Install

Equitrac Express or

Equitrac Office

Instructor Led Training
Chapter 2 – Exercise G

Topics include:

- Create a Local Equitrac Service Account
- Install Equitrac Express or Equitrac Office

Create a Local Equitrac Service Account

The Equitrac service account should be a domain user account who is a member of the Local Administrators group. Refer to the Microsoft Web site for information on how to create a domain service account.

NOTE: For training purposes, this classroom environment is using a workgroup **NOT** a Domain. Therefore the following information will differ in a production domain environment.
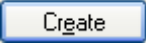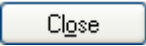
1. On the virtual machine, right-click the **My Computer** icon and click **Manage**.

2. Double-click **Local Users and Groups**.

3. Double click **Users**.

4. In the right pane, right-click in the blank white area and click **New User**.
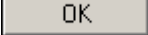
5. Type the following information:

   > **User Name** = EQService

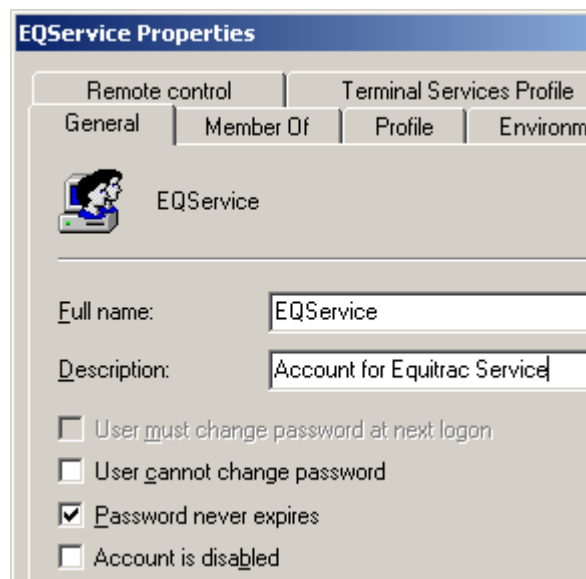   > **Description** = Account for Equitrac service

   > **Password** = Equitrac1
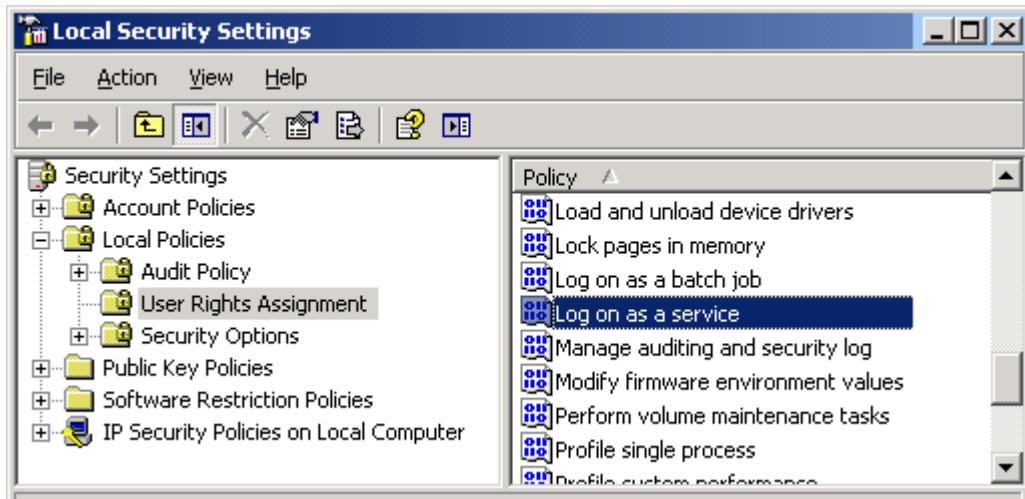
   > **Confirm password** = Equitrac1

6. Click to clear the **User must change password** check box.

7. Click the **User cannot change password** option.

8. Click the **Password never expires** option.

9. Click the [Create] button; the account is created and all fields are cleared.

10. Click the [Close] button; the new account appears on the list of users.

11. Double-click the **EQService** user account; the Properties dialog box appears.

12. Click the **Member Of** tab.

13. Click the [Add] button.

14. In the **Enter the object names**…. field; type **Administrators** and then click the [OK] button.

15. In the EQService Properties dialog box, click the [OK] button.

16. Close this Computer Management window.

17. Click the [start] button and then click **Administrative Tools>Local Security Policy**.

18. In the left pane, click **User Rights Assignments**.

19. In the right pane, double-click **Log on as a service**.

20. In the Log on as a service Properties dialog box, click the ⬚ Add User or Group... button.

21. In the **Enter the object names….** field, type **EQService** and click the ⬚ OK button; the account appears on the list.

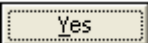22. Click the ⬚ OK button.

23. Close this Local Security Settings window.

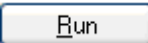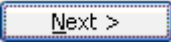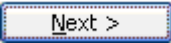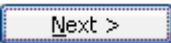## *Install Equitrac Express or Equitrac Office*

1. Close all other applications on the server prior to beginning the Equitrac installation.

2. Start the Equitrac Training CD.

3. Click the release of Equitrac to be installed; the Equitrac installation page appears.
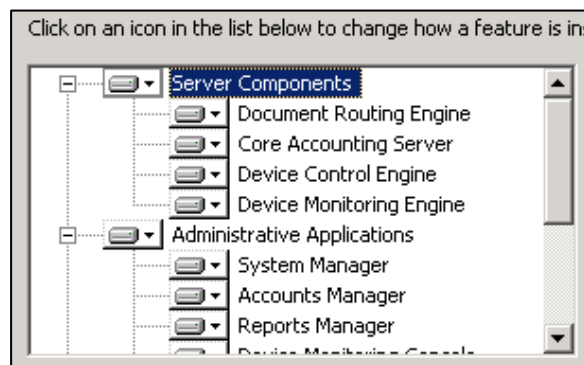

NOTE: If a warning message appears regarding activity that could harm your computer, click the [Yes] button.

4. Click the 32-bit version of Install Server for Equitrac Office or Express.

NOTE: If a warning message appears regarding activity that could harm your computer, click the [Yes] button.

5. In the File Download – Security Warning dialog box, click the [Run] button.

6. In the Internet Explorer – Security Warning dialog box, click the [Run] button; an Extracting Files dialog box appears.

7. In the Welcome to the InstallShield Wizard for Equitrac dialog box, click the [Next >] button.

8. In the License Agreement dialog box, click the **I accept the Licensing terms and conditions** radio button and then click the [Next >] button.

9. In the Select Features dialog box, click the [Next >] button. Accept all of the default settings, all Server Components and Administrative Applications are selected. Leave the default selections for a Local installation.
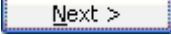

10. In the Select Language dialog box, ensure **English** is selected; click the [Next >] button.

NOTE: You cannot change the language settings after the initial installation. To change the display language, you must uninstall and reinstall Equitrac, and change the language selection during the reinstallation. This language selection is independent of the regional language setting on the machine, meaning that you can run Equitrac in Italian even if the regional setting of the machine is set to French.

11. In the Select database type dialog box, ensure that **SQL Express** is selected and click the <kbd>Next ></kbd> button.

12. In the Instance for SQL Express dialog box, click the <kbd>Next ></kbd> button; leave the default of **SQLEXPRESS** as displayed.

13. In the User Name for Services dialog box, type the following:

    User ID = EQSERVERXX\EQService

    Password = Equitrac1

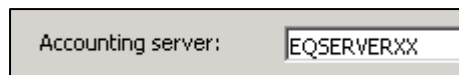   where XX is the number assigned to you by the instructor

User ID:	EQSERVERXX\EQService
Password:	*********

NOTE: Domain accounts must use the domain name (for example, domain\username). However, since we are using a workgroup in this training environment, we will use the local account. Type the computer name, followed by the userID (for example, computer_name\userID). Although this account does not require Administrative privileges on the server, the account must have Print Operator privileges to allow the Document Routing Engine (DRE) to process print requests.
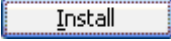
14. Click the <kbd>Next ></kbd> button.

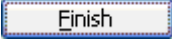15. In the Equitrac accounting servicer dialog box, type **EQSERVERXX**

    where **XX** is the number assigned to you by the instructor

Accounting server:	EQSERVERXX

16. Click the <kbd>Next ></kbd> button.

17. In the Ready to Install the Program dialog box, click the <kbd>Install</kbd> button.

NOTE: This process may take 5-10 minutes to complete. The installation wizard copies files, configures services, and creates shortcuts to the Administrative applications.

18. In the InstallShield Wizard Completed dialog box, click the <kbd>Finish</kbd> button to exit the installation wizard.