped drive. Also, do not map using an IP address for the same reason.

The Pearl folder will also contain several subfolders:

- Archive
- Attachments
- System
- Letters

Pearl users will need read/write/modify permissions to the Pearl folder and its subfolders.

NETWORK

We strongly recommend installing Pearl on a fast, stable wired network, with steady network connectivity to the network file server. For Microsoft Access databases to function well they need uninterrupted connections. Wireless connections, Peer-to-Peer connections, and wide area network (WAN) connections are slower and very prone to minor and temporary interruptions. Often, these interruptions cause the Access database to 'crash' and you are forced to restart the program. Sometimes these interruptions cause the Access database – in this case Pearl – to become corrupt and you either have to repair it, or restore it from a backup. Please let us know if you plan to use Pearl in any other type of network environment other than a traditional client/server so we can discuss likely issues with you.

BACKUP OF THE PEARL DATABASE AND ASSOCIATED FILES

It is the responsibility of the client to insure that all of the Pearl programs and data files are adequately duplicated (known as making a "backup copy"). Bromelkamp Company is not responsible for the client's failure to do so, or for any cost of reconstructing lost during the course of or caused by services rendered. It is also the client's responsibility to retrieve backed up data from external media sets when necessary.

WE RECOMMEND THE FOLLOWING BACKUP SCHEDULE:

- A 2-week rotating, nightly backup: each night, back up the Pearl folder and all subfolders (which includes your Chronicle Attachments and, for accounting clients, your posting backups) onto external media. Use two separate sets of external media, one for each day of the week. Store the off-week's set off site. This is a 14-day rotation, so a backup done tonight would not get overwritten for 14 days.

- In addition, each month or quarter, replace one of the media sets and keep the old set aside not to be returned to the rotation for one year. Remember that if something goes wrong and you don't realize it for more than 2 weeks, you'll need to restore this backup set.

- Once a year, pull a media set permanently out of the rotation and put it in storage for permanent reference.

REMOTE ACCESS

We recommend Remote Desktop to connect Windows Terminal Server, or a Citrix Client for connecting to a Citrix server. Never try to work in Pearl or any MS Access database over a virtual private network (VPN), over a slow speed modem connection or over a wireless network connection because of the high likelihood of database corruption.

Since Pearl is an Access database file, the system requirements for installation are technically the same as for the version of Office you intend to install. Many independent Access developers contend that Microsoft sets the system requirements at the low end of what will really give you optimal performance. If you are purchasing new computers, our recommendation is to buy hardware that exceeds the minimum; purchase the mid to high end of both RAM (4 GB) and processor. While you might not immediately need all of the speed and memory, you ensure that your computer will continue to run well with later versions of Office and operating systems. We strongly suggest that you work with a local PC consultant to define your needs and guide your purchases:

Users' needs for speed, memory, and hard disk space on their computers vary depending upon the types of non-Office programs they run (for example, Adobe Photoshop), their version of Microsoft Office, and the version of workstation and network operating systems being used. For instance an installation of Office 2010 Professional requires more memory and processor speed than an installation of Office 2007

The amount of hard drive space allocated for the Pearl folder on the network share should be enough not only for the database and Pearl system files, but also for associated files and documents. 2-5 GB is not uncommon

The first time a user opens Pearl, several dll and help files (Pearl3.dll, Pearl5.dll, Pearl.chm, etc.) are moved to the user's C:\Windows\System32 or SysWOW64, and C:\Windows\Help folders*. **Ideally, all Pearl users should be administrators on their computers. If not, it is necessary for an administrator to log into the computer and open Pearl for the first time (see our Pearl Workstation Setup guide), after which non-administrator users can use Pearl. The same thing applies to Pearl updates.** Bromelkamp Company offers free annual updates to its Pearl programs. The dll and help files are periodically replaced with updated versions of these files as a part of the overall program updates. Please contact us if you have security concerns about giving Pearl users read, write and modify permissions to these folders so we can discuss alternatives with you.

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