Network Implementation Guide

AccountEdge Network Edition

About this guide

This guide is intended to provide basic conceptual information about networks and network hardware. It describes how to set up your network for use with AccountEdge Network Edition. Chapters include:

- 'About networking' on page 3
- 'Setting up your AccountEdge network' on page 12
- 'Company file access' on page 20
- 'Maintenance and troubleshooting' on page 25

Note that this information is not a comprehensive review of Mac networking and does not describe all types of network setups. It is intended to familiarise you with the concepts and technology required to set up and run AccountEdge Network Edition.

This guide is applicable to Australian and New Zealand users of AccountEdge Network Edition.

Expert assistance

For assistance in setting up and working with AccountEdge Network Edition, contact a Certified Consultant by visiting myob.com.au and choosing the **Partners** menu.

If you need help with your hardware, you can contact an Apple Authorised Service Provider, who specialises in Mac networking. While not necessarily MYOB experts, they can help you get the most out of your Mac OS X network.

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1   About networking

AccountEdge Network Edition is designed specifically to enable multi-user access across a network.

This chapter includes the following topics.

Network advantages

Multi-user data entry

AccountEdge Network Edition enables multiple users to work on your company file simultaneously, from different workstations.

When you purchase AccountEdge Network Edition you receive three network licences at the time of purchase. However, you can buy additional licences whenever the need arises.

The number of users that can access a company file at one time depends on the number of workstation licences you have. The maximum number of users that can access a company file at one time is 15 although the number of simultaneous users will depend on your network, number of daily transactions and the size of your company file.

Faster data transfer

Simply put, FileConnect is a background process that is controlled by a system preference and is automatically installed with AccountEdge Network Edition. FileConnect's main purpose is to facilitate the transfer of data between workstations and your company file sitting on the host computer. FileConnect needs to be enabled in your System Preference on the Mac that is hosting your company file.

Company file maintenance is centralised

You need to backup, verify and optimise your company file regularly. You can perform all of these tasks from either the host computer or a workstation.

For further information regarding maintenance of your file see 'Maintaining your company file over the network' on page 25.

What is a network?

A network consists of multiple connected computers that communicate through a wired or wireless medium to share data or other resources. It is made up of a few physical elements in addition to the computers, printers and other devices that are the main components of the network.

Simple networks often include such items as network interface cards, network cables and hubs. More sophisticated networks also use items such as bridges, switches and routers to connect the devices in the network in more elaborate ways.

The introduction of wireless network technology, such as the AirPort Extreme Base Station (a type of wirelss router), has also added to the range of network devices available.

Why use AccountEdge Network Edition?

Networking allows multiple computer users to access the same files and programs simultaneously. You can add, change or delete information, print reports and perform analysis functions at the same time as your colleagues.

Local-area networks (LANs)

A local-area network, or LAN, is a specific type of computer network which is typically tailored for computer communication over a short distance. There are two types of LANs which can be set up: peer-to-peer and client/server.

Peer-to-peer networks

In a peer-to-peer network all the computers on the network are linked using a hub or router as a central connecting device. This enables the hard disks and other devices of each computer to be shared equally by the network's other computers. And so each computer is considered a 'peer' of the other computers on the network.

A peer-to-peer network is inexpensive and relatively simple to set up. It is best-suited for businesses that have six or fewer computers and devices to connect to the

network, with a moderate data load. If you have large volumes of data to transfer, a client/server configuration might be more suitable.

AccountEdge Network Edition is designed to work on a peer-to-peer network.

Client/server networks

Businesses that have seven or more computers and devices in their network, and who have heavy data loads, may want to consider creating a client/server network. Client/server networks use a dedicated central computer on the network (a server) to store files for the other computers (clients) to use. The server is usually a high-performance computer.

By incorporating a server, a business can store large amounts of files—including programs and data—and expect that all computers accessing those files will be able to use them at about the same speed. Because client/server networks require an additional computer, they are more expensive and are more complex to set up.

AccountEdge Network Edition is recommended for use on a peer-to-peer network

On a peer-to-peer network running AccountEdge Network Edition, the *company file* (the file which contains your business's financial data) is stored on one of the computers in the network. This computer is referred to as the *host computer*, and it must be accessible by the other computers on the network, known as *workstations*.

The host computer does not need to be a dedicated computer (like a server), it can be any computer in the network. Note that all computers that will use AccountEdge Network Edition must be using Mac OS X 10.9 or higher.

In , we discuss how to set up a peer-to-peer network.

LAN technologies

Each type of LAN uses a specific *LAN technology* to help the devices on the network communicate with each other.

Wired LANs   Ethernet is the most common wired LAN technology. Standard **Ethernet** networks run at a data rate of 10 million bits per second (10MBps), **Fast Ethernet** transports data at 100 MBps and **Gigabit Ethernet**, at 1,000 MBps. All Macs since 2006 were equipped with Gigabit Ethernet.

Wireless LANs   Several wireless LAN technology options are also available. In wireless LANs, data is transferred using radio waves instead of the traditional wires and cables of wired networks.

Wireless computers can also access the Internet. Wireless technology (known simply as "Wi-Fi") allows computer users to be more flexible in their workplace with the same security and reliability of a wired network.

A common wireless technology for Macintosh computers is Apple's **AirPort**. An AirPort-enabled Macintosh can communicate to similarly equipped Macs without additional hardware.

You can use an AirPort Extreme Base Station to create or join any type of Ethernet network, which would allow AirPort-equipped computers to communicate with computers not using AirPort, as well as with the Internet.

To learn more about Apple wireless technologies, visit apple.com/wifi.

AccountEdge Network Edition and LAN technology

If you want to use a wired network, we recommend using Fast or Gigabit Ethernet for your LAN technology.

If you want to use a wireless network, we suggest that you build an AirPort network with AirPort Extreme Cards and an AirPort Extreme Base Station.

Network protocols

Network protocols are a convention or standard that controls and enables connection, communication, and data transfer across a network.

These protocols must be set up in your operating system to ensure that programs you run on the network—including AccountEdge Network Edition—are able to send and receive data with the other computers on the network.

Network protocols are set up by default on most newer computers, so you are unlikely to need to install a protocol separately. However, if you are setting up a network for the first time, you may need to activate the protocols on your computers.

TCP/IP (Transmission Control Protocol/Internet Protocol)

TCP/IP is the single, global standard for network protocols on local area networks; it can handle large amounts of data with ease. It also works well in mixed environments with many different types of computers, including Macs and Windows PCs.

TCP/IP has a direct method of transferring data from one computer or device to another. Each computer in a TCP/IP network is assigned a specific, unique address (known as an *IP address*) that identifies the computer to the network and across the Internet.

All IP addresses are stored in a centralised registry or a distributed directory service, often located within a company using a router, or outside of the company at an Internet Service Provider (ISP).

When one device needs to communicate with another device in a TCP/IP network, it sends a small sliver of data, known as a *packet*, to the centralised registry. The registry then locates the intended device's IP address and directs the packet immediately to that device.

For example, if Computer1 is trying to send data to a company file on Computer2, Computer1 will send its request to the registry. The registry will then pass on Computer1's request directly to Computer2.

How Bonjour simplifies networking with TCP/IP   Bonjour, previously known as Rendezvous, is a technology that connects computers automatically, without any IP address configuration on the part of the user. Whenever a computer is added to an existing TCP/IP network, Bonjour senses the network's settings and instantly prepares the computer for use with that network by giving it an IP address and special Bonjour name. All computers using Bonjour can communicate with each other simply by browsing for their Bonjour names in the Finder's **Connect To Server** window.

Bonjour isn't a requirement for using AccountEdge Network Edition; you can choose to configure direct IP settings between your computers and your network.

AccountEdge Network Edition requires TCP/IP network protocols

TCP/IP is the network protocol that's required for AccountEdge Network Edition. We also suggest that you consider using Bonjour to simplify the process of accessing your company file on the network.

Network security methods

Firewalls

The most common software-based method of protecting your network and Mac is a firewall. Firewalls prevent unauthorised connections and data transmissions between computers on a network, and can be configured to deny network access to external computers.

A firewall filters all information travelling across a network (or coming from other networks) to determine whether to forward the information toward its intended destination.

There are two common types of firewalls:

- An **Internet firewall** is used to protect the computers on a network from external attacks. This type of firewall is usually installed when you add a router to your network so you can connect to the Internet. See 'Routers' on page 10.
- A **personal firewall** is used when you need to protect a computer from another computer on the same network. For example, if the other computer on the network is regularly infected by viruses. A personal firewall is available as a built-in part of Mac OS X, or you can install personal firewall software from a third-party provider.

Ports

An extension of the TCP/IP protocol, a *port* is an entry point, guarded by a firewall, through which data of only a specific type flows. Firewalls are usually configured to monitor your computer's data ports. Each computer that uses TCP/IP is able to communicate through up to 65,535 ports.

Software programs either use preassigned or dynamically assigned port numbers.

Preassigned port numbers   Programs that use ports with preassigned numbers communicate with the most common types of data in the computing world. For example, web browser software always communicates HTTP data (that is, web pages) through port 80 on a computer, and email programs always transmit SMTP data (that is, email messages) through port 25.

Dynamically assigned port numbers   Programs using this method receive their assigned port each time a connection must be made, and the port is usually different each time. For example, an online multimedia program may use port 50444 to receive streaming audio during one session and then use port 56733 during the next session. All dynamically assigned ports are numbered between 49152 and 65535.

Using a firewall to restrict the use of ports   By restricting the use of specific ports in your firewall software, you can effectively prevent particular types of data from entering your computer. For example, if you configure your firewall to deny the use of port 25, your computer will not be able to receive email.

You can also use your firewall to restrict the use of a range of ports (for example, 50000 to 57000). By doing so, you'll restrict data of any type from passing through those ports.

Securing your network for AccountEdge Network Edition

You do not need to make changes to your Internet firewall to use AccountEdge Network Edition. If you use a personal firewall on your host computer, however, you will need to ensure that the firewall is configured to allow data to pass from workstations to the host.

AccountEdge Network Edition does not use a preassigned port number for the transmission of data from workstations to your company file on the host computer. Therefore, any port between 49152 and 65535 can be used to transmit data to your company file.

You can choose to specify a particular port number in that range for your data activity (but the port must not be closed by a personal firewall), or you can simply allow AccountEdge Network Edition's FileConnect system preference to dynamically assign a port for you.

Later in this guide, we'll show you how to configure FileConnect and decide whether you should assign a specific port for the transmission of your data.

Network hardware

If you are setting up a network for the first time, you need to consider your business's immediate and future communications requirements. This means choosing hardware and software components that can be easily expanded as your business grows.

Network interface equipment

Network interface equipment works with your network software to send and receive messages on the network. On wired networks, the network interface equipment is usually an Ethernet port, while wireless networks use an AirPort Card to communicate with the network. Each computer that you want to connect to the network must have some sort of network interface equipment installed in it.

Installing network interface equipment

If you choose a wired Ethernet network, you won't need to install anything; an Ethernet port is included in all Macintosh computers.

If you are using an AirPort wireless network, each computer in the network needs an AirPort Card installed. Note that most newer computers come pre-equipped with this.

Network cables

If you're planning on using a wireless AirPort network, you can skip this section and go to 'Routers' below.

It is recommended that Cat5e or Cat6 ethernet cables be used throughout your network due to their ability to better handle gigabit speeds as well as cutting down on network interference or crosstalk compared to the obsolete Cat5 cables. Using Cat5 cables, especially if they are long, will result in slower network speeds and potential interference which will effect network performance overall.

Routers

To allow the computers on your new network to access the Internet, you'll need to use a **router**. A router acts as an intermediary between your local network of computers and the Internet. Usually, the router is **firewalled**, which means it protects the computers on your network from external attack.

The individual computers on the network are then connected to the router with cables or wirelessly. When a computer wants to retrieve information from the Internet, it notifies the router.

The router then passes the request to a modem, and the modem gathers the requested data (such as a web page) and returns it to the router. Finally, the router directs the data to the computer. Typically, this transfer of messages and data takes only a few seconds.

Routers exist in both wired and wireless networks.

Network hubs

A *network hub* is the central connection point across a LAN. All computers and other devices (for example, printers) in a wired network are linked to each other through the hub. In a hybrid network, a wireless computer can also connect to the rest of the network through the hub.

A typical Ethernet hub, sometimes known as a repeater, has a number of ports (ports in which cables are inserted) to which computers and other devices are attached. One ethernet cable can be inserted into each port. The other end of each cable is inserted into the Ethernet port of each computer or device.

When a computer transmits information to the network, the information travels through the computer's Ethernet port to the hub. The hub then makes a copy of this information and sends it to each computer on the network. For example, if one user in the network enters a transaction in a hosted copy of AccountEdge Network Edition, the hub communicates the change to other computers in the network.

In networks that access the Internet through a central source, the network hub might also be connected to a router.

Hubs are usually the central point of LANs, so they're usually placed in a central location in the office.

1 Setting up your AccountEdge network

If you haven't already set up the physical components of your network, this chapter will help you with the basic setup. We recommend that you employ a networking consultant or to set up your network hardware so that it fully meets your business' needs.

Minimum system requirements

Your system must meet the minimum system requirements in order to run MYOB AccountEdge Network Edition.

Operating system	Mac OS X 10.9 to 10.12
Hardware	• Intel Based Mac with 4GB RAM or more • 250 MB available space for program installation • Minimum of 35 MB available space for each company file • 1152 x 720 screen resolution with thousands of colours Note: UNIX-formatted hard drives are not supported
Network	• *Wired Ethernet network:* 100BaseT or faster Ethernet network • *AirPort wireless network:* AirPort Extreme cards installed in all computers, AirPort Extreme Base Station • TCP/IP must be enabled on all computers
For Optimal Network Performance	• Intel Dual Core i5 or faster processor with 8 GB RAM and SSD drive added for hosting company files • 1000BaseT/Gigabit Ethernet Wired Network • Mac OS X 10.11 or 10.12 Note: Hardware and software requirements will vary depending on your operating system

Do these tasks to set up your network

Task		See
1	Set up your network hardware	below
2	Optimise your network	page 15
3	Prepare your network for AccountEdge Network Edition	page 16

Set up network hardware

The instructions for building your network assume that your network will be connected to the Internet and will require a router. If your network won't be used to access the Internet, you can skip the section about installing a router.

You should carefully review the documentation for the network equipment you purchase, and adhere to the manufacturer's recommendations for its use.

Setting up a wired Ethernet network

The following procedure outlines the basic steps for setting up the physical elements of a typical peer-to-peer Ethernet network.

1   Decide where you want to install the hub and/or router.

Pick a location that's relatively close to all the computers that will be on the network. You may find it convenient to situate your router near other central devices, such as the modem or printer. Refer to manufacturer's documentation regarding recommended distances between workstations and hub/router.

2   If you plan to connect two or more hubs together, do this now.

Ensure you use the dedicated ports on the hubs. Some hubs use special 'uplink' ports for connecting to other hubs.

3   Switch off all the computers and other devices that you plan to add to the network.

4   Connect one end of a network cable into one of the hub or router's ports, then connect the other end of the cable into one of your computers.

Repeat this step for each computer and device you want on your network.

5   Plug your hubs or router into an electrical outlet and turn on your computers.

6   Follow the instructions in your new hardware's documentation to configure it for your Ethernet network.

Once you finish these steps, your network hardware is ready to go. Before you continue the setup process, see 'Optimise your network' on page 15.

Setting up a wireless AirPort network

The following procedure outlines the basic steps for setting up a typical AirPort network that's connected to the Internet.

1   Decide where you want to install the AirPort base station.

Pick a location that's relatively close to all the computers that will be on the network. You may find it convenient to situate your base station near other central devices, such as the modem or printer. Refer to your base station documentation for recommended distances between workstations and base station.

2   If you plan to connect two or more AirPort base stations to increase the range of your network, do this now.

Refer to your base station documentation to learn how to 'bridge' base stations to increase your network's range.

3   Switch off all the computers and other devices that you plan to add to the network.

4   Connect your AirPort base station into your Internet source and plug it into an electrical outlet.

5   Turn on your computers and use the AirPort Setup Assistant to configure each computer for your AirPort network.

Once you finish these steps, your AirPort network is ready to go. Before you continue the setup process, see 'Optimise your network' below.

Optimise your network

Optimising your network helps ensure the network is running as efficiently as possible before you begin using AccountEdge.

System performance

- Ensure your computers all meet (or exceed) the minimum system requirements for AccountEdge. The requirements are printed on your AccountEdge box and are listed in the *Getting Started* guide provided with your software.
- Ensure all computers are using the same version of Mac OS X. This will minimise communication time between computers.
- Try to keep some hard disk free on each computer. When a hard disk has very little free space, files—including your AccountEdge company file—can become fragmented on the disk.

Computer memory

- Although AccountEdge can run on computers with less than 1GB of RAM, you'll find that increased amounts of memory will improve your system's performance. If possible, upgrade your computers to exceed the minimum RAM required.
- If you're planning on running additional programs while AccountEdge is running, we recommend that you purchase additional RAM.

Network maintenance

- The faster your network, the faster AccountEdge will send and receive messages across the network. If you are using Fast Ethernet at 100 MBps, we recommend you upgrade to Gigabit Ethernet running at 1,000 MBps.
- If you use a wired network, we recommend you use high-quality Cat5e cable or better.
- Keep your network components as clean and dust-free as possible.

- Set your computers, especially the Mac hosting your company file from entering Sleep mode. If your Mac falls asleep while other users are connected, this can cause network errors and other users from being kicked out of the company file.
- Try to minimise the traffic on your network when AccountEdge is in use. AccountEdge requires a significant amount of attention from the network when it's recording and processing your company's financial data. If other programs are requesting network resources at the same time, you may experience slower performance in AccountEdge.

Proceed with 'Prepare your network for AccountEdge' below.

Prepare your network for AccountEdge

This section describes how to select, set up and identify your host computer, and outlines how to configure the network protocol.

NOTE : Administration access required   If you are unable to complete the procedures in this section because you do not have sufficient access, contact the person who set up your network.

You need to set up your network so it properly supports MYOB Accounting. Read the following sections.

- 'Choosing a host computer' on page 16
- 'Identifying the host computer' on page 17.

Choosing a host computer

For networking, the company file needs to be stored on a host computer to which each user has access. In choosing a suitable host computer, consider the following:

- **Host the company file on the most powerful computer in the network**   Network performance is enhanced if the company file is stored on the fastest computer with the most memory.
- **Host the company file on a network server**   If your company employs a server running special server software such as Mac OS X Server, consider hosting the company file on the server. Servers are faster and are specially designed to handle network traffic.
- **Host the company file on the key employee's computer**   If one employee will use AccountEdge more than anyone else, consider storing the company file on

that employee's computer. Better performance can result from accessing the company file directly, compared with accessing it across the network.

- **Host the company file on a backup computer**   If you store all your important files on a central host that is backed up frequently, store your company file on that host. Then the company file will be backed up with all your other vital data.

Constraints on host computers

You can run AccountEdge on a host computer and use the company file on that computer, but users on workstations accessing the same file may discover that their system is slower than usual if AccountEdge is running on the host. If you encounter this situation, here are some solutions:

- Upgrade all your computers to a recent release of Mac OS X, and be sure they're all using the same version. This will take advantage of the latest networking features of Mac OS X and streamline the communication among computers.
- Try to perform processing-intense tasks—such as printing documents or installing software programs—on the host computer only when others do not need access.

Identifying the host computer

Workstations accessing the company file need to be able to identify the host computer on the network.

The host can be identified easily by name through Bonjour, or manually, through the host IP address. You can also use a combination of the two methods. (Note that Bonjour was called Rendezvous in earlier versions of Mac OS X.)

Using Bonjour

In a network that uses Bonjour, any workstations running AccountEdge can use Bonjour to locate the company file by knowing the host computer's name. Users can open and work with the company file without needing to know any other details about the host computer.

To find the name of a computer   Open the **System Preferences** on the computer you want to identify and click **Sharing**. The computer's name is displayed near the top of the window.

CAUTION : Bonjour cannot be used in some network situations   If you have a network that incorporates multiple subnetworks (subnets) and the host computer is on a different subnet than your workstations, you won't be able to use Bonjour.

Using IP addresses

Permanent IP addresses may be assigned to computers in some network configurations. This means the IP address can be reliably used to identify the host, without losing connection because of a dynamically changing IP address.

If the computers on your network use different versions of Mac OS X (for example, Mac OS 10.6.8 and 10.8), you might find that your network service will be more reliable and efficient if you choose the IP address method to identify each computer.

You can use a combination of both methods   Depending on the flexibility of your network setup and management, you may decide to give users the choice of how to identify the host: through Bonjour and through the IP address.

Configuring TCP/IP for Built-in Ethernet

Note that the following procedure may not apply to your LAN set up. You may need to seek the advice of your system administrator or a qualified network consultant.

If you are using AirPort, see your AirPort user documentation for how to configure TCP/IP.

1   Log in as a user with administrator rights.

2   Go to the Apple menu and choose **System Preferences**.

3   Click the **Network** icon. The **Network** system preferences appears.

4   Select **Built-in Ethernet** from the list on the left. Options appear in the right-hand side of the window.

5   If you want to allow the computer to be dynamically assigned an IP address, select **DHCP** from the **Configure** drop-down list.

6   If your network setup requires you to manually enter the IP details:

a   Select **Manually** from the **Configure** drop-down list. Fields for
    entering the IP details appear.
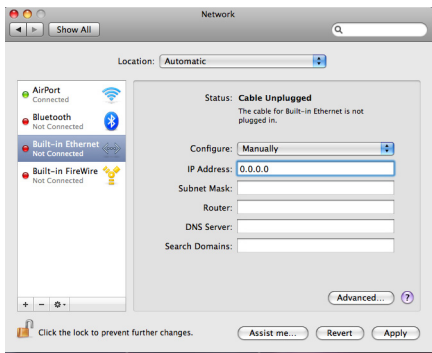
b   Enter the IP address details, including the LAN's primary DNS server
    on the first line in the **DNS Servers** text box.

c   If there are any secondary DNS servers, add them on the remaining
    lines.

7   Click **Apply**.

    If you selected DHCP, the server then dynamically assigns an IP number
    to the computer, and the **IP Address**, **Subnet Mask**, and **Router** fields
    will be updated. Make note of the IP address, as you will need to know
    it when you setup your company's workstations to connect to the host
    computer.

1 Company file access

This section describes how to enable your workstations to access and open your company files across the network.

Before you can complete these procedures, you need to have:

- installed your software and created a company file. See the *Getting Started* guide
- set up and enabled your network. See 'Setting up your AccountEdge network' on page 12.

Enable the network connection

In order for your workstations to connect to the host computer, you need to enable your network connection using FileConnect. FileConnect must always be running on the host computer while you are using AccountEdge Network Edition.

If you haven't already installed your software, you need to do so before using FileConnect. Refer to the installation instructions in the *Getting Started* guide.

When you install your software, FileConnect is automatically added to your system preferences.

Start FileConnect on the host

FileConnect needs to be running on the host computer so that your workstations can access the company file. Do not install or run FileConnect on your workstations.

To start FileConnect

1   Launch the **System Preferences** from the dock. The **System Preferences** window appears.

2   In the Other section of the window, click the **AccountEdge** icon. The AccountEdge system preferences appears.

3   Click **Start FileConnect** to turn FileConnect on. After a moment, the text on the button will change to **Stop FileConnect**, which indicates that FileConnect is now running.

4   Click the **Port Number** tab.
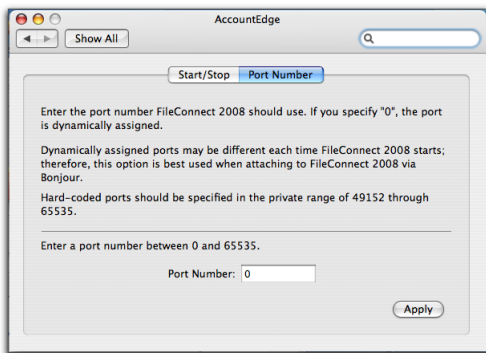
5   Decide if you want to use a specific port to allow AccountEdge workstations to access the company file on the host computer, or if you want to allow FileConnect to choose a port for you.

   ■ If you want to allow FileConnect to assign a port, or if you will be using Bonjour to access your company files, leave the **Port Number** field at zero. This indicates the port used to transmit AccountEdge data will be dynamically assigned by FileConnect; that is, a different port number may be used each time FileConnect is restarted.

   ■ If you will be using a direct IP address to access your company files, or if you want to assign a specific port, enter a port number between 49152 and 65535 in the **Port Number** field. This will ensure your workstations will access the company file using this particular port on the host computer.

   For more information about ports, see 'Network security methods' on page 7.

Prevent the host computer from sleeping

When other users are accessing the company file on the host computer, you should not allow the host computer to go into sleep mode. Follow the steps below to prevent a computer from going to sleep.

To prevent the host computer from sleeping

1. Log in to the host computer as an administrator.

2. Go to the apple menu and choose **System Preferences.** The **System Preferences** window appears.

3. Click **Energy Saver** and then click **Sleep**.

4. Click **Show Details** to see the sleep settings.

5. Drag the top slider to **Never**.

6. Deselect the **Put the display to sleep when computer is inactive** option.

7. Close the window.

Opening a company file

When you create or upgrade a company file, it is stored on the host computer at **Macintosh HD\Library\Application Support\AccountEdge NE\ Databases**.

Provided that the company file is stored at this location, you will be able to open it from any of your workstations that have AccountEdge installed. You can open a company file, on either the host computer or on workstations, using the **Finder** or by using a connection document.

To open a company file using the Finder

1. In the **Finder**, locate the AccountEdge installation folder.

    This is the folder that was created when you installed AccountEdge. For example, if you installed your software in the default location, the folder location will be **Applications\ MYOB AccountEdge NE [version].**

2. Double-click the AccountEdge NE icon. The **Welcome** window appears.

3. Click **Open your company file**. The **Company File Browser** window appears.

4. Select the method you use to locate the host computer on the network, either **Bonjour** or **IP Address**.

5. If you want to locate the company file using Bonjour:

    a. Click **Bonjour**. The name of the host should appear in the **Hosts** list.

    b Click the host's name to select it. The company files residing on the host computer will be displayed in the **Company Files** list.

    c Select the company file you want to open.

6 If you want to locate the company file using the IP address:

    a Click **IP Address**. The IP address options appear.

    b Enter the IP address and port number of the host computer in the **IP Address** and **Port #** fields, then click **List Files**. The company files saved to the host computer appear in the list.

    c Select the company file you want to open.

7 Click **Open**. The **Sign-on** window appears.

8 Complete the **Sign-on** window and click **OK**. The company file opens.

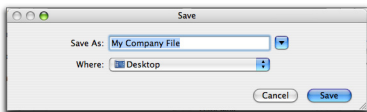# Create a connection document for a company file

You can simplify the process of opening a company file on the host computer by creating a connection document on a workstation. A *connection document* is a shortcut file that retains the information about your company file's location on the host computer. You can place the connection document in a convenient location on your workstation, such as the desktop. You can then double-click it to start AccountEdge and open your company file.

- -

NOTE : **Connection documents replace aliases**   A connection document is similar to an alias, which is another type of Mac shortcut file. However, you cannot use an alias to open a company file on a host computer. If you wish to use a shortcut, you must use a connection document.

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1 In the **Finder**, locate the MYOB Accounting installation folder.

This is the folder that was created when you installed AccountEdge. For example, if you installed your software in the default location, the folder location will be **Applications\ MYOB AccountEdge NE [version]**.

2 Double-click the AccountEdge NE icon. The **Welcome** window appears.

3 Click **Open your company file**. The **Company File Browser** window appears.

4   Select the company file for which you want to create a connection document. Select the file in the **Bonjour** or **IP Address** tab of the window, depending on how you access the company file.

5   Click the **Save Connection** button at the bottom of the **Company File Browser** window. The **Save** window appears.

6   Enter a name for the connection document in the **Save As** field.

7   Choose where you want to store the connection document by making a selection from the **Where** list. We suggest that you save the document on your desktop, where you can later drag it to the Dock for easy access.

8   Click **Save**. The connection document will appear in the location you selected with the name you entered. Note that the name of the connection document will be displayed with a '.connect' suffix.

To open a company file using a connection document

9   Locate the connection document and double-click it. AccountEdge starts and the **Sign-on** window for the company file appears.

10 Complete the **Sign-on** window and click **OK** to open the company file.

1 Maintenance and troubleshooting

This chapter describes how to maintain your company file on the network and how to stop and start FileConnect.

Maintaining your company file over the network

To help ensure the integrity of your financial information, you should perform regular maintenance on your company file, including backing up, verifying and optimising your company file.

Perform maintenance tasks on the host computer   We recommend you perform maintenance tasks on the host computer. Performing these tasks on a workstation can take longer and network interruptions may disrupt the processes.

Enable single-user file locking for maintenance tasks   Only one user should have access to a company file during file maintenance procedures. For example, optimising a company file rearranges its internal structure, so ensure that the file is not being accessed while this process is taking place.

Single-user file locking prevents all but the first logged-in user from accessing a shared company file—other users cannot log in.

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TIP : View a list of users   To check whether any other users are currently using the company file before you set a single-user lock, go to the **File** menu and choose **Active Workstations.**

- -

To enable single-user access after starting your MYOB software, click **Single-user access** in the **Sign-on** window.

Task		See
1	Back up your company file	page 26
2	Verify your company file	page 27
3	Optimise your company file	page 28

Backing up company files

If multiple users access a company file, you need to back up the company file on the host computer—including custom forms, letters and spreadsheet templates you have created. You can then copy the updated templates to each workstation and ensure the latest versions are used.

To back up a company file

1 Open the company file you want to back up.

2 Make sure no other users are logged into the company file.

3 Go to the **File** menu and choose **Backup**. The **AccountEdge Company File Backup** window opens.

4 Choose the type of backup you want:
   - To back up your company file and templates, click **Backup all data**.
   - To back up your company file only, click **Backup Company File only**.

- -

NOTE : Customised documents stored on workstations will not be backed up   If you're using the host computer to back up your files, any custom letters, forms and spreadsheets stored on the workstations on the network will not be included in the backup. You will need to back up these items separately on your workstations.

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5 Choose whether to check your company file for errors by selecting one of the options.

6 Select a location option for your backup:
   - To back up to your local disk, to a different hard disk, or to other media, select **To a Disk**.
   - To back up to a Dropbox account, select **Dropbox.**

Note that before you can back up to Dropbox you must have a Dropbox account. For more information about Dropbox accounts, see the Dropbox website.

7 Click **Continue**.

8 If you selected the **Check Company File for errors** option, the verification process may take several minutes.

When the verification process finishes, click **OK** in the window that appears. Note that this window appears whether or not errors have been found in the company file.

The **Back Up** window appears.

9 Specify where you want to store the backup file.

A default filename is assigned:

Default filename	Description
Backup *mm-dd-yyyy filename*.zip	• *mm-dd-yyyy* is the date from your computer's clock • *filename* is your company file name • .zip is the file extension and cannot be changed.

10 If you want, you can change the name of the backup file. Note that you should name your backups with enough information to tell you when they were from and where you were up to in data entry—for example, 'Wednesday 010714' or 'Backup as of 010714'.

11 Click **Save**. The backup process begins.

12 If you are storing the backup files on a removable storage device, label them clearly, so you know exactly when the backup was done.

Verifying company files

Data verification is the process of checking a company file for errors. Verification can catch minor problems in the file before they cause serious problems. You can verify your company file at any time. We recommend you do this on the host computer.

To verify a company file

1 Open the company file you want to verify.

2 Make sure no other users are logged into the company file.

3 Go to the **File** menu and choose **Verify Company File**. A message appears, describing the data verification process.

4 Click **OK** to confirm that you want to verify your company file. Your company file is scanned for errors.

When the file verification process is complete, a message appears describing the results of the process.

If no errors were found, click **OK** to end the verification process.

If your company file is corrupt, you can:
   - Attempt to fix the company file by optimising it and then repeat from step 1 above to check if the errors have been fixed.
   - Restore the company file from your most recent backup—see 'To restore a backup' in the Maintenance chapter of your getting started guide.

5 Click **OK**.

Optimising company files

As you enter transactions, then remove or purge them, your company file will have unused areas that once contained these transactions. These unused areas can affect the efficiency of your company file and take up space on your hard disk.

You can use the Optimisation Assistant to remove the unused areas in the company file and keep your software running efficiently.

You can optimise your AccountEdge data file at any time. We recommend you do this on the host computer.

To optimise a company file

1 Open the company file you want to optimise.

2 Make sure no other users are logged into the company file.

3 Go to the **File** menu, choose **Optimise Company File**. An information window appears.

4   Click **OK** to continue. The **Optimisation Assistant** window appears.

5   Click **Continue**. The **Open a company file** window appears.

6   Locate the company file and click **Open**. The optimisation process begins.

    When the process is finished, a window will appear, confirming the company file has been optimised.

7   If you want to optimise another company file, click **Continue** and repeat from step 6.

8   Click **Close**.

Troubleshooting FileConnect

The following information will help you prevent interruptions to your workstations' access to the host computer.

To restart FileConnect on the host computer

If FileConnect quits unexpectedly, you will need to restart it. When you restart the system preference, review the port settings to be sure they are accurate.

9   Log in to the host computer as an administrator.

10 Go to the apple menu and choose **System Preferences.** The **System Preferences** window appears.

11 Click the AccountEdge icon. A control panel window appears.

12 Click **Start FileConnect** to turn FileConnect on. After a moment, the text on the button will change to **Stop FileConnect**, which indicates that FileConnect is now running.

13 Check that your access ports are set correctly:

14 If you allow FileConnect to assign a port, or if you use Bonjour to access your company files, leave the **Port Number** field at zero. This indicates the port used to transmit AccountEdge data will be dynamically assigned by FileConnect.

    ▪ If you use a direct IP address to access your company files, or if you use a specific port number, enter the port number between 49152

and 65535 in the **Port Number** field. Your workstations will access the company file using this particular port on the host computer.

For more information about ports, see 'Network security methods' on page 7.

To stop FileConnect on the host computer

Once FileConnect is running on the host computer, you should not turn it off. If you do need to turn off FileConnect, follow the steps below. Note that users will not be able to access your AccountEdge Network Edition company file if FileConnect is not running.

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NOTE : All workstations need to be logged out of company files
FileConnect will not stop unless all workstations are disconnected from your company files. To check whether any other users are currently using the company file, go to the **File** menu and choose **Active Workstations.**
- -

15 Log in to the host computer as an administrator.

16 Go to the apple menu and choose **System Preferences.** The **System Preferences** window appears.

17 Click the AccountEdge icon. A control panel window appears.

18 Click **Stop FileConnect** to turn FileConnect off. After a moment, the text on the button will change to **Start FileConnect**, which indicates that FileConnect is no longer running.

19 If you receive an alert message when you try to stop FileConnect, a user may still be logged into a company file. Make sure all workstations are logged out of the company files and repeat this procedure.

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NOTE : Trouble stopping FileConnect   If you are having trouble stopping FileConnect, be sure that all users are first disconnected from any company file being hosted on this Mac. If you continue to not be able to stop FileConnect, you can reboot your Mac or you can use the Activity Monitor from your Utilities folder to find the background process named FileConnect to Force Quit the process. Be sure that all users are disconnected from your company file before restarting your Mac or quitting the backround process from the Activity Monitor.
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