

1 Introduction

The Close Support applications use a common database to store and maintain your data. Two database formats are supported, Microsoft Access .mdb file or SQL Server version 2005 or above. On installation the Access format is used. These instructions are for creating a Close Support SQL Server database and transferring your data from an MS Access database.

2 Instructions

The following instructions will allow you to transfer your Close Support data to SQL Server version 2005 or above. It is assumed that you have a reasonable level of knowledge about the use and administration of SQL Server and databases.

[Prerequisites](#)

[Create the database](#)

[Run the Upsizing Wizard](#)

[Run the Upgrade Script](#)

[Make the Database Available](#)

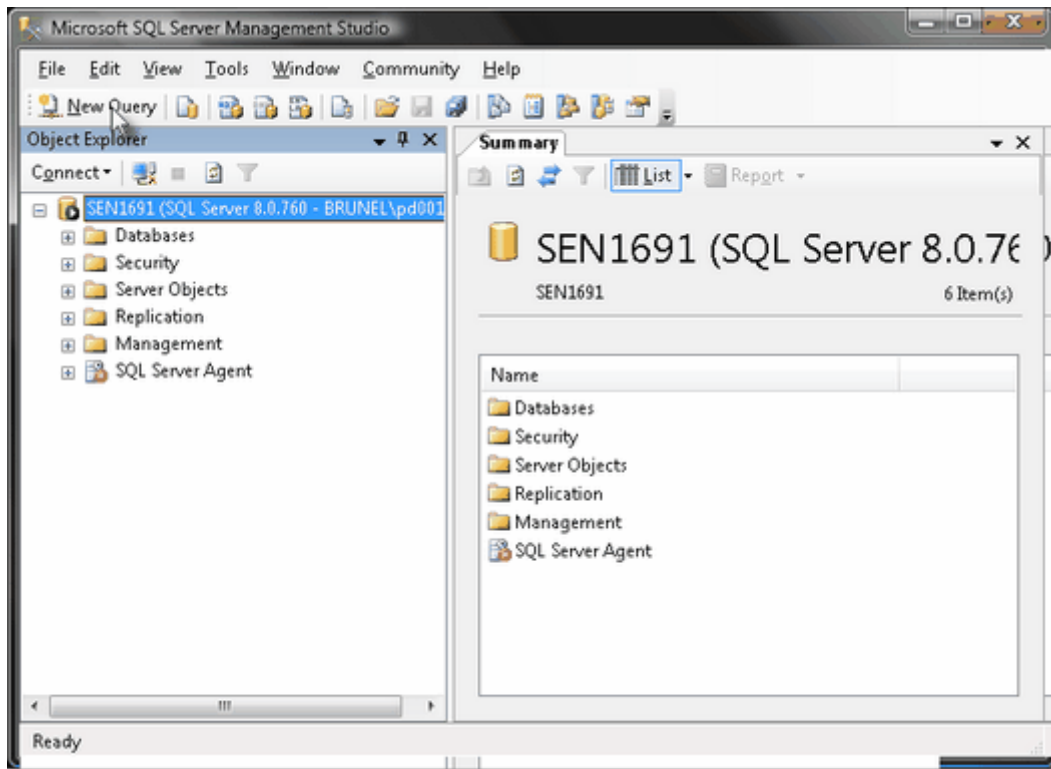
[Connect the Service Desk](#)

2.1 Prerequisites

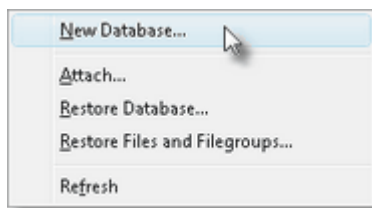
Close Support Service Desk installed;
Access to SQL Server version 2005 or above with security settings that allow the creation of databases;
Microsoft SQL Server Management Studio or similar;
Microsoft Access version 2003 or above.

2.2 Create the database

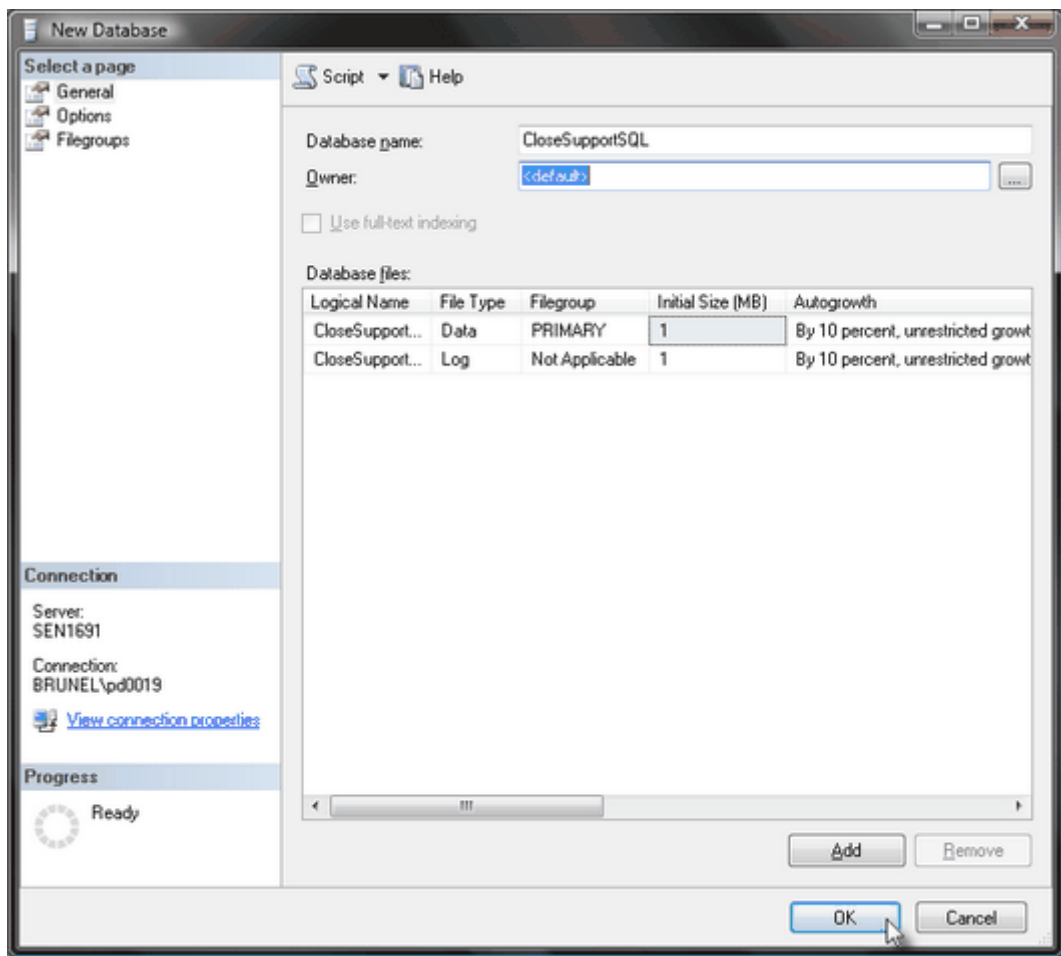
Launch Microsoft SQL Server Management Studio and connect to the chosen instance of SQL Server:



Create a blank database by right-clicking the Databases icon and selecting New Database....:



Name the database CloseSupportSQL. You may also want to review the various options for your new database. Click OK:



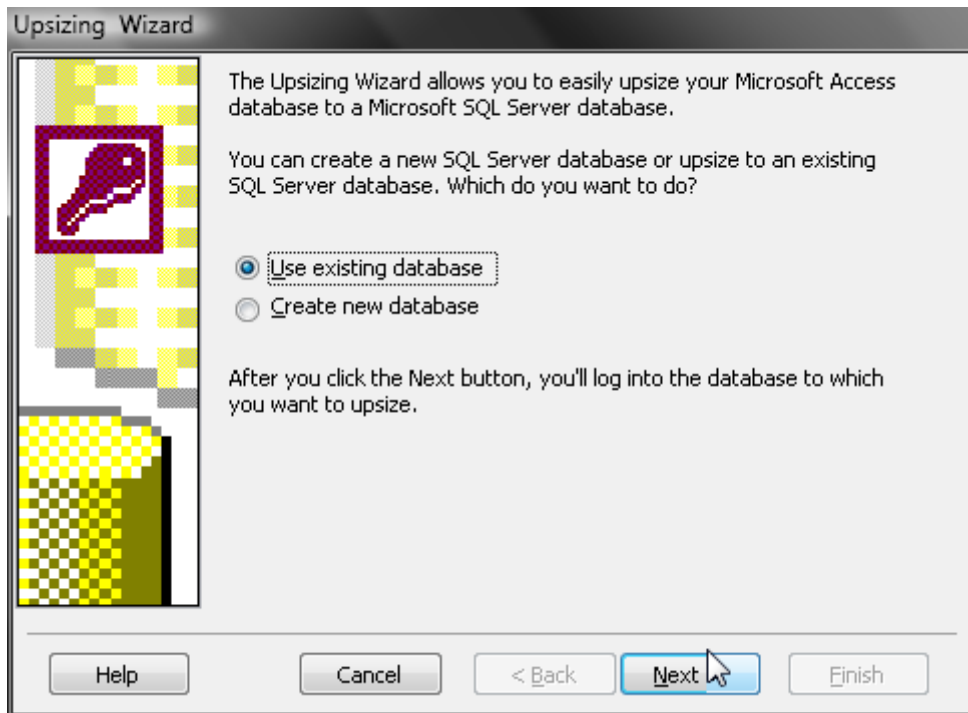
2.3 Run the Upsizing Wizard

All versions of Microsoft Access from 2003 onwards have a built-in "Upsizing Wizard" that makes it really easy to copy tables and data from an Access database to SQL Server. There are minor differences in the way that the wizard works in each version of Access, but the principles are the same. However, the entry point is different.

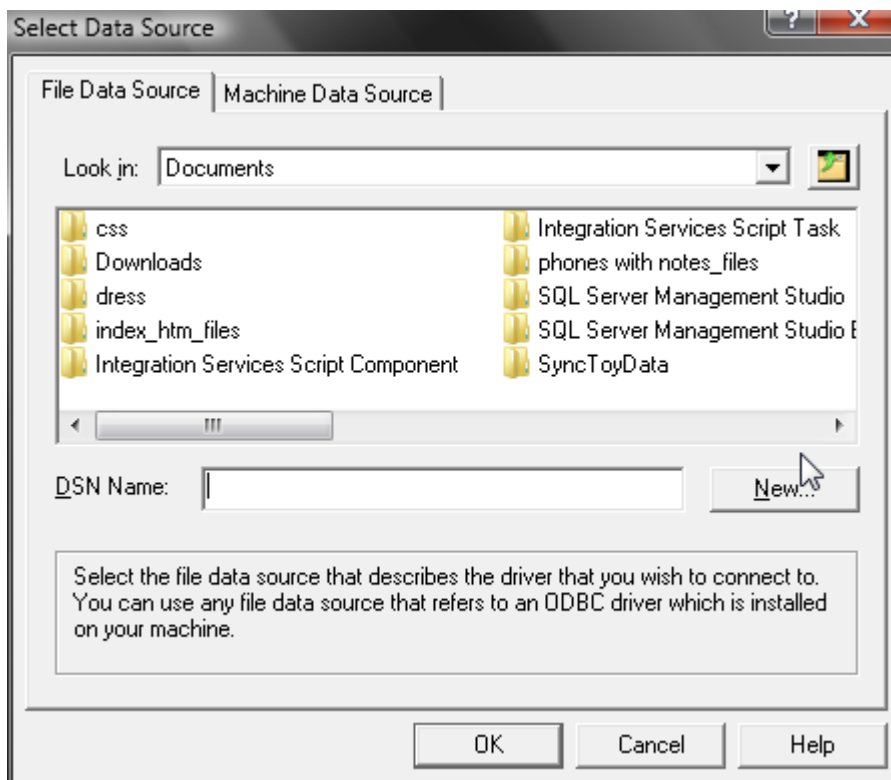
Use your installed version of MS Access to open the file CloseSupportBE.mdb, then:

- Access 2003: Click on Tools, Database Utilities, Upsizing Wizard.
- Access 2007/2010: Click on Database Tools and in the Move Data section click on SQL Server.

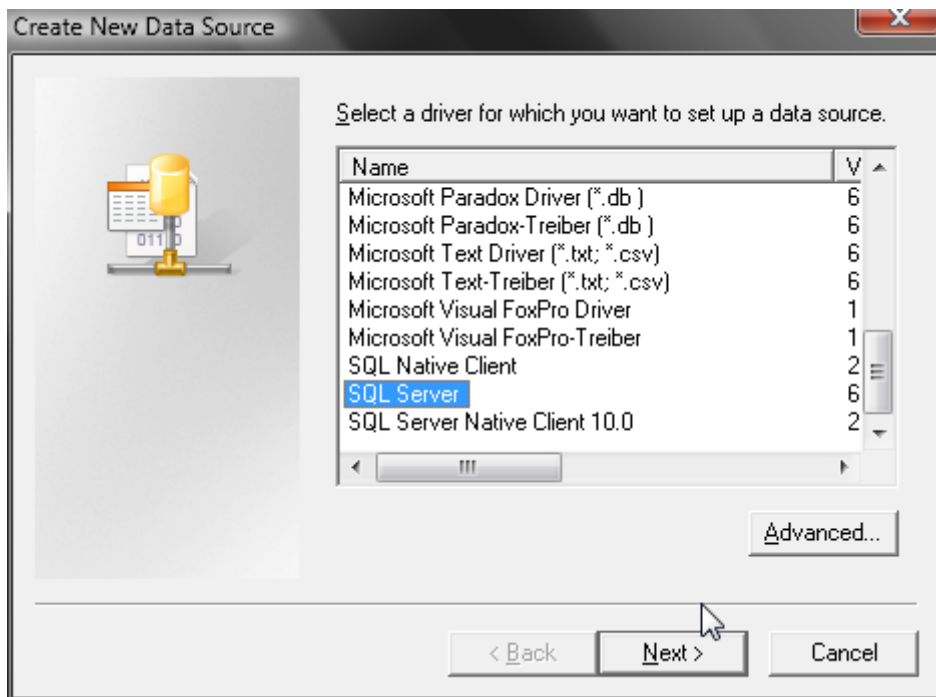
Select Use Existing Database and click Next:



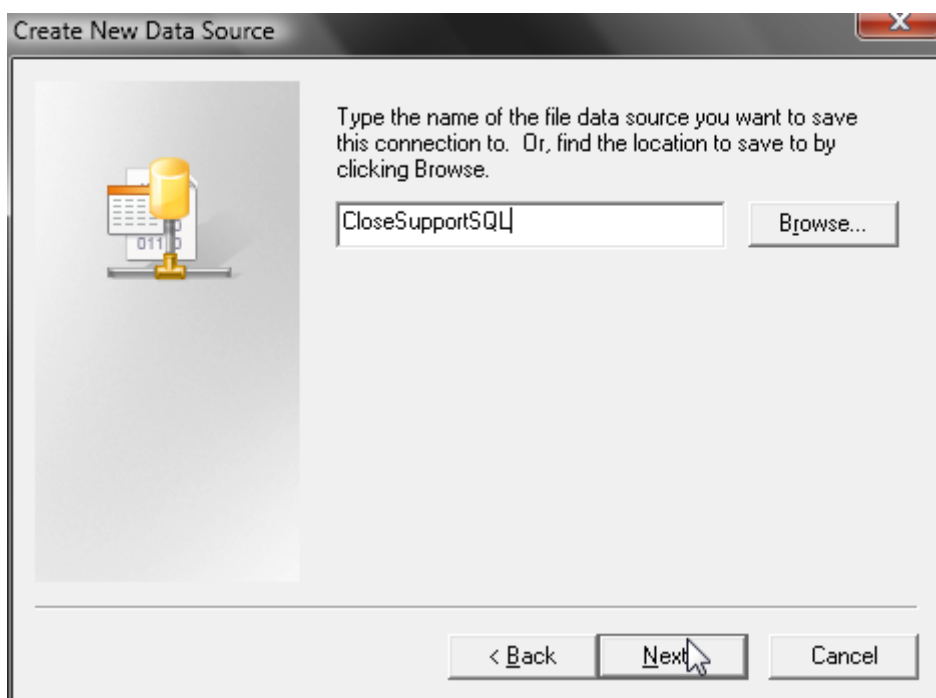
In the Select Data Source screen, click New to create a new Data Source Name (DSN):



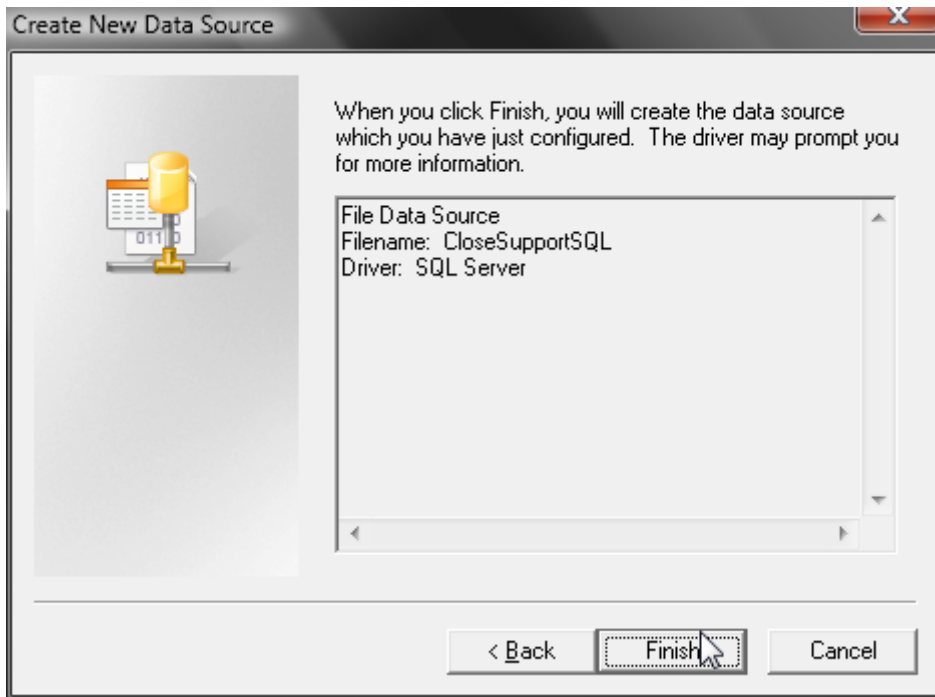
Select SQL Server and click Next:



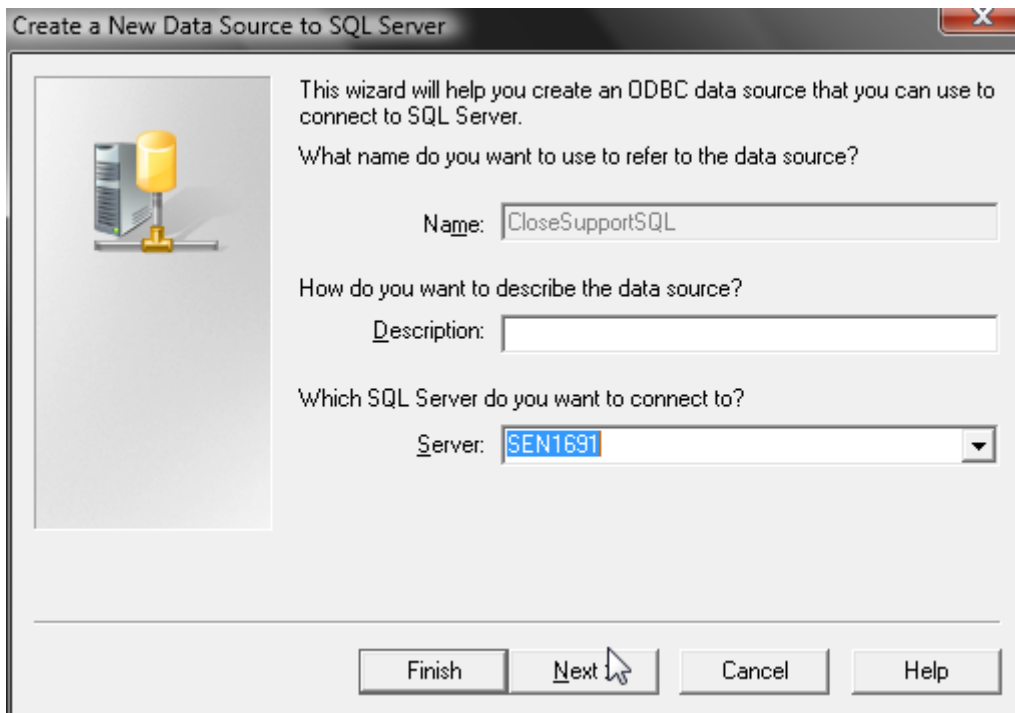
Name the DSN CloseSupportSQL and click Next:



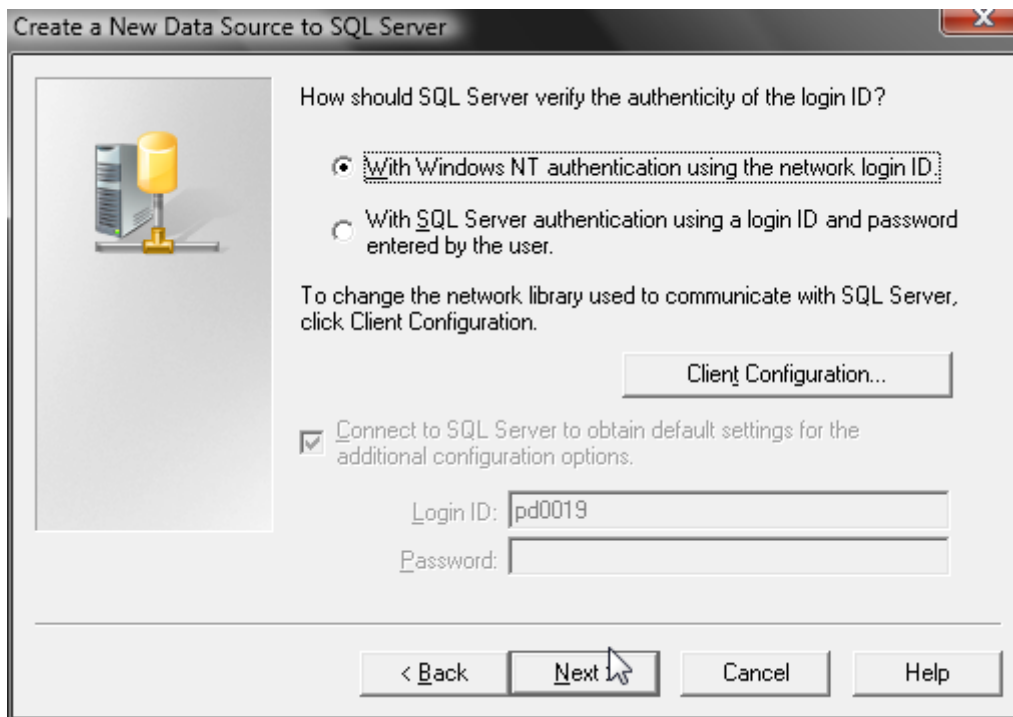
Click Finish:



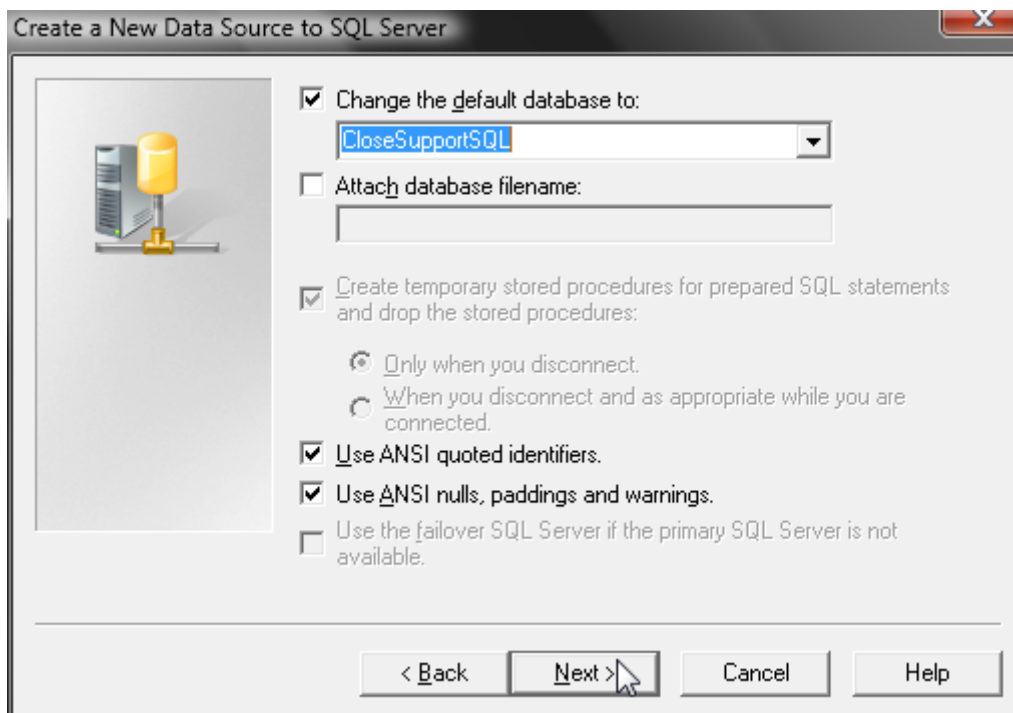
Select the relevant SQL Server instance from the list and click Next:



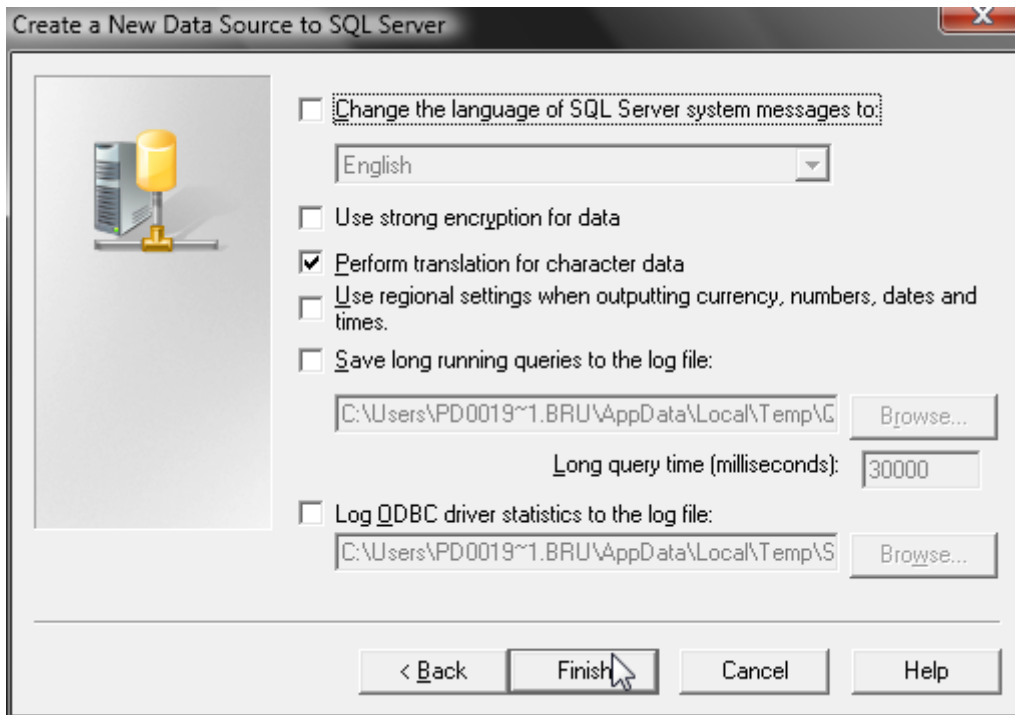
In this screen select /enter the relevant authentication method. The authenticated user needs write permissions on the recently created CloseSupportSQL database. Click Next:



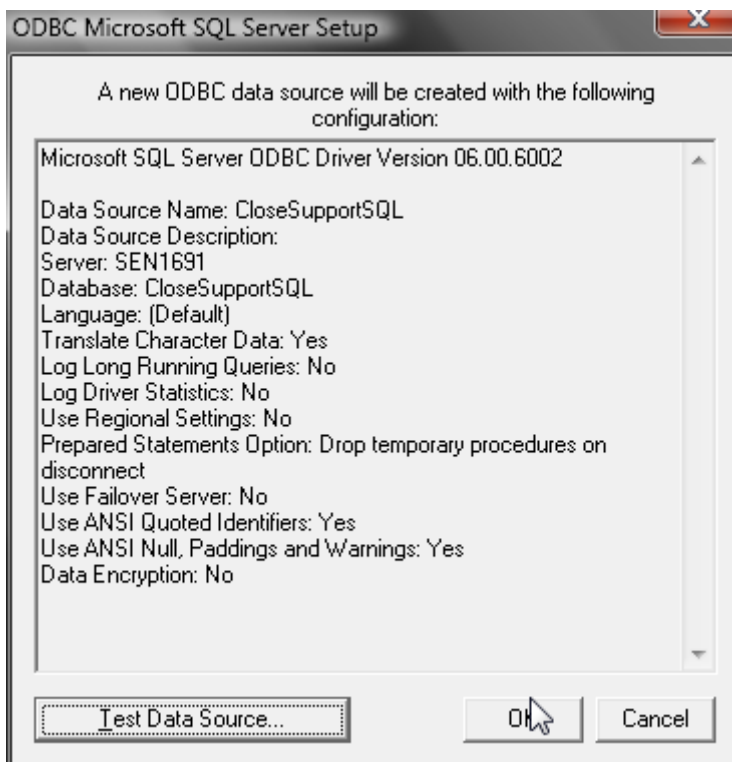
Check the box to change the default database and select the CloseSupportSQL database from the list. Click Next:



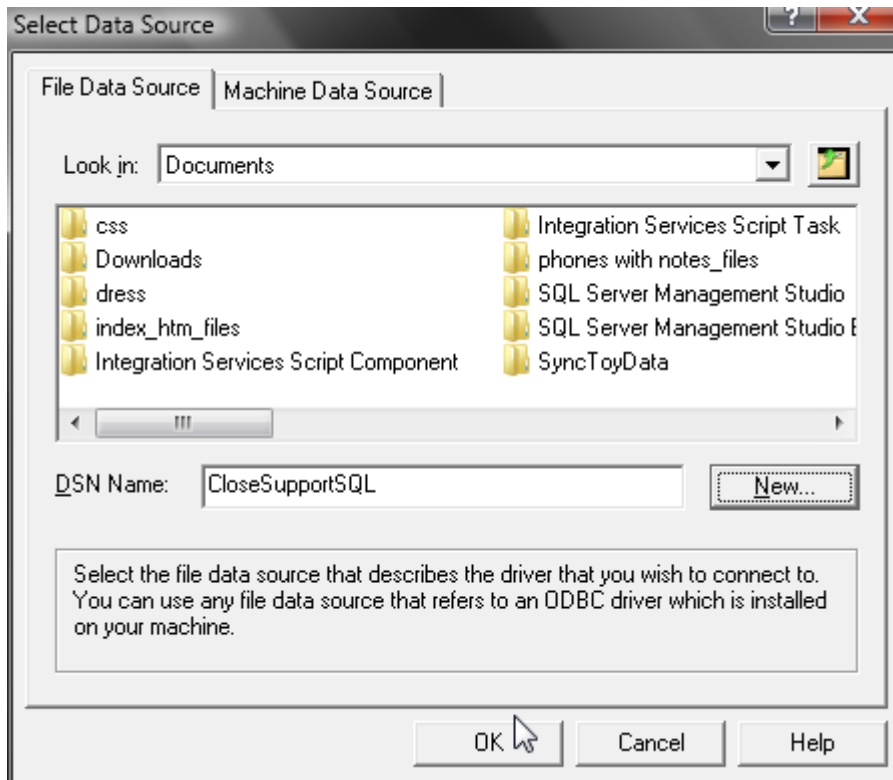
Click Finish:



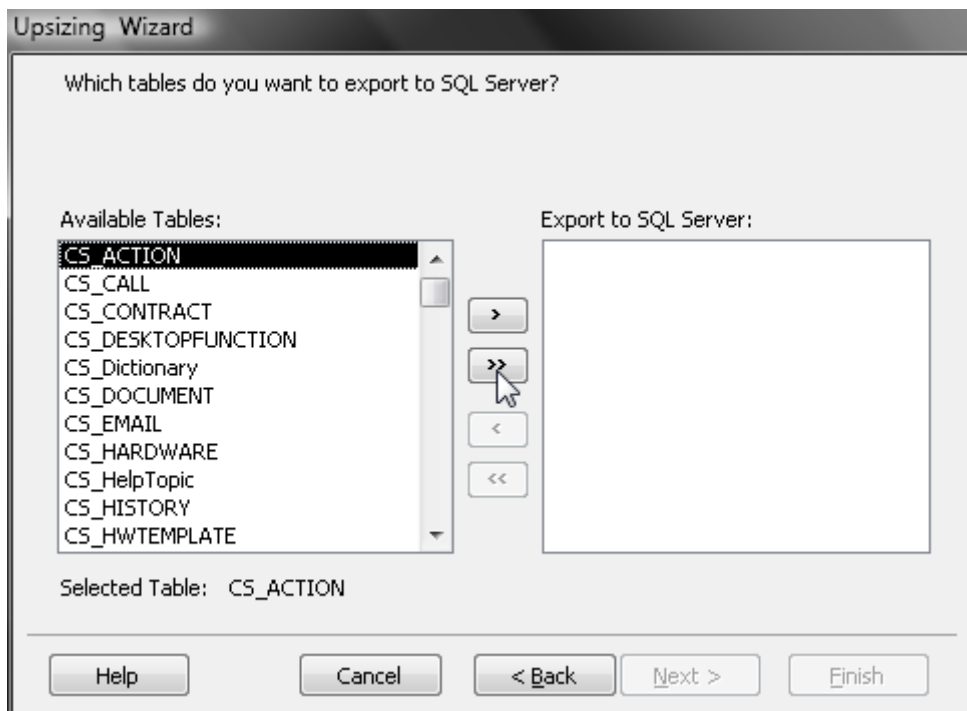
Click OK:



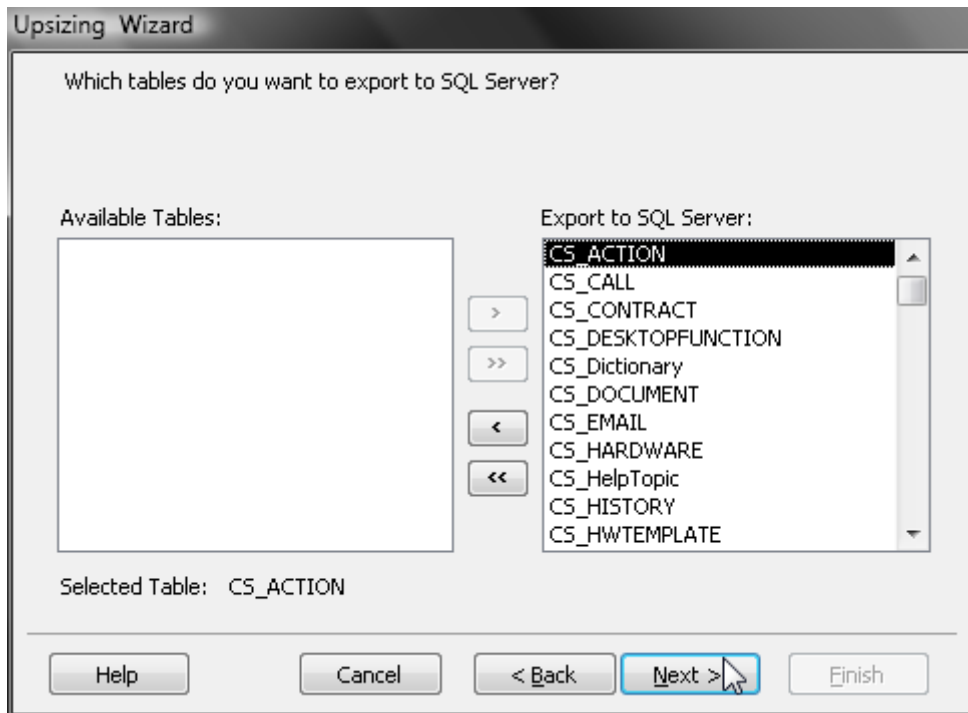
Back at the Select Data Source Screen click OK:



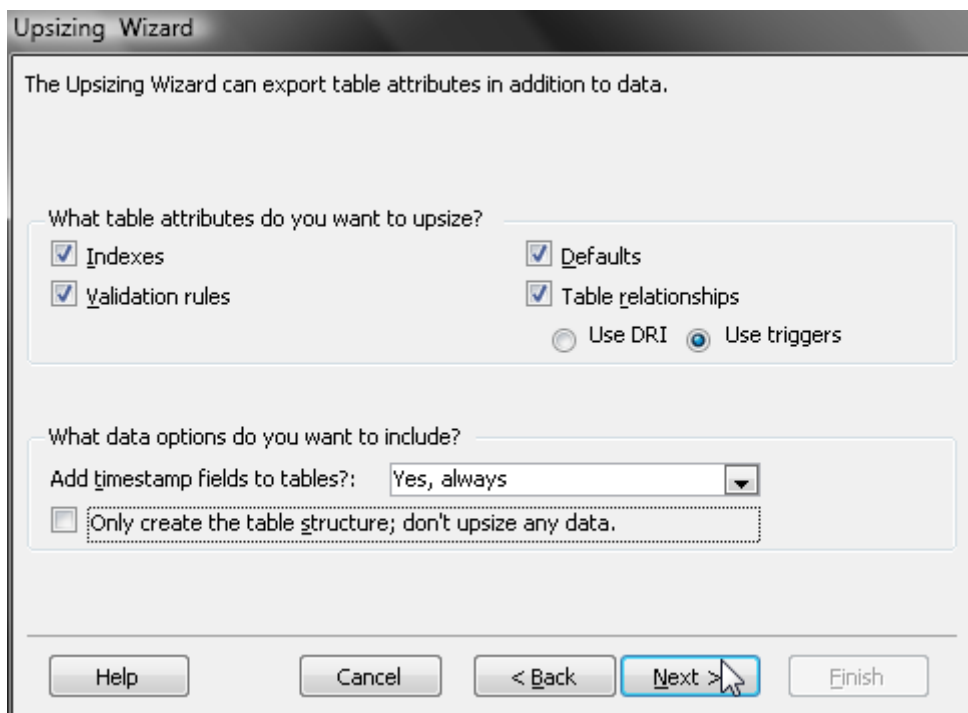
You are now back at the Upsizing Wizard screen:



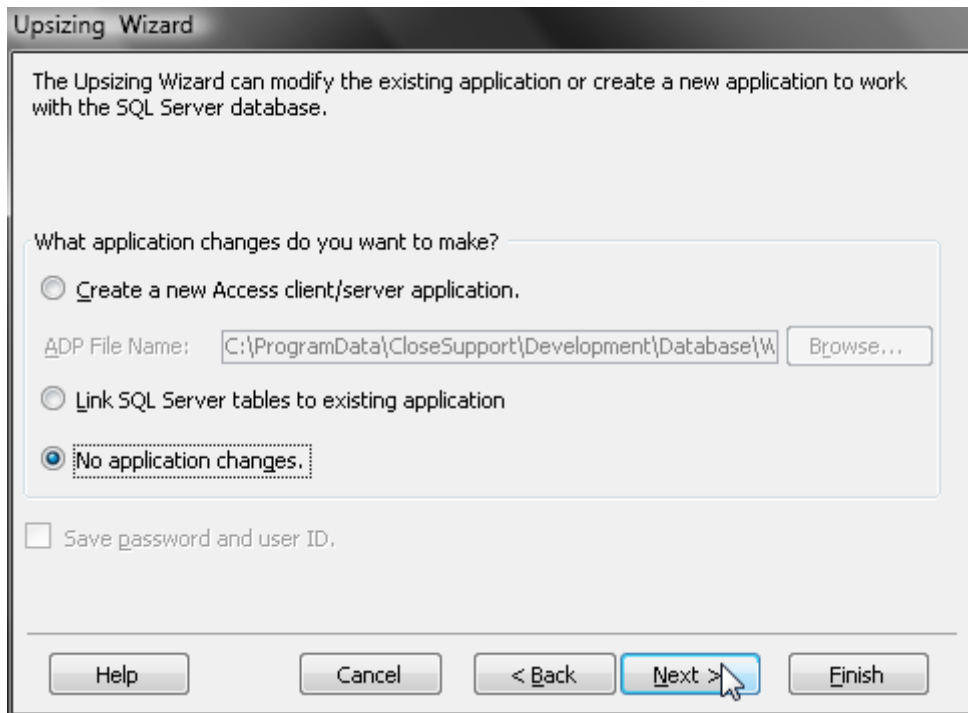
Click on the double arrow to move all available tables into the export list and click Next:



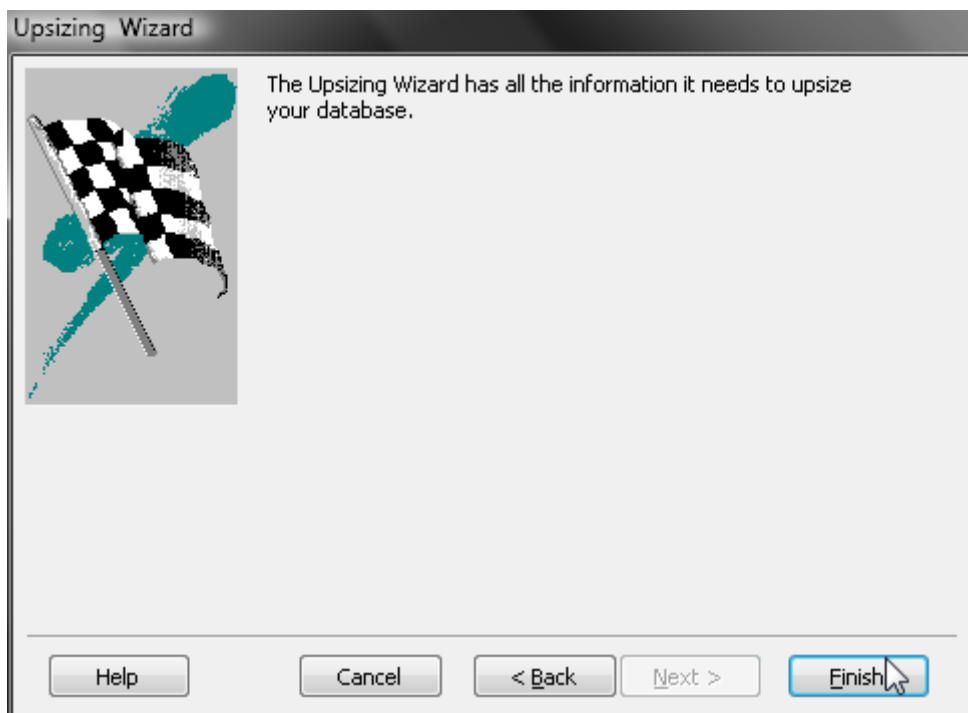
You want the data to be transferred so at this screen unselect the option to only create the table structure and click Next:



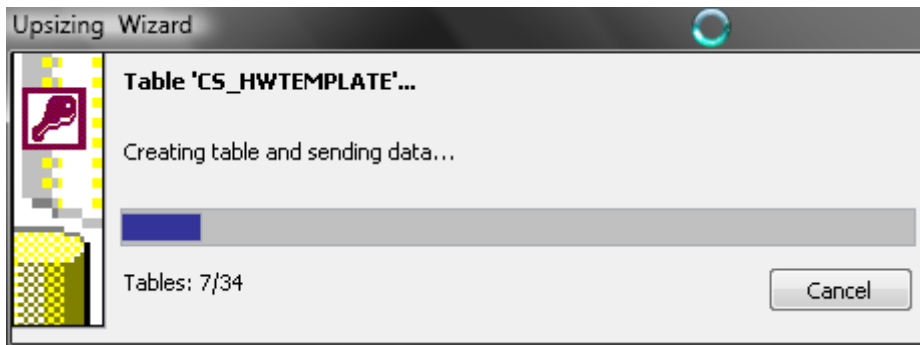
There are no application changes required. Click Next:



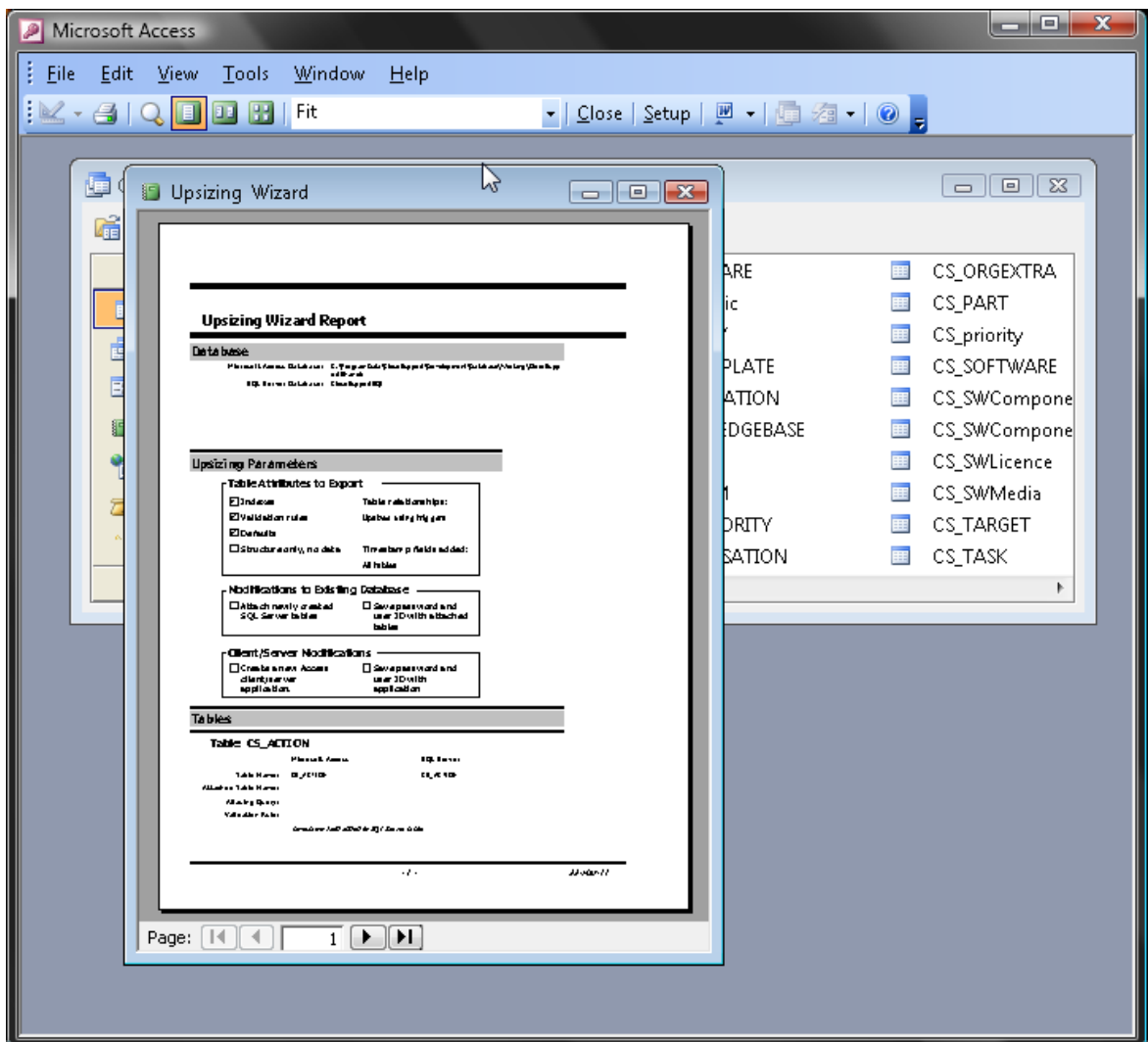
Click Finish:



The Upsizing Wizard runs:

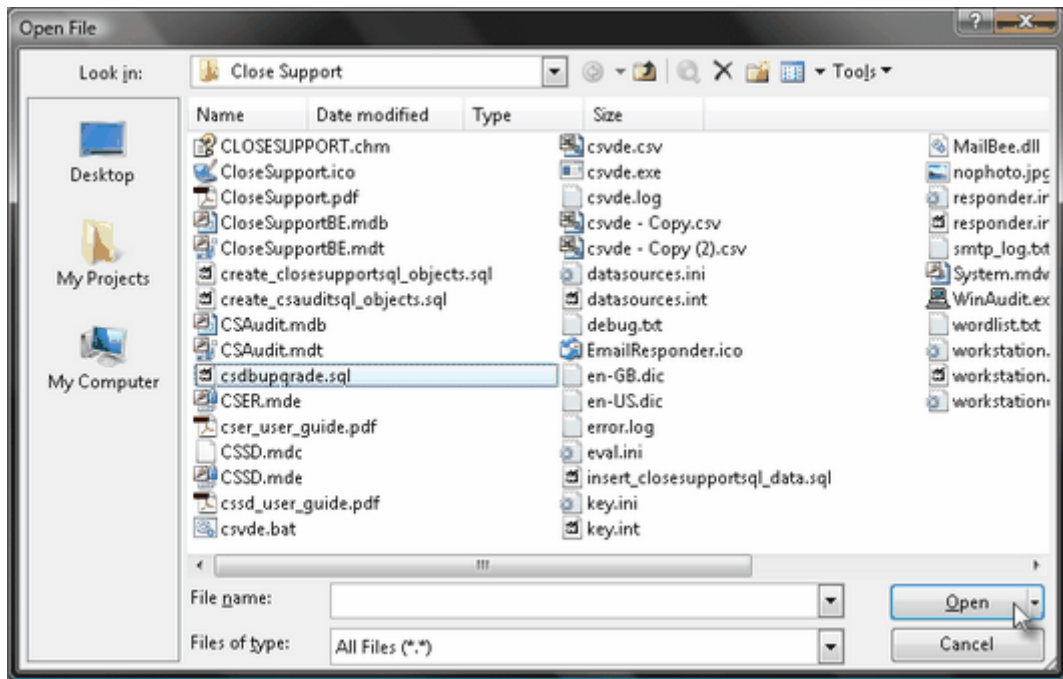


When the Upsizing Wizard has concluded a report is displayed for your review:

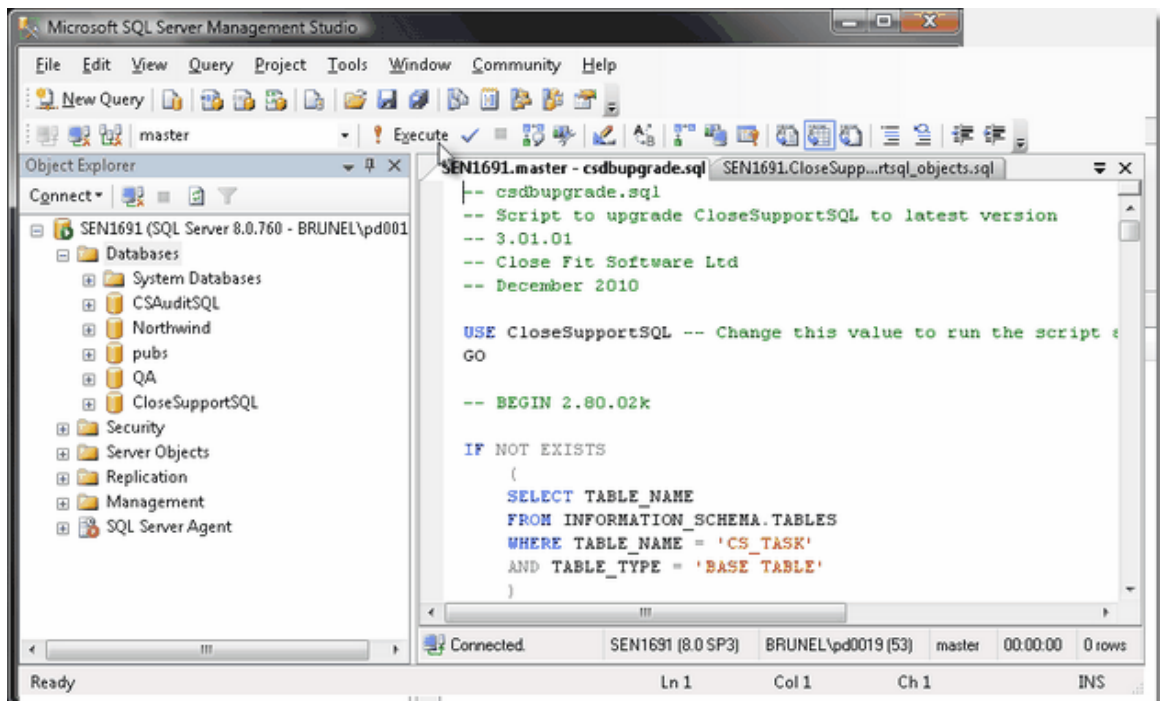


2.4 Run the Upgrade Script

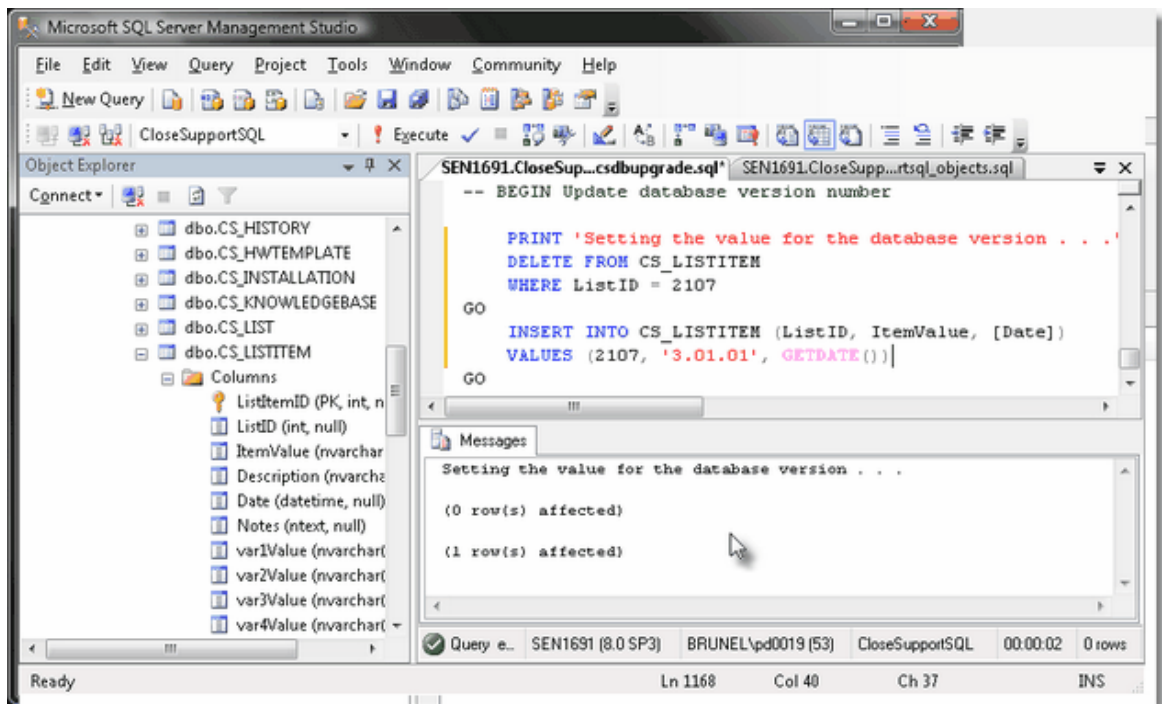
Using SQL Server Management Studio, click on File, Open, File and browse to the Close Support installation folder. Highlight the file `csdbupgrade.sql` and click Open:



Click on Query, Execute:



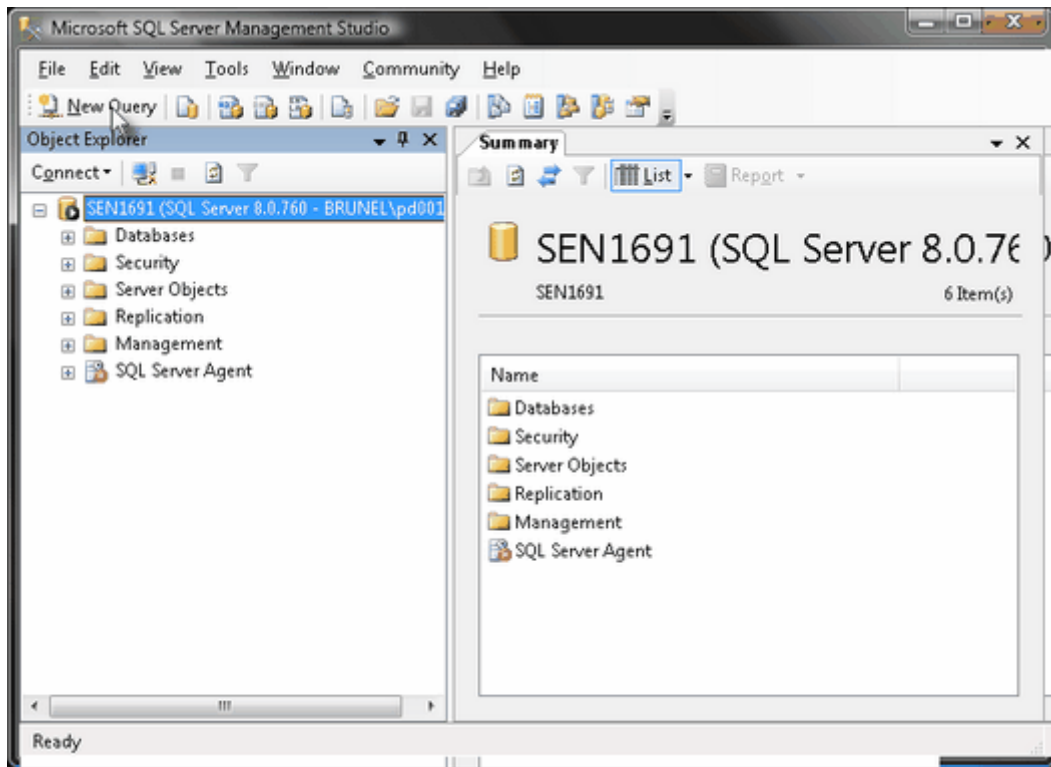
When the script completes its execution check the messages area for any errors and resolve:



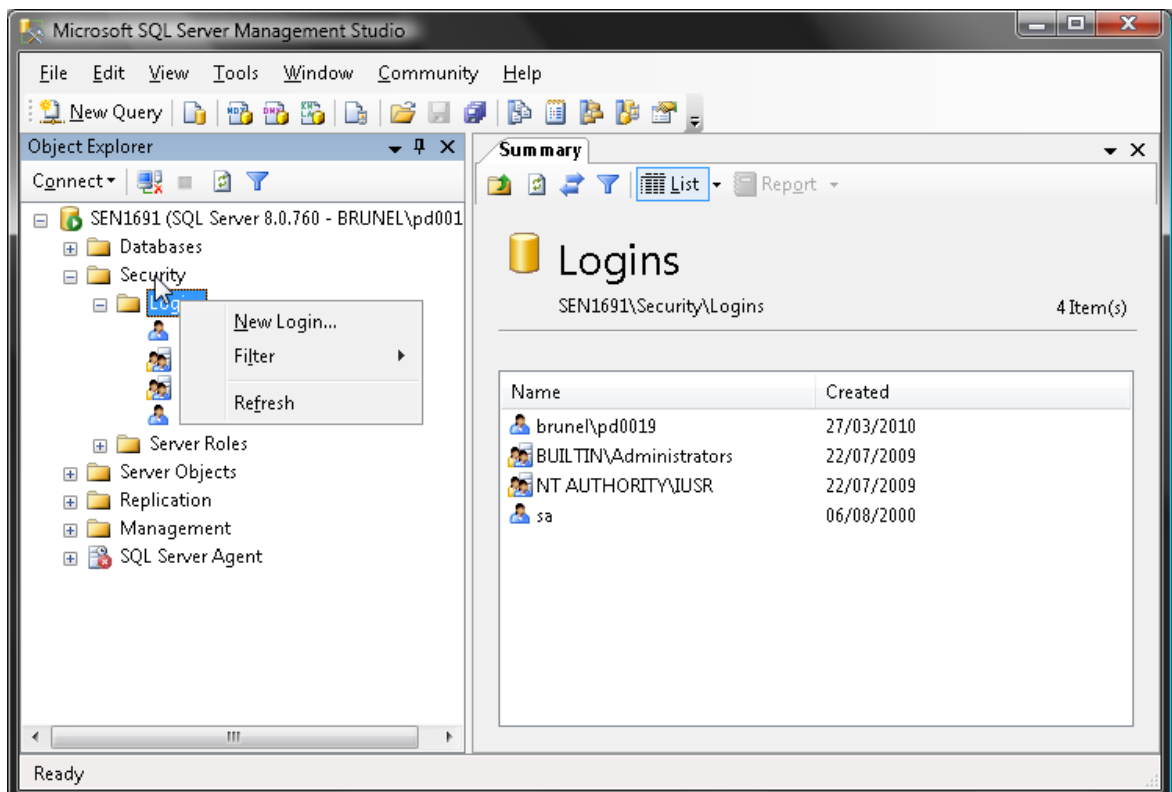
2.5 Make the Database Available

You need to ensure that those users who need to access and update Close Support records have the correct security rights on the SQL Server database, CloseSupportSQL. There are many ways to achieve this and you may want to seek advice from your database administrator or network security guru. Our recommendation would be to create an AD security group and add the relevant Windows user accounts to that group. As an example we have created a security group called ServiceDeskOperators. Here are the steps we take to provide that group with the relevant access rights.

Launch Microsoft SQL Server Management Studio and connect to the chosen instance of SQL Server:



Drill down through Security and right-click on Logins, select New login:



Click Search:

Login - New

Select a page

- General
- Server Roles
- User Mapping

Script Help

Login name: Search

Windows authentication

SQL Server authentication

Password:

Confirm password:

Mapped to certificate

Certificate name:

Mapped to asymmetric key

Key name:

Default database: master

Default language: <default>

Connection

Server: SENT691

Connection: BRUNEL\pd0019

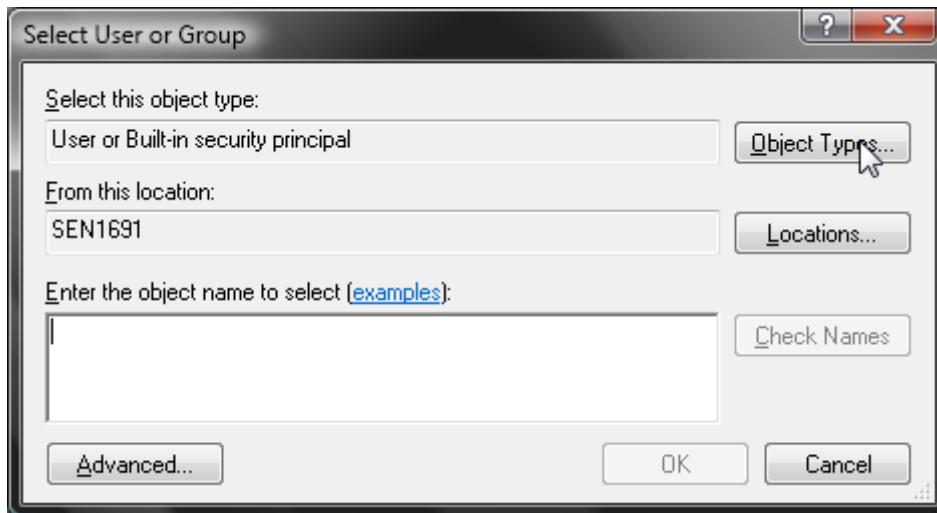
[View connection properties](#)

Progress

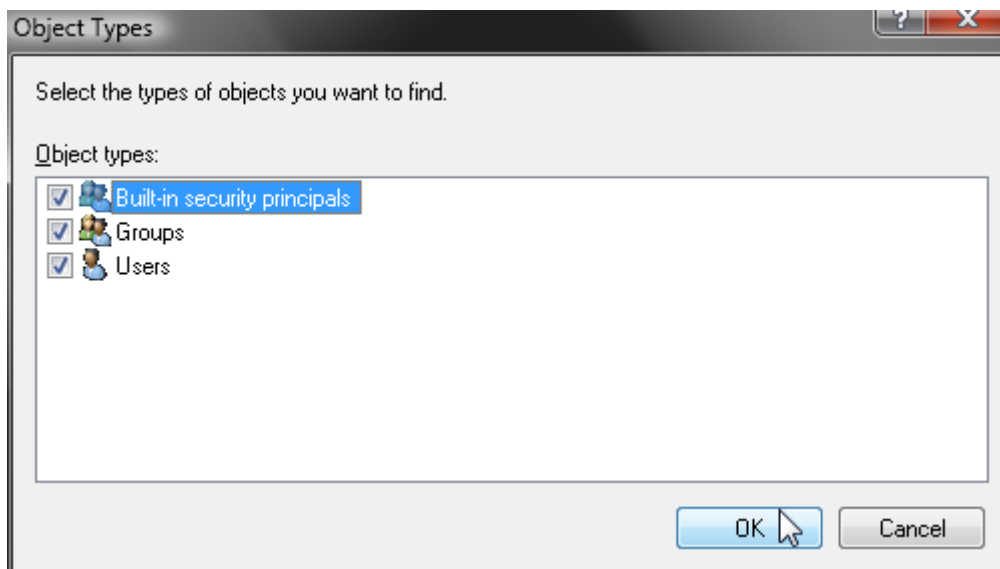
Ready

OK Cancel

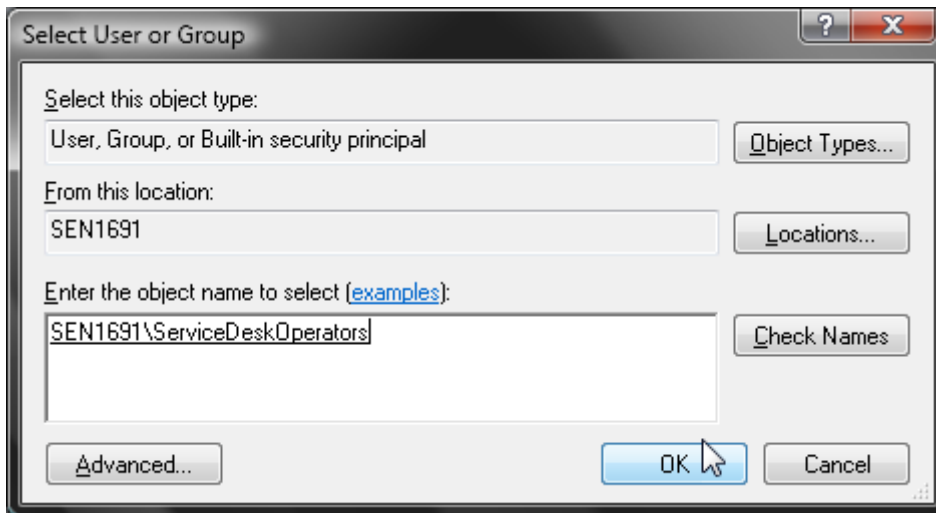
Click Object Types:



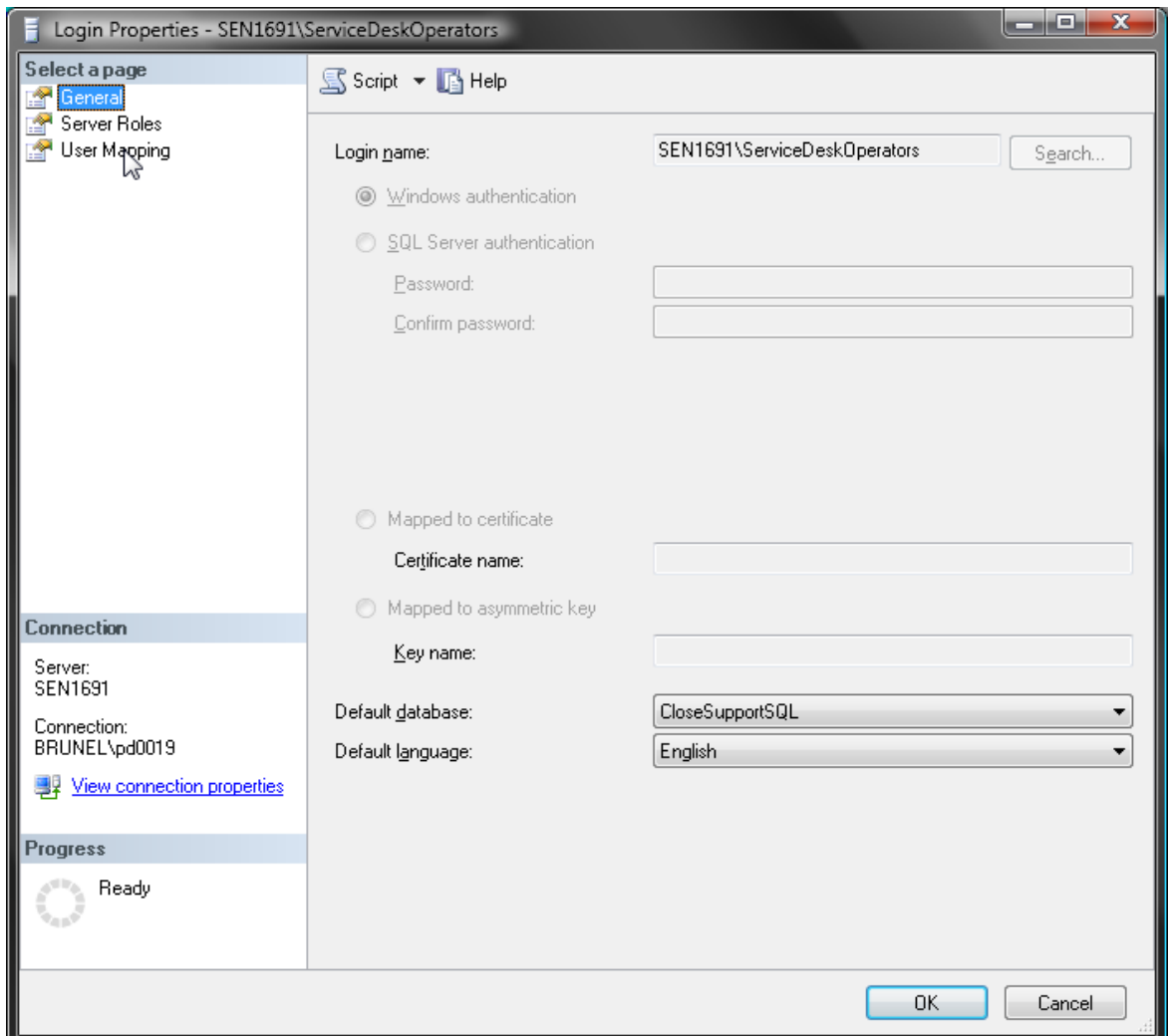
Select all object types and click OK:



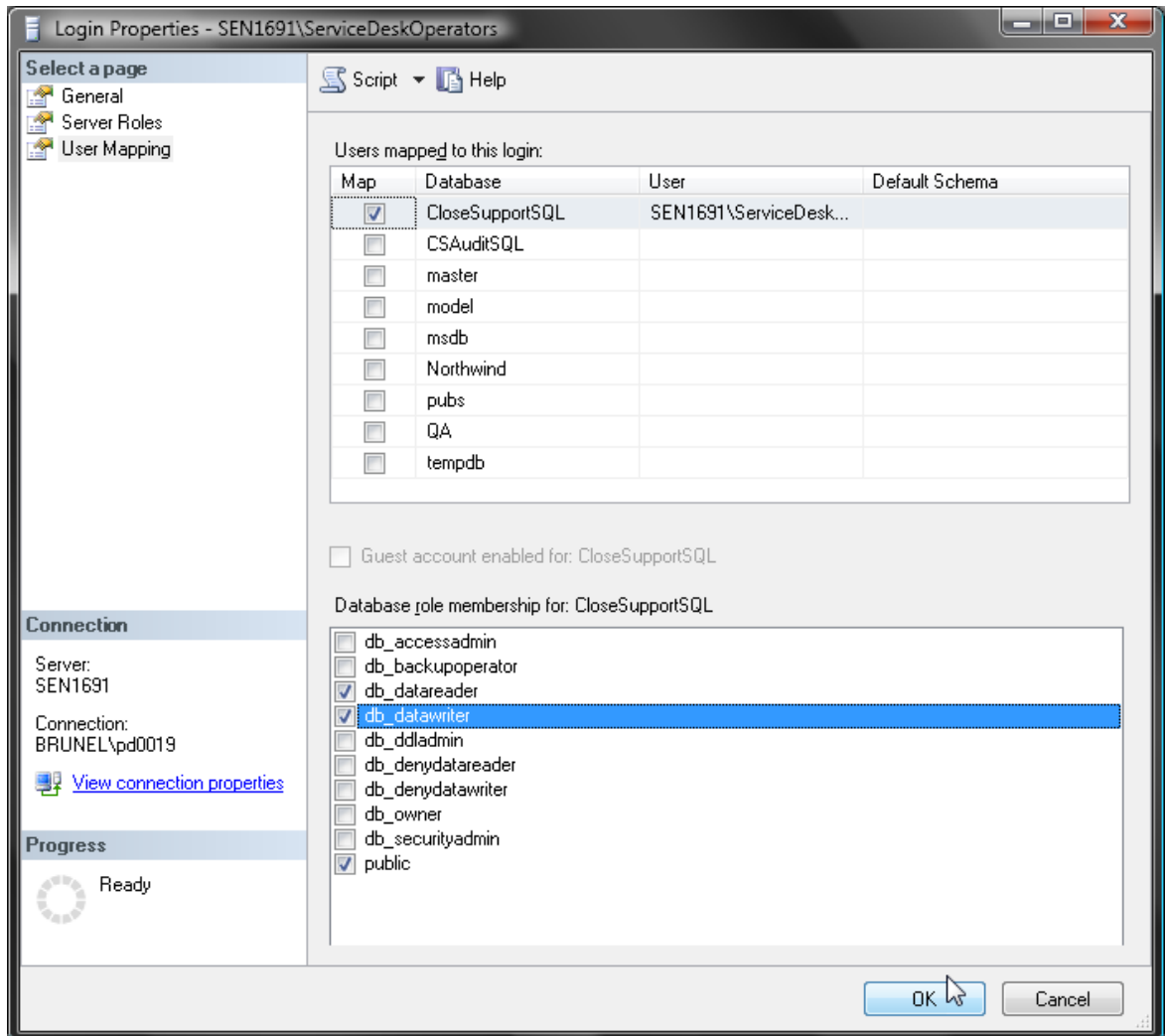
Type in the name of your security group, click Check Names, click OK:



Select CloseSupportSQL as the default database and click User Mapping:



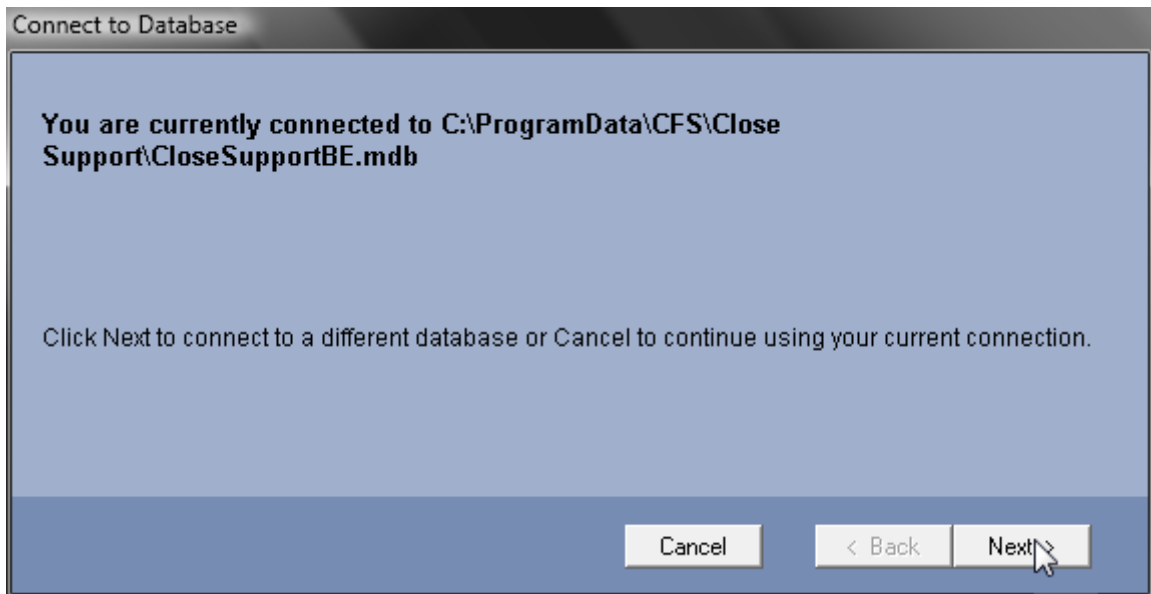
Select Map for CloseSupportSQL and role membership of both db_datareader and db_datawriter. Click OK:



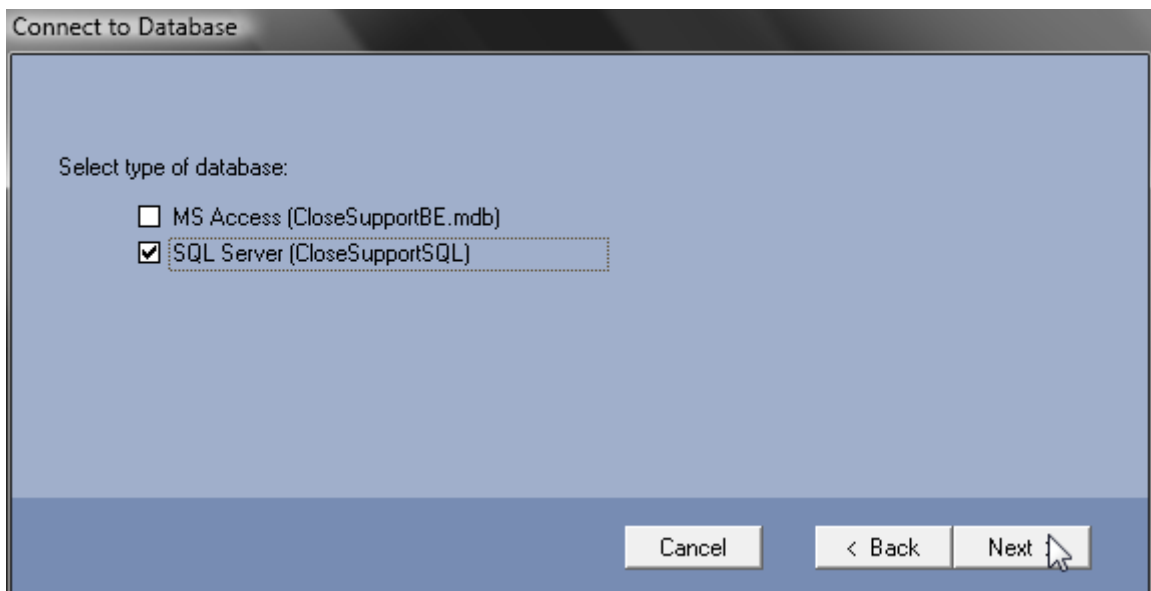
2.6 Connect the Service Desk

Now that your Close Support data is transferred to SQL Server you need to connect all Service Desk installations to the new database.

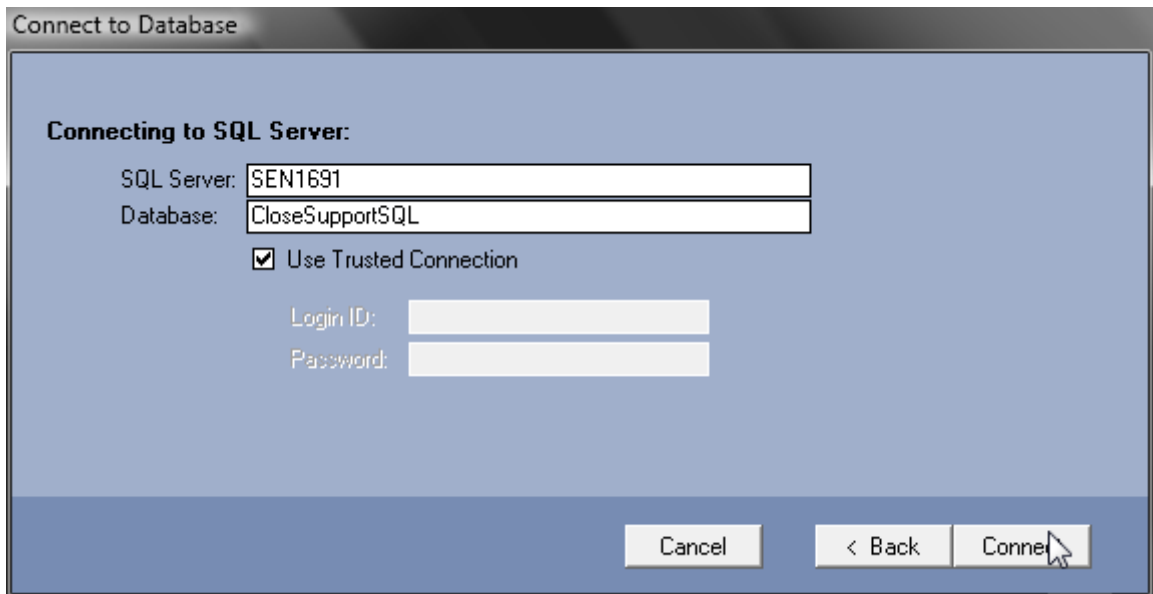
Launch the Service Desk and click on Tools, Connect to Database, Click Next:



Select SQL Server, click Next:



Enter the name of your SQL Server, click Connect:



Connect to Database

Connecting to SQL Server:

SQL Server:

Database:

Use Trusted Connection

Login ID:

Password:

Cancel < Back Connect

Finished!

You can do this for all Service Desk installations or alternatively copy the file `datasources.ini` from the installation folder of a connected Service Desk to all others.