Donation Manager
Software Installation and Configuration

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This software is free for any St. Vincent de Paul conference

Donation Manager Installation and Setup

Installing the software

1. IMPORTANT: If you are installing an updated version of the application, be certain to back up your database before installing the new version or uninstalling the old version.
2. Before installing the application program files, your computer must be running a recent version of Microsoft Access. Recent versions include Access 2016. The runtime version of Access 2016 is available for download on the Internet or available as a link on the Pantry Distro website.
3. Once Access is installed, install the pantry application and database files.
   - Download the file **DonationMgrSetup.exe** to your desktop and run it.
   - The setup program installs several files on your computer.
   - PantryDistro.accdb is the client application with all the forms and logic, and the other files contain the pantry data.
4. Next, open the application by clicking on the desktop shopping cart icon.
5. If you get a message stating "A potential security concern has been identified", continue the program by clicking the **open** key. This message indicates that Access 2016 has determined that the program is executing a set of low-level VBA instructions. To suppress this message when opening the application in the future, see the section at the end of this document entitled Eliminating the Access 2016 Security Message.
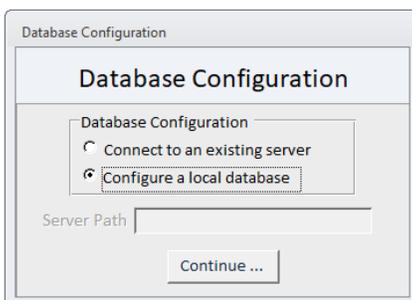
Initial Database Configuration

Since you are running the application for the first time, you will be prompted with the **Database Configuration** form.
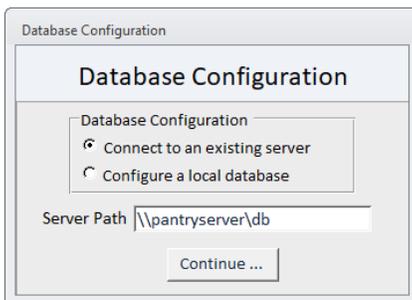
Connecting to an existing database

If you wish to connect to an existing database located on a Windows file server, select **Connect to an existing server**. Enter the server path and click the **Continue** button. You will then be prompted to log in using an existing ID and password supported by that server's backend database. Since the server database has already been configured, the install process is now complete.


Configuring a new database

If you are creating a new database and not connecting to an existing file server, select the option **Configure a local database** and click **Continue**. The database will reside on the local workstation, although it may be migrated later to a file server. You must now configure that database by performing the following steps.

Setting the DBA Administrative Password
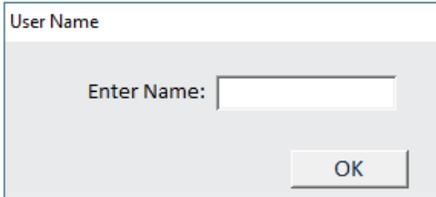
When you are prompted to log in, enter the user name DBA. The DBA (database administrator) can perform key database maintenance functions within the application.
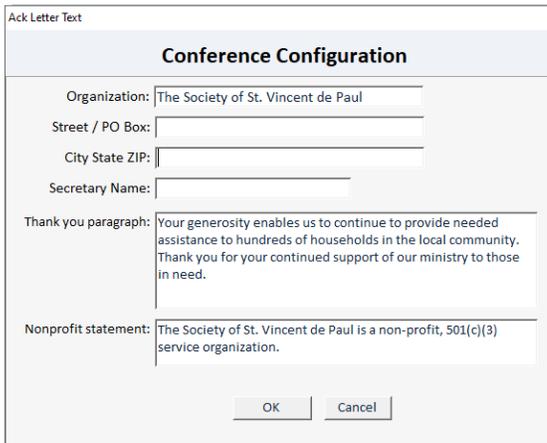
When prompted, create a password for the DBA. Enter the same password on both lines and click OK.

Setting the Conference Configuration Text

When you are prompted, enter the conference configuration information. This information will be included in acknowledgement letters sent to donors.
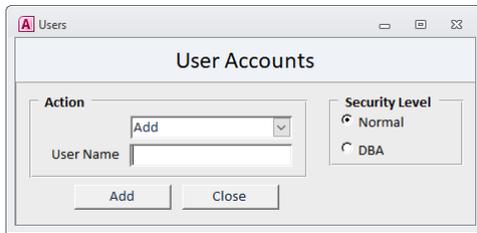
You will then be presented with the application's main menu

Adding users

As the database administrator, one of your first tasks will be to add users and configure their level of entitlement. Click on the configuration icon on the main menu, select **Users** and you will be presented with the **User Accounts** form.

For each user, select Add from the list of dropdowns and enter a user name. Next select a security level for the user. Finally click the Add button. The security level entitlements are listed below.

Security Level	Entitlement
Normal	Perform function listed under the Edits and Utilities
DBA	Perform all functions including Configuration functions

Database reconfiguration and maintenance

Migrating the database to a file server

The application may have been configured to utilize the database files that were installed on the same directory as the application program. If you require more than 1 workstation to access the data, the database can be migrated to a windows file server.

Click the **Configuration** button on the main menu and select **Configure database connection.** The connection form will appear as below.
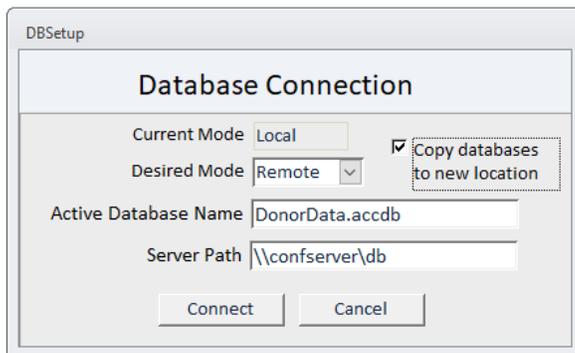
On the **Database Connection** form, check the box labeled **Copy database to new location**. Next select **Remote** in the **Desired Mode** list box. Set the **Server Path** to the network server location that will contain your database. Next click **Connect,** and the database will be copied to the server location and the application will be linked to the remote server database. In this example, the database will be stored in the **db** directory on the server named **confserver**.

Important: After configuring the server database, when you install the application on another workstation, configure the database connection by selecting **Connect to an existing server**.

Database backups

To reduce the risk of losing data due to a hardware failure, you will want to back up the database files periodically to an external device or to a network archival server. The system supports backing up the database tables to another device or server. Click the **Options** button and select **Backup.** When the **Database Backup** form appears, enter the path of the backup device and indicate whether backup file names will include a date stamp. When you have entered those to values, click the **Set Path** button. In the first example below, the user has indicated that backups are to be written to the archive directory on the network's backup server computer, and the backup files names should include a time stamp. In the second example, the user has indicated backups are to be written to the root directory of the computer's F drive, which corresponds with an attached USB flash drive.
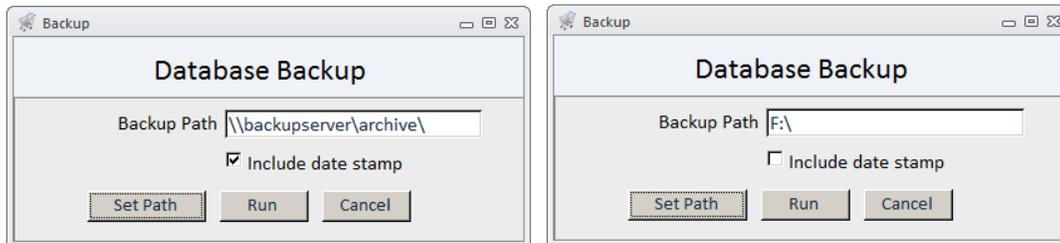
Once the target device and path has been set, the user can back up database tables by clicking the **Backup** button located on the program's main menu.

Automated backups

To automate backups, it is recommended that you set up a scheduler script on the database server that performs a nightly backup of files from the database server to the archive server. A sample script is included on the installation media.

Database compression

Over time the database will grow in size even when records are deleted. For that reason, it is recommended that you perform data compression periodically. To do so, click the **Options** button and select the option labeled **Compress database**.   Note that you can perform database compression only when other users are not accessing the database. It is recommended that you perform a database backup before running a database compression.

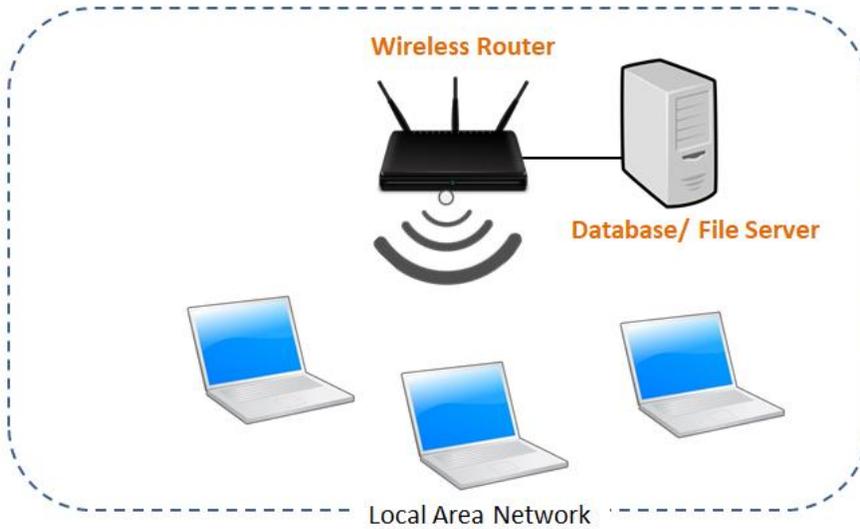# Eliminating the Access 2016 Security Message

If you encounter the message "A potential security concern has been identified" when starting the program, do the following:

1. Download the file AddPath2016.
2. Using Windows Explorer, copy the file to the pantry program directory (C:\PantryDistro).
3. Run the program by double clicking it from the windows explorer.

Typical server-based pantry configurations

The first configuration supports LAN-based access from the pantry workstations a common back-end database via a WIFI connection. The second configuration adds remote user access, employing either a virtual packet network or a remote desktop running on the server.

Simple LAN Configuration

Wireless Router

Database/ File Server

Local Area Network

LAN and Remote Access

VPN or remote desktop access via the Internet

Wireless Router

Internet Router

Database/ File Server

Local Area Network