



# *Recorder 6*

## **Standalone Installation Guide**

### **Version 4.1**

Version 3.1: Dorset Software for JNCC, the Joint Nature Conservation Committee  
Version 4: Sally Rankin, JNCC *Recorder* Approved Expert, February 2012  
Version 4.1: Sally Rankin, JNCC *Recorder* Approved Expert, January 2013

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## Introduction

This document is designed to assist you with installing *Recorder 6* on a standalone computer. Versions 4 and 4.1 are for use with *Recorder 6* version 6.17 onwards.

The system can be installed on a single computer or on a network. Different installation files are required for the two options and separate installation guides are available:

**Standalone Installation Guide v4.1.pdf** – this document

**Network Installation Guide v5.1.doc**

These can be found in the Documentation folder in the installation files, in the [Resources](#) section of the *Recorder* web site, [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder), and at <http://www.recorder6.info/>. **Network Installation Guide v5.1.doc** was written for SQL Server 2000 and hasn't been updated, but it still contains much useful information for those who want to install *Recorder 6* on a network or consider whether a networked or standalone solution is better for them. It contains descriptions of more advanced techniques, information on the import wizard, mapping and setup optimisation, and various SQL statements that may be useful for querying the database directly. Modifications to the version 6.17 network installation files enable *Recorder 6* to be installed with **Windows Server 2008**.

The installation files are available as downloads or on DVDs. The download links are:

*Recorder 6* standalone: [www.Recorder6.info/Standalone.zip](http://www.Recorder6.info/Standalone.zip)

*Recorder 6* network: [www.Recorder6.info/Network.zip](http://www.Recorder6.info/Network.zip)

The standalone download is 460 MB for v6.17.2 so you will need to allow adequate time for it to download. The network download is 389 MB for v6.17.2. If you have difficulty downloading things of this size you can obtain a DVD from one of the approved *Recorder* experts at <http://jncc.defra.gov.uk/page-4611> .

To install *Recorder 6* you will need a Site ID and a verification key which are also available from the approved *Recorder* experts. Site IDs uniquely identify different copies of *Recorder 2000/2* or *6*. Data exchange between copies of *Recorder* relies on these being unique so each Site ID must only be used for one current/live installation. To do otherwise would contravene the licence agreement.

If you are transferring *Recorder 6* to another (new?) computer or transferring from *Recorder 2002* to *Recorder 6* you should use your existing Site ID. You don't need a new Site ID in these circumstances, provided the original installation is not going to be used once the new one is up and running.

*Recorder 6* version 6.17 is compatible with the **Microsoft Windows 7** operating system, as well as **Vista** and **Windows XP**. It includes changes to accommodate the more rigorous security requirements of Windows 7, and the installation files have been modified to make installation with Windows 7 more straight forward. Different elements of the system are stored in more appropriate locations to avoid the permissions problems that arose when all the application files and folders were all placed in C:\Program Files.

## **SQL Server**

*Recorder 6* is a Microsoft SQL Server system so its data is stored in a SQL Server database. Users need a version of SQL Server to run it. It is supported when used with:

- SQL Server 2005, or its free run-time version, SQL Server 2005 Express Service Pack 3, or later.
- SQL Server 2008, or its free run-time version, SQL Server 2008 Express. Both the **32-bit** and **64-bit** versions are supported.

Existing installations are supported when used with SQL Server 2000, or its free run-time version, MSDE, Microsoft SQL Server 2000 Desktop Engine, but *Recorder 6* can no longer be installed with this version of SQL Server.

If you already have SQL Server running you will be able to use it for your installation of *Recorder 6* – see the window where you **Select Existing SQL Server** in the *Recorder 6* installation process. If you do not have SQL Server on your computer, you need to download and install a version of it. The Express versions will meet the needs of users running *Recorder 6* on standalone computers but users running it on network systems may prefer to buy a full version to take advantage of the additional functionality available, although the full licences are expensive. Note that some computers come with **SQL Server Compact** but this is not adequate for running *Recorder 6*. The Installation section of <http://www.recorder6.info/> is designed to help you select and download the version most appropriate for your operating system. Basically, SQL Server 2008 Express is recommended for Windows 7 – either the 32-bit or 64-bit version, as appropriate – and SQL Server 2005 Express is recommended for Windows XP, but only because it is easier to install.

**SQL Server Management Studio Express** contains useful tools for SQL Server. You are advised to install this as well in case you or people helping you with *Recorder 6* need to use it.

This document contains instructions for installing SQL Server 2008 Express but the installation of 2005 is very similar.

**Note** that the maximum database size in SQL Server 2005 Express is 4 GB, in SQL Server 2008 Express it is 10 GB. At installation the *Recorder 6* database, NBNDData\_Data.MDF, is over 1.4 GB because it contains the dictionaries (taxon, biotope and admin areas) and the associated index files, but a *Recorder 6* database containing about 500,000 species observations will probably be less than 2.2 GB, although the size will depend on the richness of the data stored.

## **System Requirements for a Standalone Installation**

The following guidelines illustrate the specification of machines that will give reasonable performance in *Recorder 6*. It is possible to use lower specification machines although the performance is reduced.

Processor:	Intel Pentium 3 processor or later, 1GHz minimum, 2GHz recommended
Memory:	1GB RAM minimum, 2GB recommended
Hard disk:	7 GB disk space minimum, 15 GB recommended
Software:	Windows XP (SP3), Vista or Windows 7 Internet Explorer 5 or later SQL Server 2005 Express Service Pack 3 or later, or SQL Server 2008 Express, or SQL Server 2005, or SQL Server 2008

## Permissions required for installation/running

### *Installing*

To install SQL Server, *Recorder 6* and any add-ins, users need administrator rights.

If you are installing the software on a personal computer running **Windows XP**, you need to log in using an administrator account not a normal user account. If it is your own computer and nobody has placed any restrictions on your use of it, the way you normally login will probably provide sufficient rights for the installation.

If you are running **Vista** or **Windows 7**, you will need to request elevation via the User Account Control window which appears automatically when administrator rights are required. This window will ask the question 'Do you want to allow the following program from an unknown publisher to make changes to this computer?' Answering [Yes] will give you the required rights to install SQL Server and *Recorder 6*.

### *Running*

To use *Recorder 6*, users only need standard access rights.

## Installing SQL Server 2008 Express

The following is a step by step guide to installing SQL Server 2008 Express on a standalone computer. If you have any difficulties please report them in the *Recorder* section of the NBN forum [forums.nbn.org.uk](http://forums.nbn.org.uk) so that assistance can be provided and these instructions updated, if necessary. Notes are included after the instructions to provide additional information.

**Please note** that some of the stages of installing SQL Server 2008 Express and *Recorder 6* take a little while but rarely more than a few minutes. **Please be patient** after clicking a button and wait for the operation to complete. Messages are sometimes delayed and/or hidden. If they are hidden, clicking away from the active window and clicking on it again usually brings them into view.

1. Ensure that you have all of the necessary permissions etc. (see above).
2. Download the required version of SQL Server using the information in the Installation section of <http://www.recorder6.info/> and unzip it.
3. Close all other programmes on your computer.
4. Run the executable, SQLEXPRT\*.exe, by double clicking it.

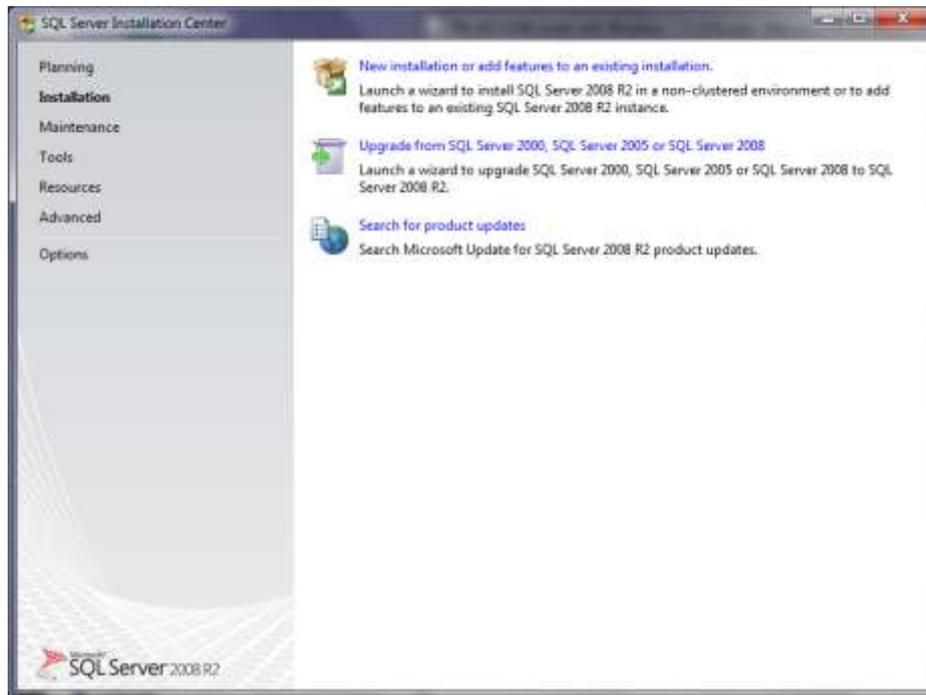
The following window should now be in view:



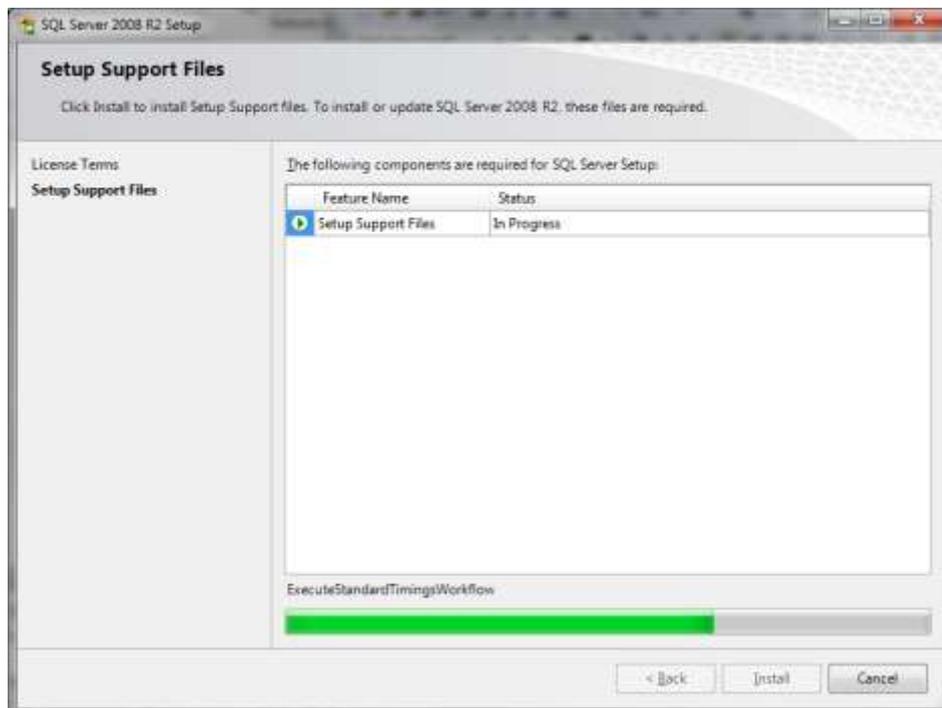
Click [Run] to confirm that you do want to run this programme.

At the User Account Control window on **Vista** and **Windows 7** computers, answer [Yes] to ‘Do you want to allow the following program from an unknown publisher to make changes to this computer?’

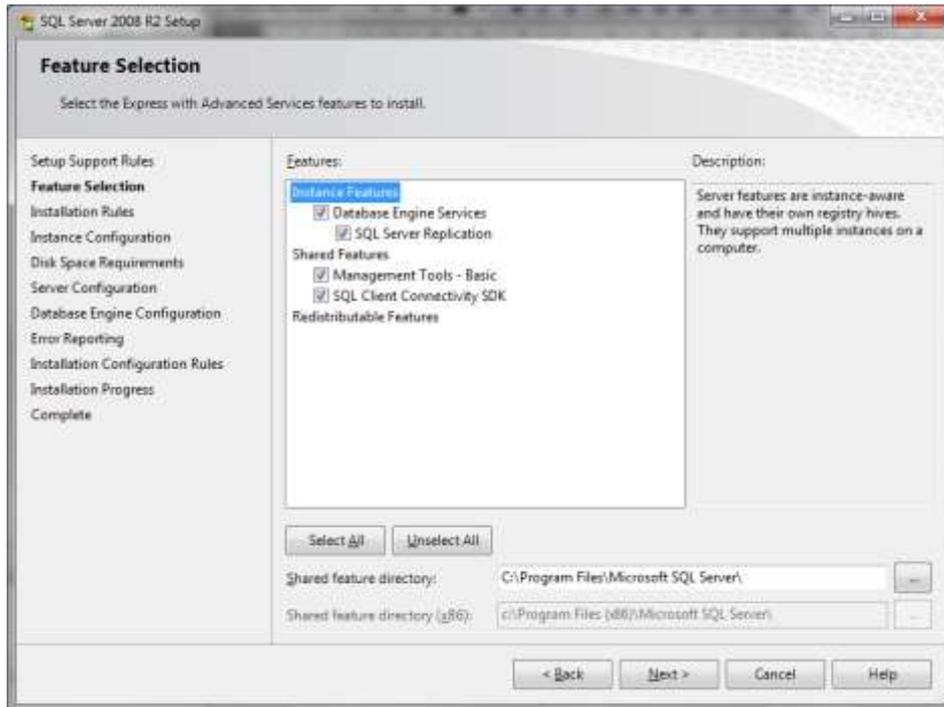
5. The following window should now be in view. Select the first option and wait while SQL Server processes the current operation.



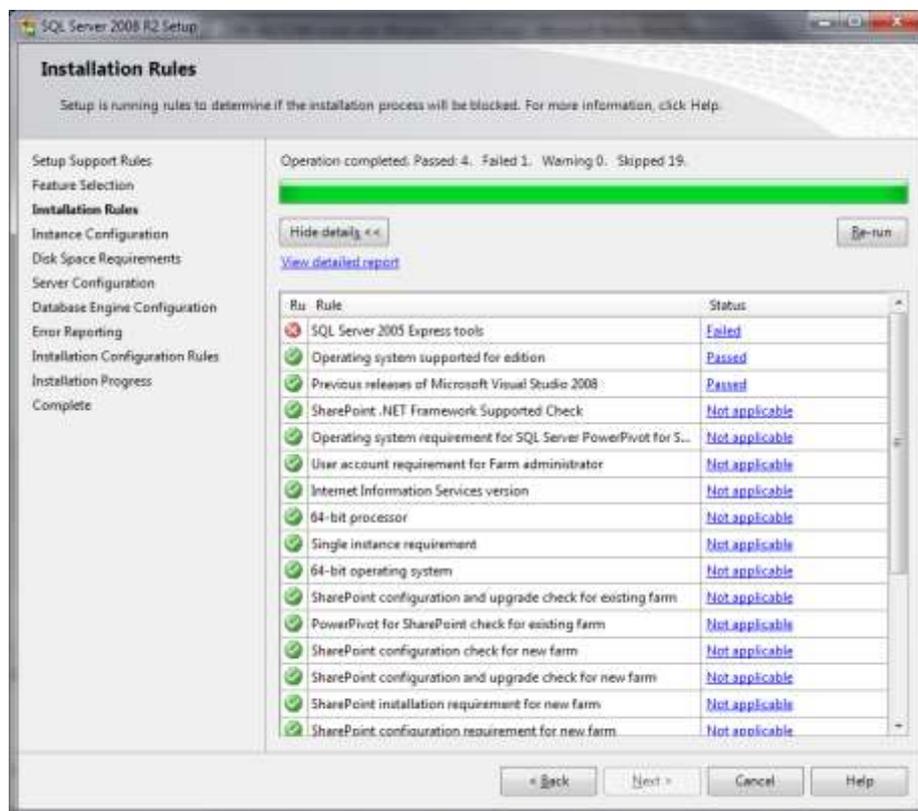
6. Read the Microsoft Software License Terms presented on the next window before ticking ‘I accept the license terms’ and clicking [Next].
7. Click [Install] on the following window when it becomes active:



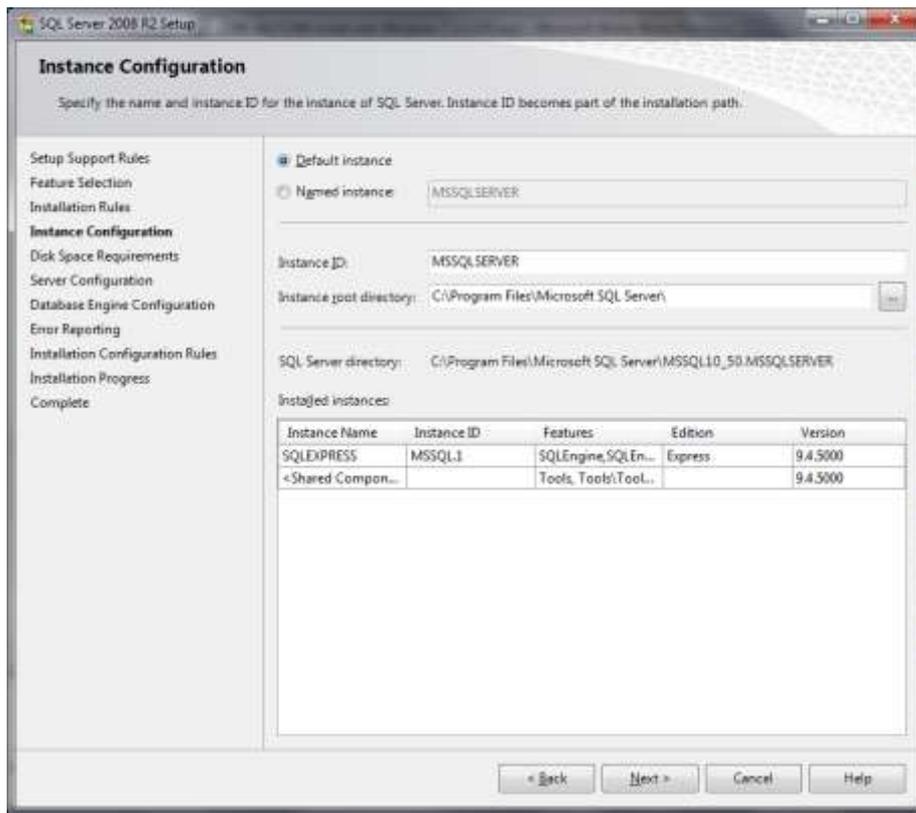
- Make sure the items ticked in the following window are also ticked for your installation then click [Next]:



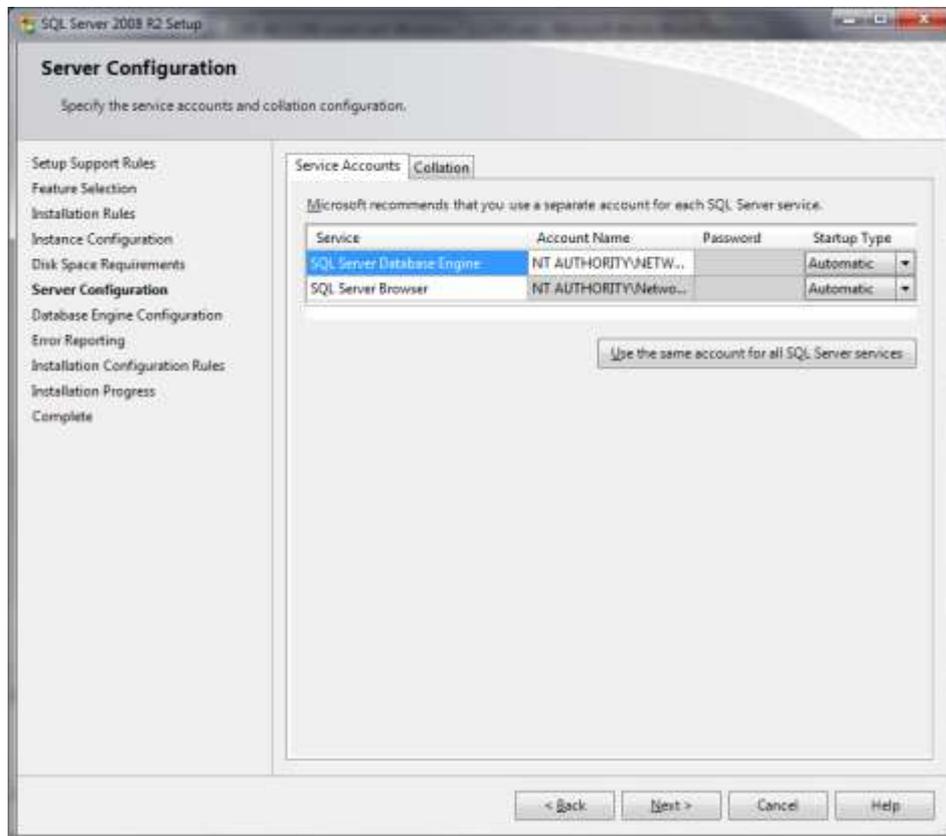
- The following window only appears if problems are detected. In the installation concerned, SQL Server 2005 Express was already on the computer along with the corresponding Management Studio Express, the SQL Server tools. In this case, it was necessary to go Back and untick 'Management Tools – Basic' then click [Next] and [Next] again. See note iv under Additional Information below for the preferable course of action when 'SQL Server 2005 Express tools' fails.



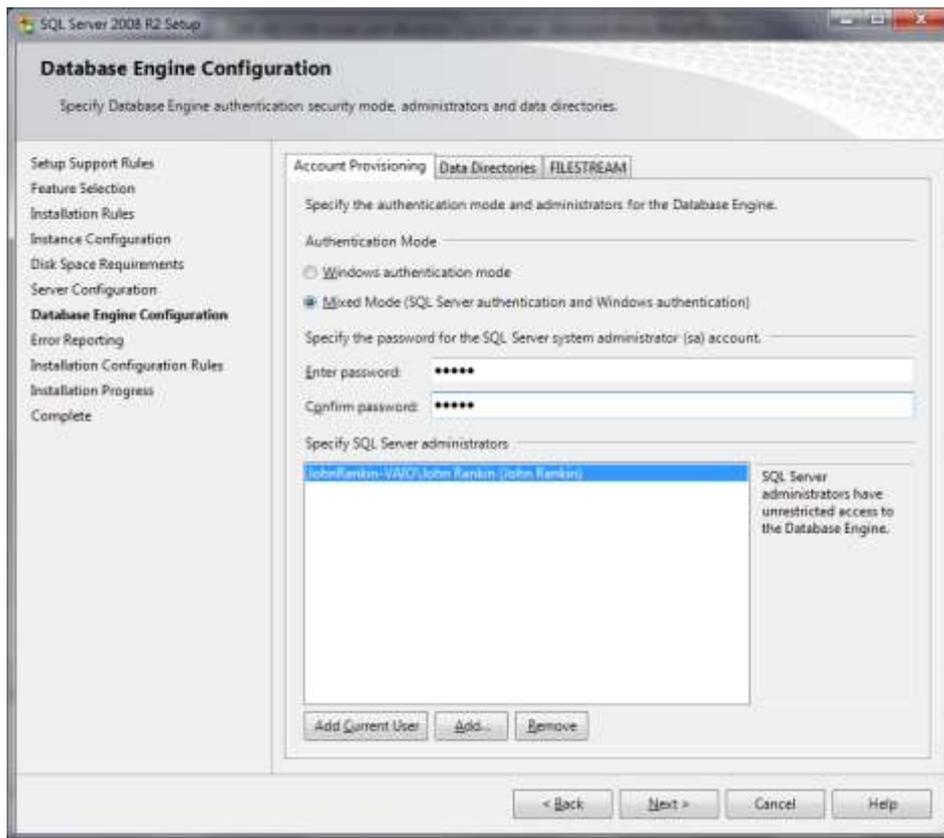
10. If there are no other SQL Server instances on the computer click [Next] on the following window. If there are other instances you may prefer to select 'Named instance' and specify a name yourself, e.g. SQLEXPRESS2008.



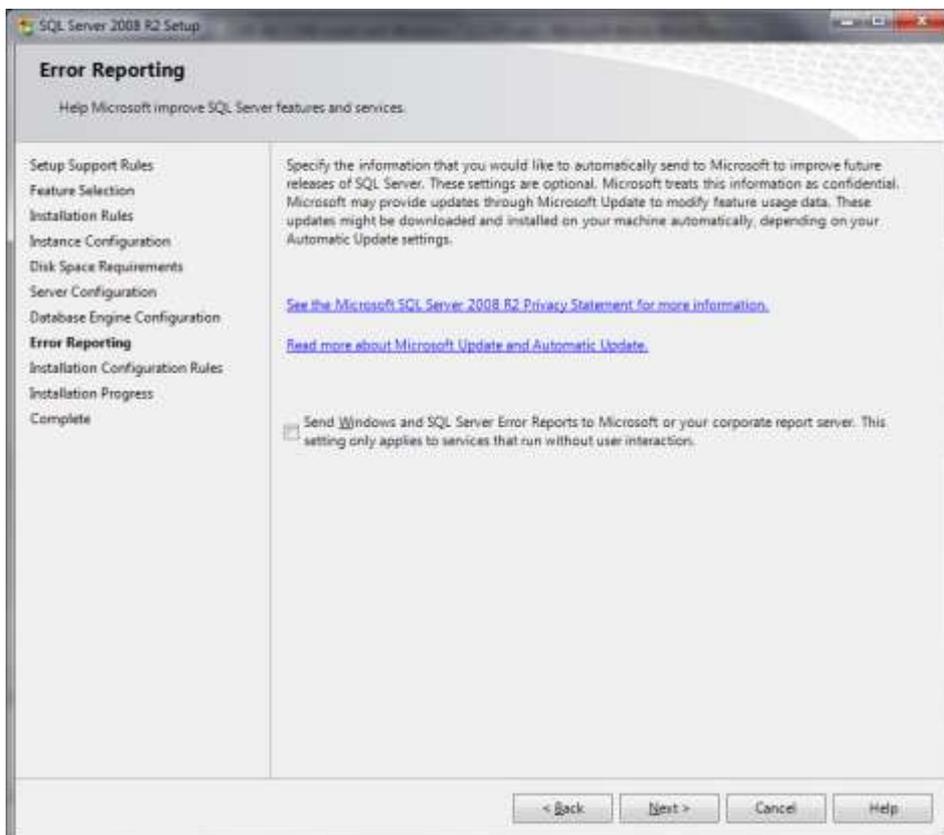
11. Click [Next] on the following window:



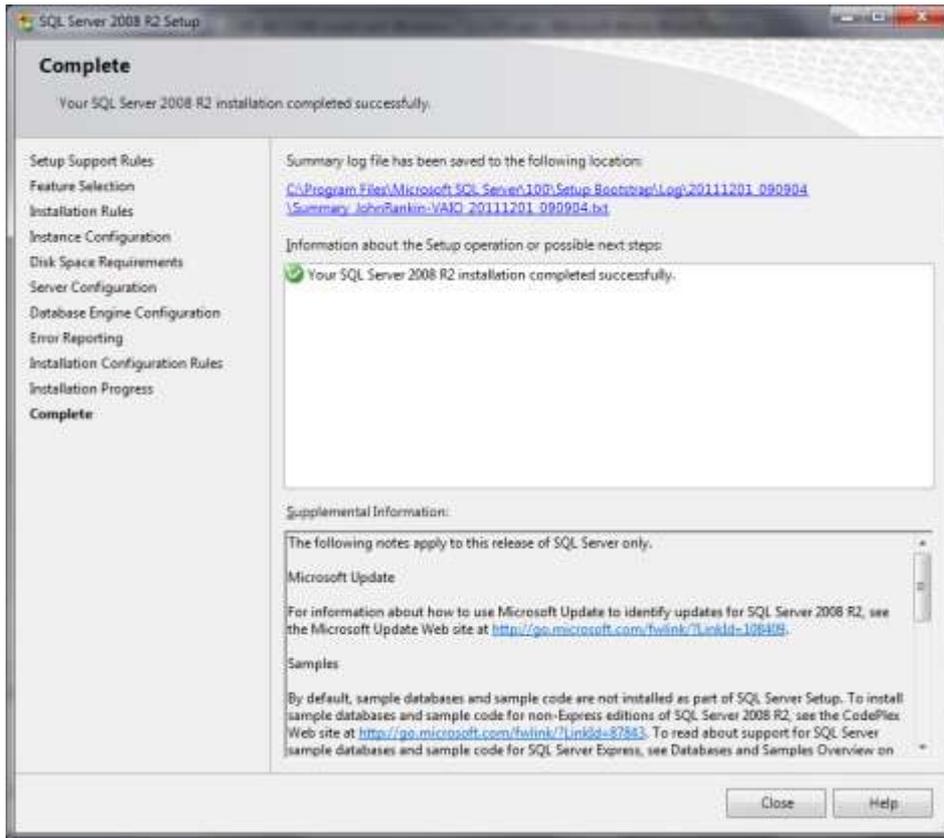
12. Mixed Mode is the recommended selection in this window. Enter a password and take care not to forget it as it will be required when running things like upgrades and it is difficult/impossible to find out what it is if you forget it.



13. Decide whether you want to send error reports to Microsoft then click [Next] and wait while SQL Server 2008 Express is installed.



14. When the installation is complete you will see the following window:



15. You are now in a position to install *Recorder 6*.

## **Installing Recorder 6**

16. Ensure that you have all of the necessary permissions etc. (see above).

17. Close all other programmes on your computer.

18. Insert the standalone installation DVD if you have one.

The installation programme should start automatically. However if this does not happen please follow the following instructions:

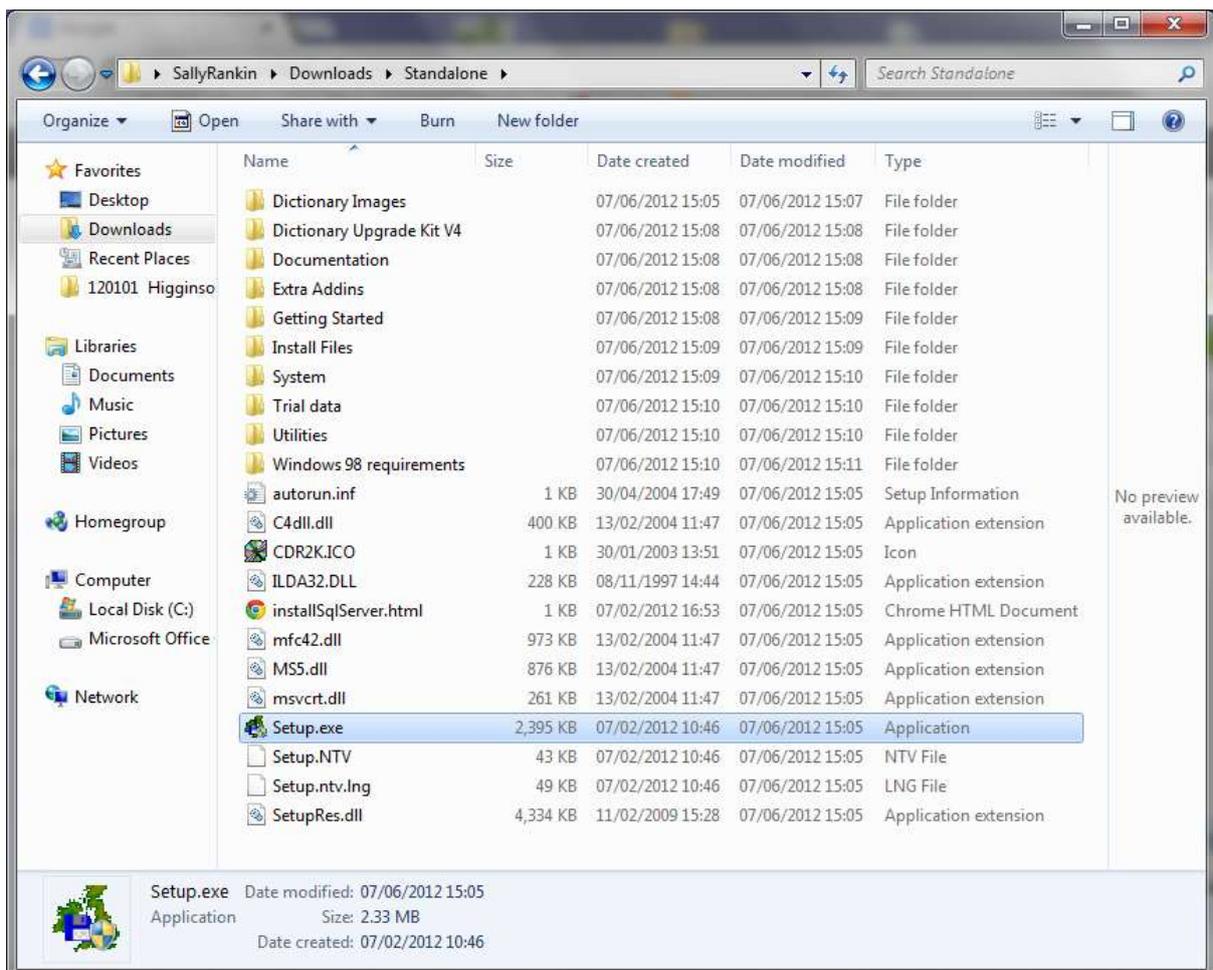
- Using Windows explorer locate the Setup.exe file on the installation DVD (it is in the root folder).
- Run the Setup.exe with administrator rights as specified in the section on permissions above.

You should now have the following initial window of the installation wizard in front of you:



Choose option 1 **Install Recorder 6 on this machine.**

If you have downloaded the standalone installation files, unzip the download, maintaining the folder/file structure. The contents will be:



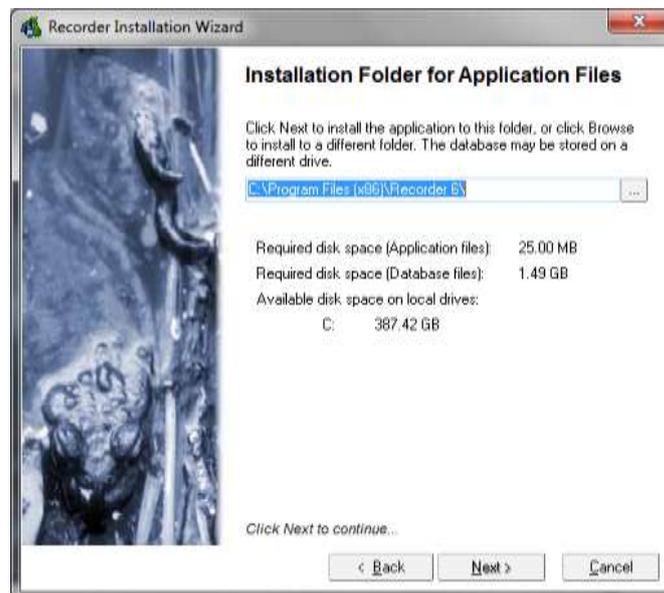
Run the setup programme, Setup.exe (by double clicking it), with administrator rights as specified in the section on permissions above.

The **Welcome to Recorder 6 Installation** window above will appear. Choose option 1 **Install Recorder 6 on this machine.**

19. Read the information presented in this window before clicking [Next]:



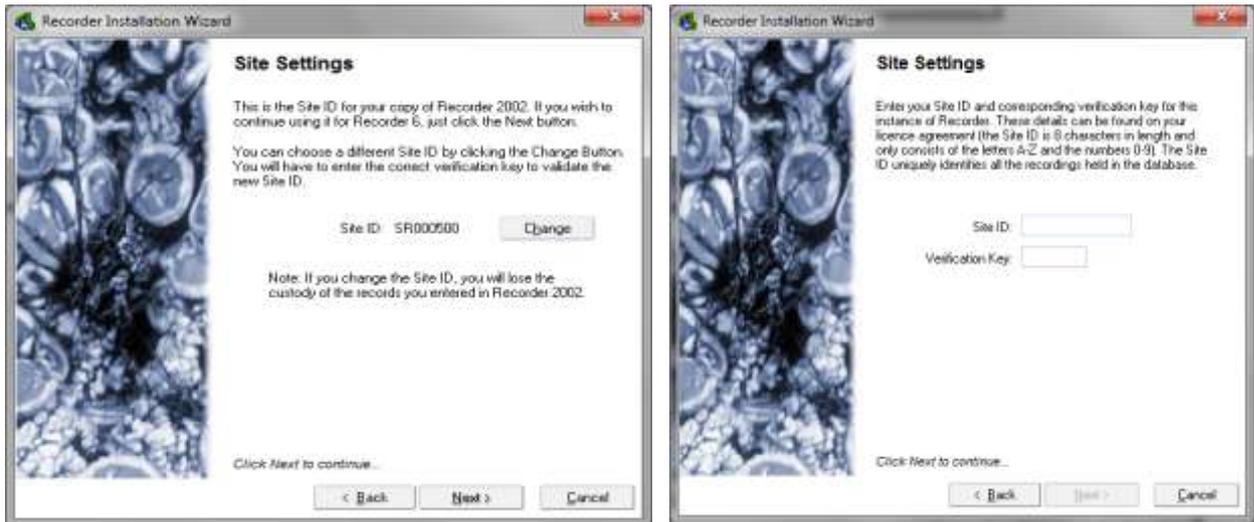
20. You should then be presented with the following window asking you to identify the folder in which you want to install Recorder 6. By default you will be offered 'C:\Program Files\Recorder 6\' on a Windows XP computer or 'C:\Program Files (x86)\Recorder 6\' on a Windows 7 computer. You may choose to install at a different location but you should bear in mind the space that you require in the installation folder. Some users for instance have a D drive that has more free space than their C drive and is therefore a more appropriate place to install the programme.



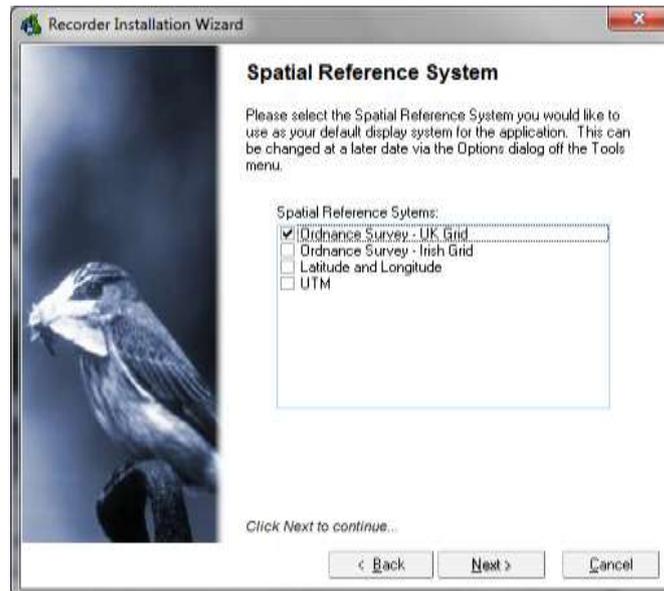
Answer [Yes] to the question about creating the selected folder now.

21. You will then be presented with one of two **Site Settings** windows depending on whether you have Recorder 2002 installed on your machine. If you have Recorder 2002, the Recorder 6 installation programme assumes that you will be installing Recorder 6 with the same Site ID and fills in the form as shown below on the left. In case this assumption is incorrect you are given the option to change it. If you choose to change to a different Site ID or if you do not have a copy of Recorder 2002 that the installation programme can get a Site ID from, the **Site Settings** window shown below on the right will be displayed. You will need to enter your 8 figure Site ID and your 4 figure verification key. This information is available from the licence agreement that you received with your initial purchase of the programme (either Recorder 2002 or Recorder 6). If you don't know what your Site ID or verification key are, please e-mail [John.Morris@jncc.gov.uk](mailto:John.Morris@jncc.gov.uk) or contact JNCC on 01733 866866 and ask to talk to the

Recorder Site ID administrator. Click [Next].



22. You will then be asked to choose a spatial reference system. The default option is the ordnance survey UK grid which is appropriate for the majority of users. Users in Northern Ireland or the Republic of Ireland should switch to the Irish grid. Click [Next].



23. The next window allows you to select the SQL Server instance to attach the database to. If you installed SQL Server 2008 Express as described above you should select the instance specified in the Instance Configuration window (point 10). The Instance name in the window below is displayed as 'computer name\instance name'. Note the information in the window about the SQL Server instance you wish to use not being displayed.

It is recommended that you accept 'Use my Windows Account to login' – Windows authentication. If you opt for 'Use the following SQL Server system administrator login' – SQL Server authentication – you will need to enter the password you specified when installing SQL Server – see point 12 above.

Once you have chosen your options click on [Next].



24. The next window allows you to say where your SQL Server database is to be held. Be aware that this is where the majority of your data will be held and that it therefore needs plenty of disk space – see the system requirements above. Once you have chosen your option click [Install] and wait for the *Recorder 6 Application Files* to be installed.



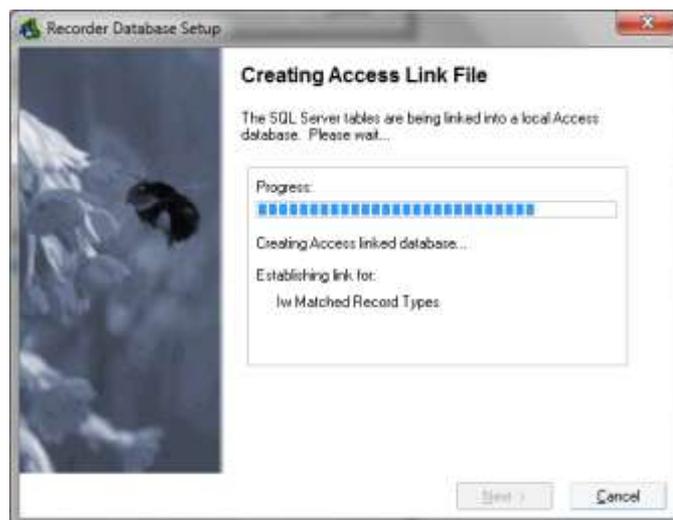
25. This window indicates that Application Files have been installed. Click [Continue].



26. This window is displayed while the installation process is creating the database and attaching it to the SQL Server instance:



27. This window is displayed while the installation process is creating the Microsoft Access database that contains links to all the tables in the SQL Server database. It is provided for the benefit of users who wish to use Access to query the database:

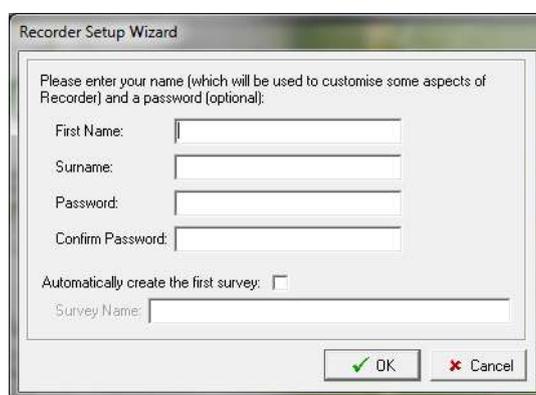


28. When this window appears the installation is complete. If you are upgrading from *Recorder 2002*, please read the message in red.



29. When *Recorder 6* starts, it will display the following window. Enter your first name and surname, and a password for *Recorder 6*, if required. If no password is entered, your password will be 'password'. Your name will be added to the list of names and addresses and a username and password will be registered for you with the privileges of System Manager, which gives you full rights to the system. Note that a username of 'Default User' is also created with a password of 'password' with the same privileges. If you are the only user, apart from the Default User, and your password is 'password' you won't need to complete the login dialogue box each time you start *Recorder*.

In *Recorder 6*, all observations (records) are stored in 'surveys', which can be structured organised surveys, or something unstructured such as simply a list of your observations. This is important as it enables you specify the date range and geographic coverage for the observations, and attach information to them about why the information was gathered, what quality control has been applied and so forth. If you would like *Recorder* to create a survey for you, tick 'Automatically create the first survey' and enter a survey name, e.g. Biological Records. This will save you having to enter a survey by the normal means (**Data Entry – Observations – Add**) before you can start entering observations. If you enter a survey this will be created in the observation hierarchy. You will be able to enter observations with dates of 1900 onwards into a survey entered in this way. If you need to enter observations with earlier dates you will have to edit the Records Allowed From date on the survey. Click [OK].



30. You are now in a position to start using *Recorder 6*.

## **Support for Recorder 6**

The main source of assistance with using *Recorder 6* is the Windows style Help within the system. The Help menu item provides access to all the help via standard Contents, Index and Search tabs. Alternatively, the function key F1, for context sensitive help, will usually open the Help at the topic appropriate to the window in which the cursor is currently located.

If the Help does not display correctly in your system, please consult the known issues on the web-site <http://jncc.defra.gov.uk/page-4981> or seek help via the forum.

If you are a new user, it is recommended that you run through the Getting Started Guide. This has not been updated for sometime but much of the information it contains is unchanged.

- Prior to installation, bring up the **Welcome to Recorder 6 Installation** window as in point 18 above, and select 'Getting Started Guide'. If that option doesn't appear, navigate to the Getting Started folder on the DVD or in the downloaded files and click on the file called 'Recorder 6 Getting Started Guide.chm'. On a network DVD or download this folder is in the Install Files folder.
- Following installation, it can be started by clicking on the Guide's icon on the desktop.

The Guide comprises screen text with audio-visual examples, including dynamic screen shots with a voice-over.

For those who prefer printable guides, there is the **Recorder 6 User Guide.doc** which can be found in the Documentation folder on both versions of the DVD and in the download files. It was originally written by

Stuart Ball at JNCC in 2007 as a training handout for the Falklands but it has largely been updated for the UK and v6.13 of *Recorder*. Unfortunately resources didn't run to also updating it for later versions so it is a little out of date but it still contains much useful information. It can also be accessed from the *Recorder 6* web-site [www.jncc.gov.uk/page-4595](http://www.jncc.gov.uk/page-4595) .

Another source of help is the forum that enables users to exchange information about *Recorder* and the NBN. It can be accessed at [forums.nbn.org.uk](http://forums.nbn.org.uk).

JNCC have now out sourced the central support and maintenance for *Recorder 6* to a consortium whose members are Mike Weideli, John van Breda and Sally Rankin. As you will see from their official announcement – <http://forums.nbn.org.uk/viewtopic.php?pid=9228#p9228> – the contract includes NBN Forum support which means that a lot of support via the forum will be free to end users. Alternatively, you can contact the supplier of your copy of *Recorder*, or any of the *Recorder* suppliers who are listed on the *Recorder* web site, [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder), but charges may apply.

Further information is available on the *Recorder 6* web-site [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder) .

## **Additional Information**

### ***Notes***

- i. A number of versions of SQL Server Express are available for download but the ones available from the Installation section of <http://www.recorder6.info/> (point 2 above) installed more easily than the other ones tried. They also have the advantage of enabling you to install **SQL Server Management Studio Express**, the SQL Server tools, at the same time. The **SQL Server for Recorder 6** link in the **Welcome to Recorder 6 Installation** window in point 18 takes you to <http://www.recorder6.info/>.
- ii. Some Microsoft documentation says that other things need to be installed before installing SQL Server 2008 Express, e.g. Microsoft .Net Framework 3.5, but it isn't easy to check whether all of them are installed. It is easier to simply try installing SQL Server 2008 Express. If it needs anything that isn't on your computer it will tell you.
- iii. If you have SQL Server 2005 Express installed but you want to use *Recorder 6* with SQL Server 2008 Express you can install the latter alongside SQL Server 2005 Express. Take care to select the SQL Server 2008 Express instance when installing *Recorder 6*.
- iv. If you have the SQL Server 2005 version of Management Studio Express installed and you decide to use SQL Server 2008 Express you may find it easier to uninstall Management Studio and install the 2008 version while you are installing SQL Server 2008 Express. The 2008 version can be used with SQL Server 2005 Express and SQL Server 2008 Express but the 2005 version can only be used with SQL Server 2005 Express and earlier.

### ***The Recorder 6 Database***

For information on the *Recorder 6* database, see the *Recorder* Wiki. There is a link to it from the *Recorder 6* web-site [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder) (bottom left). Once in the Wiki, select **Recorder** then **Recorder 6** where the required information is under 'Database Information' under 'Application Administration Information'.

### ***Backups***

For information on backing up *Recorder 6*, see the help in the system. Select **Help – Help** on the main menu, select the **Contents** tab and double click **Tasks** then **Making backups**.

## *Upgrades*

Most changes to *Recorder 6* are implemented as upgrades which come in two forms:

- Software upgrades which fix problems, introduce new features and improve existing ones.
- Dictionary upgrades which improve the taxon, biotope and admin areas dictionaries.

The *Recorder* web-site [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder) tells you what the latest version is. In *Recorder 6*, **Help – About Recorder 6** will tell you the version of your copy of the system. Upgrades will be announced in the *Recorder* section of the NBN forum [forums.nbn.org.uk](http://forums.nbn.org.uk) .

For information on upgrading *Recorder 6* to a later version see the help in the system. Select **Help – Help** on the main menu to take you to the opening page of the Help, then click the links for **Upgrading Recorder** or **Dictionary Upgrades**. Check for variations on these instructions for individual upgrades on the *Recorder* web-site.

Whenever an upgrade is to be installed, it should be done through an administrator user account to avoid any potential problems due to limited user account access rights.

## *Migrating from Recorder 2002 to Recorder 6*

For information on migrating from *Recorder 2002* to *Recorder 6*, see the *Recorder* Wiki. There is a link to it from the *Recorder 6* web-site [www.jncc.gov.uk/recorder](http://www.jncc.gov.uk/recorder) (bottom left). Once in the Wiki, select **Recorder** then **Recorder 6** where the required information is under ‘Migrating from Recorder 2002 to Recorder 6’ under ‘Application User Information’.