prevero
a Unit4 company

# Getting Started

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# Support

Customers with a valid maintenance contract are eligible for technical and operational support:

Support Service:

For support, please send an email to support.professional@unit4.com or call the hotline: Monday - Friday, from 9 a.m. to 5 p.m.

In Austria:

Phone: +43 316 8010-670
Fax: +43 316 711 557

In Germany:

Phone: +49 89 455 77-670

If you have technical problems, please provide us with the user protocol as well as screenshots of the relevant error messages to enable our support team to find a solution as quickly as possible.

In our Competence Center, you can find answers to frequently asked questions as well as comprehensive online documentation: http://competence.prevero.com/

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# 1 Introduction

## 1.1 About this manual

This manual provides support for the installation of single workstation versions, as well as server versions of professional planner. It offers a comprehensive overview of the technical possibilities and requirements of professional planner systems.

## 1.2 Scope of serial numbers

Depending on the professional planner licenses you purchased, you received one or more of the following serial numbers:

- professional planner single user (single workstation)
- professional planner server
- professional planner client
    - Administrator (including professional Services for Microsoft® Excel)
    - Analysis & Reporting User
    - App User (including professional Services for Microsoft® Excel)

# 2 System Requirements

Before installing professional planner on your computer, please make sure that your system meets the following requirements:

| Single Workstation | Server | Client |
|---|---|---|
| **Microsoft operating system**: Windows 11, Windows 10 (recommended), Windows 8.1, Windows 8 | **Microsoft operating system**: Windows Server 2022, Windows Server 2019, Windows Server 2016 | **Microsoft operating system**: Windows 11, Windows 10, Windows 8.1, Windows 8 |
| **Database system:** Microsoft SQL Server 2019/2017/2016, Microsoft SQL Server 2019/2017/2016 Express) (local database files only) | **Database system:** Microsoft SQL Server 2019/2017/2016 | **Not required** |
| **Processor:** at least Dual Core | **Processor:** at least 2 x Quad Core | **Processor:** at least Dual Core |
| **Clock rate:** at least 2.0 GHz | **Clock rate:** at least 2.6 GHz | **Clock rate:** at least 2.0 GHz |
| **Working memory:** at least 4 GB RAM | **Working memory:** at least 16 GB RAM | **Working memory:** at least 4 GB RAM |
| **Hard disk system:** at least 10 GB free space | **Hard disk system:** 4x SAS hard disk (at least 4 disks for the operating system, database log files, database data files and database temp files) – SQL Server disks formatted for sector size 8KB – capacities depending on requirements between 100 GB and 1 TB | **Hard disk system:** at least 10 GB free space |
| **Not required** | **Network interface card:** Network interface card (GBit) | **Not required** |
| **Web browser:** Microsoft Internet Explorer 8.x or higher | **Web browser:** Microsoft Internet Explorer 8.x or higher | **Web browser:** Microsoft Internet Explorer 8.x or higher |
| **Screen resolution:** 1280 x 1024 at 32 Bit True Color | **Screen resolution:** 1280 x 1024 at 32 Bit True Color | **Screen resolution:** 1280 x 1024 at 32 Bit True Color |
| **Components:** Visual C++ runtime components, Microsoft .NET Framework 4 or higher (will be automatically installed) | **Components:** Visual C++ runtime components, Microsoft .NET Framework 4 or higher (will be automatically installed) | **Components:** Visual C++ runtime components, Microsoft .NET Framework 4 or higher (will be automatically installed) |
| **Administration permissions** | **Administration permissions** | **Not required** |

# 3 Upgrade

If you are working with an older version of professional planner, you can upgrade to the new version. Please note that not all professional planner versions support a direct upgrade:

| Version | Upgrade possibility |
|---|---|
| PP 3.0 and before | ✗✗ |
| PP 3.5 | ✗ |
| PP 4.0 | ✗ |
| PP 4.1 | ✗ |
| PP 4.2 | ✓ |
| PP 4.3 | ✓ |
| PP 2008 | ✓ |
| PP 2010 | ✓✓ |
| PP 2011 | ✓✓ |

**Legend:**

| | |
|---|---|
| ✗✗ | Unfortunately, it is not possible to upgrade to professional planner 8. However, our consultants are happy to implement your requirements with professional planner 8. |
| ✗ | Depending on individual adjustments and intended use, an upgrade requires a certain amount of effort. However, our consultants are happy to evaluate the effort and implement your requirements with professional planner 8. |
| ✓ | An upgrade is possible. However, please note the information in chapter 3.1, as the new installation directories and supported database systems require different upgrade steps. |
| ✓✓ | An update is possible without a large amount of effort. However, please note the information in chapter 3.1, as .NET managers may require special attention during the upgrade. |

## 3.1 Upgrading contents

### 3.1.1 Datasets

professional planner 8 supports the following database systems:

- Microsoft SQL Server 2019/2017/2016
- Microsoft SQL Server 2019/2017/2016 Express (local database files only)

Older versions of professional planner also supported Sybase, Oracle and SQL Server 2000 or SQL Server 2000 Desktop Engine. To be able to work with datasets in these formats, they must be converted to Microsoft SQL Server Version 2014 or higher datasets.

Please note that ABI2 datasets are not supported anymore and must thus be converted to ABI3.

ⓘ Once a dataset has been opened in professional planner 8, it can no longer be used in earlier versions.

### 3.1.2 Business Content Libraries (BCLs)

Since version 4.3, there have been continuous changes in the BCLs, as well as many extensions (e.g., additional cost groups, tax balancing, etc.). In professional planner 8, the tax calculation was modified and extended. To make use of these extensions in your datasets, you need to convert them to the "Finance" BCL.

If you have a customized BCL and would like to benefit from the above-mentioned changes, please contact your consultant.

ⓘ BCLs based on professional planner 8 cannot be used in earlier versions.

### 3.1.3 Documents

Documents can be opened in professional planner 8 without any migration steps needed.

ⓘ Documents edited or created in professional planner 8 cannot be used in earlier versions.

### 3.1.4 Manager

When using .pba managers from professional planner version 2008 or earlier, you have to check if there are any storage directories and queries on registry entries that must be changed. .pba managers from version 2010 onwards can still be used. Contact your consultant or the person who created the manager to carry out a check.

.NET managers must be recompiled with professional planner 8. For a recompilation, please contact your consultant or the person who created the manager.

Please note that .pba managers can be integrated into documents and that they are started automatically when the document is opened. If this is the case, disregarding the points mentioned above can lead to error messages.

ⓘ It is possible that .pba managers based on professional planner 8 or newer cannot be used in earlier versions.

ⓘ .NET managers based on professional planner 8 or newer cannot be used in earlier versions.

### 3.1.5 User interface and workspace

Due to the new ribbon navigation, customized user interfaces are not supported anymore and must be recreated in professional planner 8. Please also note that there are new default interfaces in professional planner 8.

HTML workspaces can still be used in the new version but in some cases you may have to adjust directories, managers or integrated scripts. When using interfaces from professional planner version 2008 or earlier, you have to check if there are any storage directories and queries on registry entries that must be changed. User interfaces from version 2010 onwards can still be used. Contact your consultant or the person who created the user interface to carry out a check.

We recommend you to switch to the new monitor technology available from version 2011 onwards.

Version 8.3 of professional planner introduces a new generation of monitors based on a new technology. However, monitors from previous versions (2011 or later) still work when integrated into the user interface.

ⓘ For more information about the update, please visit our Competence Center.

## 3.2 Uninstalling older versions

When upgrading from professional planner 8.3 or older versions to professional planner 8.3.1, the old version and all add-ons must be uninstalled first.

Just like installing, uninstalling requires administrator rights. Close professional planner before starting the uninstalling process.

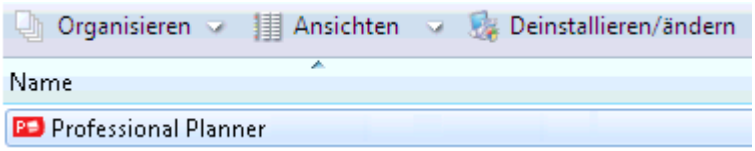
When uninstalling server versions, it is necessary to stop the professional planner service.

ⓘ Before uninstalling professional planner, save all files you created in a separate folder (e.g., on the desktop or under My Documents).

ⓘ Some components such as datasets, managers, customized BCLs and user interfaces may require adjustments in order to be used in professional planner 8. For further details, please refer to chapter 3.1.

Right-click on the **Start** button to open **Programs and Features** in Windows 8.

- Select the program **Professional Planner** and click the "Uninstall" button.




- Once the old version has been successfully uninstalled, we recommend deleting the existing installation directory in the MS Explorer (…/Program Files/…).

When uninstalling version 4.3 or higher, it is particularly important to do so in Control Panel. Deleting the *professional planner* folder and the corresponding registry entries is not enough and may cause errors.

ⓘ In order to completely uninstall the program, it is necessary to restart your computer, otherwise, the new installation cannot be executed correctly.

ⓘ Please note that you have received new serial numbers for professional planner 8 or higher versions. All serial numbers from older versions are no longer valid and cannot be used to install professional planner 8 or higher versions.

# 4 Installation

## 4.1 Preparations

Extract the downloaded software package. The installation wizard starts automatically.

ⓘ If the installation wizard does not open automatically (e.g., after restarting the system), it can be launched by double-clicking the file *Setup.hta*.

Please follow the on-screen instructions which will guide you through the installation process. You will also be supported in checking the prerequisites.

## 4.2 Database systems

### 4.2.1 Microsoft SQL Server

ⓘ **Important:** Make sure to enter an SQL Server administrator during server configuration. Otherwise, you can neither use professional planner nor set up the SQL Server. This setting cannot be defined later!

### 4.2.2 Microsoft SQL Server Express Versions

Microsoft SQL Server Express is a royalty-free, redistributable database engine that is fully compatible with the SQL Server. It is mainly used on local single workstations.

Compared to the full version of Microsoft SQL Server, there are the following limitations:

- Only one CPU or four cores
- Maximum of 1 GB RAM
- 10 GB maximum database size
- No SQL Server Agent

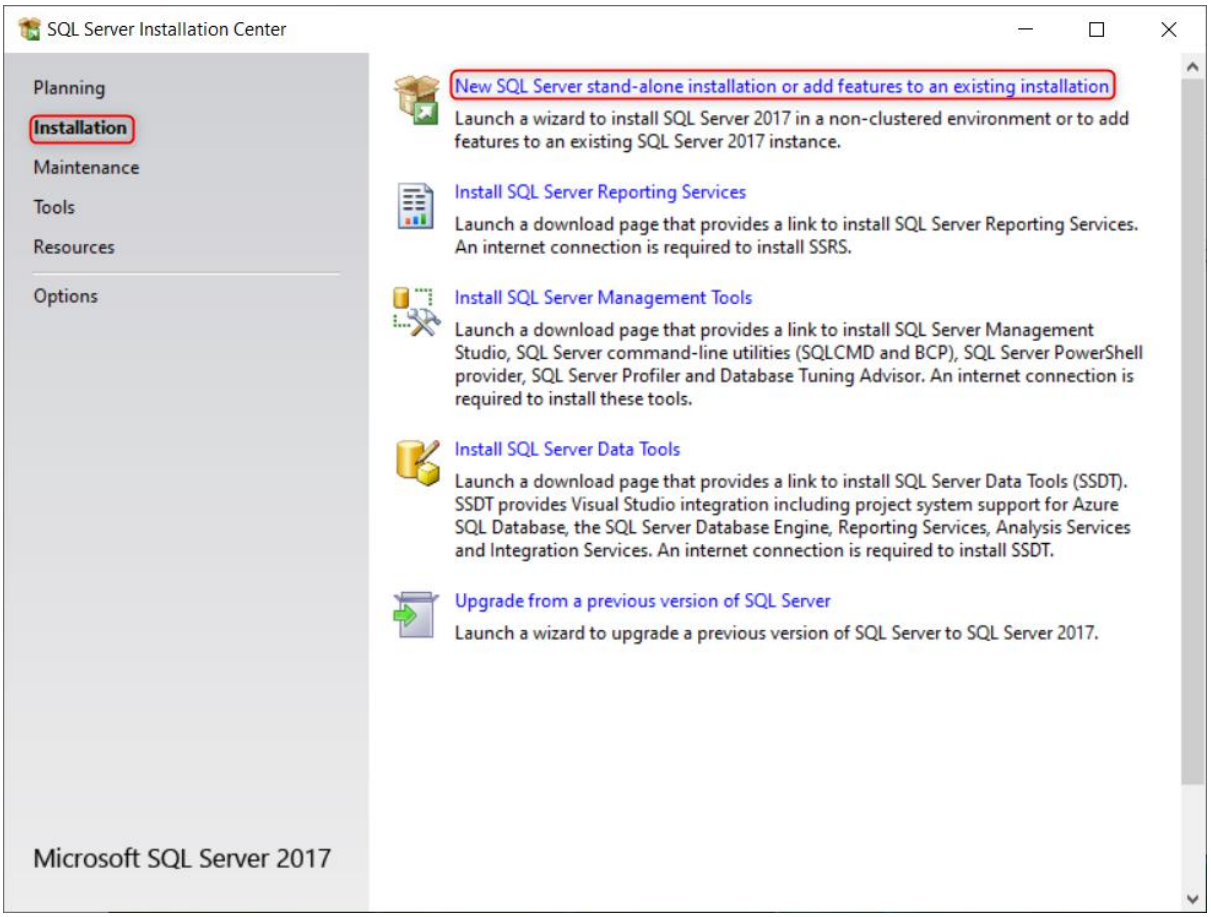
Microsoft SQL Server Express uses an instance name as default. For further details, please refer to chapter 5.

### Installing

Microsoft SQL Server 2017 Express can be downloaded in the Microsoft Download Center [Microsoft Download Center](Microsoft Download Center).

Follow these steps after the download:

- Double-click to open the setup file. The file is extracted and the Microsoft installation wizard opens.
- Select **Installation** on the left. Click **New SQL Server stand-alone installation or add features to an existing installation** if you do not have an SQL Server installed. If you already have a previous version of SQL Server installed on your system, you can perform an upgrade. Select **Upgrade from a previous version of SQL Server**.

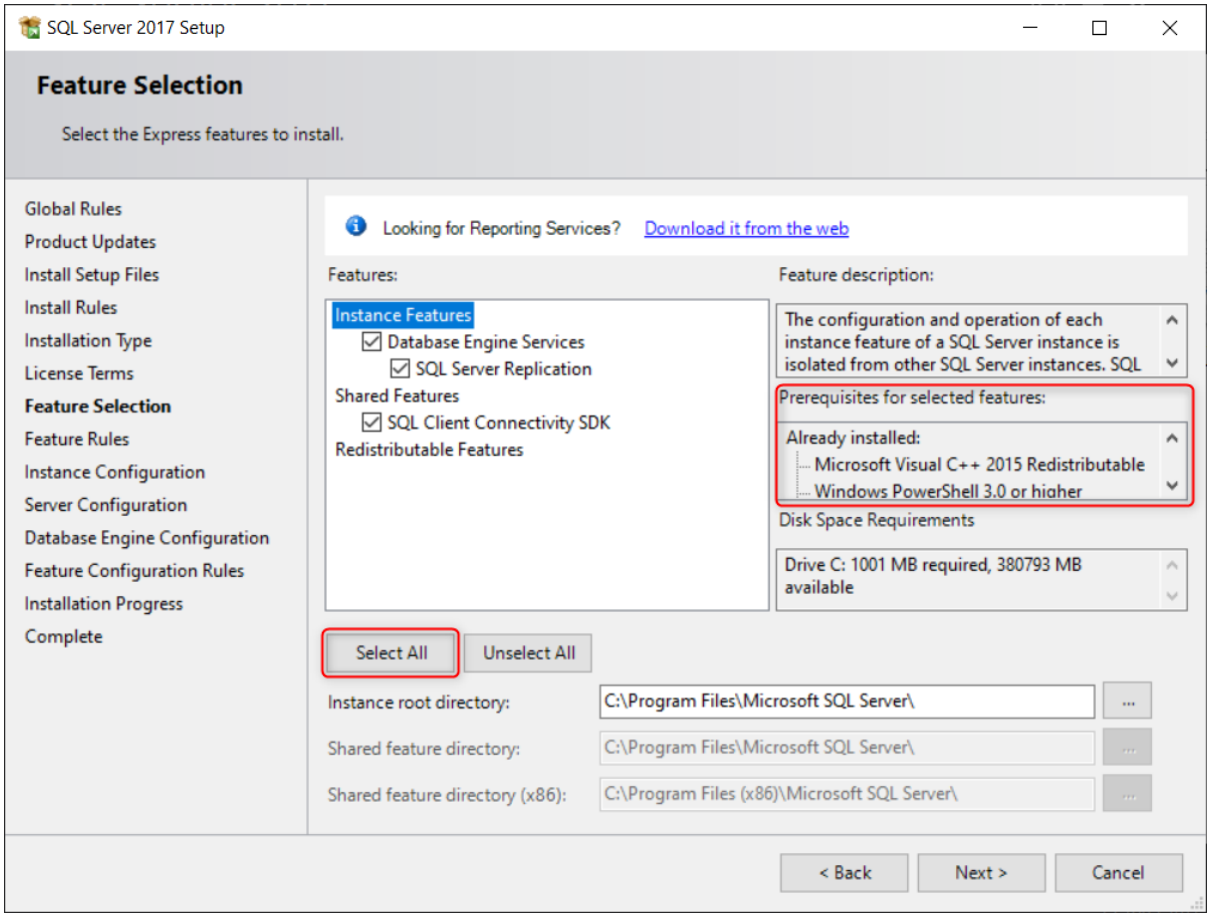



- Next, you are asked to accept the license terms. The installation can only be continued if you accept them. Please confirm by clicking **Next**.
- After ensuring that the system meets the requirements, the first setup files are installed.

- In the step *Feature Selection*, please click **Select All** to make sure that all required components will be available.

ⓘ Please pay attention to the notes on the right side of the window. Here you can find information if a component needs to be installed manually.

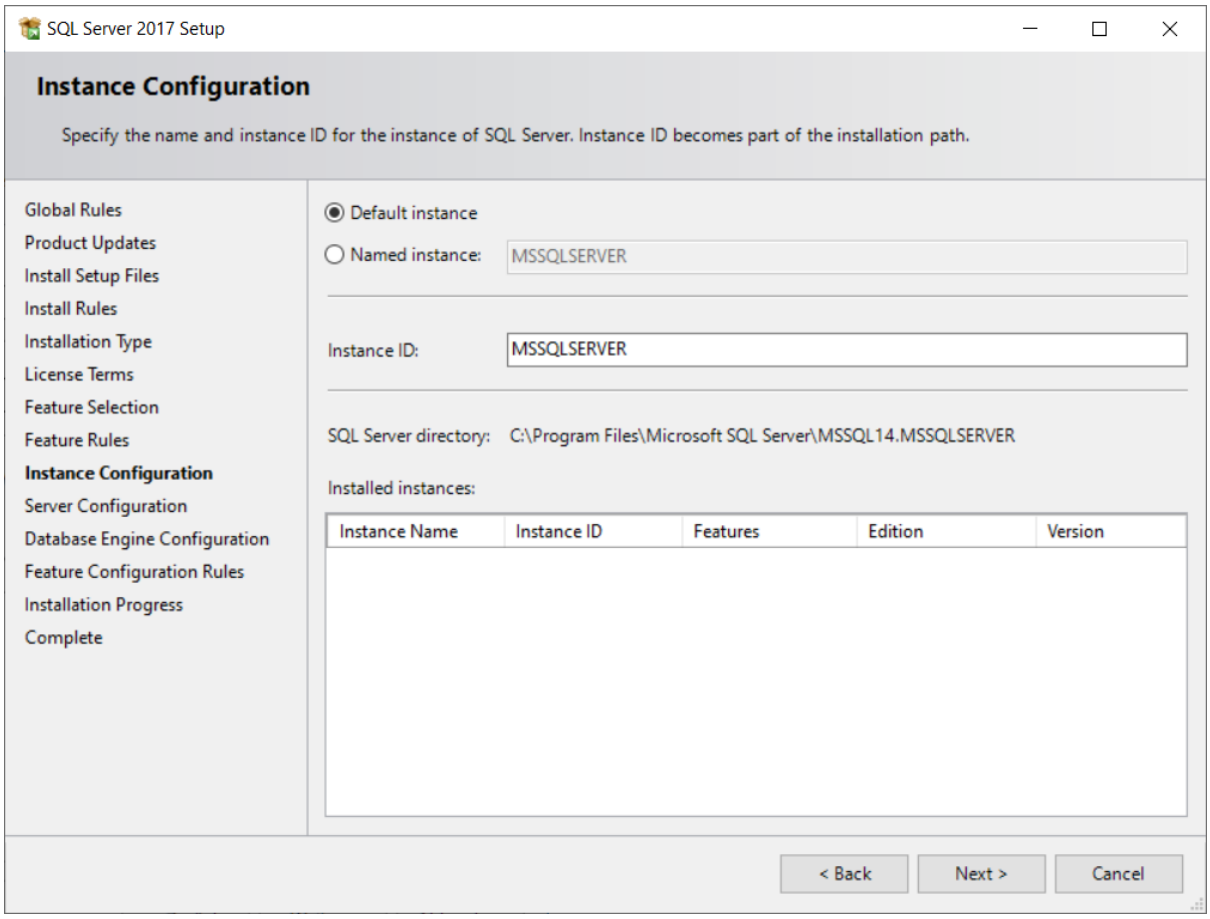
- Confirm by clicking **Next**.



- In the next step, you can define a named instance you want professional planner to work with. This makes only sense if you want to physically separate an existing SQL Server from a new SQL Server for professional planner. If it is the only one you can select **Default instance**.

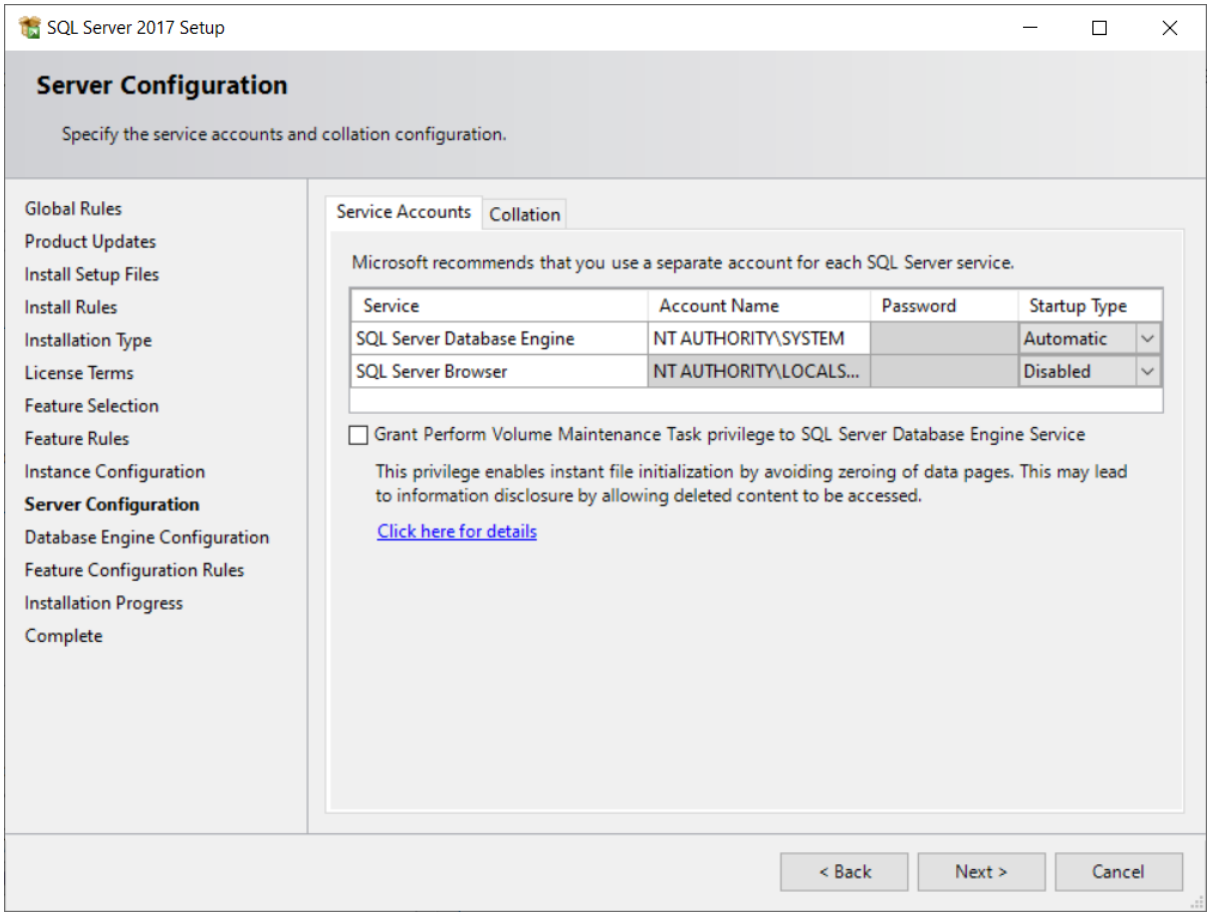
ⓘ The instance must be specified in professional planner later. For further details, please refer to chapter 5.

- Please confirm by clicking **Next**.



- Specify the accounts for the SQL Server services in the *Server Configuration* dialog.

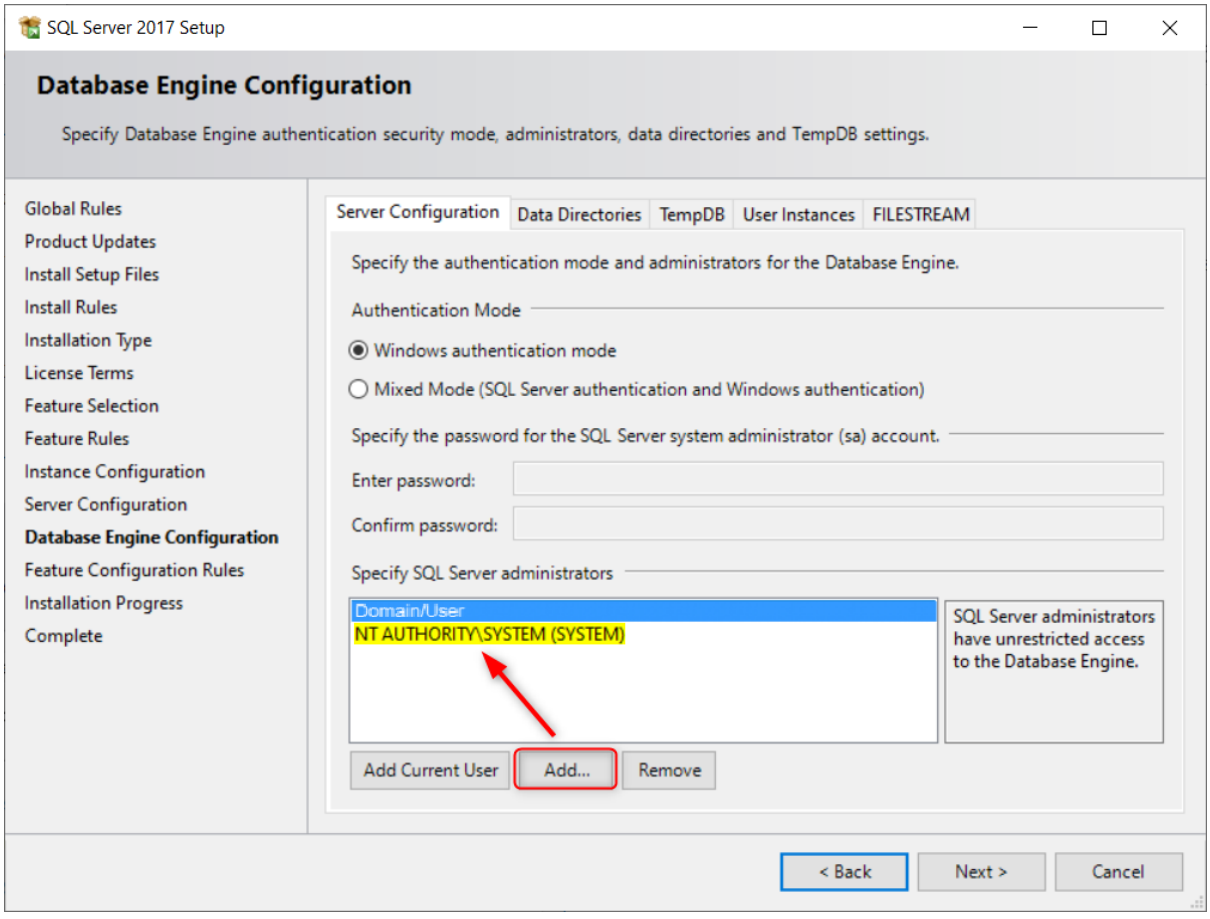
ⓘ You need to set up a separate system account, which must subsequently be given sysadmin rights.



- Please select the authentication mode **Windows authentication mode** in the step *Database Engine Configuration*.

ⓘ **IMPORTANT:** Make sure to enter an SQL Server administrator. Otherwise, you can neither use professional planner nor set up the SQL Server. This setting cannot be defined later!

- The current user is already entered as server administrator. Use **Add...** to add the user "System".
- Please confirm by clicking **Next**.




- In the window *Error and Usage Reporting* you can select if you want to send information to Microsoft. This does not affect functionality. Please confirm by clicking **Next**.
- Now all selected components are installed. You receive a confirmation if the installation has been completed successfully. If there have been errors during installation, please refer to the details provided by Microsoft.

**Microsoft SQL Server Management Studio**

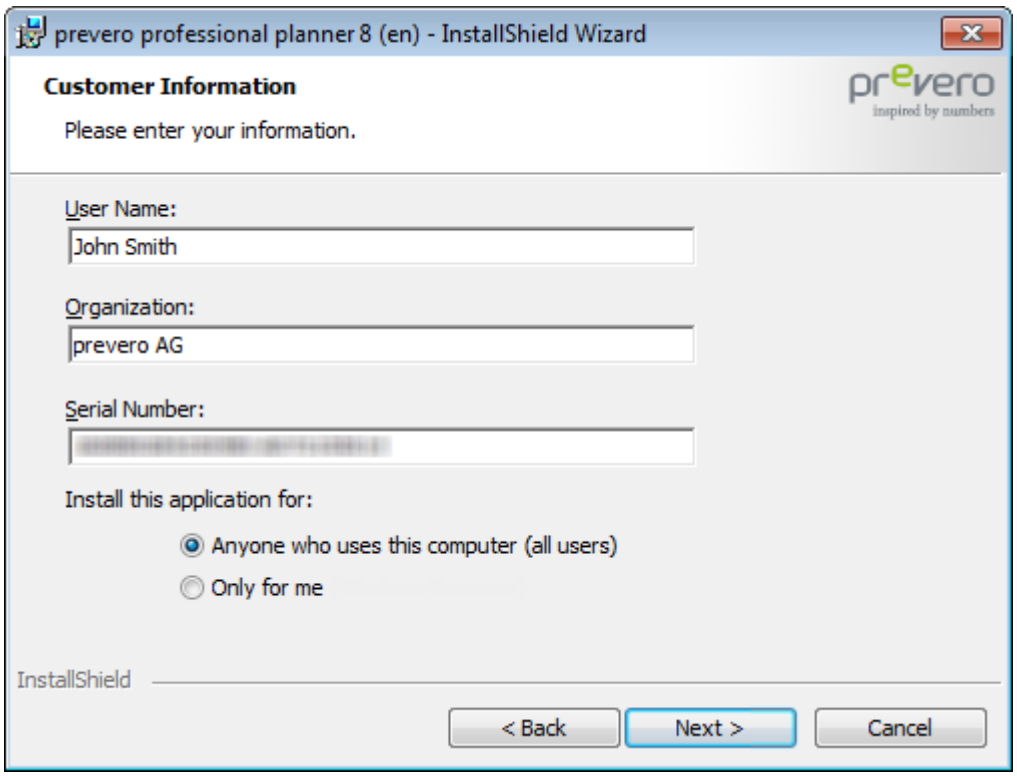
We recommend you also install **Microsoft SQL Server Management Studio**. The Management Studio is a free, easy-to-use graphical management tool for managing databases. However, you do not have to install it to be able to use professional planner.

For instructions on how to install the Management Studio, please refer to the article Microsoft SQL Server Management Studio in our Competence Center.

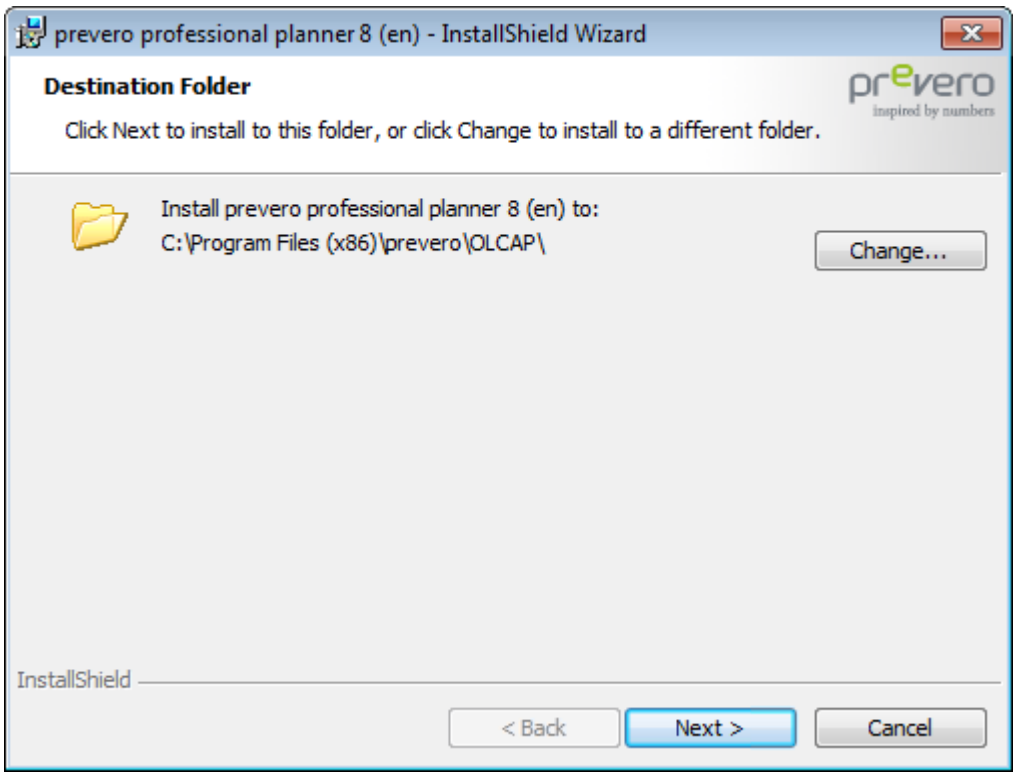
## 4.3 Installing professional planner

To start installing the server or client, click the **Install** button in Step 4 of the installation wizard.

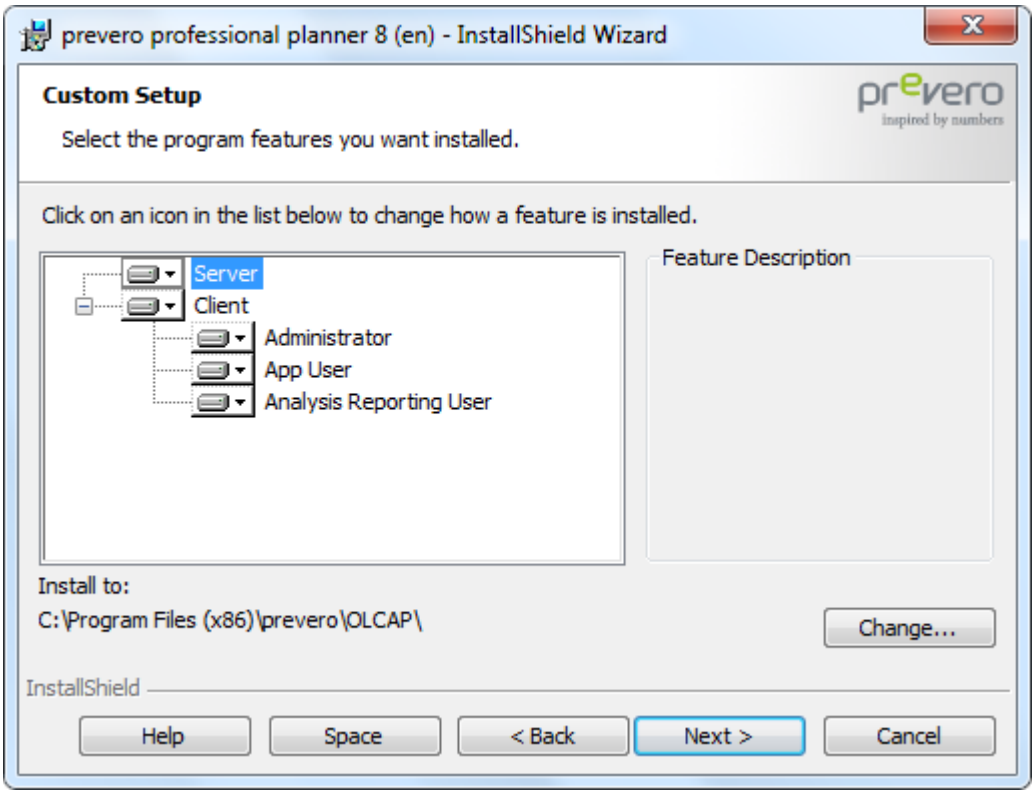
- First, the installation program checks if all requirements are met. These requirements may differ depending on the operating system. If additional components are required for the installation, they will be installed automatically.
- Enter a username, an organization and your serial number into the respective fields and confirm with **Next**.



- The next step is to specify the professional planner installation directory. By default, professional planner is installed in the directory *…\prevero\OLCAP.* The installation path can be changed using the **Change...** button.



- In the next step, define the components to be available after installation:
  - The **Server** option must remain enabled for single workstation versions and installations on the application server. If you choose to install only the client components, you can disable this feature by clicking on **Server**.
  - The **Administrator** interface provides all ribbon functions and standard documents offered by professional planner. This interface is recommended for users belonging to the local user group *OLCAPAdministrators*.
  - The **App User** interface provides access to all ribbon functions and all standard documents except for the administration documents. It is tailored to the requirements of users exclusively belonging to the local user group *OLCAPUsers*.
  - The **Analysis & Reporting User** interface is intended for users who analyze data in professional planner but cannot modify them. This interface is particularly suitable for members of the local user group *OLCAPReportingUsers* and only contains standard documents and commands used for analyzing purposes. The document groups *Toolbox, Currency Conversion* and *Administration* are not available. Moreover, the ribbon functions are limited and it is not possible to create new documents, Import Managers, memos or managers.




- After selecting the desired components, click **Next**.

- Click on the **Install** button to install professional planner on your system with the chosen settings.

## 4.4 Requesting a license

After successfully installing professional planner, you need to request a license. professional planner cannot be used before requesting the license file.

ⓘ You only need to request a license if you are installing server or single workstation versions.

Open the program *OLCAP Runtime* via *Start > All Programs > prevero > professional planner 8 > Tools*.

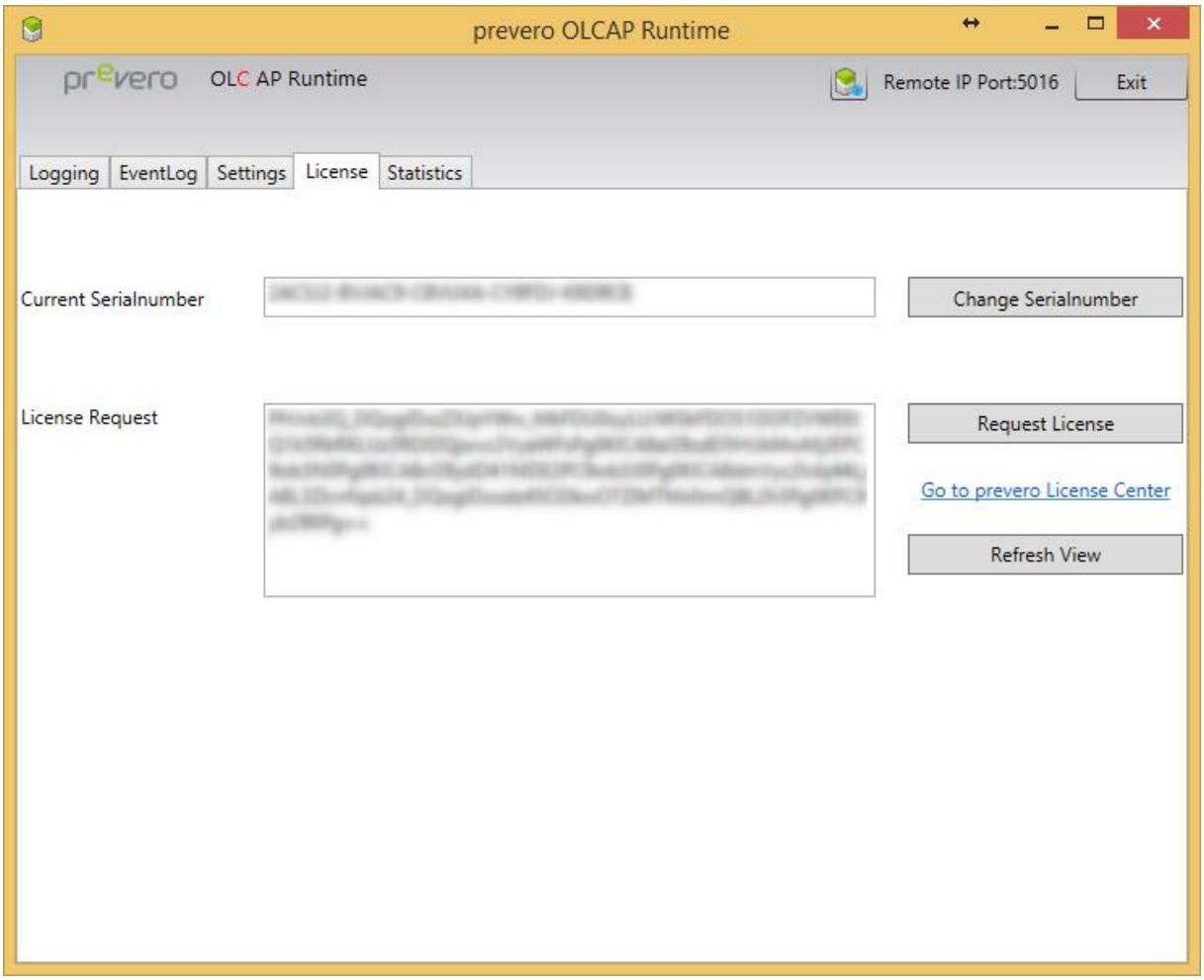
- Switch to the *License* tab.

There are two options:

**Automatic licensing:** You can request a license automatically by clicking the *Request License* button.

**Manual licensing:** If you do not have internet access or the license request does not work (e.g., due to firewall restrictions), you can request a license manually via the browser or another computer.

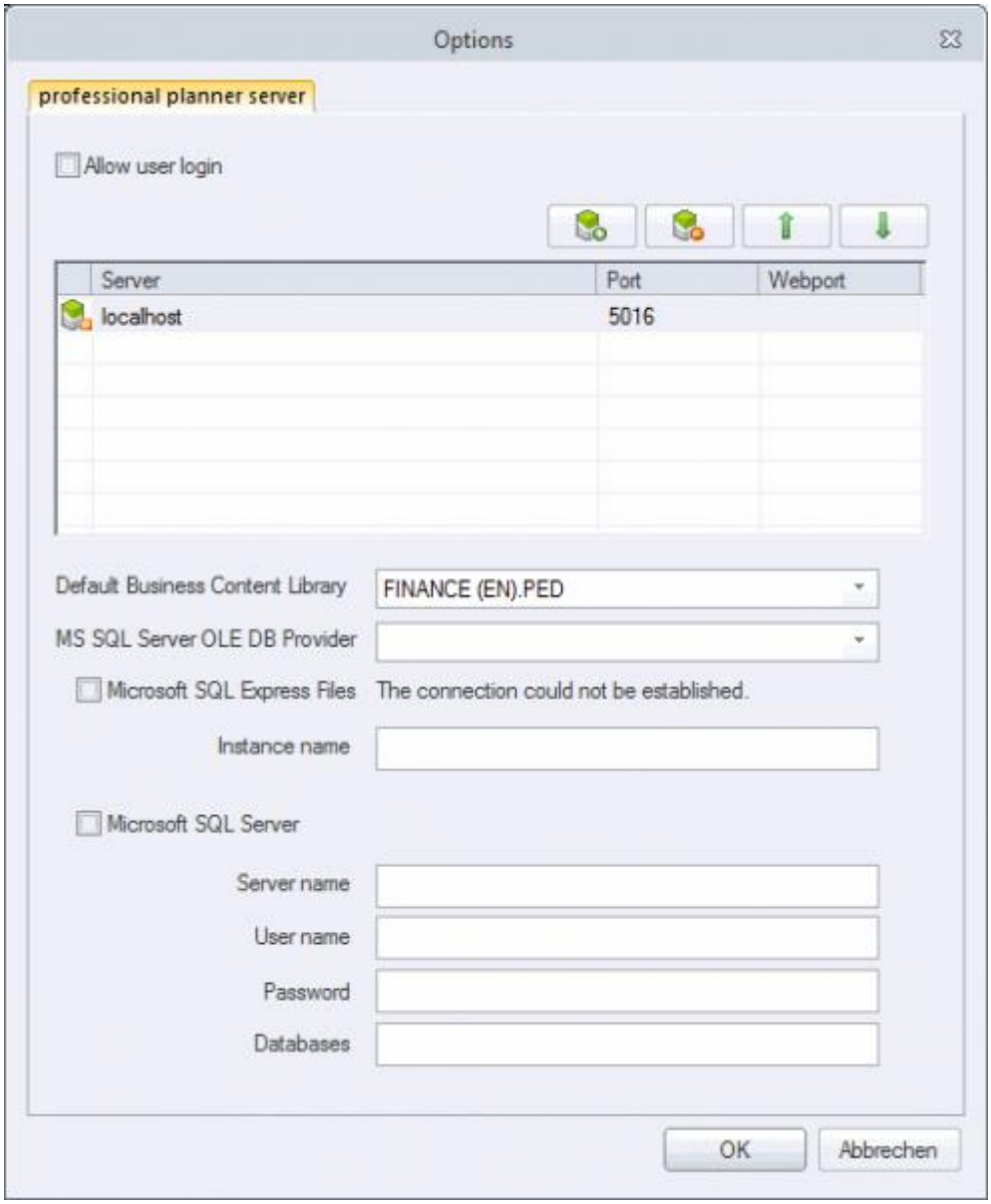
- Copy the code from the **License Request** field.
- Open the License Center by clicking on the link **Go to prevero License Center**.
- Follow the instructions in the License Center and subsequently copy the license file you receive into the professional planner 8 AppData directory (default directory: *C:\ProgramData\prevero\AppData*).


prevero OLCAP Runtime
prevero
OLC AP Runtime
Remote IP Port:5016
Exit
Logging
EventLog
Settings
License
Statistics
Current Serialnumber
Change Serialnumber
License Request
Request License
Go to prevero License Center
Refresh View

# 5 Configuration

After successfully installing professional planner, please open the program via *Start > All Programs > prevero > professional planner 8 > User Interface > Administrator*. If you have not installed this user interface, you can also select another one.

If professional planner is not able to connect to the server yet, a dialog is opened to configure the connection to the database system:




- **Allow user logon:** If this setting is enabled, the OLCAP Server authenticates the users and enables the assigned permissions.
- **Server management:** Here you can add or delete servers.

- **Default Business Content Library:** The BCL (short for: Business Content Library) determines the fundamental calculation and operational relationships within a company model in professional planner. The *BCL Finance* and the *BCL Profit* are included in the standard scope of delivery of professional planner 8.
- **Microsoft SQL Server OLE DB provider:** Specify your database provider. The following values can be entered for the corresponding providers:
    - **SQL 2016 and later**: sqlncli11
- **Microsoft SQL Express files:** If you select this option, Microsoft SQL Server Express is used.
    - **Instance name:** Specify the instance name here if you do not want to use the default instance. The default instance is SQLEXPRESS. This field must not be empty!
- **Microsoft SQL Server:** If you select this option, Microsoft SQL Server is used. Enter the server name (instance name), username, password and the databases for the server.

After defining all settings, confirm with **OK**.

# 6 Troubleshooting

If you have problems during installation, you can find possible causes and the respective solutions in our Competence Center at:

http://competence.prevero.com/

In addition, you can contact our support team, who will be happy to assist you.

# Further Information

Would you like to receive information on other topics and find answers to your questions?

Visit the Competence Center, our online help system for our products providing full-text search, easy navigation with the help of links and references to other pages as well as a knowledge base offering Support FAQ.

We are looking forward to your visit!

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