

Install Process



Instructor Led Training

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Chapter 2-Exercise A

Microsoft® Windows Server Hardware Requirements

- Ⓒ Minimum Pentium III or Athlon
- Ⓒ Minimum of 512 MB of system memory
- Ⓒ Minimum of 100 MB available disk space for applications
- Ⓒ Minimum of 5 GB of available disk space for database
- Ⓒ Minimum display resolution set to 1024x768

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Databases Supported

- Microsoft Server Desktop Engine (MSDE) 2000 with Service Pack SP3a or higher
- Microsoft SQL Server 2000 with Service Pack SP3a or higher
- Microsoft SQL Server 2005*
- Microsoft SQL Server 2005 Express*

* Microsoft SQL Server 2005 or Microsoft SQL Server 2005 Express requires the installation of Microsoft .NET 2.0 framework on the system on which the database resides.

Databases Supported

- Oracle® 9i: 9.2.0.1.0 server with patch set 9.2.0.4 or higher
Oracle 9.2.0.1.0 client with patch set 9.2.0.4 or higher
Oracle ODBC driver 9.2.0.60
- Oracle 10g: 10.1.0 server with patch set 10.1.0.4 or higher
Oracle 10.1.0 client with patch set 10.1.0.4 or higher
Oracle ODBC driver 10.1.0.4.0

Operating System of Print Server Document Routing Engine (DRE)

- Ⓒ Microsoft Windows Server 2000 or 2003
- Ⓒ Novell® NetWare 5.1 or 6.5 with SP2
(Open Enterprise Server with NDPS only)
- Ⓒ IBM AIX® 5.1, 5.2 or 5.3
- Ⓒ UNIX® HP-UX ia64
- Ⓒ Sun Solaris™ 8, 9, or 10 for SPARC
- Ⓒ Sun Solaris X64 10
- Ⓒ Red Hat Enterprise Linux 3 or 4
- Ⓒ Fedora Core 3, 4, or 5 (Linux)
- Ⓒ SUSE Linux Enterprise Server 8 or 9
- Ⓒ SUSE Linux Server 9

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SQL Server Express vs MSDE

	SQL Server Express 2005*	MSDE*
Ram	192 MB (512 MB recommended)	128 MB
Computer	600 MHz or higher	166 MHz or higher
Hard Disk	525 MB	44 MB
Max DB	5 GB	2 GB

*Both databases require .NET 2.0 or higher to be installed prior to the installation of the database.

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Equitrac Server Components

Core Accounting Server (CAS)
Document Control Engine (DCE)
Document Monitoring Engine (DME)

- ☞ Microsoft Windows Server 2000
with Service Pack SP4 or later
- ☞ Microsoft Windows Server 2003

Server Configuration

- ☞ Ensure you have a recent external backup for each server.
- ☞ Set the virtual memory to:
Initial size = 1.5 x installed RAM
Maximum size = 3 x Initial size
- ☞ Export (backup) the following registry subkey:
HKEY_LOCAL_MACHINE\System\
CurrentControlSet\Control\Print\Printers

Installation Program



- Installation files are available on CD or can be downloaded from Equitrac Partner Portal
- All Equitrac Office components are installed in one process
- The installation process might need to be run on multiple machines to install machine specific services

Preinstallation Checklist

1. Determine the system roles, including installation destinations for each Equitrac component.
2. Verify that your network configuration supports communication between Equitrac components, including document routing to network printers.
3. Create a user account with local administrator privileges for the server on each machine where Equitrac services will be installed.

NOTE: If you plan to use the Active Directory Synchronization tool, this administrative account must have a minimum of Create User privileges on the active directory to read the schema.

Preinstallation Checklist

4. Install and configure TCP/IP protocol on each print server and physical device.
5. Prepare your existing database to use with Equitrac, or determine space requirements for the database you plan to install.
6. If your existing database is SQL Server 2005 or SQL Server Express 2005, you must configure the database to use Windows Authentication Mode. Equitrac Express or Equitrac Office might lose some functionality using mixed mode authentication.

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Preinstallation Checklist

7. Verify all servers and workstations meet Equitrac minimum requirements.
8. Determine the installation location of each Equitrac component, on one local server or with services installed across multiple servers. There is no prescribed order to this process; however, it is logical to install the Core Accounting Server and database first, and then install the Print Server(s), and client workstations, as needed.

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Preinstallation Checklist

9. Verify you can successfully print to all network printers to be used with Equitrac before converting to Equitrac ports.
10. If adding new printers, verify printing prior to converting to an Equitrac printer.
11. Verify you have license keys to all Equitrac components to be install; record license keys.
12. Determine how user accounts are to be created.
13. Determine the business strategy for charging users or departments (Accounting Policy).

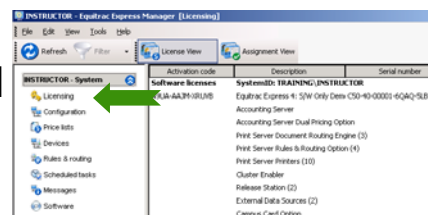
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Licensing and Registration

- ☑ Licensing and registration should be completed before you configure the Equitrac system.
- ☑ If you run Equitrac in unlicensed mode, no transactions are recorded, some functionality (for example, Client Billing popup) does not function, and PageCounter terminals do not boot.
- ☑ Licensing is configured in Equitrac System Manager.



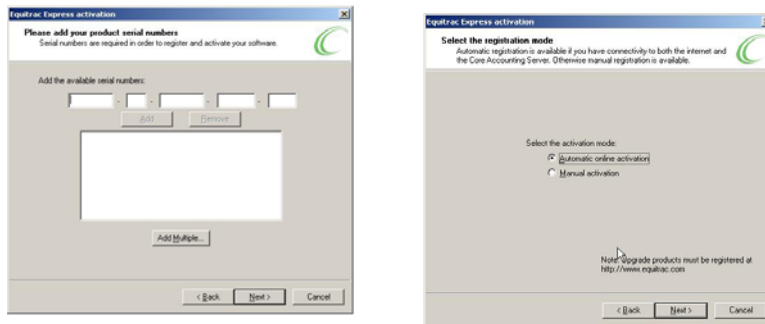
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License Activation

- 🌱 Licenses require activation before they become valid
- 🌱 Enter the Equitrac product serial number
- 🌱 Activation can be automatically or manually



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License Activation - Automatic

- 🌱 Takes approximately 1 minute to complete
- 🌱 Internet access is required for the Equitrac server to connect to the Activation server.
- 🌱 Complete the online registration form

The image shows a screenshot of the 'Equitrac Office activation' registration form. The form is titled 'Registration' and includes a note: 'Specifying as much detail about your site will prove useful should you require technical assistance.' The form fields and their values are as follows:

Field	Value
Company name	Equitrac Corporation
Address	Kingsfordweg 151
City	Amsterdam
Country	Netherlands
Contact first name	Micki
Contact last name	Mather
Email address	mickm@equitrac.com
Telephone	+31204913905

At the bottom of the form, there is a note: '* (Required fields)'. Navigation buttons '< Back', 'Next >', and 'Cancel' are located at the bottom right.

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License Activation - Manual

- Manual registration can be performed using the Equitrac website or by phone
- On the website, you can view a list of licenses you have already registered
- Generate an activation code for new product serial numbers

Product Registered To
Equitrac
900, 1000 South Pine Island Road
Plantation, FL 33324

UPDATE PROFILE

<https://activation.equitrac.com/register/>

Enter the Serial Number of a new product you would like to register.

Serial Number

REGISTER A NEW PRODUCT

Click on the product Serial Number to view additional information.

Serial Number	Product	Registered Device	Unregistered Device
F57-40-49vBf-4jgu-3fe	Deposit Station	1	
F57-40-49vBf-4jgu-3fe	Equitrac Office 3 Downloadable Demo	1	

License Activation - Manual

- Once you receive the activation code, start Equitrac System Manager and configure the licensing

Licensing

Configuration

Price lists

Devices

Rules & routing

Scheduled tasks

Messages

Software

Add Licensing Information

License Information

Serial number:

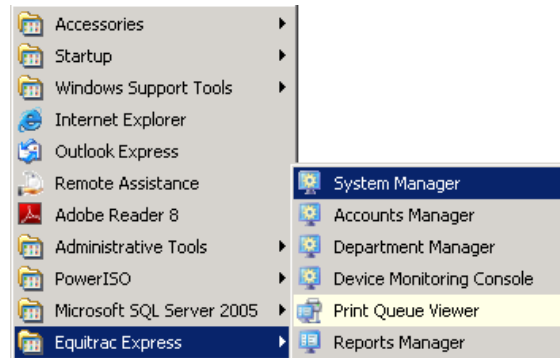
Activation code:

Add

Cancel

Starting Equitrac Applications

- By default, each system administrative and diagnostic application is started individually from the Programs menu



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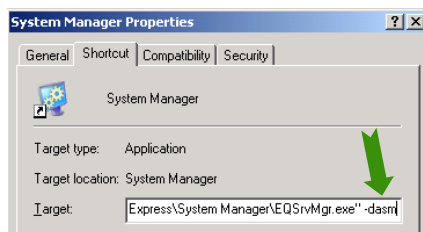
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Start All Applications at Once

- A shortcut can be created to start all of the applications in Equitrac System Manager
- In the properties of the Equitrac System Manager application icon, add the switch **-sadm** to the end of the executable line

s = **S**ystem
a = **A**ccounts
d = **D**iagnostic
m = **D**ME Console



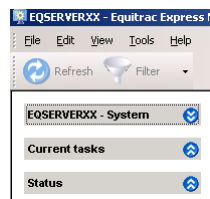
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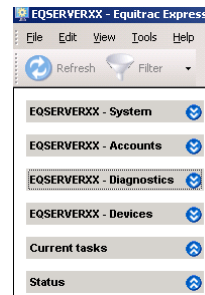
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Start All Applications at Once

- Each application now appears within Equitrac System Manager



Before applying the switch



After applying the switch

Client Workstation Requirements

- Processor:
Minimum Pentium III or Athlon
- System memory:
Minimum 256 MB
- Available Application Disk space:
Minimum 20 MB
- Display Resolution:
Minimum of 1024 x 768

Client Workstation Operating System

- ☞ Microsoft Windows 2000 Professional with Service Pack SP2
- ☞ Microsoft Windows XP
- ☞ Macintosh OSX
- ☞ Microsoft Vista

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Planning the Client Installation

- ☞ Determine the most effective roll out method:
 - Manual
 - CD
 - Network share
 - Silent Install
 - Login/logout scripts
 - System Management Server (SMS)
- ☞ You may want to notify users that printing may be interrupted momentarily during installation

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Planning the Client Installation

- Test the roll out process in stages.
 - Install the client on one workstation
 - verify success
 - Roll out to five workstations
 - verify success
 - Roll out to a group of users
 - verify success
 - Roll out to enterprise
 - verify success

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Install the Client Silently

- Client applications may be installed “silently” via a script. This is recommended in large enterprise environments where the number of client workstations prohibits the use of a manual install.
- Refer to the Equitrac Office or Equitrac Express Installation Guide for detailed instructions on how to create a silent install package

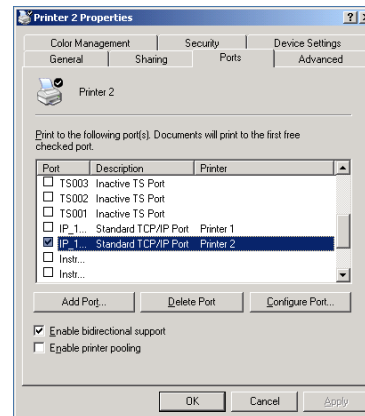
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Complete the Install – Printers

- Print server printers must be configured to use an Equitrac (EQ) Port
- EQ ports can be created manually or using the Equitrac Printer Conversion Wizard.
- Ensure printing is operational PRIOR to converting a port.



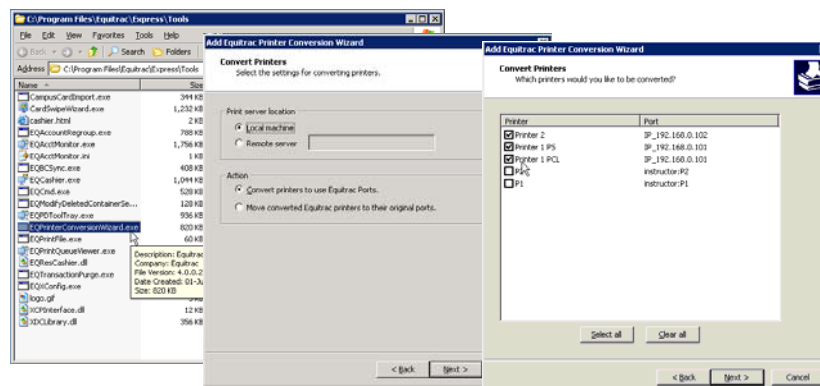
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Equitrac Printer Conversion Wizard

- After converting a port, print a test page to automatically register the printer in Equitrac System Manager



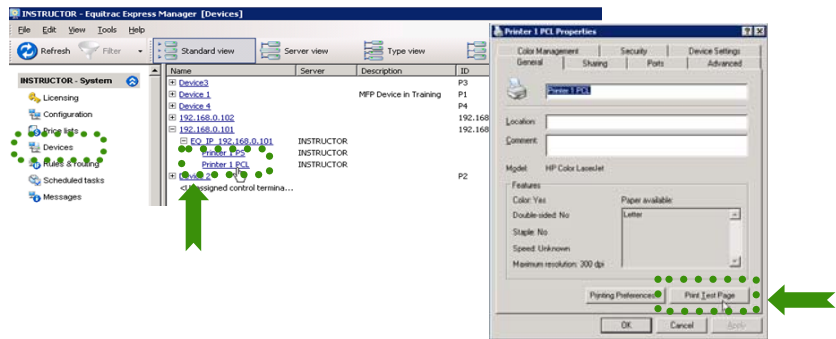
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Confirm Printer Setup

After you print a test page, the printer appears in Equitrac System Manager as a Physical Device (IP address of the port)



Stored Value Card Readers

<u>Manufacturer</u>	<u>Supported Models</u>
Access Control Technologies	ACT-355
B.E.A.R	DCS-2000
Cartadis	TC11, TCRS
Equitrac	DebitLog
Infineer or Absec	6202/6208/6408/6502
InterCard	AS 3880
Jamex	7114 (James Payment controller)
Schlumberg-DANYL	D/AUX
Xafax	AS 6200
XCP	5870 (Unit or Value cards), 5871/5571, 5812, 5512, (Unit or Value cards)

Troubleshoot Installation

- Ⓒ Errors appear during the report generation test:
 - report definitions did not load
 - CAS service did not start
- Ⓒ Device is missing in Equitrac System Manager:
 - System Manager window needs refreshing
 - CAS is still updating - takes at least 30 seconds
- Ⓒ Licensing fails during Automatic Activation
 - Restart CAS, which controls licensing
 - Ensure the license number entered is correct

Questions?

