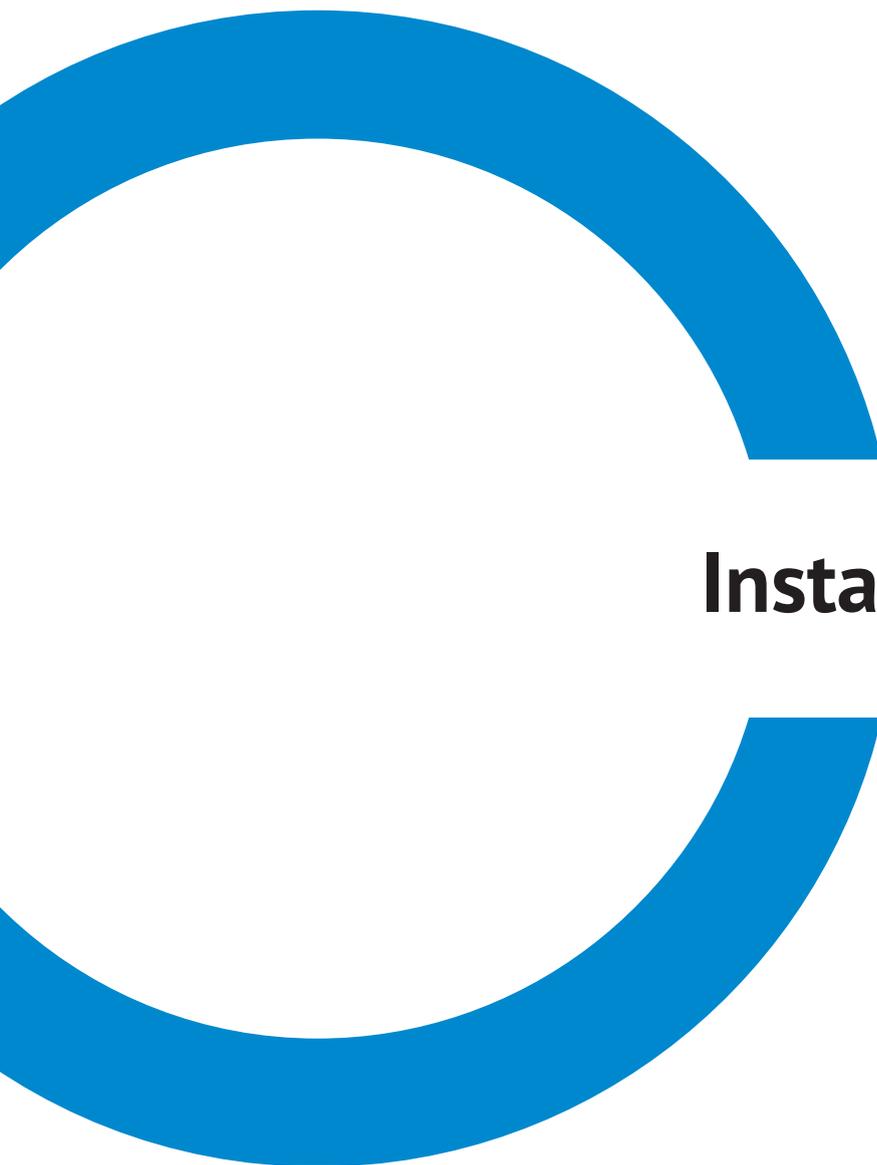


cobra[®]
CRM

A large, thick blue circular graphic that is partially cut off on the left side, forming a large 'C' shape. It is positioned on the left side of the page, behind the text.

Installation Manual

©Copyright 2020 cobra – computer's brainware GmbH

cobra Adress PLUS[®], cobra CRM PLUS[®], cobra CRM PRO[®] and cobra CRM BI[®] are registered trademarks of cobra - computer's brainware GmbH. Other terms may be trademarks or otherwise protected and are used in this document without any guarantee of their free use.

All rights reserved. Reproduction, also in extracts, is not permitted. No part of this document may be used or reproduced in any form (photocopy, microfilm, scan or a different technique) or by any means – not even for teaching purposes – processed, copied, or published by using electronic systems, without prior written permission of cobra GmbH.

Changes, incorrect documentation and printing errors reserved.

This document does not constitute an assurance of product attributes. The range of functions of your product may differ from the functional range described here.

August 2020

Materials by Harald Borges.

www.cobra.de

Content

Important notice.....	4
Installing and transferring data from the 2018 version.....	5
cobra and the SQL Server	6
Prior to the Installation	6
Installation.....	7
Installation as Single Workstation Version.....	7
Installation in a Network	8
Step 1: Server Installation.....	9
Step 2: Client Installation	9
Technical Information	11
Security Aspects.....	11
Access Control on Network Level for Program and System Directory	11
Activating the Software.....	13
Starting the Activation Wizard.....	13
Online Activation.....	14
Creating a License File (Offline Activation)	15
Selecting Activated License File	16
Duplicate-Module.....	17
Checking the Installation	17
Updating Clients with the Client Updater	18
Installing the client updater	19
Patch File.....	20
Installation on the first client	20
Installation on a further client.....	20
The SQL Server Wizard	21
Selecting Existing SQL Server (or Existing SQL Server Express Edition)	23
Locally Installing SQL Server Express Edition	26
Installing SQL Server Express in the Network	27
Notes on the Installation.....	28
Management Console.....	28
Microsoft SQL Server Management Studio Express (SSMSEE).....	29
User and Security Settings	33

Important notice

The illustrations in this book show (mostly) screens taken from the cobra version CRM BI.

If you work with either cobra CRM PLUS or CRM PRO your program and its functionality may be different from the illustrations and explanations given in this document and you will not have all the functions you see here!

Major differences are indicated in this document, e.g. »CRM BI, CRM PRO«.

You will find improved versions of this document on the internet.

<http://www.cobra.de/service/downloads/dokumentationen.html>

Installing and transferring data from the 2018 version

Please refer to the system manual and the installation instructions available as PDF files for further details on installation, configuration and data transfer.



During a patch installation from the 2018 to the 2020 version the old version will be updated and completely overwritten in the process. This means that there will be no way to return to the 2018 version should you not have done a complete backup of the old 2018 version before(!).

To backup the system completely proceed as follows:

1. Copy the complete server installation including all folders and subfolders to a safe location.
2. In cobra 2018, backup your SQL databases using the command »File: Database: Backup«.

Installing the patch to update from cobra 2018 to cobra 2020

You have downloaded the patch file from our customer portal or received it some other way from cobra or your specialist dealer.

When a patch is installed your existing cobra 2018 version will be updated to version 2020. All paths and settings valid now will be retained. This means that you cannot specify new paths during a patch installation.

Make sure that you have the activation data at hand since they will be needed during the update.

- Close cobra 2018.
- Close the cobra Appointment Manager.
- Close Outlook.
- Double click the patch file. The patch installation will start. It will automatically detect the existing cobra 2018.
- Follow the steps of the wizard.

cobra and the SQL Server



Version 2020 is exclusively interacting with SQL databases.

SQL Server is a comprehensive database and analysis solution for easier and faster access and exchange of data, for automation of administrative functions and routine duties. The SQL Server can hereby increase the performance significantly, especially when managing large databases.

For general information on the SQL language or the basic database concept of the SQL Server, please refer to the Microsoft SQL Server documentation.

Prior to the Installation

There are two ways of using the program:

- The *single workstation installation*. The program is installed isolated on one single PC. This PC does not share any data with other PCs.
- The *network installation*. The program is partially provided on a server. Several PCs access data on this server. Address data can be used and edited by many users.

A network installation is done in two steps:

First, perform the server installation.

After completion, on each individual workstation a client installation from the directory on the server must be executed.



It is not possible to share the data access in the network from several *single workstation installations*. For this purpose, server and clients must be installed separately in a network installation.

Installation

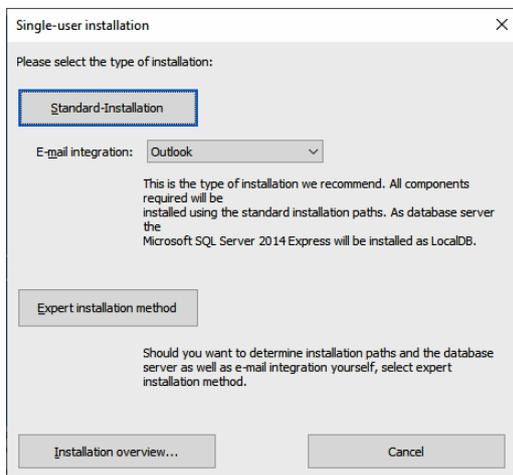
Installation as Single Workstation Version

For an installation you need administrator authorization for this PC or server.

Open the Windows Explorer, go to the installation CD and double-click the SETUP.EXE file.

Select the »single workstation installation«.

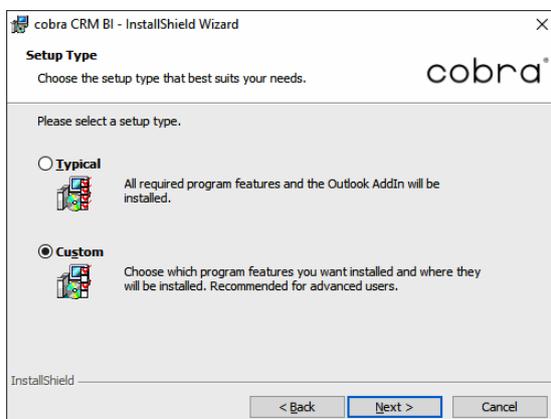
Select the »expert installation method«.



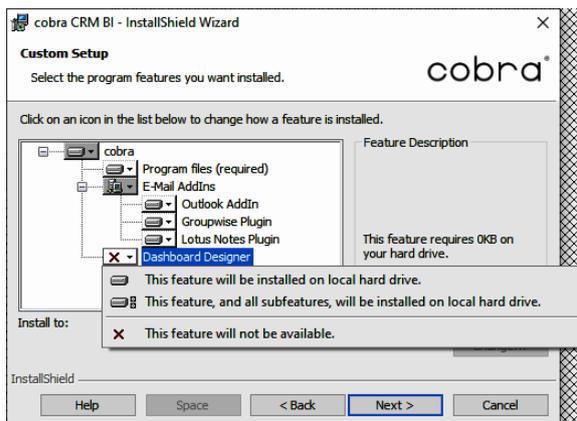
Follow the Installation Wizard instructions.

The SQL Server Wizard opens. *For more information please refer to page 21.*

Select the setup type »custom«.



In the next step select the Feature »Dashboard Designer«.



Installation in a Network

i For a network installation the Windows Installer 4.5 is necessary. Otherwise after the installation there will be an automatic restart of the server!

Overview

In PC networks, the program must be installed on a file server or on another PC which can be accessed by all users.

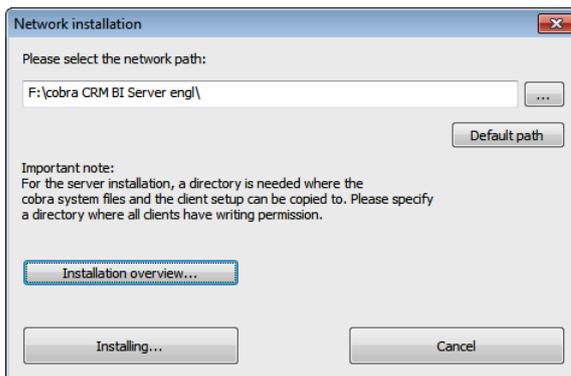
For the installation on several workstations in the network, proceed in the following order:

- Install the software on the server. Should you prefer to use an UNC path definition instead of a connected network drive, select »Browse« and enter the UNC name manually.
- During the server installation, a sub-directory \CLIENT-SETUP is created on the server. It contains an installation routine which must be started from each client afterwards.
- Perform the adjustments for peer-to-peer networks (optional).
- Enter the network license(s) at the program start of cobra.
- Create the necessary databases.
- Define all database fields.
- Define all users and user groups and activate the user administration.

- If you want to work with the Active Directory User Administration, please refer to the chapter »Security System« first.
- Assign access permissions.
- Install all other workstations.
- Define the start parameters (*see User Manual*).

Step 1: Server Installation

- Make sure to perform the server installation from a client.
- The installation is started automatically when the CD is inserted in the CD drive. If the installation should not start automatically, open the Windows Explorer, go to the installation CD and double-click the SETUP.EXE file.
- Select the »Network Installation« command to start the installation.
- The selected server can be a dedicated file server.

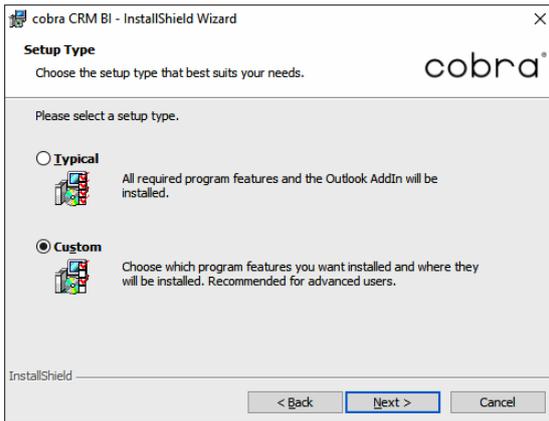


- Create a directory for the cobra files on the server.
- The installation on the server will now be started.

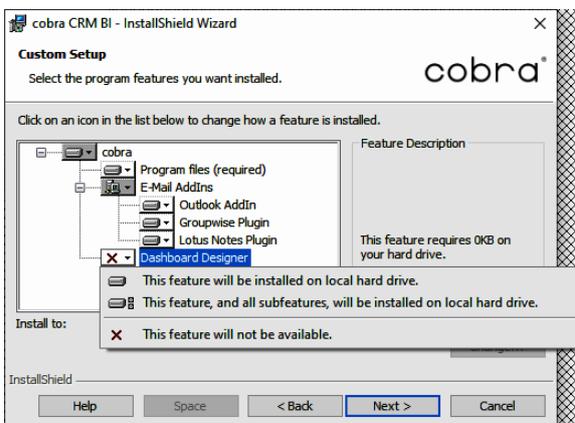
The SQL Server Wizard opens. *For detailed information please refer to page 21.*

Step 2: Client Installation

- For each client, a client installation has to be carried out afterwards. To do this, call the SETUP.EXE program in the \CLIENT-SETUP directory of the server installation.
- Select the setup type »custom«.



In the next step select the Feature »Dashboard Designer«.



- The client installation creates a shortcut to cobra in the client's Windows Start menu, which can be used to start the program.
- The network installation is finished by this.

The system environment is installed on the server, the program itself is installed locally on the client.

Further components can be installed via the »Extras« button from setup.



We highly recommend to install the cobra Client Upgrader on *all* clients!

Technical Information

Security Aspects

The program can process any number of files with almost any number of addresses. Most commonly, several users will be working with address data from one work field or one company.

Hereby, different forms of cooperation can be possible:

- Several people are working on one PC, one after the other.
- Several people are working on several computers in a network, either at the same time or one after the other.

These different forms of cooperation result in numerous security requirements. A user administration must enable restriction of access permissions for individual users and databases.

After the installation is completed, all users starting the program will have full access control. So the first step now should be to set up your user environment and the access permissions.

For this purpose, the program provides the following functions:

- *System password* for the identification of the system administrator.
- *User administration* with users and user groups including user password.
- *Authorization system* for defining detailed access permission for every user in every database.
- *Database passwords* for the access of individual databases.

Access Control on Network Level for Program and System Directory

Since several users share the same files in a network, files have to be configured in different ways according to their use.

- A *single workstation installation* installs system environment as default in the path C:\Documents and settings\All Users\Application data\cobra ... The program files are stored in the installation directory you have chosen.
- A *network installation* installs the program directory on the local workstation. The system environment is installed in the network. Files are divided into the following groups:

Workstation

\Program..... The *Program directory* includes the actual program file Adress-Plus.Exe, all Dynamic Link Libraries (DLLs) and some additional files. In the network, all files should have read-only attribute.

System Environment

\User..... This directory includes all user-specific entries (like views) and formats for labels, letters and other printed matters. All users need unrestricted access.

\Client Setup..... This directory is created only for network installations and contains the SETUP.EXE file for the installation of the individual workstations.

\Data The addresses entered by the users are the actual data. The data directory is used for storing the databases. All users need writing permissions. If the users are working in only one database, you can modify the start parameters so that the database will be opened immediately at the program start.
If you want to store several databases in one directory and the user should select one at the program start, enter this directory as *work directory* in the desktop shortcut. The »Open File« dialog will display all databases stored in this directory immediately at the program start.

\Documentation..... This directory contains the technical documentation.

\Document..... This directory can be used as the root directory for the complete correspondence if document management has been activated. All users need unrestricted access to this directory.

\Groups..... This directory contains all group specific entries (like views) and formats for labels, letters and other printed materials. All users need write privileges.

\Help This directory contains the Online Help.

\System The files in the *System directory* store the current settings (user administration, selection lists, telephone drivers, postcodes, connection to ERP) and formats (for labels, index cards, data export, etc.). Every user can work with them but only the system administrator can edit the settings. All users need write access.

With this classification, the overview on the individual files is clearer and the assignment of network access permissions simplified.

Activating the Software

As long as the program has not been activated, it can only be used in demo version mode.

You will receive the data required to activate the cobra software, the login name and the password, from cobra or your cobra partner. Please make sure to save this data.

The Activation Wizard will replace the license numbers used previously. As soon as it has been activated, the software can be used as full version. After a new installation, or the installation of a cobra patch, the activation will have to be done again.

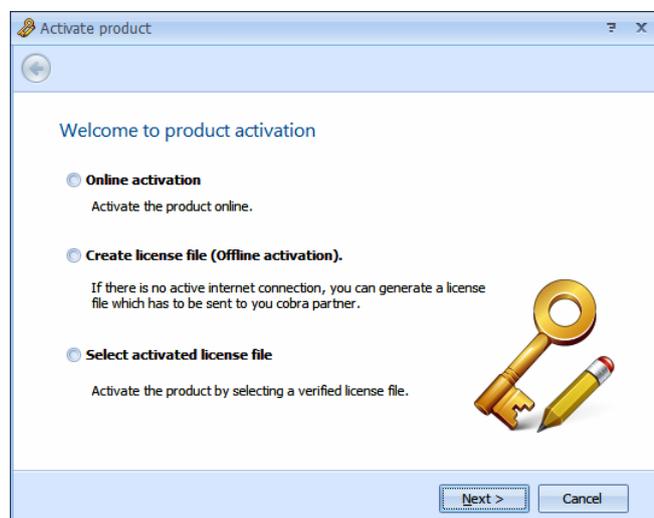
Starting the Activation Wizard

Should you be starting the program for the first time, or have you used the program as demo version before and the allocated time has expired, a selection dialog will be shown. Click the »Activate now« button.



The wizard can also be started under »File: System settings: System settings: General« via the »Activate Product« button. This could become necessary if you have purchased an additional license, for example, to use cobra for additional workstations. If you received a license file directly from cobra or your cobra partner, the software needs to be activated as well.

It is possible to activate the software online if you are connected to the Internet. Alternatively, offline activation is possible as well.



Online Activation

This is the quickest and most common way of activating your product.

In this dialog, enter the user name and password you received when purchasing the software.

The dialog box is titled "Activate product". It contains the following elements:

- Header: "Enter license information for product activation"
- Instruction: "Enter your license information here for product activation."
- Fields: "User code:" and "Password:" with corresponding input boxes.
- Checkbox: "Visible password" with a small square icon.
- Button: "Change password..."
- Footer: "Which data is transmitted?" with an information icon.
- Navigation: "Next >" and "Cancel" buttons.

Should your company have several locations, select one from the list.

You can rename the location in this dialog.

- To do so, click the button .
- Enter the new name for the location.

The dialog box is titled "Activate product". It contains the following elements:

- Header: "Select location"
- Instruction: "There are more than one location for your license. Please choose at least one location. Locations that are already in use, will be displayed in bold."
- List: A list box containing "Sales Department (Oxford)" (bold) and "Keyaccounts (Folkestone)".
- Section: "Location informations" with a sub-section for "Sales Department (Oxford)" showing:

Name:	Sales Department (Oxford) 
Available licenses:	15
Activation count:	1
Expiring date:	-
- Image: A globe with a red pushpin.
- Navigation: "Next >" and "Cancel" buttons.

Click »Activate product«.

The activation process will be completed and the software can be used as an unrestricted, full version for the number of workstations you defined with the purchase.

The dialog box is titled "Activate product". It contains the following elements:

- Header: "Activate product"
- Instruction: "All information for activation is collected. Please double check your input and select 'Activate product'."
- Text area: A scrollable box containing:


```
Product: CRM PRO
User code: Z485720
Location: Sales Department (Oxford)
Available licenses: 15
```
- Button: "Activate product" with a green checkmark icon.
- Navigation: "Next >" and "Cancel" buttons.



A location license is always bound to the installation location and may not be used more than once.

Creating a License File (Offline Activation)

In this dialog, enter the user name and password you received when purchasing the software.

The screenshot shows the 'Activate product' dialog box. The title bar reads 'Activate product'. Below the title bar is a navigation arrow. The main area contains the text 'Enter license information for product activation' and 'Enter your license information here for product activation.' There are two input fields: 'User code:' and 'Password:'. Below the password field is a checkbox labeled 'Visible password'. At the bottom right, there are two buttons: 'Next >' and 'Cancel'.

- Click »Create license file«.

The screenshot shows the 'Activate product' dialog box. The title bar reads 'Activate product'. Below the title bar is a navigation arrow. The main area contains the text 'Create license file'. There are three steps listed:

- 1st Step: Create license file. A button labeled 'Create license file...' is next to it.
- 2nd Step: Send data to cobra or your cobra partner.
- 3rd Step: You received an activated license file from cobra or your cobra partner. Using this wizard you can activate the product through this file.

 At the bottom right, there are two buttons: 'Finish' and 'Cancel'.

Save the file on your PC.

- Send the file to your cobra partner or directly to cobra. The file can be mailed from any PC connected to the Internet or can be copied to a data medium. Please make sure to add your sender address. If you are working with several locations, please specify for which location the activation is to apply.

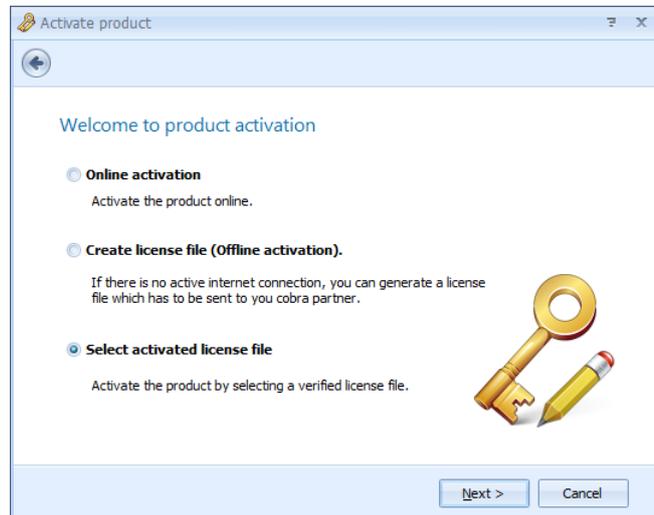
The screenshot shows the 'Save As' dialog box. The title bar reads 'Save As'. The address bar shows the path 'p104 Drive E (\p104) (H:) > Activation codes'. The main area shows a file explorer view with columns for Name, Date modified, Type, and Size. The file name is 'Offline License.rtf' and the save as type is 'cobra offline License (*.rtf)'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

Selecting Activated License File

After you have sent a license file, your cobra partner or cobra will send back an activated license file to you. The file must be imported in order to activate the software. Please make sure to save the activation file on the same PC where the file has been created.

In the wizard, click the »Select activated license file« option.

A dialog is shown where you can activate cobra using the license file you have received.

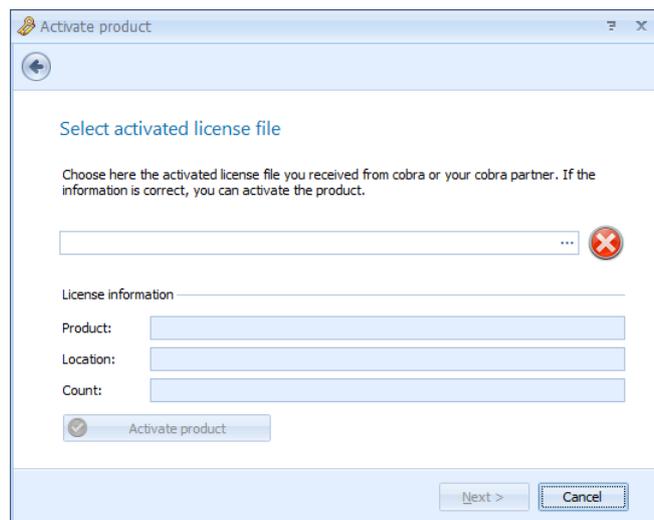


Click the   button.

Select the file you have received (file extension is usually *.ALF).

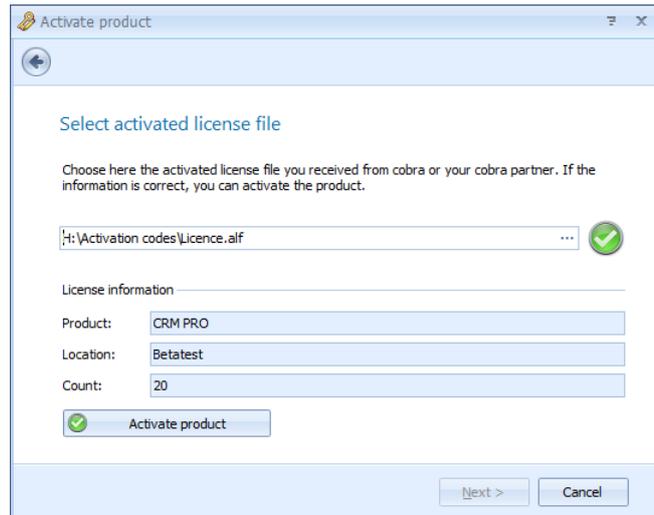
Confirm by clicking »Open«.

The file is imported and license information will be shown.



Click »Activate product«.

The activation is completed and the software can be used as an unrestricted, full version for the number of workstations you defined with the purchase.



Duplicate-Module

The Duplicate-Module must be activated separately.

- On the clients select »Data: Show: Duplicate-Module«.
- The License Manager is getting started.

Checking the Installation

After finishing the installation, you should check the installation paths and settings on all workstations and the server. The system settings can be found in the »Information: More: Product info: System info« menu.

- For the workstations, check if all computers use the same program version.
- Check the settings for file access.
- Check which users are currently logged on.
- If required, specify the access permissions for the individual data fields so that only the system administrator can access specific data.

Updating Clients with the Client Updater

As owner of an up-to-date warranty you will receive program updates (so-called »Patches«) on a regular basis. The patches will have to be installed in order to update your program to the newest release version.

The Client Updater is a plug-in supplied together with cobra. It will ensure that clients are updated automatically so that you do not need to install new software versions on every client manually. All you need to do is to store a patch file on the server and update the server. When clients are then started again, they will recognize that there is a new version and automatically update themselves.



As soon as one client is updated to the actual version, the other clients don't work properly till they are updated too.

To ensure proper software distribution, the Client updater will have to be installed on all clients. Clients where the installation is missing will not be updated.

- The easiest way of installing the updater is via the regular cobra setup under »Tools«.
- Alternatively:
 - You can find the Client update on your cobra data medium.
 - Go to the \EXTRAS\CLIENTUPDATER directory.
 - Double-click the file with file extension *.MSI and follow the instructions of the installation wizard.

Installing the client updater



You need to install the Client Updater separately, on *all* the clients to be updated.

There are two ways to do so:

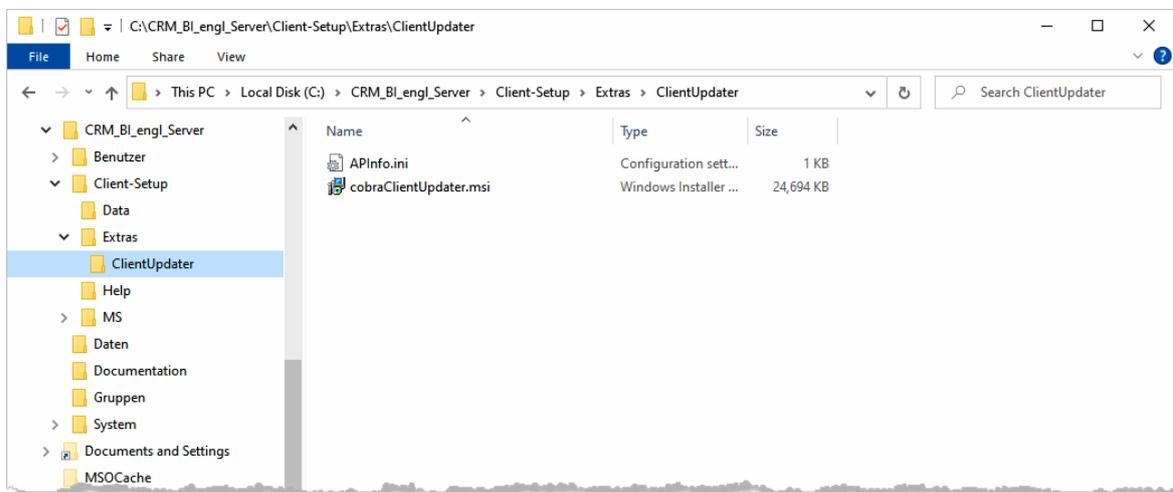
1. After cobra was installed, you call up »Tools«. Install the Client Updater from here.



2. Or you start installation of the Client Updater later.

You can find the installation file in your cobra server installation. There, go to the subdirectory »Client-Setup: Extras: Client Updater«.

Double-click the CobraClientUpdaterxxx.msi file.



A wizard will guide you through the installation.

Patch File

You will regularly receive patch files to update your cobra installation.

- Store the patch file on the cobra server. It must be stored in your server installation in the \Client-Setup subdirectory.

Installation on the first client

First of all, you must install the patch manually once .

- Open a client.
- In the Windows Explorer, go to directory containing the patch file.
- Double click the patch file.

This process will update the server as well as the client.

Installation on a further client

Installation on all the other clients the Client Updater was installed on will be carried out automatically. This is done whenever cobra is started again on a client. During the cobra start, the Client Updater will recognize that the data on the server were updated.

The user will see a message and be asked to wait.

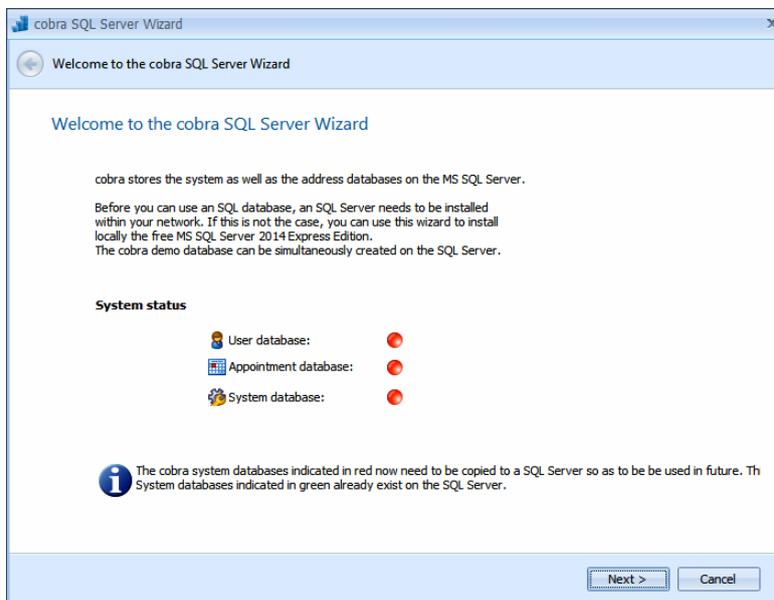
The Client Updater will automatically update the client. cobra is then started.

The SQL Server Wizard

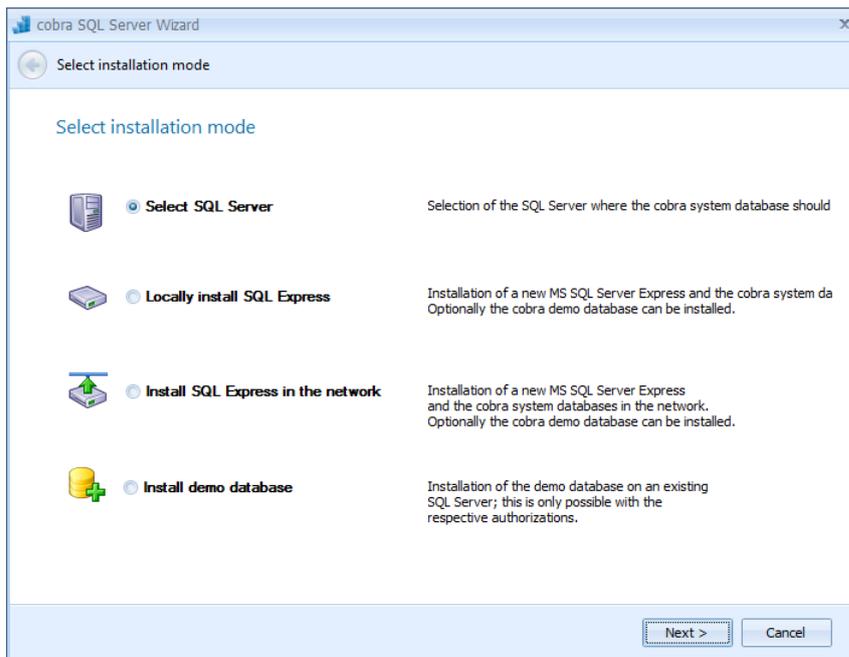
When the installation is completed, a wizard opens that supports you to manage the system databases on the SQL Server. If you want to practice, you can also create a demo database with imaginary data.

You can also start the wizard manually.

- To do this, go to the \SYSTEM\SQL SERVER subdirectory of your cobra installation.
- Double-click the SQLServerSetupWizard.exe file.



The red icons indicate which databases do *not* exist. In case of a new installation, all databases will be marked accordingly. With click »Next« on you can go to the next step.



You can choose from three different installation modes:

Select SQL Server

Here you define an existing SQL Server where you want to store the database. The server installation must already exist, i.e. it must have been installed before.

If a SQL Server Express installation already exists – in the network or locally – you need to select this option in order to connect to the SQL Server Express.

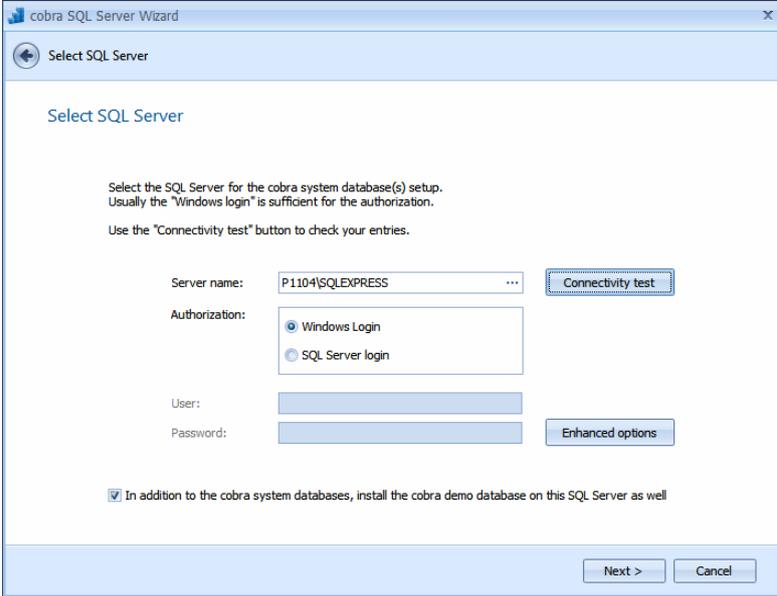
Locally install SQL Server Express Edition

SQL Server Express Edition is the “little brother” of the SQL Server and is provided free of charge within your cobra software package. *Details can be found on page 26 ff.*

Install SQL Express in the network

In order to use SQL Server Express as server in the network, you need to install SQL Server Express locally on the computer which will be used as server. This means, you cannot install the SQL Server Express from a different server! Later on you connect from each client to the SQL Server Express.

Selecting Existing SQL Server (or Existing SQL Server Express Edition)



The screenshot shows the 'cobra SQL Server Wizard' window, specifically the 'Select SQL Server' step. The window title is 'cobra SQL Server Wizard' and the step title is 'Select SQL Server'. The main content area contains the following text and controls:

Select the SQL Server for the cobra system database(s) setup.
Usually the "Windows login" is sufficient for the authorization.
Use the "Connectivity test" button to check your entries.

Server name: P1104\SQLEXPRESS ...

Authorization: Windows Login SQL Server login

User:

Password:

In addition to the cobra system databases, install the cobra demo database on this SQL Server as well

Next >

We recommend the installation of a demo database with imaginary data for practicing in the same step.

Authorization There are two different modes to log in to the SQL Server.

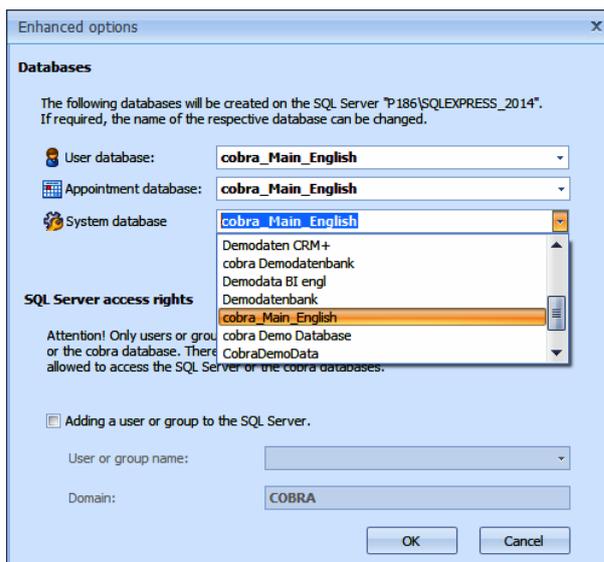
Windows login

This login mode is a good solution if the database is accessed only inside the domain. The SQL Server authenticates the user automatically via the user name or the group membership. As default, two local accounts are configured in the SQL Server: these are the local group account and the local user account, each named »Administrator«.

SQL Server login

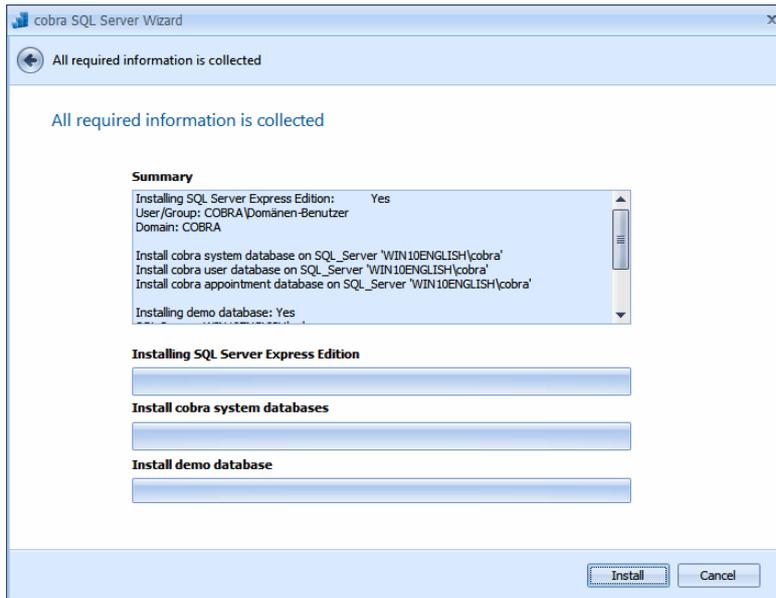
This login mode is used if external users access the database as well, or, if Windows domains are not used. In this case, the SQL Server checks if the user has typed in a valid SQL Server login name. If the login is incorrect, the connection is denied.

If you want to define additional settings, click »Enhanced Options«.



In this dialog you can save the system files on the SQL Server in databases which are named differently. Just type in the name of the new database.

You can also select one or more existing system databases from a SQL Server.



- With click on »Install« the databases are created. Additionally to each of the databases, ADL files are created in the system directory. If you are installing cobra anew at a later time and want to access the same database(s), please make sure to have a backup of the ADL files which you can copy to the system directory of the new installation later on.

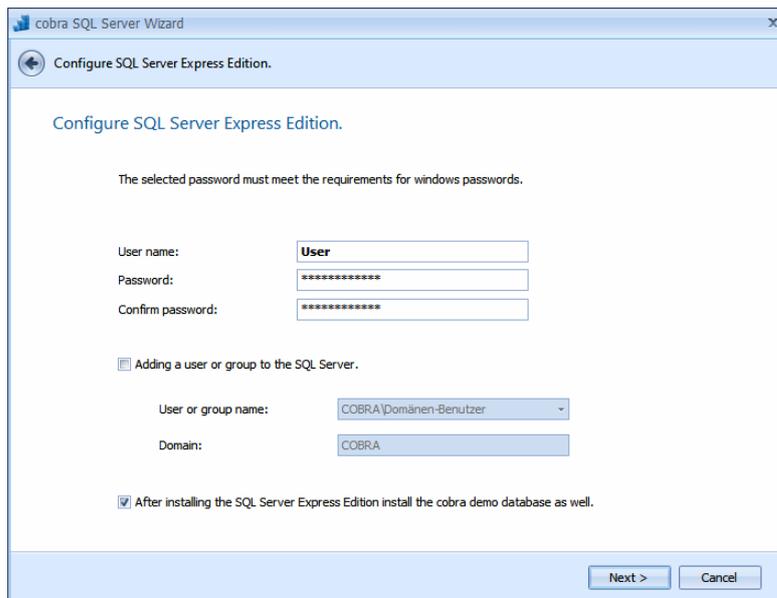
For a *single workstation installation* this is the last step and you can now start the program.

For a *network installation* you need to install the single clients now.

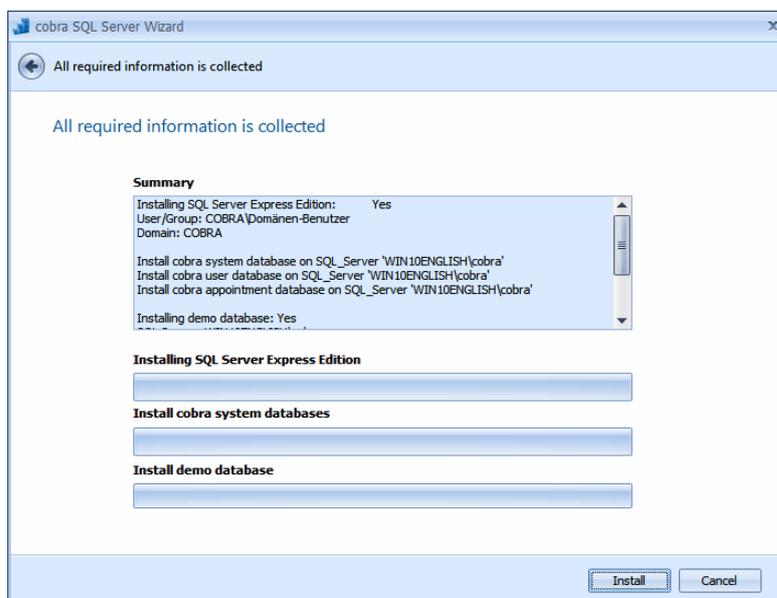
Locally Installing SQL Server Express Edition

It is also possible to install the SQL Server Express locally which is provided within your cobra package. Information about the difference between the SQL Server and SQL Server Express can be found in the Internet.

- A wizard opens which guides you through the installation procedure.



We recommend the installation of a demo database with imaginary data for practicing in the same step.



For a *single workstation installation* this is the last step and you can now start the program.

For a *network installation* you need to install the single clients now.

Installing SQL Server Express in the Network

Information about the difference between the SQL Server and SQL Server Express can be found in the Internet.

- Install the SQL Server Express locally on the computer that will be used as a server, following the instructions in this manual.
- Afterwards install the single cobra clients on the respective computers.

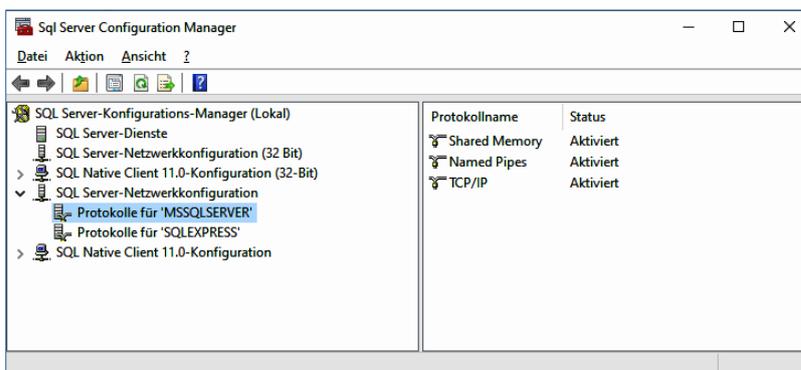
Now connect to the SQL Server Express on the computer which is used a server.

- This is done in the last step of the installation. Choose the option »Select SQL Server« in the SQL Server Wizard.
- Now select the SQL Server Express as SQL Server on the computer which is used a server.
- The system databases are created on the selected SQL Server Express.

For a *single workstation installation* this is the last step and you can now start the program.

For a *network installation* the single clients are installed now. Afterwards the SQL Server Express is configured which is the prerequisite that all clients can access this server instance.

- In the Windows Start menu, select the MS SQL Server program group.
- Or open your Windows installation.
In \SysWOW64 you find the SQLSERVERMANAGERxxx.msc.
Double click it.
- Define the settings which are shown here:



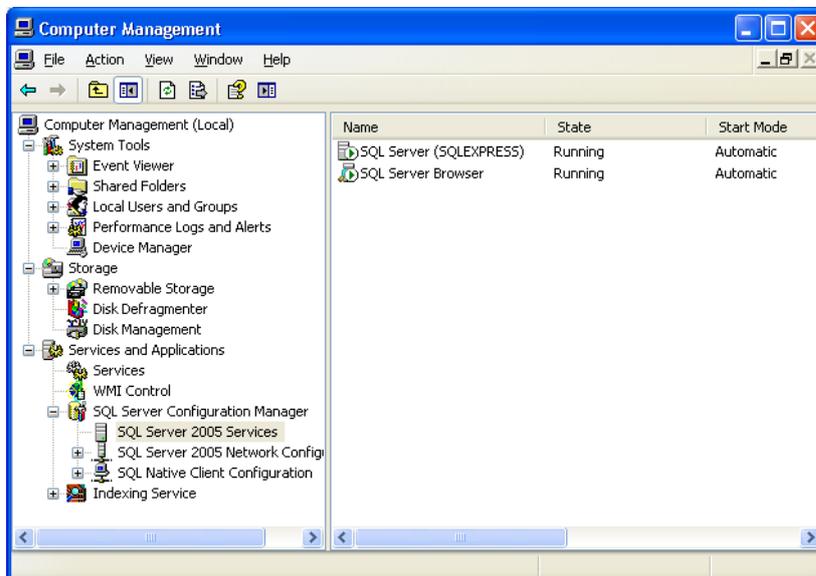
Notes on the Installation

Management Console

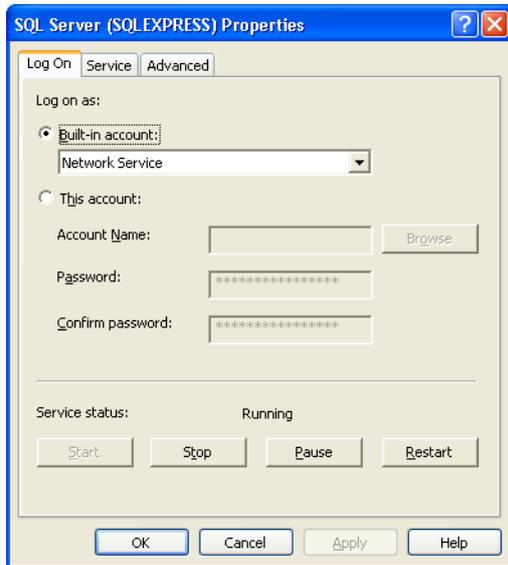
SQL Server runs as a service and is performed under a user account. Changes are applied in the Microsoft Management Console (MMC).

The Management Console can be found in the Control Panel in the »Administrative Tools« section under »Computer Management«.

In the dialog window on the right side, click »SQL Server« (with the right mouse button) and select the »Properties« command from the context menu.



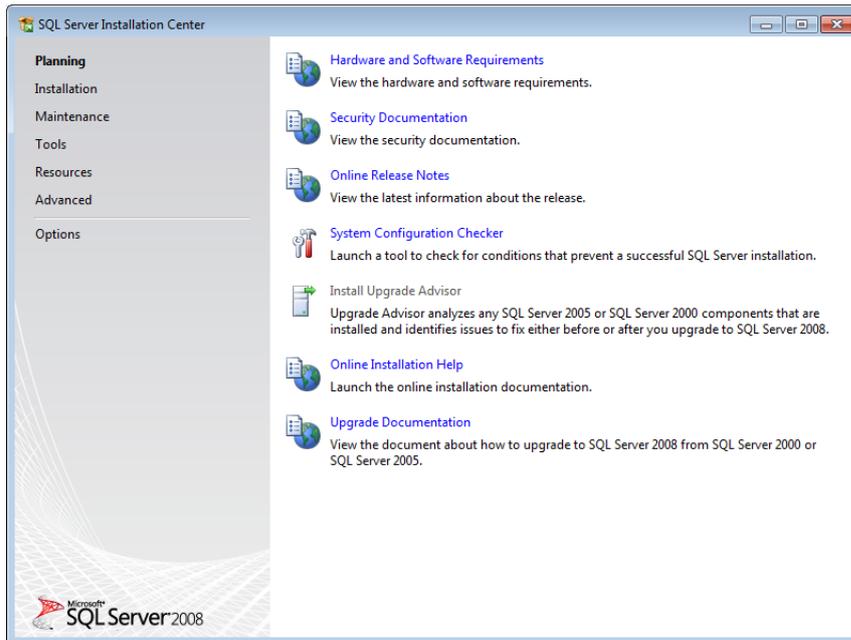
As default, the service is operated under the integrated account »Network service«. Should you prefer to use a different account, you can select it under »This account«.



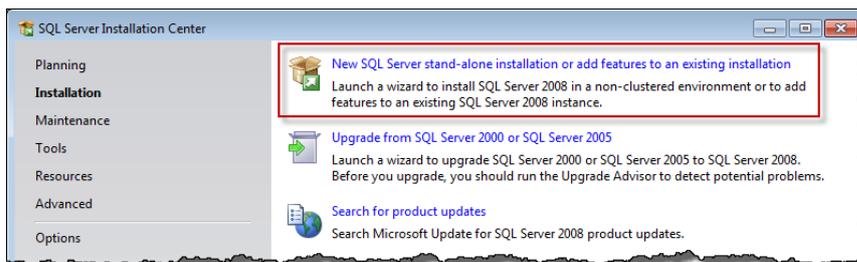
Microsoft SQL Server Management Studio Express (SSMSEE)

Microsoft SQL Server Management Studio Express (SSMSEE) is a free, easy to use graphical administration tool for the management of SQL Server Express Edition and SQL Server Express Edition with Advanced Services. Please make sure to refer to the Microsoft documentation.

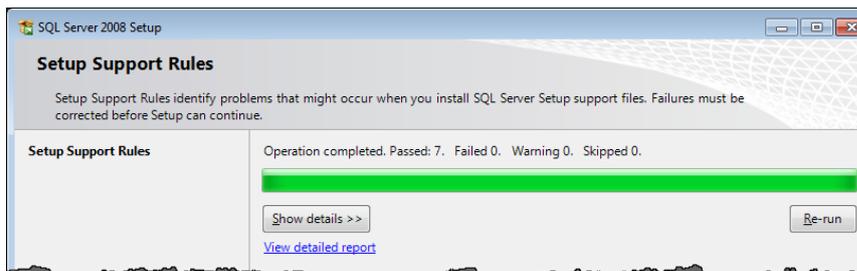
- The software can be found on your cobra data medium in the folder `\EXTRAS\SQLMANAGEMENTSTUDIO`.



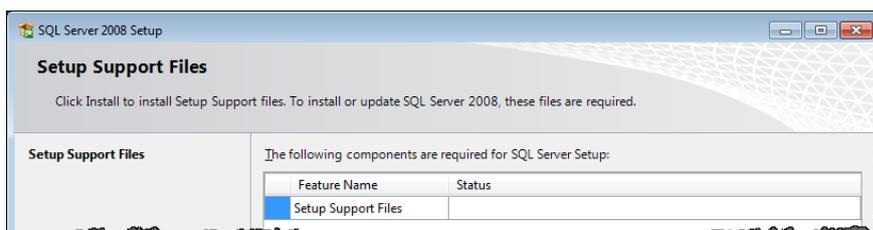
- Click the »Installation« command to the left.



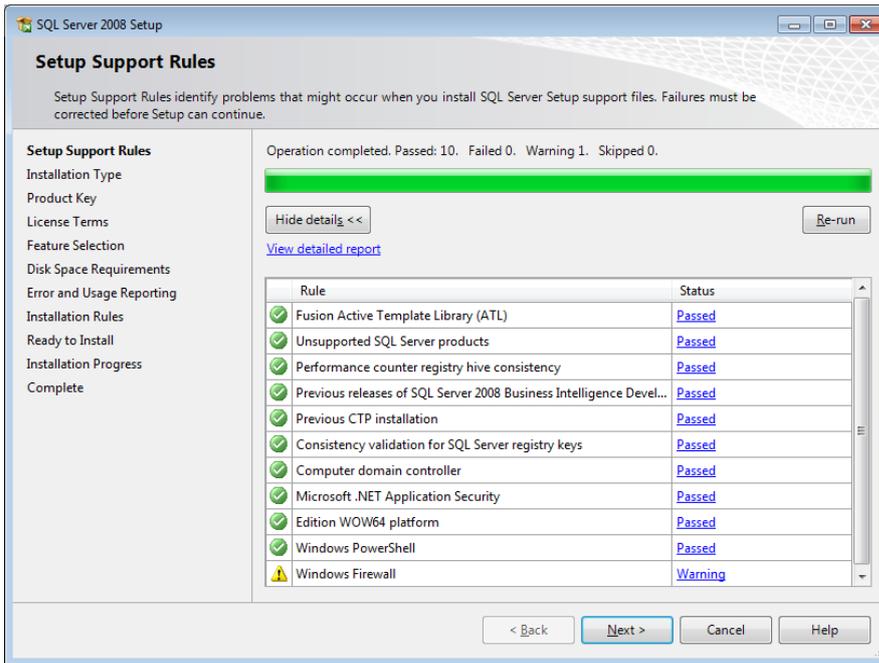
- Click the first option, as selected in the figure.



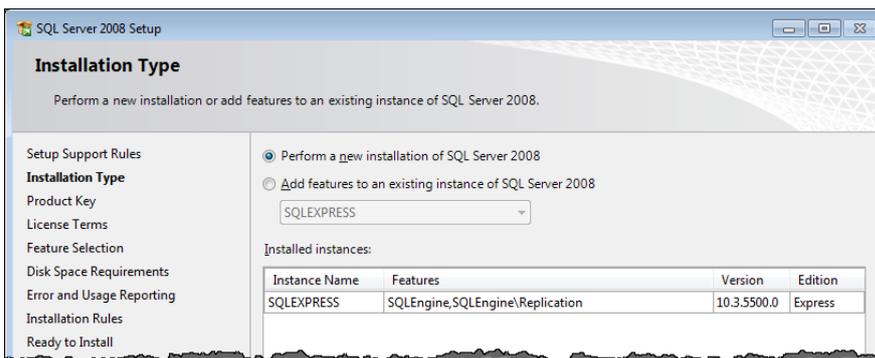
- Confirm with OK.



- In this dialog, click »Install«,

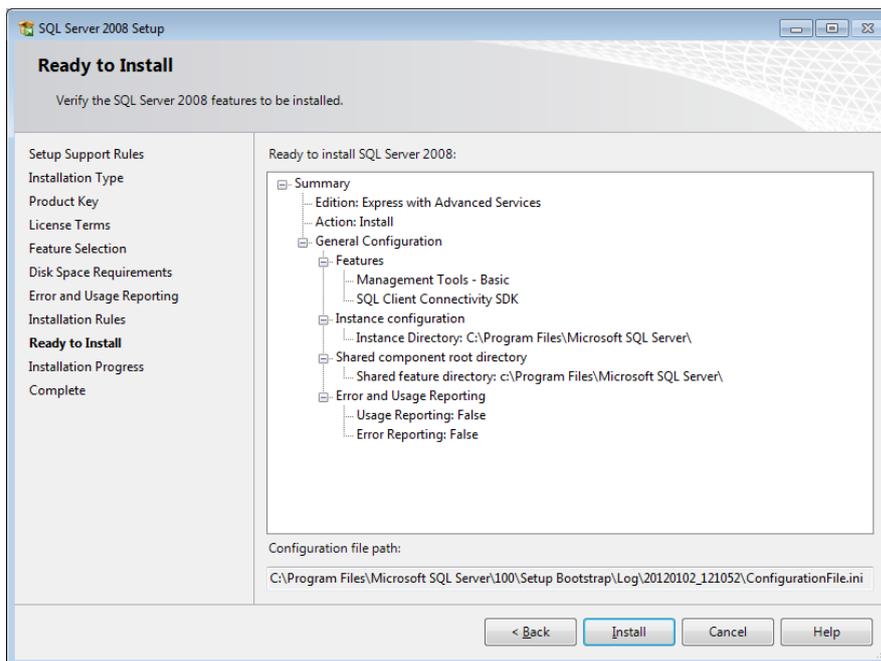


- Click »Next« until the following dialog is shown:

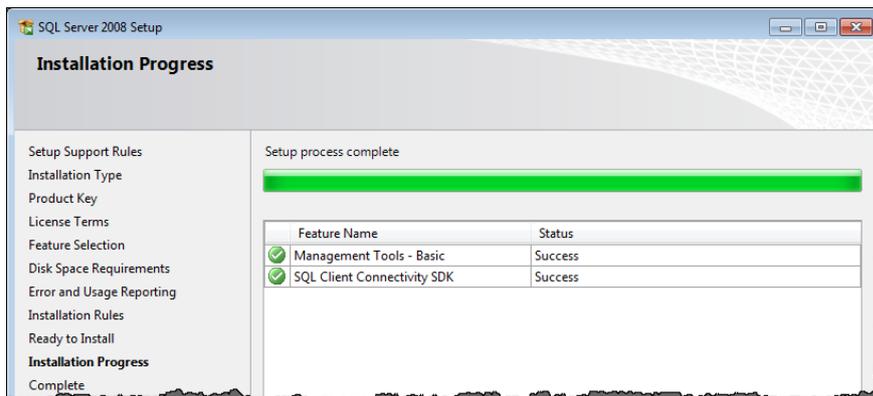


- Make sure to select the option »Start new installation of SQL Server«!
- In the following dialogs, click »Next« until the feature selection dialog is shown, as in the figure below:
- Select the option »Management tools«.

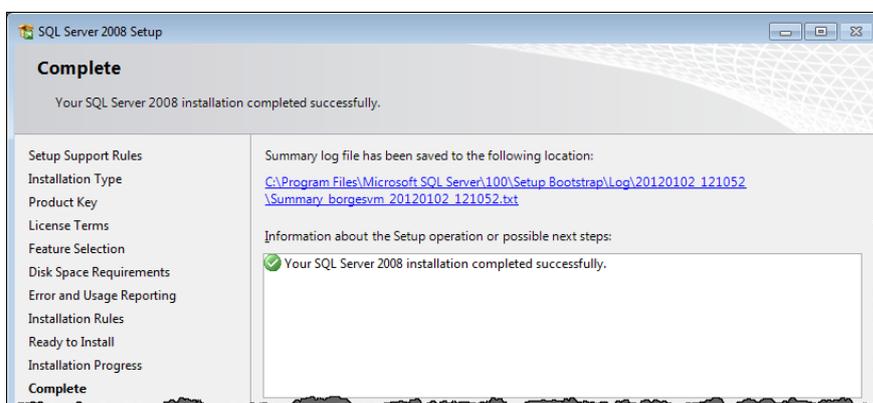
- Click »Next« until the following dialog is shown:



- Confirm the summary with click on »Install«.

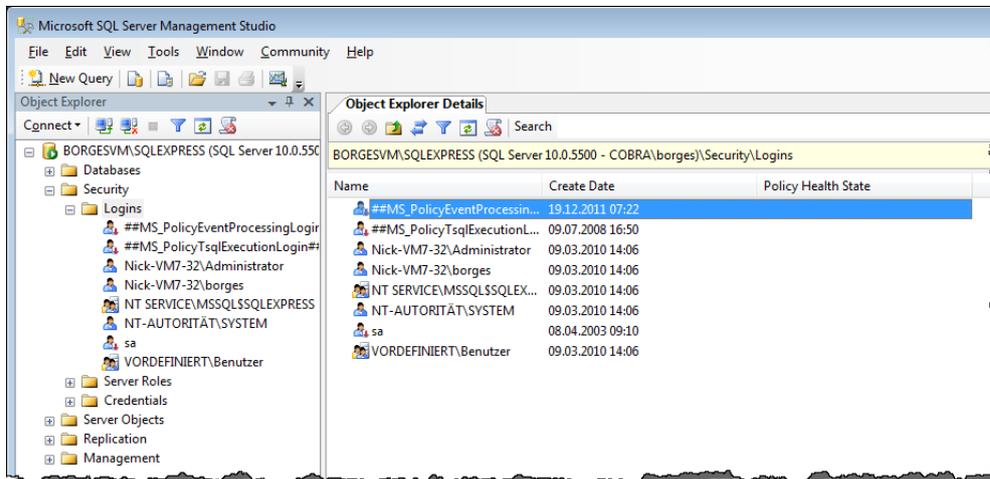


- Confirm setup completion with click on »Next«.
- The installation is completed now.

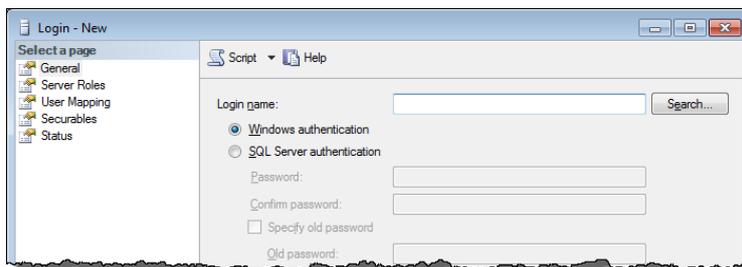


User and Security Settings

During the SQL Server installation, an “sa” account is created as built-in account with full control permission for the server.

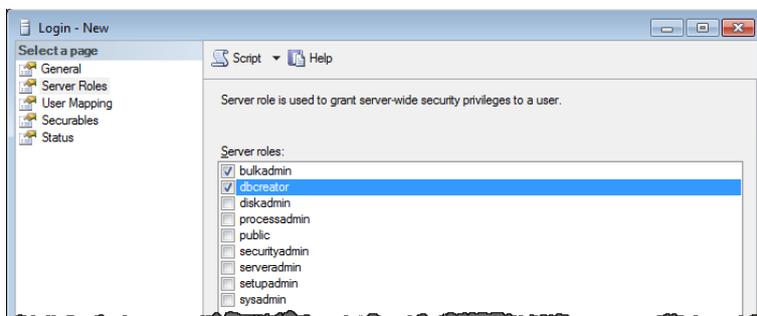


Users are set up via »Security – Authentication«. Right-click to call the context menu and select the »New Login« command.

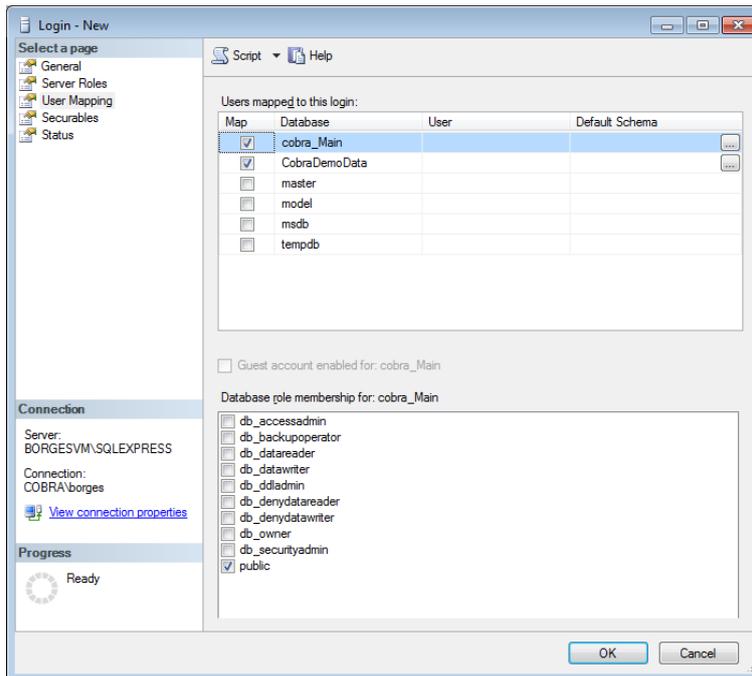


Under »Login Name« you may choose groups from the domains. This way, you save yourself the individual defining of all group members – but you can just as well define individual group members as users.

A »Server Role«, containing the individual user privileges, is assigned to each user:



Under »User Assignment« you can specify which databases a user can access.



In the »Membership« list you can see which users have been assigned a database role.

Database Role	Privileges
db_accessadmin	Allow/deny database access
db_backupoperator	Instruct commands for database backup and maintenance
db_datareader	Read-access for all user tables
db_datawriter	Write-access for all user tables
db_ddladmin	Execute DDL statements
db_denydatareader	No read-access for all user tables
db_denydatawriter	No write-access for all user tables
db_owner	Unrestricted access permissions for the database
db_securityadmin	Administrate roles, memberships and privileges for the database

Database roles (db_datareader, db_datawriter) are required for the login

Every user that can access a database is automatically added to the "Public" database role.

The page features two large, thick blue curved shapes. One is a wide, shallow arc on the left side, and the other is a narrower, deeper arc on the right side, partially overlapping the first one.

cobra - computer's brainware GmbH

Weberinnenstraße 7
D-78467 Konstanz

Telefon 07531 8101-0
Telefax 07531 8101-22
info@cobra.de

www.cobra.de