



# Phase25 Database Guide

*Version 8 – January 2025*



Small Business Software Built with Enterprise DNA

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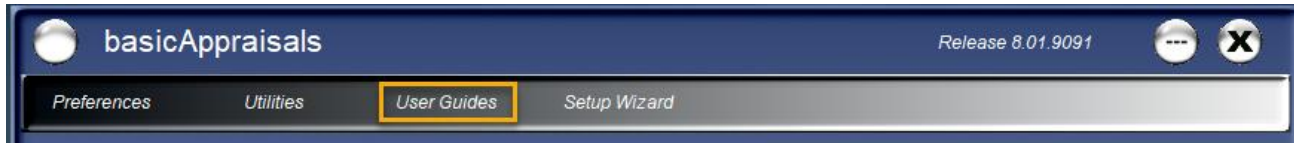
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# Phase25 Database Guide

## Overview

This guide is a resource for users of all Phase25 software products, Version 8.x.

For additional information, click on [Main Menu >> User Guides](#) to open our Support site. All user guides and video tutorials are FREE!



## Why Do We Need a Database?

Ok, you just purchased a Phase25 Software product (or downloaded a trial version), that's all you need, right? Well, almost... All of our products, when newly installed, automatically create a SQLite database in your **Documents** folder, in a subfolder with the name of the application. So you don't need to do anything else! But if you add users for the application and need to share a database, then you'll need to upgrade to the next level. This document will describe the options and why you would choose one.

## Application vs. Database

Just in case you're confused about how an application and a database fits together, here's what you need to know.

The technical explanation is simple:

- **Database:** A collection of organized data stored and accessed electronically.
- **Application:** A program that queries the database and returns usable information.

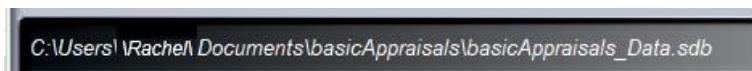
**The Application** is the logic for what you want to do; the **database** stores what you did. Some simple examples:

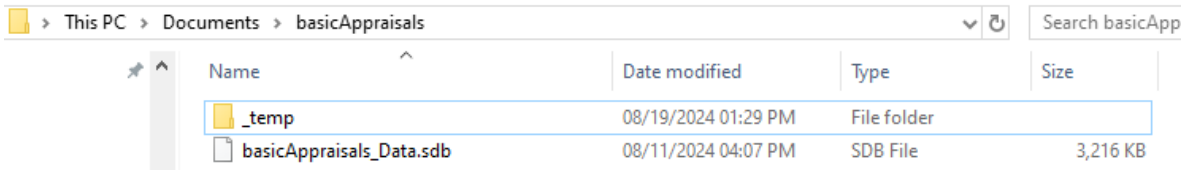
Application	Data Stored In:
Microsoft Word	Documents (.docx)
Microsoft Excel	Workbooks which may have multiple Worksheets (.xlsx, .xlsm)
Notepad	Text Files (.txt)
Adobe PDF Editor or Reader	PDF Files (.pdf)

When you've finished editing a file, you're prompted to "Save As..." and the file is clearly separate from the application that created it. None of the above examples use a database to store the information as each saves the data you created in a separate file. But database applications are more efficient!

After you install one of our products, the **application** needs a place to store the data. The only difference is that it only needs ONE file to store the data, which is the **database**.

By default, a SQLite database is created and populated with the default information (report templates, system settings, etc.). This "file" has an extension of ".sdb" and you can open the file location (folder) where it resides simply by double-clicking on that file path on the bottom of the Main Menu.





## Supported Database Types

Our products support several database types, depending on your license agreement.

### SQLite

SQLite is a standalone database engine that's the default storage file for every Phase25 application. It's "zero-conf" (zero-configuration), which means it requires no server and no administrative services. If you're familiar with a Microsoft Access database, it's similar in that it's a single file that you can copy or move using Windows Explorer, but with much larger capacity and stability. Structurally, a SQLite database can store up to 140 TB (terabytes) of data, however capacity is limited to the size of your computer's hard drive, which is usually 1 TB or less.

When you open any Phase25 software product for the first time, a new SQLite database is created automatically in your **Documents** folder, in a subfolder with the name of the application. For example, with **basicAppraisals**, your database would be here:

[C:\Users\<your name>\Documents\basicAppraisals\basicAppraisals\\_Data.sdb](C:\Users\<your name>\Documents\basicAppraisals\basicAppraisals_Data.sdb)

You can use this startup database or if you want to move it to another folder on your computer, you can do that in Windows Explorer, just like moving any other file folder-to-folder. Only a couple of rules around that:

1. Close the application before moving the database.
2. **Do NOT move the database into a folder that's linked to online file storage, like Google Drive or OneDrive.**

#### Why Not?

- a. Because every time you save data (a record) to your database, the online service will see that the file is changed and try to upload it to the cloud, slowing your computer's processing and possibly locking the database until the "sync" is done.
  - b. When that happens, you may experience hang ups in the application, or even lock ups where you have to restart the application to get a connection with the database again. A worse case scenario is that you lose your changes or corrupt the database.
  - c. As your database grows, the time to "sync" that file to the cloud will increase and cause further disruptions in the application.
3. After you move the database, the application will not find it the first time you open it again. Use the **Open Database** option to reconnect it.

### What can you do to protect and backup your data?

We made it easy! If you're connected to a SQLite database you'll have a built-in Backup (and Restore) utility which can be setup in **Preferences**. You can specify where you want to copy your database when you close the application (or manually anytime you want), and also you could setup a back to your cloud folder. When you close the application, the database is copied, and your online service only has to run once and NOT while you're still accessing the database.

SQLite is a single-user standalone database file. As long as you're the only user, you don't need to upgrade to the next levels (SQL Express or SQL Server).

## SQL Express Is The Middle Option

SQL Express is a free, full-featured database engine available from Microsoft Corporation, and is most suited to supporting production applications for smaller to midsize businesses. It is not limited to a single user (as is SQLite), and can store up to 10GB of data per database. Since you can have multiple databases the size limit is not restrictive. SQL Express is the “lite” version of SQL Server and databases can be easily migrated to the full server version if your needs require more power and storage space.

SQL Express can be installed on any Windows 10/11 workstation and with the correct configuration, can be used for one to four users on a network. As long as the workstation has enough disk space for the databases, a Windows server (computer) is not required.

If you start out as a single user, using the default SQLite database, you can upgrade to the Team version of any of our products which will include utilities to easily move your data to a SQLExpress or SQL Server format.

SQL Express is a FREE download from Microsoft from the site listed below:

- *Microsoft SQL Server EXPRESS 2014 - a free product available from Microsoft's website (<https://www.microsoft.com/en-US/download/details.aspx?id=42299>).*
- *Also select the option to to download SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to the Microsoft documentation on each download site for system requirements for their products and installation instructions*

See the section below for **Configuring SQL Server Application Role**, which is the security requirement for all of our Team version products. This is a one-time entry which is done using SQL Management Studio. It will provide the permissions for any of our products to create and access a database on the server.

## SQL Server

SQL Server is a relational database developed by Microsoft Corporation. There are two editions of this product that can be used by our Team application versions:

- **SQL Server Enterprise:** It is used in the high end, large scale and mission Critical business. It provides High-end security, Advanced Analytics, Machine Learning, etc.
- **SQL Server Standard:** It is suitable for Mid-Tier Applications. It includes basic reporting and analytics.

SQL Server requires a Windows Server (computer) on a secure network to host it and the databases created for it. This option obviously requires considerable investment, in the Server, network and licensing costs for SQL Server. Typically, you would only choose this option if you exceeded the number of users that SQL Express can support, or if your company is already using SQL Server for other applications and could be shared with another product's databases.

This type of database host is typically installed and managed by a SQL System Administrator who has the technical knowledge to do so. Large companies have an IT department with staff with the necessary skills to setup and maintain the system going forward. If your company does not have these skills on staff, there are many IT consultants who can implement the technology and monitor the network needed for SQL Server.

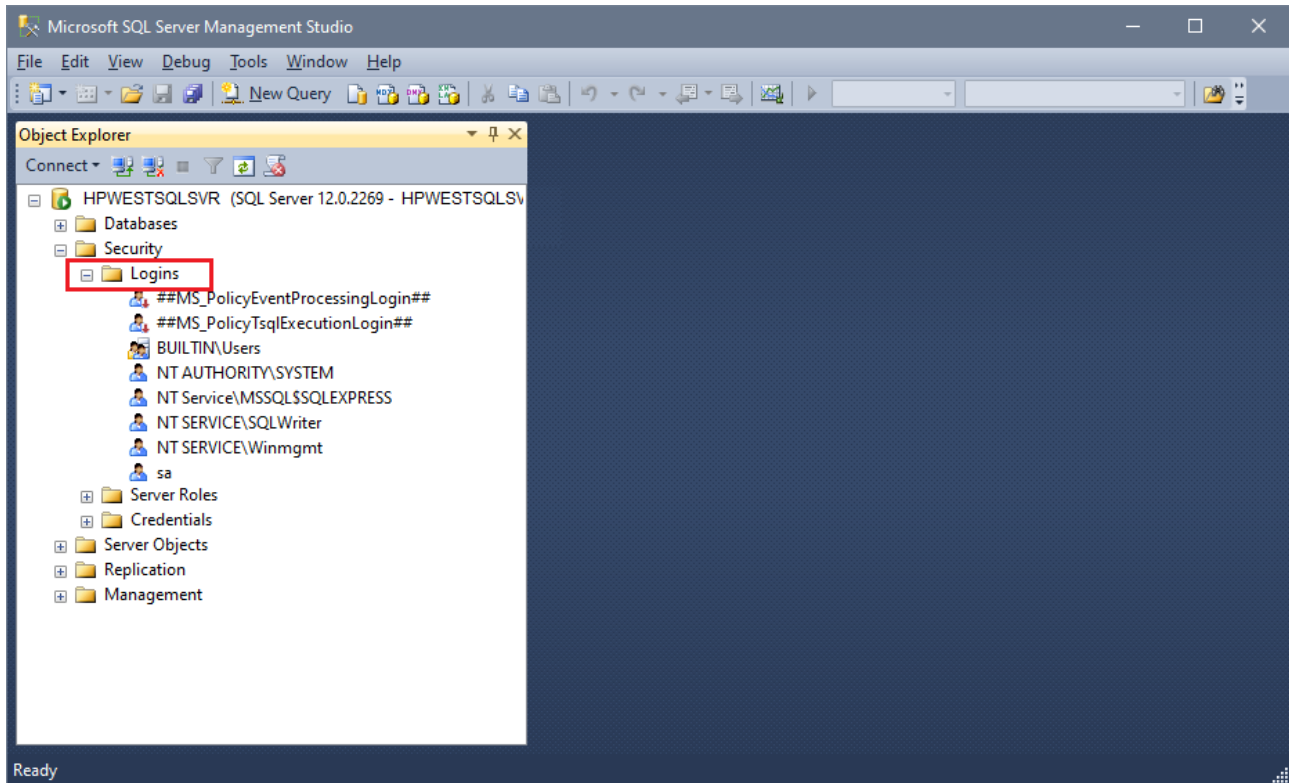
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## Configuring SQL Server Application Role

These steps apply to SQLExpress and SQL Server platforms. The examples are shown using SQLExpress 2014, but the steps are the same in any version.

### SQL Server Login Role

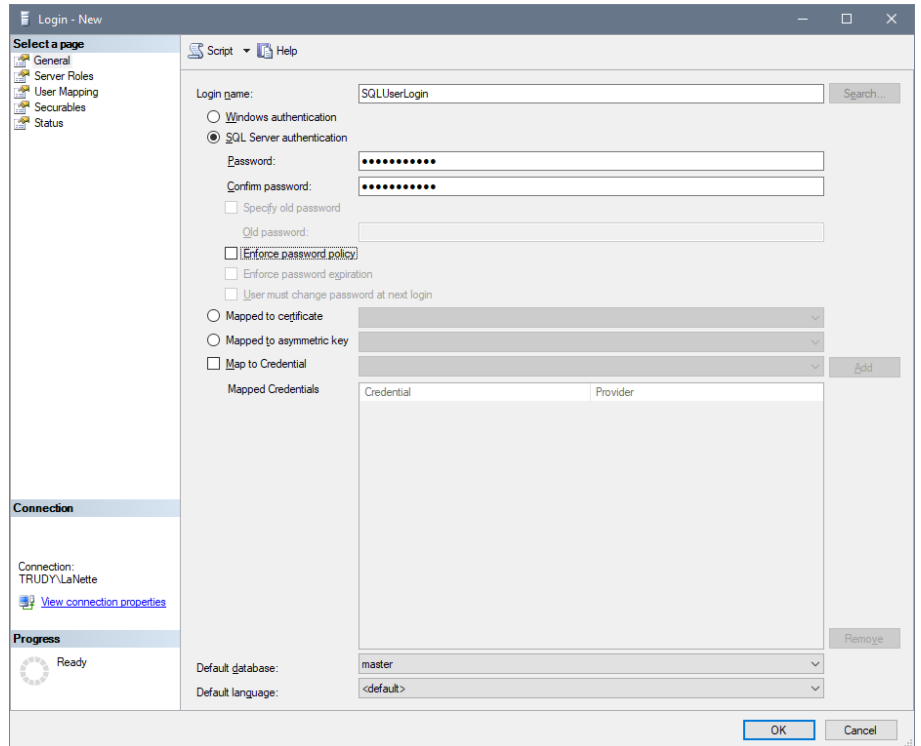
SQL Server requires a security login, also called an Application Role, in order to allow its users to open, use and create a SQL database. All users must have network access to the SQL Server (physical access), then the following steps must be done by a SQL Server administrator using Microsoft SQL Server Management Studio.



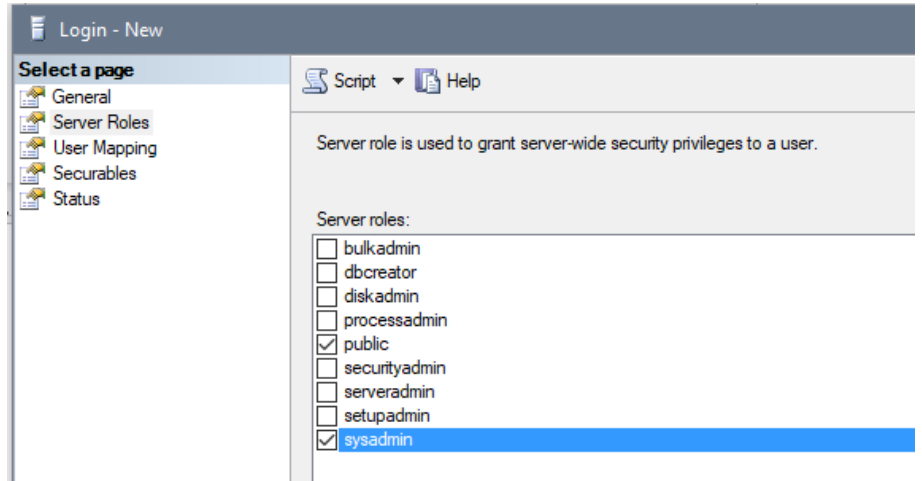
1. In the Object Explorer window on the left, expand the "Security" folder, then right-click on the "Logins" folder and choose "New Login" to display the dialog on the next page.

*Please note that your application has a default value for each of these fields; however choosing a different Login Name and Password than the default greatly increases security for the SQL Server. It also means you will need to update your SQL settings in your application. Please see the section **Updating SQL Server Settings in Your Application** later in this document for more information.*

- On the “General” page, enter the login name.
- Check the “SQL Server authentication” option and enter and confirm the password.



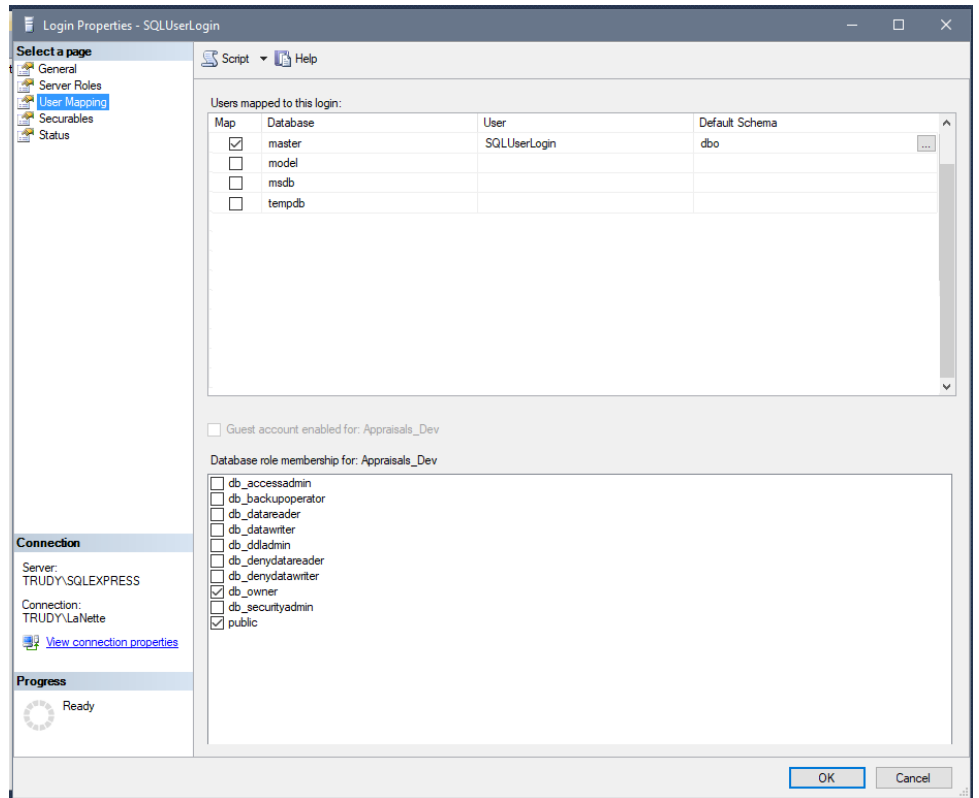
- Click on the “Server Roles” page and check the “sysadmin” checkbox on the right to give full access rights to this role.



5. Click on the “User Mapping” page and check the “master” Map checkbox in the upper list.

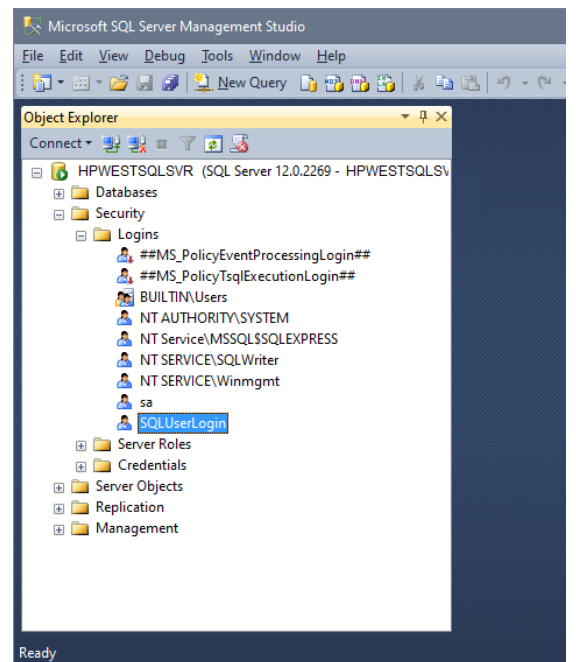
6. The Database Role Membership setting for master will be enabled; the “public” option should already be checked; check the “db\_owner” option as well.

7. Click “OK” to save these settings and create the new login.



The client login will be displayed in the Login list.

Now the application has permissions to manage its own databases on the **SQL Server**.





## Configuring SQL Server Express Connectivity Settings

Out of the box, SQL Server Express's network connectivity settings aren't enabled. The reasoning behind this configuration is simple: If users were to use SQL Server Express in a standalone installation with the network settings enabled, malicious outside users would be able to access the PC--this is how the SQL Slammer worm made such a big impact on Microsoft Data Engine (MSDE) installations. Many MSDE systems that were servicing standalone applications didn't download the latest Microsoft bug fixes, which left them open to network connections and allowed the worm to gain access. SQL Server Express prevents this type of attack by leaving the network connectivity settings off by default.

Enabling the network settings is easy using SQL Server Configuration Manager which is installed with your SQL Server installation. SQL Server Configuration Manager is a Microsoft Management Console snap-in that is available from the Start menu, or can be added to any other Microsoft Management Console display.

If you have SQLExpress 2014 and Windows 10 or 11, on the **Start Page**, type **Run**, then enter **SQLServerManager12.msc** in the Run field. ( For other versions of SQL Server, replace 12 with the appropriate version number). This opens the application.

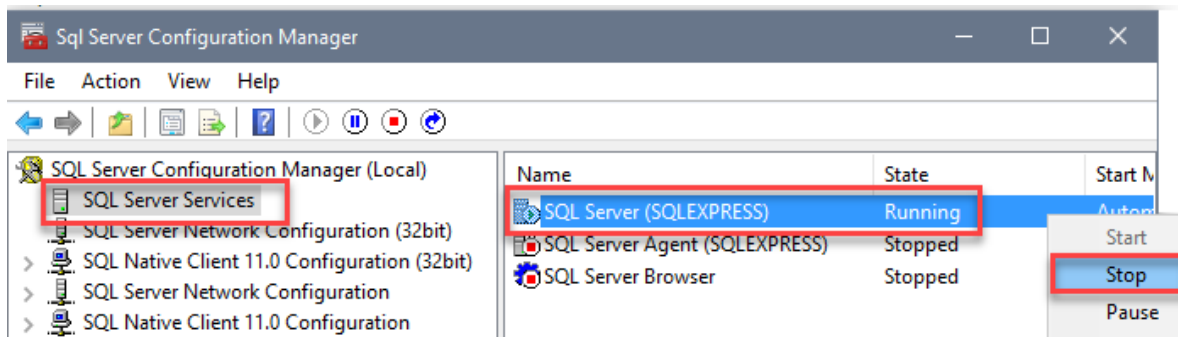
More information about SQLServer Configuration Manager can be found here:

[SQL Server Configuration Manager Info](#)

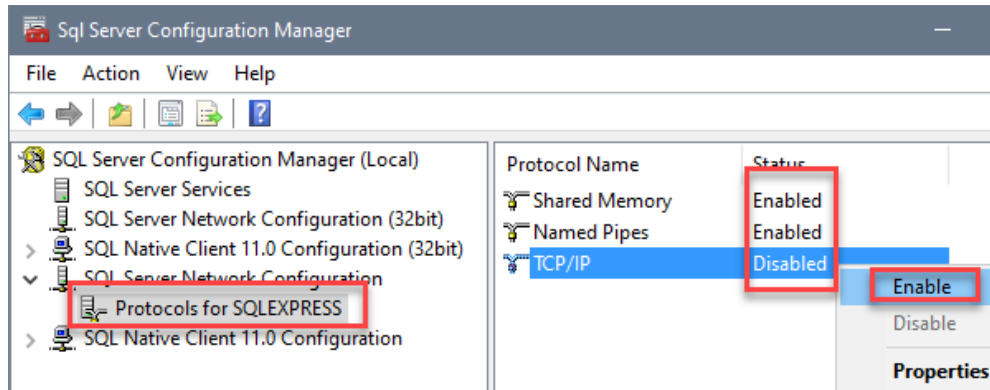
### Running Configuration Manager

The process described below will make SQL Server Express network-enabled and capable of servicing multiple network users.

1. Click on **SQL Server Services**
2. In the pane on the right, right-click on **SQL Server (SQLEXPRESS)** and if the State is "Running", right-click on it and choose **Stop**.



3. Open the **SQL Server Network Configuration** section (click on the arrow)
4. Click on **Protocols for SQLEXPRESS**.
5. In the pane on the right, right-click on each Protocol Name that has a Status of **Disabled** and choose **Enable**.

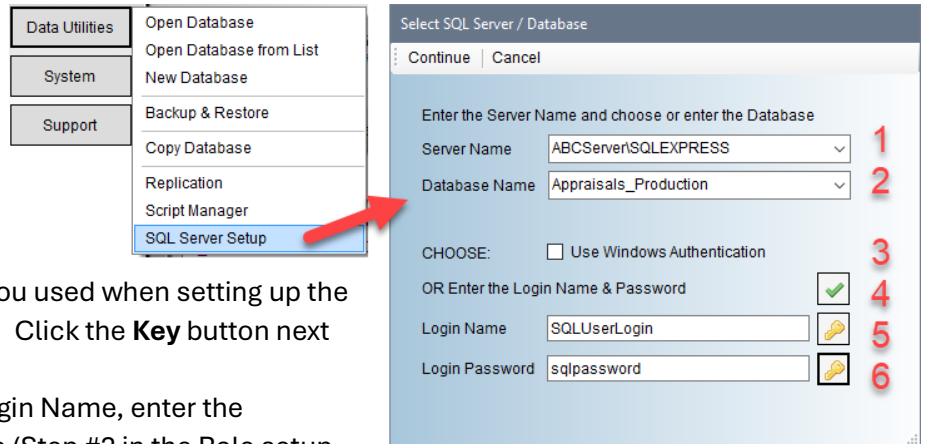


6. Repeat Step #2, but right-click and choose **Start** to restart the server. The configuration is complete.

## Updating SQL Server Settings In Your Application

In our Team versions, you'll see an option on the **Main Menu >> Data Utilities** menu called **SQL Server Setup**. This utility can be used on either SQL Express or SQL Server configurations.

1. Enter the name of the SQL server.
2. If your database name does NOT appear in the list, enter it manually.
3. Uncheck the **Use Windows Authentication** option.
4. Click the checkbox button to enter the default Login Name & Password values, if that's what you used when setting up the **Application Login Role** (above). Click the **Key** button next to each field to show the text.
5. If you did NOT use the default Login Name, enter the Application Role login name here (Step #2 in the Role setup section).
6. If you did NOT use the default Login Password, enter the Application Role login password here (Step #3 in the Role setup section)
7. Click **Continue** to close and save the information to the database's System Settings table.



**NOTE:** Typically, the Login Name and Password is defined when a new SQL database is created. However, if your SQL server changes, use these steps to reset these.

# System & User Requirements

Phase25 Software (Phase25, LLC) products are designed to be straightforward and easy to use, with minimal administration by the customer, both on a hardware and software level. We strive to quickly resolve any and all issues regarding installation, performance and daily usage; however following these standard Requirements must be met before we can effectively do so.

## General User Requirements

- Users must have an overall general understanding of how to use a computer, including but not limited to\*:
  - Basic Windows skills, such as copy/paste functions and file & folder navigation in Windows Explorer
  - General Outlook email familiarity to adjust personal settings ( Outlook Rules & Alerts & Mail Account settings)

## User (Workstation) Hardware Requirements

- Operating Systems: Windows 10, Windows 11 (please make sure all updates and service packs are applied regularly)
- MINIMUM 8GB RAM (12GB+ Suggested). More RAM results in better performance.
- 10MB Hard Drive Space for setup and installation; additional storage required for database
- Video Resolution Minimum of 1280 x 800 (100% Resolution); settings that vary from the default proportions for your system may cause some pages to appear distorted
- Microsoft Outlook 2016 or Office 365 (for email integration & user-to-user Replication)
- High-Speed Internet Connection (for updates, remote support & user-to-user Replication)
- Other computer hardware less than 3 years old.

**NOTE:** All single-user licensed applications store data in a SQLite database, which is a standalone database engine widely deployed in web browsers, operating systems mobile phones and desktop systems. This database type is called *zero-conf*, which means it needs no administrative services.

## Enterprise Software Requirements

Enterprise versions support multiple users by adding features such as SQL Server / SQL Server Express integration. Contact support for pricing and additional information at [www.phase25.com](http://www.phase25.com).

For multiple user customers, we require that **one person** from within your company be designated as the Contact Person for exchanging information about updates, support issues, and any other communication with Phase25 Software regarding the training, installation and general daily operations of the software product. We do not support each user on a one-to-one basis in multi-user situations; the Contact Person within the company is responsible for mitigating on-site issues and communicating those personally to the support staff at Phase25 Software and then reporting any resolutions, update notices, etc., to the licensed users within the company.

- Supported Database Platforms (Enterprise)
  - Microsoft SQL Server 2016 or above - requires SQL Server installed and operating on a company network and is NOT included in our software packaging, installations or pricing.
  - Microsoft SQL Server EXPRESS 2014 - requires SQL Server Express 2014, which is a free product available from Microsoft's website (<https://www.microsoft.com/en-US/download/details.aspx?id=42299>).
  - We recommend downloading and installing the SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to Microsoft documentation for system requirements for their products.\*
- Replication Requirements (Enterprise)
  - Microsoft Outlook 2016 or above or Office 365
  - High-Speed Internet Connection
  - For Replicator Server Utilities - Windows Server NOT required (Replicator can run on a workstation); however the workstation should be an up-to-date computer with a minimum of 16GB of RAM to efficiently process replication packages for client systems.

\*We provide instructions for setting up an application role login and password on SQL servers, however, we do not support the overall operations of any SQL Server products as that is the responsibility of the vendor from which it was purchased.

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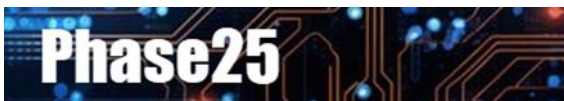
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