



## E-automate 8.7 Upgrade Guide

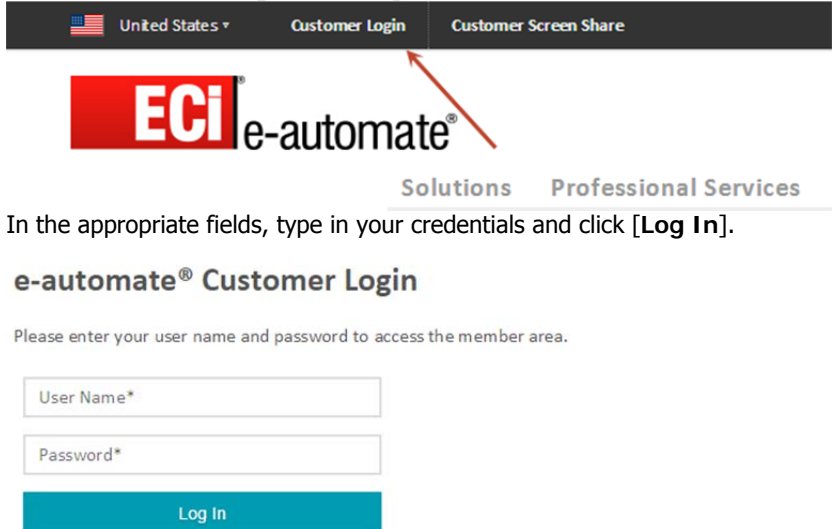
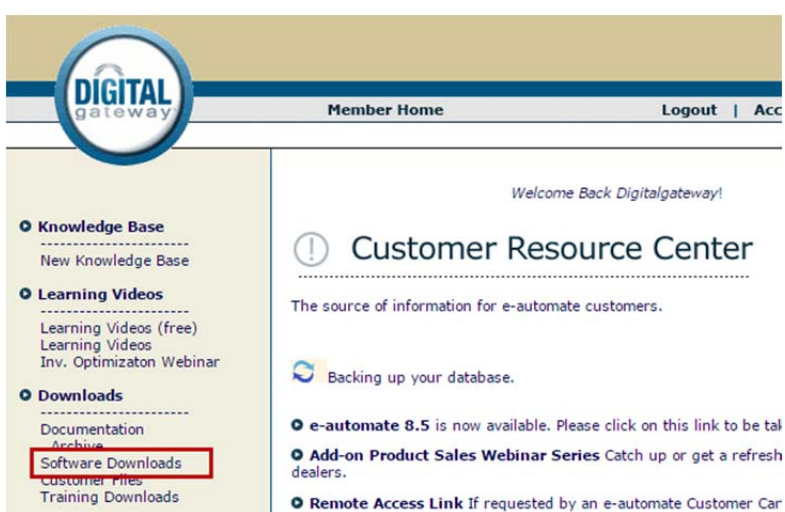


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## Downloading E-admin and E-automate

Before you can begin the version 8.7 upgrade of e-admin or e-automate, you must first download the software. You can access the software by going to <http://servicetechnology.ecisolutions.com> and logging in with the appropriate credentials. If you need assistance with this process, please contact Customer Care who can route you to your account manager or provide you with the instructions to obtain the software.

1	Open a browser on an internet connected computer and go to the site, <a href="http://servicetechnology.ecisolutions.com">http://servicetechnology.ecisolutions.com</a> .
2	<p>Click the <b>Customer Login</b> link to login.</p>  <p>In the appropriate fields, type in your credentials and click [<b>Log In</b>].</p> <p><b>e-automate® Customer Login</b></p> <p>Please enter your user name and password to access the member area.</p> <p>User Name*</p> <p>Password*</p> <p>Log In</p> <p><b>Note:</b> If you do not have credentials, contact ECI Software Support at <a href="mailto:eaaccountercare@ecisolutions.com">eaaccountercare@ecisolutions.com</a> or your account representative to secure your credentials. You must have an active current maintenance agreement to access the Customer Resource Center.</p>
3	<p>Click <b>Software Downloads</b> to access the software download area.</p> 



4	<p>In the Downloads area, click the <b>Click here</b> to access the download link.</p> 
5	<p>In the displayed page, locate the version of e-automate you want to download and click [<b>Download</b>].</p> <p>Be sure to download and review and/or follow appropriate upgrade guides, Whats New documents or installation guides.</p> <p><b>Note:</b> If you use multiple ECI Software products, be sure to download all products you actively use. When you install a new version, it is best practice to download and install appropriate versions of Add on products. For example, if you use e-info, download and install the new version of e-info.</p>

## Prior to Upgrading

Before beginning the process of upgrading to version 8.7, ensure that the minimum system requirements for hardware and software have been met. To view the system requirements, please refer to *System Requirements – E-automate 8.7* on the website. Successful implementation of your system depends upon meeting the minimum system requirements. Prior to all updates and upgrades to your e-automate database you should backup your database.

**Caution:** If you have previously upgraded using the Package Update option you will need to use the Package Update option again to upgrade to 8.7. If you use the server installers the upgrade will fail and you will be unable to log into e-automate.

To check if the Package Update option was used during your last upgrade, open e-admin and select **File > Package Updates**. If there are any package updates listed then you must continue to use the Package Update option when upgrading. Please see the *Upgrading Using the Package Update Installer* section below for instructions on upgrading using this option.

## Upgrading Checklist

### Any Prior Version (8.5, 8.1., 8.0., etc.)

If you are upgrading to 8.7 from 8.1 or earlier versions, please note the following changes:

#### SQL Server

Before upgrading, ensure that you have Microsoft® SQL server or SQL Express version 2008, 2012, or 2014 installed. **SQL Server 2005 is no longer supported.** For steps on installing SQL Express 2012, refer to the 8.7 Installation Guide on the website.



## Windows XP and Server 2003

Support for Windows XP has been discontinued for version 8.7, use at your own risk. Support for Server 2003 has also been discontinued.

## .NET 4.0

E-automate 8.7 requires version 4.0 of the Microsoft .NET Framework to be installed. Both .NET 4.0 or 4.5 will satisfy this requirement. Downloads for the .NET Framework are available from Microsoft.

## Crystal Reports

If you have custom reports that are critical to your business operations, please be sure they are compatible with 8.7 prior to upgrading. Reports in e-automate 8.7 use the Crystal Reports Runtime version 13, which will need to be installed on each workstation and server that will run e-automate. Once you have upgraded to 8.7, if you have custom reports that do not work or need to be updated, contact your account manager.

## Custom Reports

Most but not all reports developed for e-automate 8.0/8.1/8.5 should work with 8.7. Because of the platform changes in 8.7, most (if not all) customizations made to standard e-automate 7.6 reports will not work with 8.7. Testing and upgrading these types of reports is not the responsibility of ECI e-automate or the Customer Care Team. Custom reports that were not built from a standard report will likely work. Note that most custom AP Check reports will work with 8.7. For more information on getting your custom reports updated, please contact your account manager. As a guideline you should plan on 6-8 weeks to get your custom reports upgraded.

## Report Locations

If your company is using the feature in e-automate to have a central location on your network for e-automate reports you will need to be sure and replace those with the 8.7 report files.

## Contracts

Due to the extensive enhancements to the contract module, you should clear out the Contract Billing Queue and Contract Invoice Queue.

## Add-on Reinstallation

When you upgrade to e-automate 8.7 you will be required to update your add-on products as well. Upgraded versions of add-on products are available for download along with e-automate 8.7. In order to upgrade your add-on products, you will need to know your e-automate "Full Access" password (system password). This password is set in e-admin on the e-automate server under File > Settings > System Passwords.

## E-agent

E-agent now operates as a set of system services. In a default installation, the necessary architecture is installed as part of the e-automate server installation and no additional



application install is necessary. However, a separate optional e-agent service (Task Engine) can be installed elsewhere if conditions require. Typically those conditions would be for fax server purposes.

During the 8.7 upgrade, e-agent automatically suspends running of all tasks. After the upgrade is complete you will need to click the [**Suspend**] button on the e-agent toolbar to un-suspend all e-agent tasks.

If faxing will be used with e-agent a fax modem and software must be installed on the e-automate system server. The physical modem device and related software will need to reside on the same server where the DGServer service is running. If you do not want to install your fax modem and software on your e-automate server, you can install it on a separate computer but in order for it to work you will need to install a separate e-agent "task engine" for this computer to interact with e-agent.

With the release of e-agent 8.7 as a service, there are now permissions associated with accessing e-agent and viewing the tasks. In order for a user to access e-agent, they must have the *e-agent Tasks* permissions. If a user does not have e-agent permissions and they attempt to access e-agent, they are denied access.

**Caution:** Once permissions has been granted to *e-agent Tasks*, DGServer must be restarted in order for those permissions to be valid.

#### Restarting DGServer

1. Restarting DGServer should only be done when users are not in e-automate, during non-operational time.
2. On your database server or where e-admin is installed, open the **Control Panel** and access **Administrative Tools**.
3. Locate and double-click on **Services**.
4. In the list of services, locate and select, **DGServer**.
5. Click **Restart** to restart DGServer.

#### Maintenance Status

A new 8.7 license key is required so users must have a current e-automate maintenance plan and current maintenance plans for any add-on products as well. Add-ons that require separate maintenance contracts are as follows:

- e-info
- PIP (Public API)
- Digital Bar Code
- Digital Task Force
- PO Processor
- Digital Quote Manager
- E-automate Commissions
- Leasing Module



- Sales Tax Utility
- Advanced Contract Import Utility
- Budget Utility

### **Currently Compatible 8.7 Integrations**

The following integrations have been tested and are found to work with e-automate 8.7.

- Meters
  - FMAudit
  - PrintFleet (FleetView, PageTrac)
  - Print Audit
  - Print Tracker
  - Canon ImageWARE
  - Lexmark Fleet Tracker
  - Xerox Service Manager
- e-commerce
  - Britannia
  - Red Falcon
- Services
  - PROS Elite Service Reports
- Leasing
  - Great America Leasing Interface
- Alerting
  - CEO Juice

### **Currently Incompatible 8.7 Integrations**

The following integrations are either untested or have been tested and have been found not to work.

- CRM
  - Salesforce.com
- e-commerce
  - Red Cheetah
- Services
  - MWAI (ADS) Connector

## **Version 7.6 or Earlier**

### **Remote Tech**

If you are coming from a pre-TechAnyware version of Remote Tech you will need a new separate license key for Remote Tech. Please contact Customer Care to get a new license.



## e-info

When users log into e-info for the first time they will be creating new logins and passwords. The default web site name during the install is now einfo, not e-info. Any redirects or references to "e-info" will need to be changed to einfo unless you chose to keep the site name as e-info.

## PCI Compliance

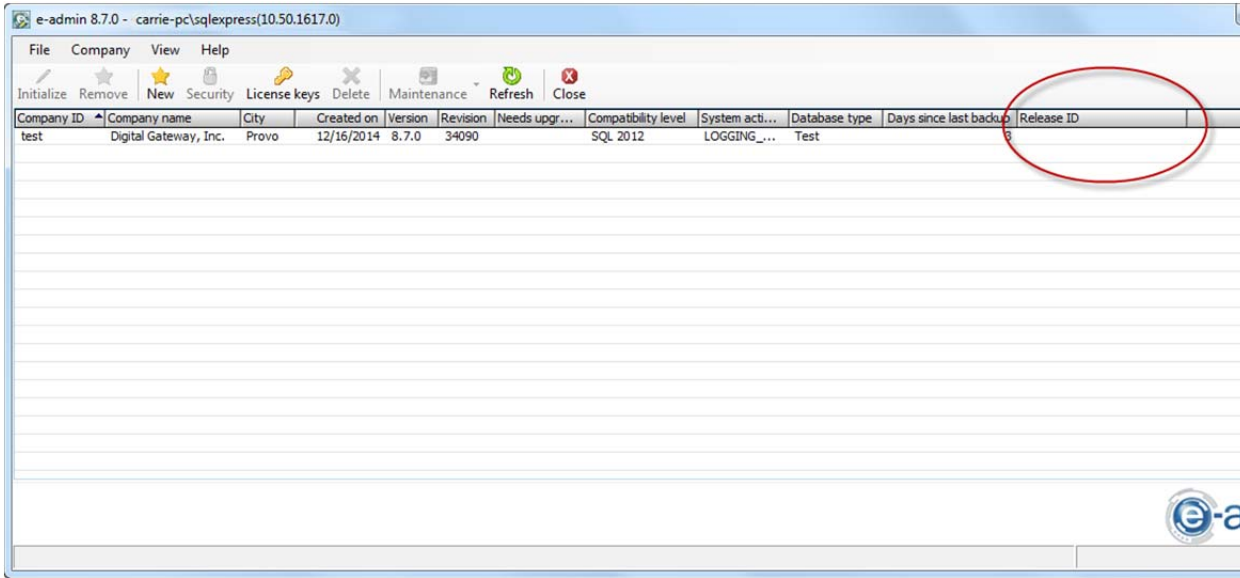
This version of e-automate complies with the Payment Card Industry's Payment Application Data Security Standards. This means that credit card numbers will no longer be stored in e-automate 8.7. Any e-automate dealer that is planning to upgrade from e-automate 7.6 to 8.7 must make a decision regarding the migration path of credit cards that you currently store in e-automate. The options available are:

- **Option 1:** Prior to upgrading to e-automate 8.7 upload your credit card records from your e-automate database to an integrated online credit card vault system using NET1/SAGE payment services. If you would like to take advantage of this feature you will need to set up an account with NET1/SAGE payment services prior to upgrading to 8.7. Please visit our PCI DSS webpage for more information.
- **Option 2:** Purge your credit card records in e-automate and proceed with a non-integrated card payment service.



## Upgrading Using the Server Install

This section outlines the steps used to upgrade e-automate using the server installation .exe files. If you have previously upgraded using the Package Update option you will need to use the Package Update option again to upgrade to 8.7. To check if the Package Update option was used during your last upgrade, do the following:

- 1
    - Go to **Start > All Programs > Digital Gateway > e-admin** to open the e-admin login window.
  - 2
    - Click [OK] to log into e-admin.
  - 3
    - In the main e-admin window, if the **Release ID** column is blank, you are NOT using the Package Update Installer.
- 

Company ID	Company name	City	Created on	Version	Revision	Needs upgr...	Compatibility level	System act...	Database type	Days since last backup	Release ID
test	Digital Gateway, Inc.	Provo	12/16/2014	8.7.0	34090		SQL 2012	LOGGING...	Test		
- 4
    - If there is a release ID in this column, please see the *Upgrading Using the Package Update Installer* section below for instructions on upgrading again using this option.

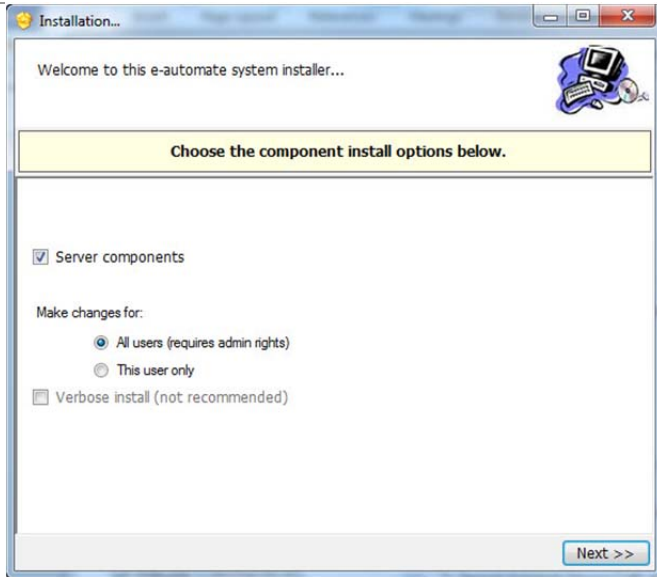
## Upgrading E-admin Server

All versions of e-automate are downloaded from the website; e-automate software is not distributed on a CD/DVD.

- 1
  - Secure the download file from the Customer Resource Center at <http://servicetechnology.ecisolutions.com>. If you have trouble obtaining the file from the website, please contact your account manager who can assist you in this process.  
**Note:** For download instructions see Downloading E-admin and E-automate at the beginning of this document.
- 2
  - Right-click the **e-automateServerSetup.exe** file and choose **Run as administrator** to begin installation.

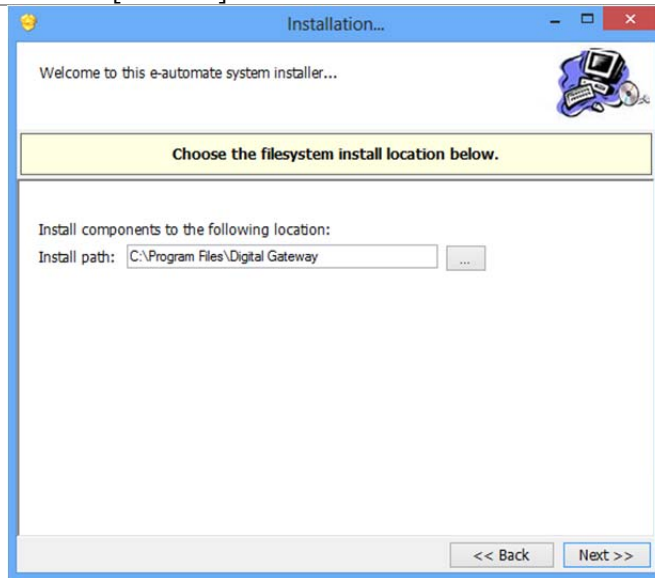


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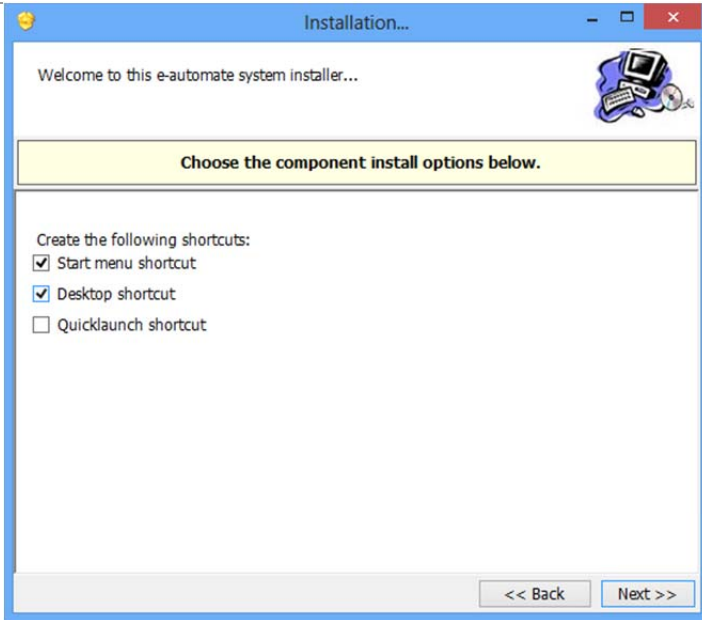
- Ensure that **Server components** is checked.  
**Note:** In prior versions of e-automate, the server components and the e-agent components were installed separately. In 8.7, the new e-agent web service is automatically installed with the server.
- Ensure that **All users (requires admin rights)** is selected.  
**Note:** Because you are installing e-admin to your server (host) machine, it is not recommended to select **This user only**.
- Click [**Next>>**].

4



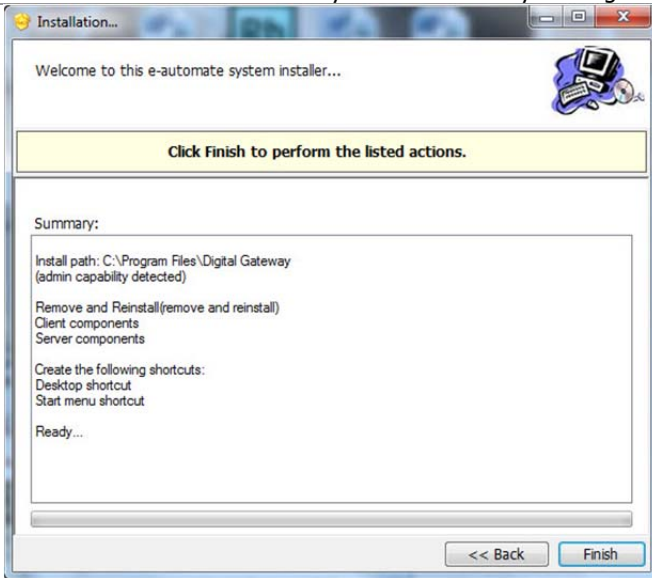
- Specify your **Install Path** and click [**Next>>**].  
**Note:** It is recommended that you install e-admin to the default directory; to choose a different location click [...] and select your desired location.

5



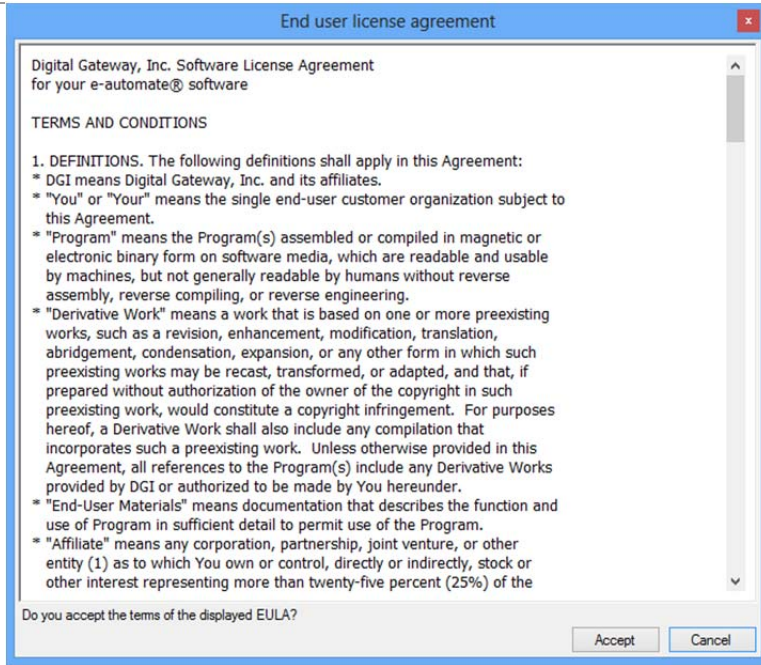
- Choose the shortcuts you wish to add by clicking the corresponding checkbox and click [**Next**> >].

6



- Click [**Finish**] to perform the listed actions. The End User License Agreement window displays.  
**Note:** At any time during the installation you can click [**Back**] to return to a previous screen and modify the parameters.

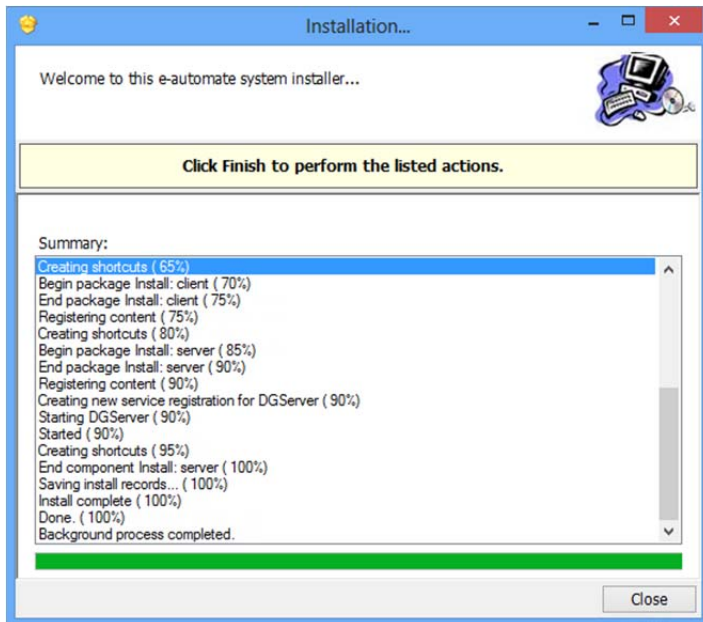
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- Read the License Agreement and click **[Accept]**. If you click **[Cancel]** in the License Agreement window, the Install Wizard stops the installation.

8

The installer completes the installation and launches the e-admin login window.



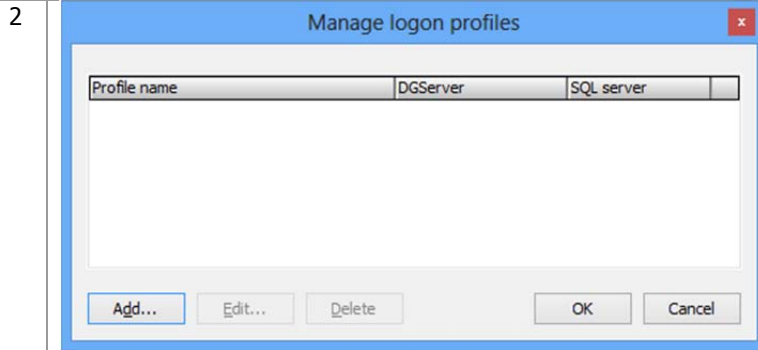
- Click **[Close]** to exit out of the installation wizard.

## Running E-admin

- 1 If you have just installed e-admin, the e-admin login window was launched at the completion of the installation. If you are launching e-admin for the first time, go to **Start > All Programs > Digital Gateway > e-admin** to open the e-admin login window.



- Click the **[Edit]** button (pencil) to open the Manage Logon Profiles window.



- Click **[Add]** to add an e-admin profile. The Edit Logon Profile window displays.



3

SQL server:

DGServer:

Next >>

- Enter the name of your SQL Server in the **SQL server** field. The DGServer name automatically populates.  
**Note:** If you need to specify an alternate SQL server port, you must use the cliconfig utility from Microsoft to specify the port.  
**Note:** You can specify an alternate port to your DGServer using the server:port syntax.
- Click [**Next** ] to continue.

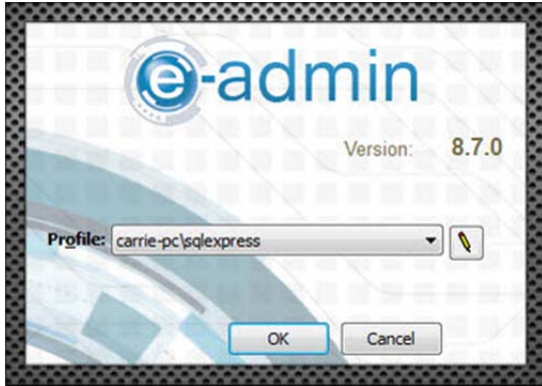
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Profile name:

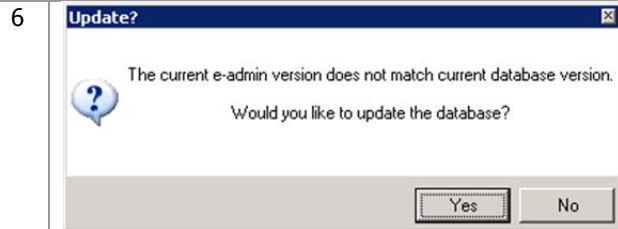
<< Previous    Finish

- In the **Profile name** field, enter a name by which this combination of SQL server and DGserver can be identified, or accept the suggestion provided and click [**Finish**] to return to the Manage Logon Profiles window.
- Click [**OK**] to close the window and return to the e-admin login window.

5 When you return to the e-admin login window, the profile you created will be selected in the Profile field.

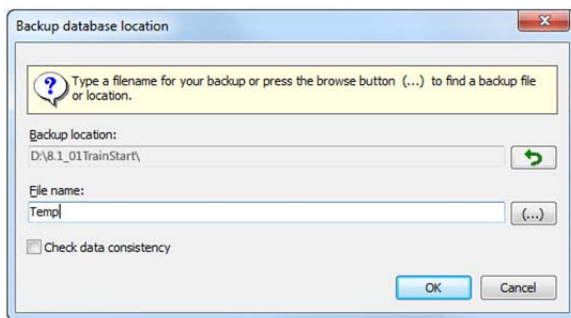


- Click [OK] to log into e-admin. The Update window displays.



- Click [Yes] to update the system database. The Backup Database Location window displays.

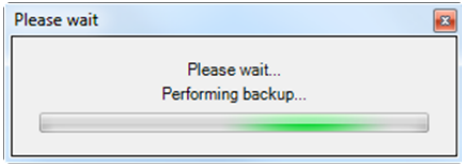
7 You will need to back up the system database before you update it.



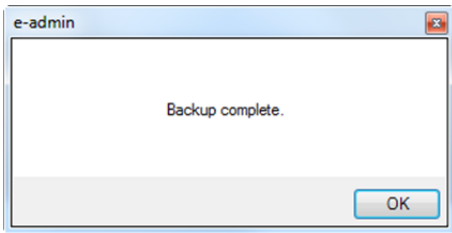
- Enter a backup file name for the system database, and ensure the backup location path is correct. Use the green arrow to change the backup location, if desired.
- Click [OK].



8 E-admin then backs up the database.



Once the backup is complete, e-admin displays the Backup Complete window.



- Click [OK]. The Configure DG Server window displays.

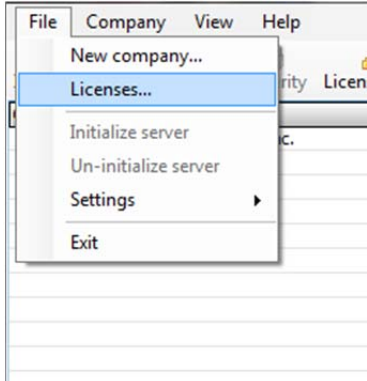
9 Configure DG server



- Enter the same system password you were using in prior versions of e-automate in the **Full access password** field. If you do not know your system password, you can enter a new one. You will need to remember this password when you install any add-on products you have purchased.  
**Note:** If your password isn't strong enough to meet the requirements, a warning dialog will appear with the required parameters.
- Enter the same system password you were using in prior versions of e-automate in the **Read-only password** field. If you do not know your system password, you can enter a new one. You will need to remember this password when you install any add-on products you have purchased.  
**Note:** If your password isn't strong enough to meet the requirements, a warning dialog will appear with the required parameters.
- Click [OK]. The e-admin main window displays.



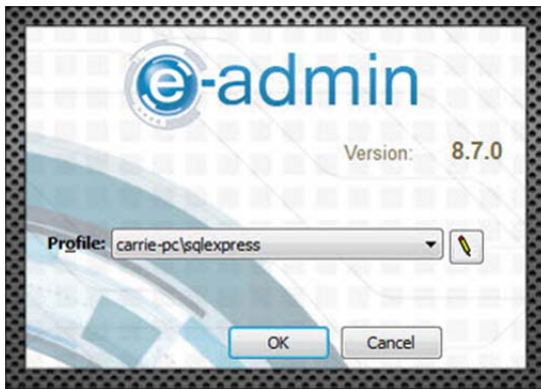
10 In order to use the new version of e-automate you will need to obtain a new 8.7 License Key. You currently cannot download the license key, you must contact e-automate customer care for a new license key.



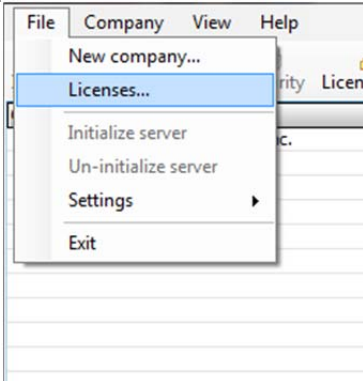
- Click **File>Licenses** from the e-admin main window. The Manage Users and Licenses window displays.
- Select the value in the **Server identification code** field and email it to [eacustomercare@ecisolutions.com](mailto:eacustomercare@ecisolutions.com).  
**Note:** The field appears as though you cannot copy, but you can copy the code for license key creation.
- You click [**Close**] to leave the Manage Users and Licenses window.
- You can also click [**Close**] to close e-admin until you receive your license key.

11 When you receive your license key from e-automate Customer Care complete the following instructions.

- Login to e-admin by going to your e-automate server, click Start > **All Programs > Digital Gateway > e-admin**.
- Click [**OK**] to login to e-admin.

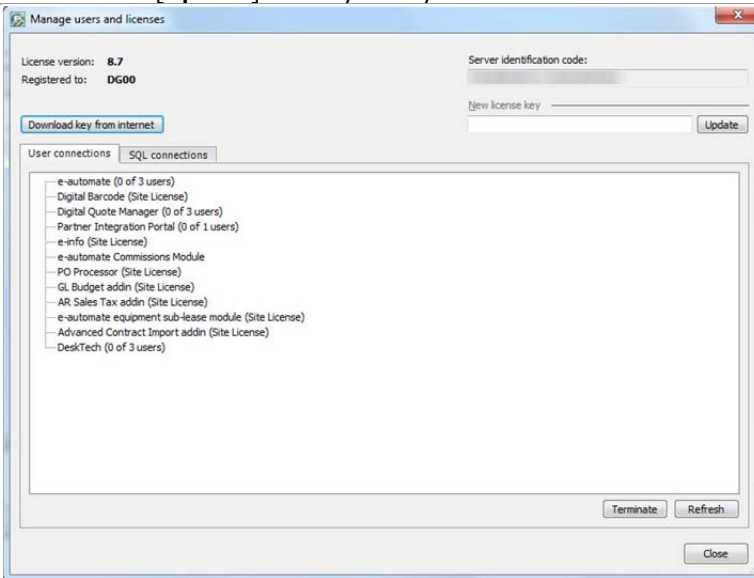


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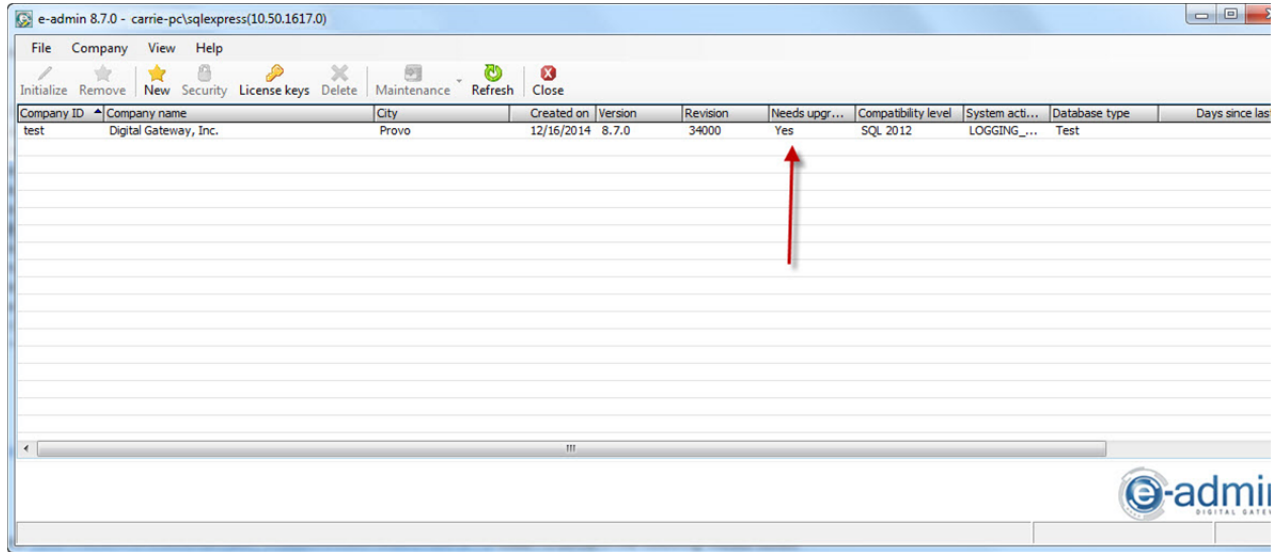
- Click the **File** menu and select **Licenses**. The Manage Users and Licenses window displays.
- Navigate on your computer to the license key you received, select it and copy the license key.
- Return to e-admin and the Manage Users and Licenses window.
- In the New license key field, right-click and select Paste to enter your new license key.
- Click [**Update**] to add your key to e-admin.

13



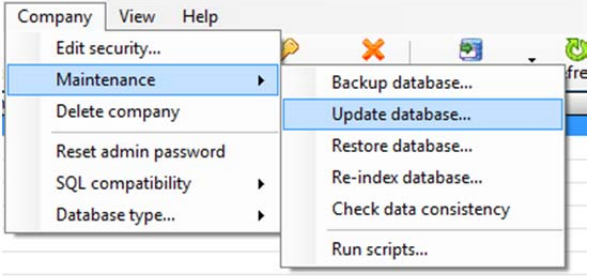
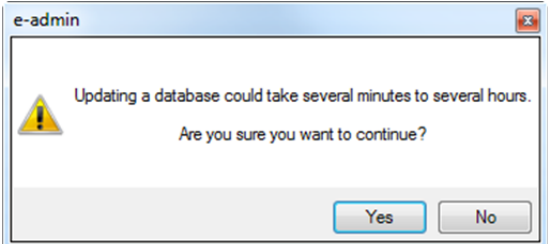
- Ensure that the correct number of licenses you purchased is reflected on the **User connections** tab. If there is a discrepancy, contact your Account Manager.
- Click [**Close**] or [**X**] out of the Manage Users and Licenses window.
- Click [**Close**] to exit e-admin.

- 14 If your database needs to be upgraded, you will see **Yes** in the **Needs upgrade** column. Please refer to the steps in the following section, *Updating E-automate Databases* for this process.

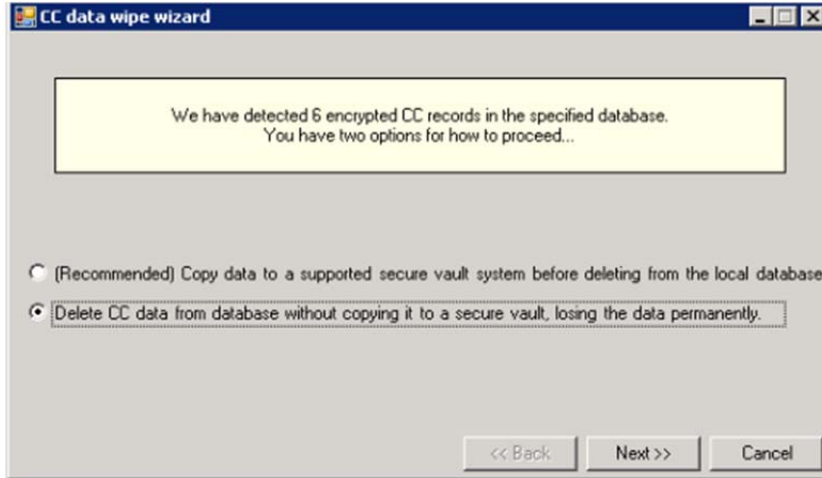


## Updating E-automate Databases

You use the **Update Database** activity to update e-automate databases. The database must be updated to the current version before you can log into the e-automate client. The version of the e-automate database is listed in the e-admin window in the **Version** column. If your database needs to be upgraded, you will see **YES** in the **Needs upgrade** column in the e-admin window.

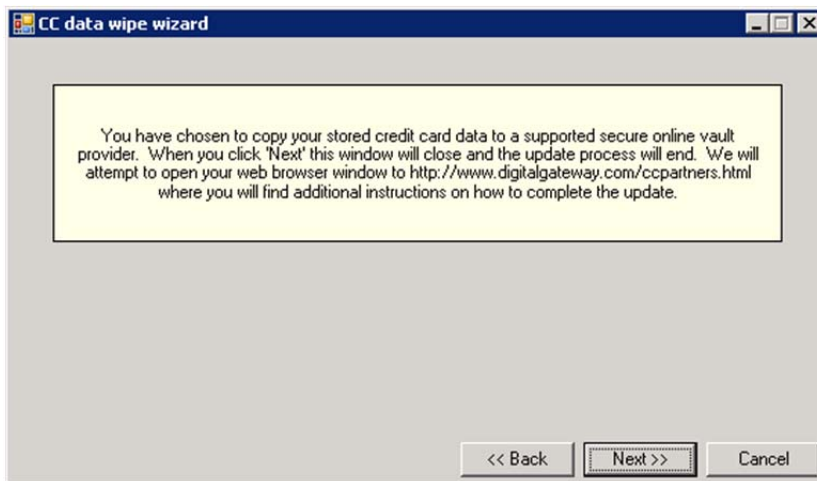
1	 <ul style="list-style-type: none"> <li>• Select the company database you want to update in the e-admin main window.</li> <li>• Select <b>Company&gt;Maintenance &gt; Update Database</b>. The e-admin window displays reminding of the time it could take to update the database.</li> </ul>
2	 <ul style="list-style-type: none"> <li>• Click [<b>Yes</b>]. If you have cleared your credit card records prior to running this database update, the Backup Database Location window displays. Skip to step 5 to continue the database update.</li> </ul>

3 If you have not cleared your credit card records prior to updating the database and you are upgrading from e-automate version 7.6 or earlier, you will see the CC Data Wipe Wizard window. You will have two options for how to proceed.



4A Option A:

- Click **(Recommended) Copy data to a supported secure vault system before deleting from the local database** to use the third-party PCI compliant pay service Element Payment Services or Net 1. Element and Net 1 are the only payment services that are currently supported by e-automate version 8.1.
- Click [**Next**].

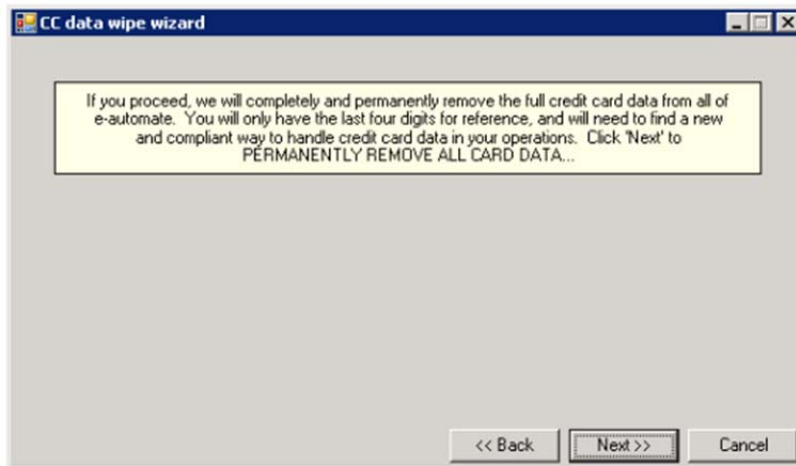


- Click [**Next**]. The window will close and a web browser will open to <http://www.ccpartners.html> where you will find information on how to set up your third-party payment service.
- Restart the database update after you have completed the setup of your pay service, and moved your credit card records to your secure online vault.

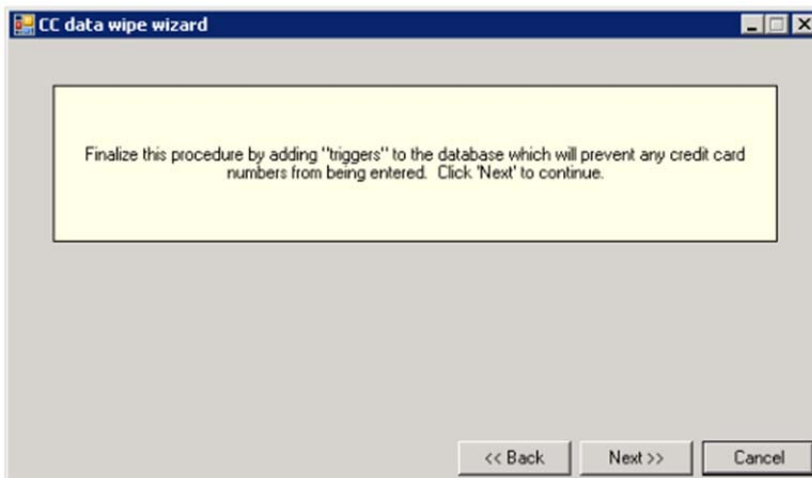


4B Option B:

- Click **Delete CC data from database without copying it to a secure vault, losing the data permanently** to remove any previous credit card data from e-automate. This will permanently and completely remove the full credit card data from e-automate. Proceed with caution.
- Click [**Next**].

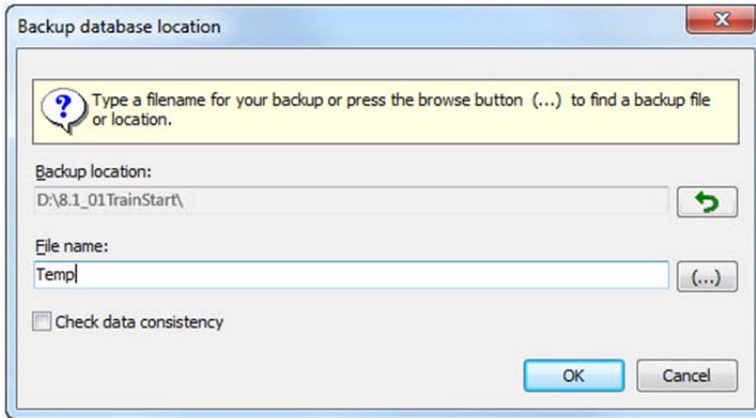


- Click [**Next**] to continue the process of deleting credit card data, [**Back**] to return to the previous screen, or [**Cancel**] to exit out of the CC Data Wipe wizard.



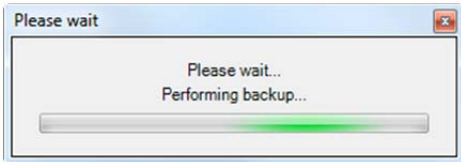
- Click [**Next**] to finalize the credit card deletion process.
- Restart the database update after you have exited the CC Data Wipe wizard.

5 Before any update is run, e-admin backs up the database in case some unforeseen error occurs.

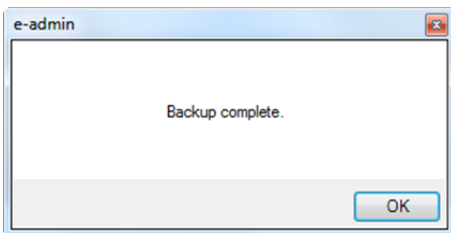


- Enter a name for your backup file in the **File name** field.  
**Note:** The backup file is stored in the **Backup Location** specified. If you want the backup stored in a different location, click the browse button (...) to specify a different location.
- Click [OK].  
**Note:** If the file already exists, e-admin displays the Attention Required window stating you must enter a unique backup name. Select [OK] and enter a unique name.

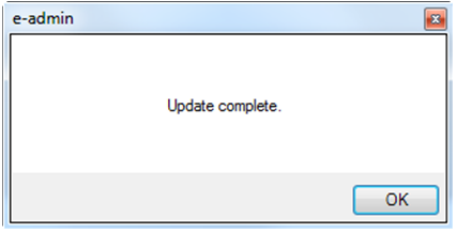
6 E-admin then backs up the database.



Once the backup is complete, e-admin displays the Backup Complete window.



- Click [OK].

7	<p>E-admin begins updating the database by running update scripts. E-admin runs each necessary script in succession until the database is completely updated to the current version you have installed.</p> <div style="border: 1px solid gray; padding: 10px; width: fit-content; margin: 10px auto;">  </div> <ul style="list-style-type: none"> <li>• Click [OK] and the database is updated.</li> </ul> <p><b>Note:</b> If you see a warning window that reads 'e-views failed to refresh,' do not be concerned, your database has been updated completely.</p>
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## Upgrading E-automate Client

Once you have upgraded the server and e-admin, you can then upgrade the e-automate 8.7 client on your various workstations. If you are using the Package Update Installer, please see the *Upgrading E-automate Client* section under *Upgrading Using the Package Update Installer* below.

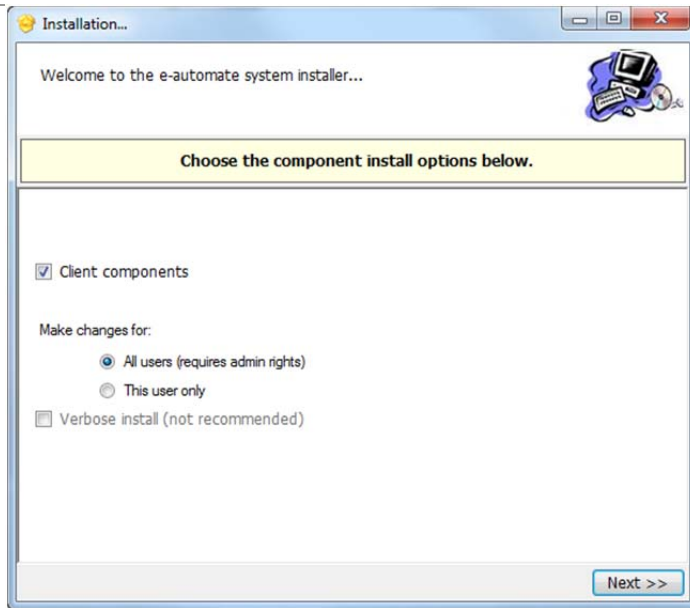
If you are using any of e-automate's add-on products, please refer to their respective installation guides found on the website to upgrade these products.

1	Secure the download file from Customer Care. Customer Care can route you to your account manager or provide you with the instructions to obtain the software.
2	<p>Locate the <b>e-automateClientSetup.exe</b> file to begin installation. To make this file available on other computers, you can:</p> <ul style="list-style-type: none"> <li>• Share this directory and make it accessible from other computers on your network.</li> <li>• Copy the client installation file, <b>e-automateClientSetup.exe</b> to a CD or flash drive that you take from client to client.</li> <li>• Copy the client install file, <b>e-automateClientSetup.exe</b> to a shared company network drive accessible from all intended client computers.</li> </ul>
3	<ul style="list-style-type: none"> <li>• From the client machines, use one of the above methods to access <b>e-automateClientSetup.exe</b>. Right-click the <b>e-automateClientSetup.exe</b> file and choose <b>Run as administrator</b> to begin installation. The Welcome window displays.</li> </ul>



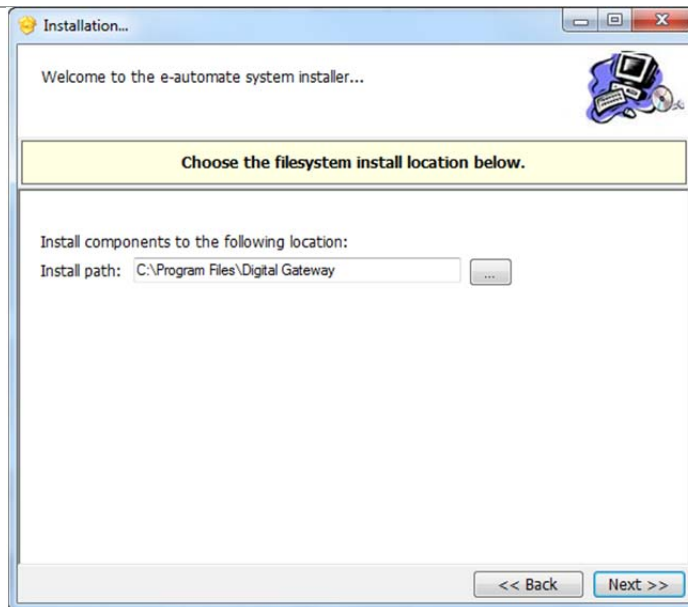


4



- Ensure that **Client components** is checked.
- Ensure that **All users (requires admin rights)** is selected.  
**Note:** This is the default setting. You can change it to **This user only** according to your company policies.
- Click [**Next**].

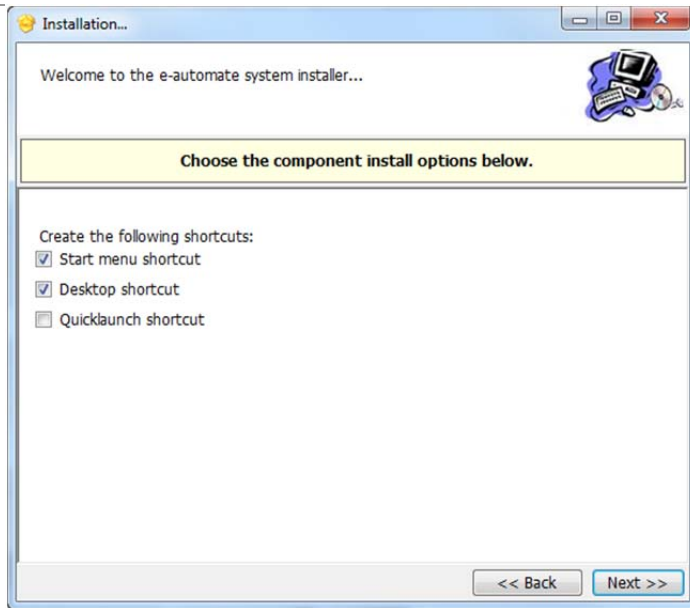
5



- Specify your **Install Path** and click [**Next**].  
**Note:** It is recommended that you install e-automate to the default directory; to choose a different location click [...] and select your desired location.

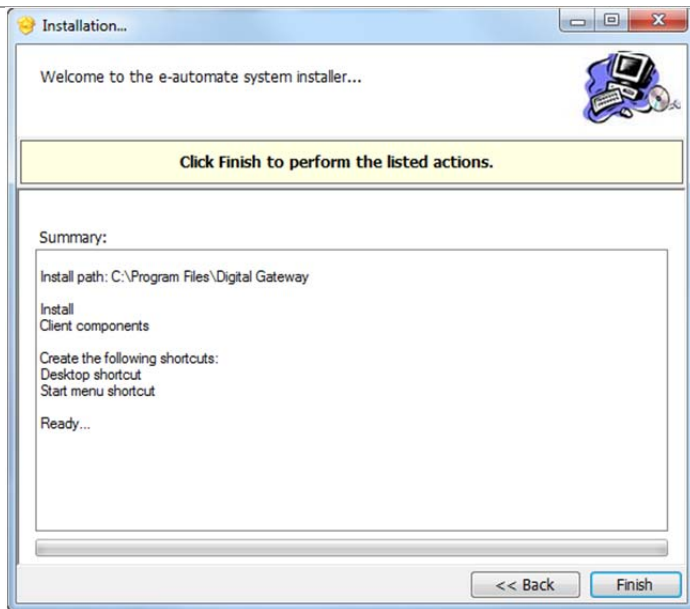


6



- Choose the shortcuts you wish to add by clicking the corresponding checkbox and click [**Next**].

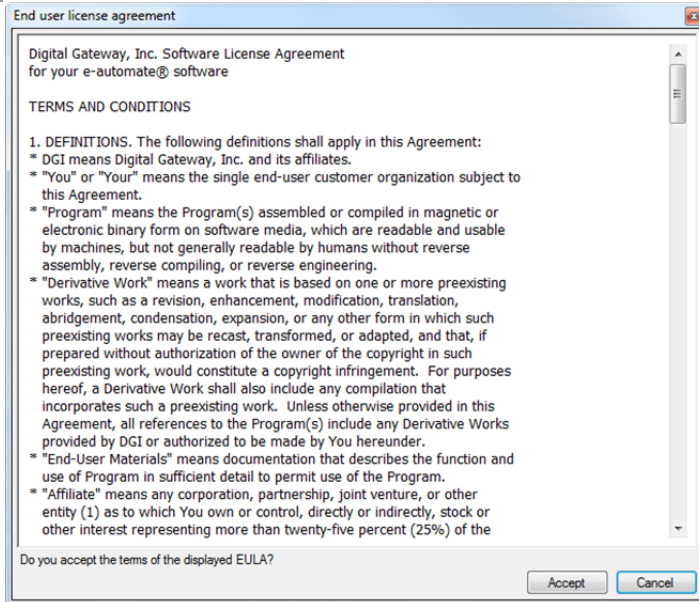
7



- Click [**Finish**] to perform the listed actions. The End User License Agreement window displays.  
**Note:** At any time during the installation you can click [**Back**] to return to a previous screen and modify the parameters.

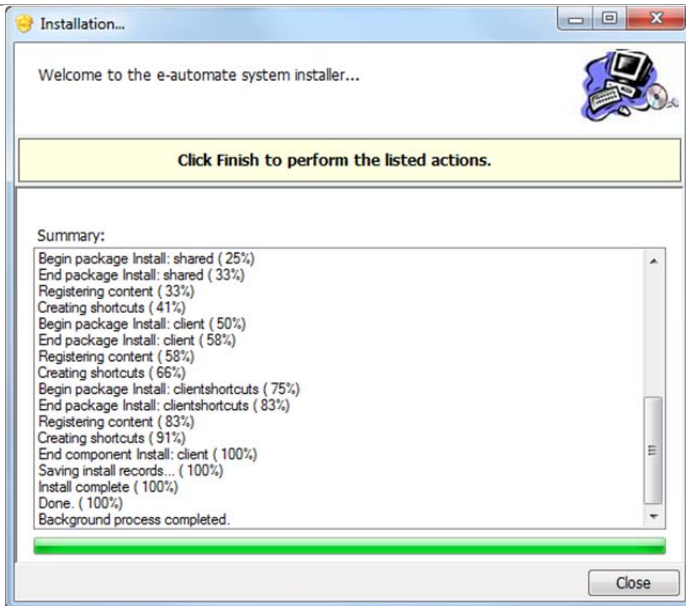


8



- Read the License Agreement and click [**Accept**]. If you click [**Cancel**] in the License Agreement window, the Install Wizard stops the installation.

9



- Click [**Close**] to exit out of the installation wizard.

## Logging into E-automate after Upgrading

1	<ul style="list-style-type: none"> <li>Select <b>Start &gt; All Programs &gt; e-automate</b> from the client workstation start menu. The e-automate logon window displays.</li> </ul>
2	<div data-bbox="251 457 787 840" data-label="Image"> </div> <ul style="list-style-type: none"> <li>Enter your user ID in the <b>User ID</b> field.</li> <li>Leave the <b>Password</b> field blank.</li> <li>Click the <b>Edit</b> icon (Pencil). The Manage Logon Profiles window displays.</li> </ul>
3	<div data-bbox="251 982 933 1312" data-label="Image"> </div> <ul style="list-style-type: none"> <li>Click [<b>Add</b>]. The Edit Logon Profile window displays.</li> </ul>



4

- Enter the name of the SQL Server in the **SQL server** field. The DGServer name automatically populates.
- Click [**Next**] to continue.

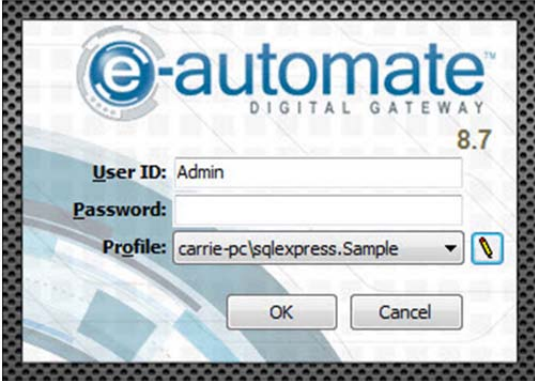
5

- In the **Company** field, use the down arrow to select the company you want to log into, if not the default.
- Click [**Next**] to continue.

6

- In the **Profile name** field, accept the name suggested or enter a new name to describe this profile.
- Click [**Finish**] to complete the profile.
- Click [**OK**] to close the Manage Logon Profiles window and add your new profile to the e-automate login window.



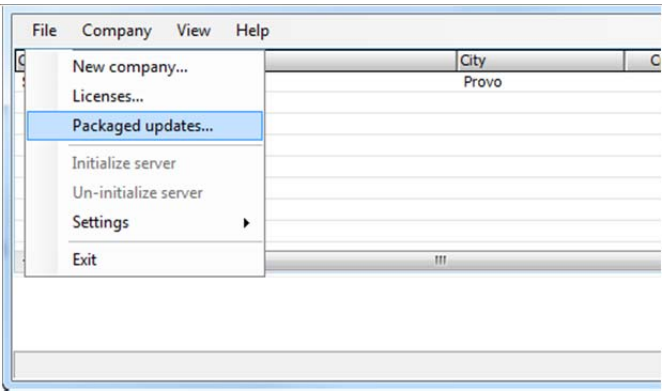
7		<ul style="list-style-type: none"><li>• In the <b>User ID</b> field, enter your user ID.</li><li>• Leave the <b>Password</b> field blank.</li><li>• In the <b>Profile</b> field, verify your created profile is displayed, use down arrow to change as necessary.</li><li>• Click [<b>OK</b>] to login to e-automate.</li></ul>
8	<b>E-automate</b> displays the <b>e-automate</b> window.	
9	Before you start working in version 8.7, you will want to update your network reports. For more information on this, please refer to the online help topic, <i>Setting Personal Client Settings – Report Options</i> .	

## Upgrading Using the Package Update Installer

If you have previously upgraded using the Package Update option you will need to use the Package Update option again to upgrade to 8.7.

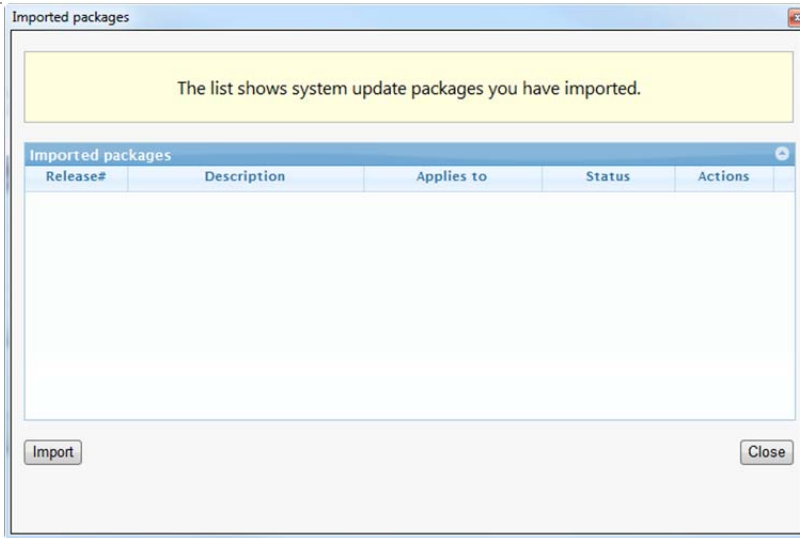
### Upgrading E-admin Server

All versions of e-automate are downloaded from the website; e-automate software is not distributed on a CD/DVD. The packaged update installer upgrades the server, and as a result, any clients (e-automate and e-views) are automatically upgraded as well. To complete the upgrade for the client, refer to the *Upgrading E-automate Client* section below.

1	<ul style="list-style-type: none"> <li>Secure the download file from the Customer Resource Center at <a href="http://servicetechnology.ecisolutions.com">http://servicetechnology.ecisolutions.com</a>. If you have trouble obtaining the file from the website, please contact your account manager who can assist you in this process.</li> </ul>
2	<ul style="list-style-type: none"> <li>Save the <b>.pkg</b> file to a location on your machine that you can easily remember and access. Open e-admin and log in with your profile.</li> </ul>
3	 <p>The screenshot shows the e-admin application window with the 'File' menu open. The menu items are: New company..., Licenses..., Packaged updates... (highlighted), Initialize server, Un-initialize server, Settings, and Exit. The background shows a table with columns for 'City' and 'C', and a row with the value 'Provo'.</p> <ul style="list-style-type: none"> <li>Click <b>File &gt; Package updates</b> from the e-admin main window. The Imported Packages window displays.</li> </ul>

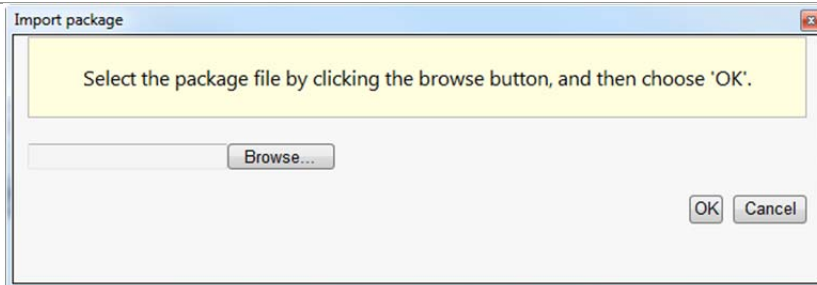


4



- Click [**Import**]. The Import Package window displays.

5

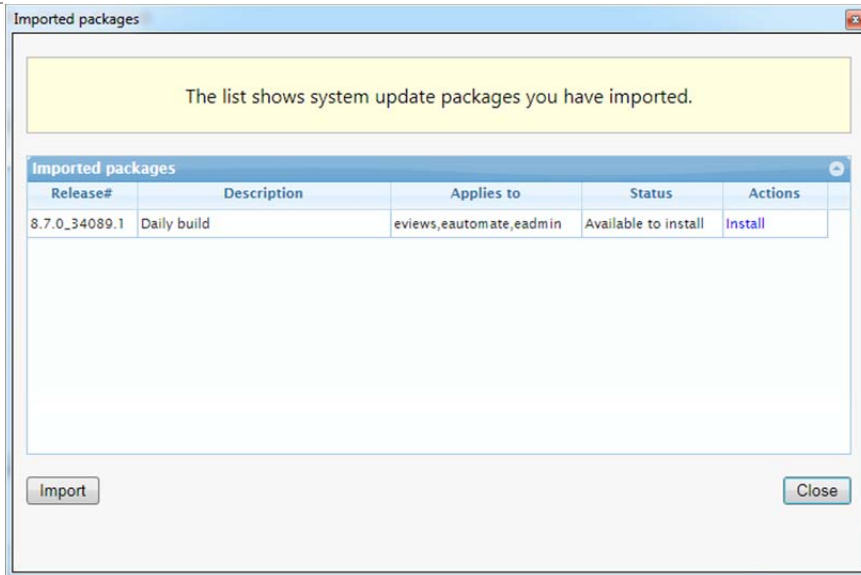


- Click [**Browse**] and locate the **.pkg** file you saved to your computer in Step 2 and click [**Open**] in the Windows Explorer window. Click [**OK**].



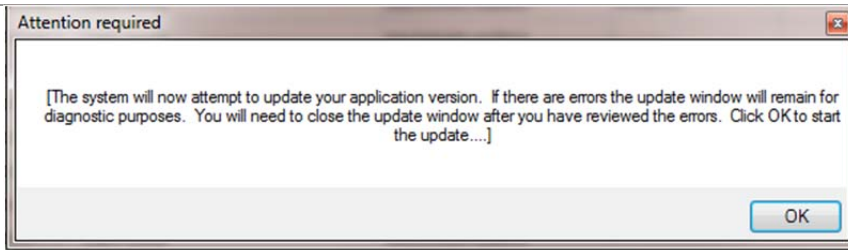


6



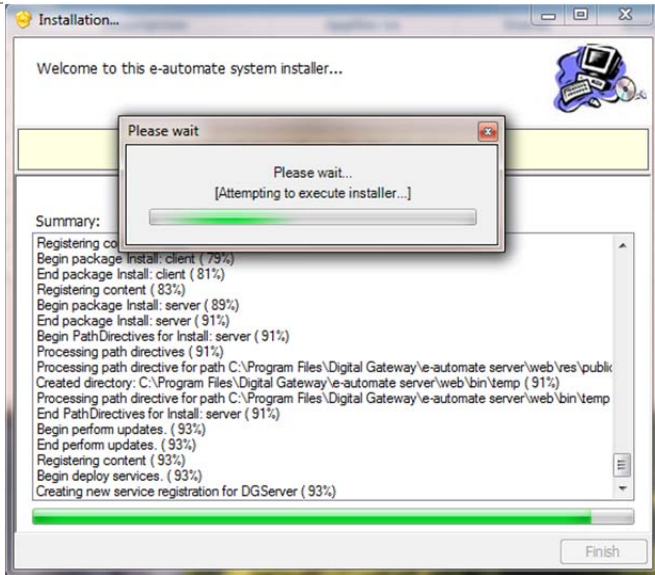
- Click the **Install** link in the **Actions** column for the package release that has *Available to install* in the **Status** column.

7



- Click [OK] to acknowledge the Attention Required window.

8

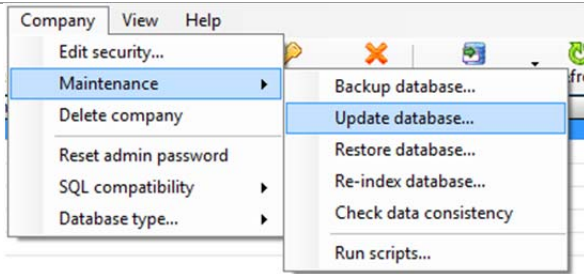


- The installer completes and displays the Attention Required window. Click [OK] to acknowledge the Attention Required window. The installer then closes the current session of e-admin and reopens a new session with the e-admin login window.

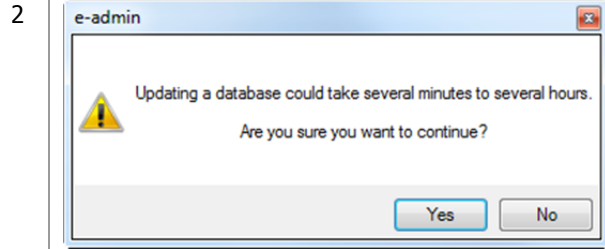
## Updating E-automate Databases

You use the **Update Database** activity to update e-automate databases. The database must be updated to the current version before you can log into the e-automate client. The version of the e-automate database is listed in the e-admin window in the **Version** column. If your database needs to be upgraded, you will see **YES** in the **Needs upgrade** column in the e-admin window.

1

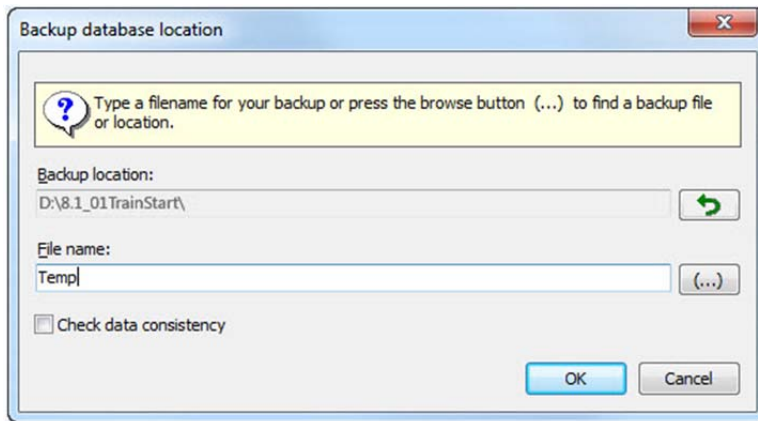


- Select the company database you want to update in the e-admin main window.
- Select **Company > Maintenance > Update Database**. The e-admin window displays reminding of the time it could take to update the database.



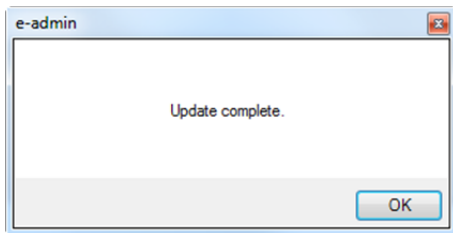
- Click [Yes]. If you have cleared your credit card records prior to running this database update, the Backup Database Location window displays.

5 Before any update is run, e-admin backs up the database in case some unforeseen error occurs.



- Enter a name for your backup file in the **File name** field.  
**Note:** The backup file is stored in the **Backup Location** specified. If you want the backup stored in a different location, click the browse button (...) to specify a different location.
- Click [OK].  
**Note:** If the file already exists, e-admin displays the Attention Required window stating you must enter a unique backup name. Select [OK] and enter a unique name.

6 E-admin begins updating the database by running update scripts. E-admin runs each necessary script in succession until the database is completely updated to the current version you have installed.



- Click [OK] and the database is updated.

**Note:** If you see a warning window that reads 'e-views failed to refresh,' do not be concerned, your database has been updated completely.



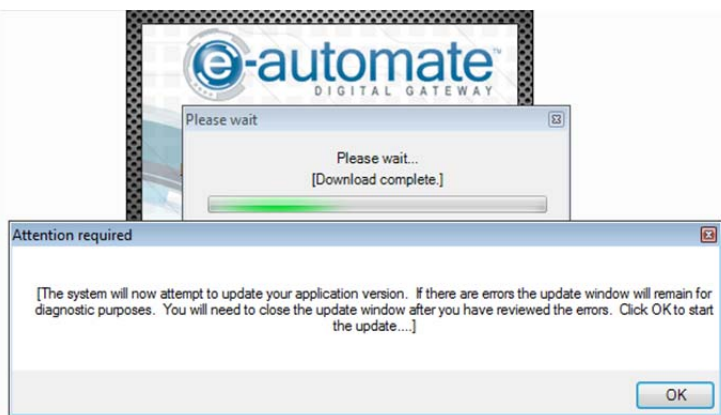
## Upgrading E-automate Client

The packaged update installer upgrades the server, and as a result, any clients (e-automate and e-views) are automatically upgraded as well.

If you are using any of e-automate's add-on products, please refer to their respective installation guides found on the website to upgrade these products.

- 1 • Open e-automate and log in with your profile.

2



- The packaged installer automatically detects that the server associated with this client has been upgraded and starts the update process for the client. Click [OK] to start the update.

3



- The installer then runs the update for the client. If the client is upgraded successfully you will see this message in the Attention Required window. The application must be restarted to access the new, upgraded version. Click [OK] to restart the client.