Guidelines for a Successful Caterease Desktop Installation

Generally, customers that experience problems with their Caterease installation typically discover the issues are due to one or more of the following considerations: (Defer to IT staff for assistance and clarification if necessary)

- **Network communication** –
  - o Multiple Network Interfaces on the server _cannot_ be supported since Advantage Database Server can only be assigned to one Network Interface. (Other interfaces must have static IP addresses removed and must be disabled)
  - o IPv6 is not supported on the Server and must be disabled. (IPv6 does not have to be disabled on the workstations.)
  - o client/server database applications generally require consistent, reliable 100Mbps _wired_ network connections between the workstation and the server. **Wireless networking is not supported** due to inherent interference and signal/speed inconsistency issues.
  - o All firewalls and routers (including sofware firewalls on the Caterease server _and_ Caterease workstations) _must_ be able to pass internal network traffic (incoming and outgoing) through both **TCP** and **UDP ports 6262**.
  - o Caterease depends on properly configured local network NetBIOS name resolution services to resolve the Caterease server name to its IP address.
  - o Every network communication device must have a reliable battery backup system to prevent communication interruptions due to power "brown outs" and "black outs"

- **File/Folder Security** – users _must_ have at least **Modify** rights to the _entire_ **Caterease9** File and Folder structure on _both_ the **server** and **workstations**. Full Control rights recommended for auto updating.

- **General Server Configuration** – Ensure server hardware meet the hardware requriements. Caterease installed onto a **Microsoft Small Business Server** that has the **Microsoft Exchange Server application** active and running may suffer performance issues. These issues stem from the fact that Microsoft designed the Small Business Server to use nearly every bit of hardware resources for the server applications built into the Small Business Server package. (Limiting the memory usage of the Exchange Server and SQL Server compenents are criticial considerations)

- **Caterease Server in a "Virtual Machine"** – With the onset of server "virtualizing" to maximize the cost benefit of today's hardware enhancements, customers are starting to run Caterease in virtualized environments with other server based applications in separate "Virtual Machines". Performance issues result from inadequete resource planning and allocation between "Virtual Machines"; especially in regards to total **Disk I/O**.

- **Antivirus Scanning of the Caterease Database Files** – The Caterease database should be excluded from any antivirus scanning (especially realtime scanning) to prevent performance issues and possible database corruption.

- **Server Hard Disk Fragmentation** – Server drives should be defragmented routinely to enhance database performance. Whenever possible, the Caterease database should be stored on a completely separate disk than the disk the operating system is installed on.

- **Caterease Database Archiving** – Events that are no longer required for immediate access can be archived to streamline the database. (A database backup shoud be run before and after archiving with a final step of a Database Refresh to optimize the database.)

- **Workstation Issues** – Ensure workstations meet hardware requirements and are running the Caterease software directly from the workstation. Running Caterease via a shortcut to the the program on the server is not supported since this causes significant performance issues and program errors.