

E-automate 8.7 Upgrade Guide

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ECI[®] e-automate[®]

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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 <u>http://servicetechnology.ecisolutions.com</u> 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.

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1	Open a browser on an in	ternet connected computer and go to the site, <u>http://servicetechnology.ecisolutions.com.</u>
2	Click the Customer Log	in link to login.
	United States 🕶	Customer Login Customer Screen Share
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	EOI	
	EUle	-automate
		Solutions Professional Services
	In the appropriate fields,	type in your credentials and click [Log In].
	e-automate® Custo	omer Login
	Please enter your user name and	password to access the member area.
	i seri deciminazi	
	User Name*	
	Password*	
	Log In	
	Note: If you do not have	e credentials, contact ECi Software Support at <u>eacustomercare@ecisolutions.com</u> or your
	account representative to	o secure your credentials. You must have an active current maintenance agreement to
3	Click Software Downlo	bads to access the software download area.
	DIGITAL	
	gateway	Member Home Logout Acc
		Walaama Baali Disitalaatawad
	O Knowledge Page	Welcome back Digitalgateway:
	New Knowledge Base	(1) Customer Resource Center
	O Learning Videos	
	Learning Videos (free)	The source of information for e-automate customers.
	Learning Videos Inv. Optimizaton Webinar	
	O Downloads	C Backing up your database.
	Documentation	• e-automate 8.5 is now available. Please click on this link to be tak
	Software Downloads	O Add-on Product Sales Webinar Series Catch up or get a refresh dealers.
	Training Downloads	Remote Access Link If requested by an e-automate Oustomer Car

In the Downloads area, click the Click here to access the download link. Downloads All downloads have been moved to the customer support portal Click here to go there now. These downloads can also be accessed by logging in to the customer support portal (http://suppor the left. In the displayed page, locate the version of e-automate you want to download and click [Download]. Be sure to download and review and/or follow appropriate upgrade guides, Whats New documents or installation guides. Note: 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.

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Prior to Upgrading

e-automate

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.

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.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 eautomate 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.

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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 eautomate 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.

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

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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 eautomate 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 nonintegrated 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:

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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.
	e-admin 8.7.0 - carrie-pc/sqlexpress(10.50.1617.0)
	rie Company View Fielp
	Q -a
4	• If there is a release ID in this column, please see the <i>Upgrading Using the Package Update Installer</i> 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.

	stallation				
W	elcome to this e-automate system installer				
	Choose the component install options below.				
Ma	Server components ke changes for:				
		Next >>			
	 Ensure that Server components is ch Note: In prior versions of e-automate, installed separately. In 8.7, the new e- Ensure that All users (requires adm Note: Because you are installing e-adr This user only. Click [Next>>]. 	lecked. the server compo- agent web service in rights) is select nin to your server	ients and the is automatica ed. (host) machin	e-agent compo lly installed with le, it is not recor	nents were the server. nmended to
1	installation	- • ×			
	Welcome to this e-automate system installer				
	Choose the filesystem install location be	low.			
	Install components to the following location: Install path: C:\Program Files\Digital Gateway				
	Install components to the following location: Install path: C:\Program Files\Digtal Gateway				

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9	Installation	×	
Welcome	to this e-automate system installer		
	Choose the component install options below		
Create the	following shortcuts:		
Start m	enu shortcut		
Desktop	shortcut		
	unch shortcut		
	<<	Back Next >>	
Welcome to) this e-automate system installer		
	Click Finish to perform the listed actions.		
Summary:			
Install path: 0 (admin capab	∴Vrogram Files∖Digital Gateway ility detected)		
Remove and	Reinstall(remove and reinstall)		
Client compo Server compo	ients inents		
Create the fol	lowing shortcuts:		
Desktop shor Start menu sh	.cut iortcut		
Beady			
rioudy			
11000			
	<< Back	Finish	
	<< Back	Finish	
• (lick [Finish] to perform the listed actio	Is. The End User License Agreement window	displays.
• (lick [Finish] to perform the listed actio	The End User License Agreement window you can click [Back] to return to a previous	displays.
• (lick [Finish] to perform the listed actio Jote: At any time during the installatior he parameters.	The End User License Agreement window you can click [Back] to return to a previous	displays. screen and

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Digital Gateway, Inc. Software License Agreement for your e-automate® software		í
TERMS AND CONDITIONS		
 DEFINITIONS. The following definitions shall apply in this Agreement: * DGI means Digital Gateway. Inc. and its affiliates. 		
"You" or "Your" means the single end-user customer organization subject to this Agreement.		
* "Program" means the Program(s) assembled or compiled in magnetic or electronic binary form on software media, which are readable and usable by machines, but not generally readable by humans without reverse		
assembly, reverse compiling, or reverse engineering. * "Derivative Work" means a work that is based on one or more preexisting works, such as a revision, enhancement, modification, translation, abridgement, condensation, expansion, or any other form in which such prepared without authorization of the owner of the copyright in such		
preexisting work, would constitute a copyright infringement. For purposes hereof, a Derivative Work shall also include any compilation that incorporates such a preexisting work. Unless otherwise provided in this Agreement, all references to the Program(s) include any Derivative Works provided by DGI or authorized to be made by You hereunder. * "End-User Materials" means documentation that describes the function and		
use of Program in sufficient detail to permit use of the Program. * "Affiliate" means any corporation, partnership, joint venture, or other entity (1) as to which You own or control, directly or indirectly, stock or other interest representing more than twenty-five percent (25%) of the		
Do you accept the terms of the displayed EULA?		
	Accept	Cancel

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

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

Welcome to this e-autor	mate system installer	
Clie	ck Finish to perform the listed actio	ons.
Summary:		
Creating shortcuts (65%)	+ (70%)	
End package Install: client	(75%)	
Registering content (75%)		
Lreating shortcuts (80%) Begin package Install: servi	er (85%)	
End package Install: server	(90%)	
Registering content (90%)	ation for DGSenver (90%)	
Starting DGServer (90%)	alonio basever (30%)	
Started (90%)		
End component Install: serv	ver (100%)	
Saving install records (10	0%)	
Done, (100%)		
Background process compl	eted.	
		Clo



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.

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

Profile name			DGServer	so	QL server		
A <u>d</u> d	Edit	Delete		0	ĸ	Cancel	

Specify to DGServer more info	he DGServer and SQL Server names here. In most cases the r and the SQL Server are the same. Hover over each field fo rmation.
<u>S</u> QL server:	computername \sqlexpress
<u>S</u> QL server: DGServer:	computername \sqlexpress

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.

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• Click [Next] to continue.

You must but you n	: give each profile a uni nay change it if you like	que name. One has bee	n suggested,
Profile name:	computername\sqle:	press	
 		<< Previou	s <u>F</u> inisł

- 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.

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		version:	0.7.0
Profile:	carrie-pc\sqlexpress		

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

6	Update? Image: Comparison of the current of the current database version. Image: Comparison of the current database version. Image: Comparison of the current database? Image: Comparison of the current database? Image: Comparison of the current database?
_	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].







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

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e-admin		
	Backup complete.	
		ОК

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

? You must set a	password for the two e-automate sql users. The system
databases.	he password and use it to access your e-automate
Full access password:	*****
Read-only password:	********
Eull access password: Read-only password:	*****

- 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. View Help File Company New company... ity Licen Licenses... Initialize server Un-initialize server Settings ۲ Exit Click File>Licenses from the e-admin main window. The Manage Users and Licenses window displays. ٠ Select the value in the Server identification code field and eamil it to 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. • 8.7.0 Version Profile: carrie-pc\sqlexpress • 1

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OK

Cancel



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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.

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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 eautomate 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.

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- 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.

card records prior to running this database update, the

2	e-admin	
	Updating a database could take several minutes to several hours. Are you sure you want to continue?	
	Yes No	
	Click [Yes]. If you have cleared your cred Backup Database Location window display	t card records prior to running this database update. s. Skip to step 5 to continue the database update.

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

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🔡 CC	C data wipe wizard			
[We have detected 6 encrypted CC records in the specified database. You have two options for how to proceed			
С (С [(Recommended) Copy data to a supported secure vault system before deleting from the Delete CC data from database without copying it to a secure vault, losing the data perma	local database.		
	<< Back Next >>	Cancel		
-				
Optio	 Click (Recommended) Copy data to a supported sec local database to use the third-party PCI compliant pay Element and Net 1 are the only payment services that are Click [Next]. 	cure vault syst service Elemen currently supp	te m before de t Payment Serv orted by e-auto	leting from ices or Net 1. mate version
Optio	 Click (Recommended) Copy data to a supported second contract of the second contrac	cure vault syst service Element currently supp	e m before de t Payment Serv orted by e-auto	leting from ices or Net 1. mate version
Optio	 Click (Recommended) Copy data to a supported second local database to use the third-party PCI compliant pay Element and Net 1 are the only payment services that are Click [Next]. Click [Next]. C data wipe wizard You have chosen to copy your stored credit card data to a supported secure online v provider. When you click 'Next' this window will close and the update process will end. V attempt to open your web browser window to http://www.digitalgateway.com/ccpartner where you will find additional instructions on how to complete the update.	e currently supp	e m before de t Payment Serv orted by e-auto	leting from ices or Net 1. mate version



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]. _ 🗆 🗙 🚂 CC data wipe wizard If you proceed, we will completely and permanently remove the full credit card data from all of e-automate. You will only have the last four digits for reference, and will need to find a new and compliant way to handle credit card data in your operations. Click 'Next' to PERMANENTLY REMOVE ALL CARD DATA... << Back Next>> Cancel 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. 🛃 CC data wipe wizard _ 🗆 X

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Finalize this procedure by addin numbers fro	g "triggers" to the database which m being entered. Click 'Next' to co	will prevent any cred Intinue.	dit card
			-

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

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

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	Backup database location
	Type a filename for your backup or press the browse button () to find a backup file or location.
	Backup location:
	D:\8.1_01TrainStart\
	Ele name:
	Check data consistency
	OK Cancel
	 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.
	Please wait Performing backup
(Dnce the backup is complete, e-admin displays the Backup Complete window.
ĺ	e-admin
	Backup complete.
	OK
	• Click [OK].

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7 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.

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e-admin		×
	Update complete.	
		ОК

• 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

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	 Locate the e-automateClientSetup.exe file to begin installation. To make this file available on other computers, you can: Share this directory and make it accessible from other computers on your network. Copy the client installation file, e-automateClientSetup.exe to a CD of flash drive that you take from client to client. Copy the client install file, e-automateClientSetup.exe to a shared company network drive accessible from all intended client computers.
3	 From the client machines, use one of the above methods to access e-automateClientSetup.exe. Right-click the e-automateClientSetup.exe file and choose Run as administrator to begin installation. The Welcome window displays.



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.

<< Back Next >>

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

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Click Finish to perform the listed actions.
Summary:
Install path: C:\Program Files\Digital Gateway
Install Client components
Create the following shortcuts:
Start menu shortcut
Ready
< < Back Finish

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.

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😌 Installation	
Welcome to the e-automate system installer	
Click Finish to perform the listed action	ons.
Summary:	
Begin package Install: shared (25%) End package Install: shared (25%) Registering content (33%) Creating shortcuts (41%) Begin package Install: cilent (50%) End package Install: cilent (58%) Creating shortcuts (66%) Begin package Install: cilentshortcuts (75%) End package Install: cilentshortcuts (83%) Registering content (83%) Creating shortcuts (91%) End component Install: cilent (100%) Saving install records (100%) Install complete (100%) Done. (100%) Background process completed.	
	Clos

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





1	 Select Start > All Programs > e-automate from the client workstation start menu. The e-automate logon window displays.
2	 Enter your user ID in the User ID field. Leave the Password field blank. Click the Edit icon (Pencil). The Manage Logon Profiles window displays.
3	Manage logon profiles Profile name Company Branch Add Edt Delete OK Cancel • Click [Add]. The Edit Logon Profile window displays.

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4	Edit logon profile	the d for ext >>	ver field. The	e DGServer	name auto	omatically p	opulates.	-
5	Click [Next] to continue. Edit logon profile Choose the company you want to log into using this profile Company: Sample Lin the Operation of Solid uses the down of Solid	• • • • • • • • • • • • • • • • • • •						-
6	Original field, use the down and Click [Next] to continue. Edit logon profile You must give each profile a unique name. One has been suggest but you may change it if you like. Profile name: carrie-pc/sqlexpress.Sample	row to sele	cu une comp	σατιγ γου wa	ווג נס וסק וז	ιω, ιι ποτ τ		-

• In the **Profile name** field, accept the name suggested or enter a new name to describe this profile.

Finish

• Click [**Finish**] to complete the profile.

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• Click [OK] to close the Manage Logon Profiles window and add your new profile to the e-automate login window.





- In the User ID field, enter your user ID.
- Leave the **Password** field blank.
- In the **Profile** field, verify your created profile is displayed, use down arrow to change as necessary.

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• Click [OK] to login to e-automate.

8	E-automate displays the e-automate 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, Setting Personal Client Settings – Report Options.



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.

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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.

	 Save the .pk and log in wi 	file to a location on your machine that you can easily remember and access. Open e-admin your profile.
	File Company View	elp
<u>.</u>	New company Licenses	City C Provo
	Packaged updates	
	Initialize server Un-initialize server Settings	
	Exit	m

ECI[®] e-automate[®]

	The list shows system	update packages you h	ave imported.	
Imported pa	ickages			
Release#	Description	Applies to	Status	Action

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• Click [Import]. The Import Package window displays.

Impor	package		
	Select the package file by clicking the browse button, and then choose 'OK'.		
	Browse		
	OK Cancel	el	

ECI[®] e-automate[®]

	The list shows syste	em update packages you h	ave imported.		
Imported pa	ckages				0
Release#	Description	Applies to	Status	Actions	
8.7.0_34089.1	Daily build	eviews,eautomate,eadmin	Available to install	Install	
Import					
• Cli	ck the Install link in	the Actions column	for the packa		that
Cli St	ck the Install link in atus column.	the Actions column	for the packa	Clos ge release	that

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8 Welcome to this e-automate system installer... Welcome to this e-automate system installer... Please wait... Please wait... Please wait... Registering co Begin package Install client (79%) End package Install client (79%) Begin package Install client (79%) Registering content (83%) Begin package Install server (91%) Processing path directives for Install server (91%) Processing path directive (91%) Begin perform updates. (93%) End package content (93%) Registering content (93%) Register

• 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.

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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.



- 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.

EC	e-automate® 🐼 🐼			R	\$) į :
2	e-admin Updating a database could take several minutes to several hours. Are you sure you want to continue? Yes No Click [Yes]. If you have cleared your credit card records prior to Backup Database Location window displays.	o running t	this databa	se update, t	the	_
5	 Before any update is run, e-admin backs up the database in case some update database location Backup database location Type a filename for your backup or press the browse button () to find a backup file Backup location: D\81_01TrainStart\ Elle name: Templ Check data consistency OK Cancel • Enter a name for your backup file in the File name field. Note: The backup file is stored in the Backup Location specified different location, click the browse button () to specify a different location, click the browse button () to specify a different location, and enter a unique name.	inforeseen fied. If you rent locati Required w	error occu want the on. vindow stat	irs. backup stor ting you mu	ed in a st enter a	
6	 E-admin begins updating the database by running update scripts. E-adm succession until the database is completely updated to the current version e-admin Update complete. • Click [OK] and the database is updated. Note: If you see a warning window that reads 'e-views failed to refresh, been updated completely. 	in runs ea on you hav ' do not be	e installed.	ry script in d, your data	base has	_



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.

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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	Please wait [Download complete.]
	Attention required [The system will now attempt to update your application version. If there are errors the update window will remain for diagnostic purposes. You will need to close the update window after you have reviewed the errors. Click OK to start the update]
	ОК
3	• 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.
	Attention required
	[The install has completed successfully and the application must close and restart as the new version. Click OK to restart the application now]
	• 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.