Partner Integration Portal (PIP) Installation Guide
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Overview

ECi Software Solutions partner applications outside of e-automate can access the e-automate database to query or insert data using special software called the Partner Integration Portal (PIP). If you want your e-automate database to interact with ECi Software Solutions partner companies, you use the PIP software. ECi Software Solutions recommends installing this software on a computer located in your DMZ, allowing access to external applications. The server must also be running Internet Information Services (IIS). For instructions on how to install IIS, see Installing Internet Information Services below.

Downloading PIP

ECi Software Solutions distributes all software through web site download. Customers on current maintenance agreements can access the Product Releases section of ECi Software Solution’s web site to download software as needed. ECi Software Solutions does not create or distribute CD/DVD for their software; in order to acquire the PIP installation files, use the following instructions to acquire your PIP software:


Note: If you access the main ECi Software Solutions website, click the Customer Login link displayed near the top of the web page to access the login page.
2. Log into the ECi Software Solutions website with appropriate login credentials. In order to download software, the user logging in must be logged in as the Administrator. ECi Software Solutions provided two users and two passwords you can use when logging into the Customer Resource Center. To download software you must log in as the Administrator.

- In the **User Name** field, enter the administrator username.

- In the **Password** field, enter the appropriate password for the entered Username.
  
  **Note:** If you do not have your Username and Password, contact e-automate Customer Care to acquire the appropriate login credentials. If you are authorized to receive administrative information, the information is sent to you. If you are not authorized, e-automate Customer Care sends the login information to the authorized person at your company.

3. Once you have successfully logged in to the Customer Resource Center, on the left-hand side, locate and click on the **Software Downloads** link displayed under **Downloads**.
4. On the **Downloads** page locate and click on the **Click here** link to be redirected to the customer support portal.

5. On the page that displays page, locate the PIP and POP Updates section.
6. Click [8.5 Compatible]. You are taken to the following page where the PIP download can be accessed.

![Partner Integration Portal (PIP)](image)

**Partner Integration Portal (PIP)**

PIP provides an integration platform connecting your e-automate system to the DGI partner network. PIP provides a platform for everything from PO Processor™ to automatically collecting meter reads. PIP opens the gateway to connecting your e-automate system with the DGI partner network to get you connected and integrated to further automate your business.

**System Requirements**

PIP is subject to the webservice requirements listed in section 3.

7. Click [Download] to begin the download process.

Optional: If you want to view the System Requirements, click [System Requirements].

8. Follow your browser’s prompts in downloading and saving the installation file.

### Installing the Partner Integration Portal (PIP)

Most of ECi Software Solutions’ third-party applications use PIP to connect to the e-automate database. PIP is the primary method for communication. In order for you to allow communication between third-party software packages that connect to e-automate, you must install PIP.

1. Place the downloaded PIP installation files on the intended installation computer on your network. **Note:** ECi Software Solutions recommends the computer on which you install PIP be exposed to the Internet via Port 80 and be running IIS.

2. Extract the zipped files to a directory on the computer. A convenient way to extract the zipped installation files is to right-click on the zipped file and select Extract All. Follow the wizard instructions to extract all the files stored in the downloaded file. Be sure you make a note of the location to which you unzipped the files.

3. From the computer on which you want to install PIP, navigate to the extracted PIP installation files and locate the file named `PIP_WebSetup.exe`.

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**Note:** The computer must have Internet Information Services (IIS) installed and functioning. For IIS installation information, see the Installing Internet Information Services section of this installation guide.

Right-click on the file, PIP_WebSetup.exe, and select Run as administrator to launch the PIP installer.

**Note:** You can right-click on the Start menu and select Explore to access Microsoft Windows Explorer. Also note that some computer configurations do not display file extensions (.exe).

4. The server installation begins and displays the Welcome screen. Click [Next >>] to continue the installation.

5. If the Choose the filesystem install location below window displays, proceed to Step 7. If the Existing install has been detected window displays, select one of the following:

- **Remove and Reinstall:** Removes the previous version and installs the latest version. If you select this option, click [Next>>] and proceed to Step 6.

- **Uninstall/Cleanup:** Uninstalls the previous version without installing the latest version. If you select this option, click [Next>>]. In the window that displays, click [Finish] to uninstall the previous version and proceed to Step 6.
6. In the **Choose the component install options below** window, check the **pip web services** checkbox.

**Note:** If you want the installer to list every single file that copies to your computer with the PIP installation and provide a more detailed account of the installation, also check the **Verbose install** checkbox (not recommended). You must have both the **pip web services** and the **Verbose install** (not recommended) checkboxes checked in order to execute the verbose installation. The verbose installation takes significantly more time to execute than the regular installation. This is due to the amount of extra information the verbose installation provides.

Click [Next >>] to continue the installation.
7. The installer displays the installation folder selection window. The PIP installer allows you to select the installation folder for ECI Software Solutions’ PIP software.

![Installation folder selection window]

8. We recommend you use the suggested installation directory, Digital Gateway. You can change the virtual directory as necessary. Click [Next >>] to continue the installation.

9. The **Click Finish to perform the listed actions** window displays.

![Click Finish to perform the listed actions window]

Review the summary information for accuracy. To proceed with the installation, click [Finish]. To modify the summary information, click [<<Back] and repeat previous steps as necessary.
10. The **End user license agreement** window displays.

![End user license agreement](image)

Click **[Accept]** to agree to the license terms.

11. In order for partner applications to connect through PIP, you must identify the connection information. Once you identify these components, the installer runs a script on the database to allow e-automate to interact with external applications.

![Please supply the listed parameters](image)
• In the **Enter a valid name for the database server** field, enter the name of your SQL server.

• In the **Specify the e-automate company (excluding the preceding “co”)** field, enter the company to which you want to connect third-party applications.  
**Note:** This tells the PIP installer on which company database to automatically run the database creation script. This script allows the chosen database to interact with external applications. If you want to allow other databases to interact with external applications you will need to run the database creation script on those databases using e-admin. The script is located in the Server directory to which you downloaded PIP.

• In the **Enter the system full access password (specified in e-admin)** field, enter your full-access password.  
**Note:** This password was added when setting up e-admin. You can change this password in e-admin as necessary. Keep in mind that this same password allows other applications access to the e-automate database. Changing a password could prevent other applications from accessing the database. If you decide to change the full-access password, be sure you change it for all applications accessing the e-automate database.

• Click [OK] to save your settings.

12. When the installation is complete, the installer displays the **Website Installation...** window.

    ![Website Installation Window](image)

    Select one of the following options:
• **Add Virtual Directory to existing Website (Recommended):** When selected, the system installs the website as a virtual subdirectory of an existing web site.

  a. In the **Website** field, select the desired website. The default is *Default Web Site*.

  b. Click [**Next >**]. The following window displays:

  ![Virtual Directory Installation Window](image)

  c. In the **Name** field, enter a name for the virtual directory.

  d. Click [**Next**]. The following window displays:

  ![Virtual Directory Summary Window](image)

Prior to installing and creating the directory on the specified web server, the installer gives you the opportunity to change your settings. To change your settings, click [**< Previous**] as appropriate to change settings. If your settings are correct, click [**Next >**] to continue.
• **Create New Website:** When selected, the system installs a new website.

a. Click [Next]. The following window displays.

![Website Installation Window]

b. In the **Name** field, enter a name for the virtual directory.

c. If you want to customize the site parameters, check the **Customize Site Parameters** checkbox and enter the appropriate information in the following fields:
   - **Hostname:** Host name for the web site.
   - **IP Address:** IP address for the web site.
   - **Port:** Port the web site uses.

d. Click [Next>] to continue the installation. The following page displays:

![Website Installation Confirmation]

Prior to installing and creating the directory on the specified web server, the installer gives
you the opportunity to change your settings. To change your settings, click [Previous] as appropriate to change any desired setting. If your settings are correct, click [Next>] to continue the installation.

13. The PIP installation proceeds and displays the Installation... window with "Background process completed" when finished. Click [Close] to exit out of the installation.

Checking the Installation

One you have completed the installation, you can check to assure that the web installation installed successfully. Use the following instructions to assure that the web site installed correctly.

For Windows XP Operating System

1. Locate the icon, Computer, either on your Desktop or in your Start menu. Once located, right-click on the Computer icon and select Manage.

2. In the Computer Management window, in the left pane, expand Services and Applications. Once expanded locate and expand Internet Information Services and then locate and expand Web Sites. Inside the Web Sites locate and expand what you called the web directory during the installation, Step 12. In the example it was named PIP.

3. In the left-pane, click on the named directory (PIP in the example) and the contents are displayed in the right-pane.

4. If in the right-pane you see directories and files, the web installation was successful.

5. In the right-pane locate the file, PublicAPIService.asmx. Right-click on the file and select Browse to open the file in your Internet browser. If you are able to view the file in your browser, your PIP installation completed successfully.

For Windows 7 Enterprise Operating System

1. Locate the icon, Computer, either on your Desktop or in your Start menu. Once located, right-click on the Computer icon and select Manage.

2. In the Computer Management window, in the left pane, expand Services and Applications. Once expanded locate and click on Internet Information Services. Change the view at the bottom of the window to Content View. Double-click on Sites and then on Default Web Site. Locate and double-click on the web icon you created during the installation, Step 12. In the
example it was named PIP.

**Note:** Be sure to select the web icon and not the directory.

3. Click on the named directory (PIP in the example) to display the contents in the right-pane.

4. If you see directories and files in the right-pane, the web installation was successful.

5. In the right-pane locate the file, PublicAPIService.asmx. Right-click on the file and select **Browse** to open the file in your Internet browser. If you are able to view the file in your browser, your PIP installation completed successfully.

### Setting the Timeout Length

When you are performing tasks that require accessing a large amount of data, the system may time out before you have all the data. If the system frequently times out before you have gotten all of your data, you may configure PIP to give you a longer period of time before the system times out.

To configure a longer time out setting, do the following:
1. From the webserver locate the PIP Web.config file. The default location for the config file is c:\program files\digital gateway\pip.

2. Right-click on Web.config and select Open with...

3. Open the Web.config file with Notepad.
4. Locate the line:

```xml
<!--<add key="CommandTimeout" value="240"/>-->
```

and change it to:

```xml
<add key="CommandTimeout" value="240"/>
```

This change sets the time-out to 240 seconds (4 minutes). To increase this time-out, change the 240 in this line to a larger number of seconds that the system should allow before timing out.

### Installing Internet Information Services (IIS)

If the server you have selected is not running Internet Information services (IIS), you must install it for your PIP product to function and to communicate with e-automate via PIP. Below are basic instructions on how to install IIS. If you need more specific direction, contact a qualified network professional.

The following instructions are based on Windows 7:

1. From the **Start** menu, select the Control Panel.
2. From the Control Panel, double-click on **Programs and Features**.
3. From the Programs and Features windows, double-click on **Turn Windows features on or off**.

![Control Panel and Programs and Features](image)

4. In the Windows Features window, check the **Internet Information Services (IIS)** box.

**Note:** Features are listed alphabetically, and you may need to scroll.
If necessary, insert your Microsoft Windows server operating system CD and follow the prompts.

5. Once IIS has been installed, Windows displays the Windows Components Wizard window. Click [Finish] to complete the installation.

Troubleshooting

Interface Test

If you run the InterfaceTest.exe for the PIP over the network, authentication will fail. Simply copy InterfaceTest.exe locally to your machine to run a successful test.

Public API Error

Problem: If you see the following error message:

![Public API Error Message](image)

Solution: Attached are `CoexecutiveUserReset.sql` and `ServerDatabaseCreationScript.sql` that have to be run on the database in the following order:

1. Backup
2. Run CoexecutiveUserReset .sql
3. Backup
4. Restore
5. Run ServerDatabaseCreationScript .sql

Be sure to back up your database and ensure that no one is on it when you run these scripts. This is a tricky fix since it fixes an issue with some procedures that were not created with the DBO. Steps three and four are intended to test whether the fix worked, so it is important that you do not overwrite old backups during this process, as you may be forced to restore back to step 1. When the directions are successful, you can go ahead and install PIP.
404 Error

Problem: 404 error from PIP on a 64 bit Server. Typically this is due to Web Services Extensions not being enabled.

Solution: In this case, however, the extensions were enabled and seemed fine for other applications running on the same website, but the new PIP install continued to return the 404 (file not found) error. Go to the settings screen by right-clicking the application (so PIP, RTS, RAP, etc.) and choosing Properties. The tab ASP.NET has the relevant field, ASP.NET version. Click on the dropdown, and set it to 2.0.50727 (or other available 2.x version) to correct this issue.

API Version

Follow these instructions to get to the API Version. This works only on the server it is running on.

On the Server that the API is installed on go to: http://mywebsite.com/pip/publicapiservice.asmx

Click getAPIVersion.

Click Invoke.

Performance Issues with PIP

Issue: After updating PIP the performance for Remote Tech (hosted on the same web server) slows down.

Solution: Reboot the web server.

Issue: After installing PIP you try to connect through the interface test tool and you get a notification that says "Account is_not_valid".

Solution: Use the APIConectionInfo? .exe (available on Athena at \Athena\customerercare\_ProductReleases\PIP\Public API (Product Integration Platform (PIP)) and set the Full Access Password again.

Problem: Can’t browse to PublicAPIService? .asmx or you see config errors when browsing.

Solution: Check to see if they have multiple web sites attempting to bind to port 80. IIS will only allow you to bind one port to 80. Take the default (or other) website, right-click and choose properties, and change it to port 81. Point the third party application to that new URL.
Setting Up e-automate Permissions

Use the security functionality of e-admin to determine what a specific user can and cannot do via PIP. If you need more information on how to grant rights in e-admin, see the Security topic in the e-admin help.

The BEI APIs interact with data from the following e-automate tables:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>View</th>
<th>Edit</th>
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The DeskTech APIs interact with data from the following e-automate tables:

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The **Sharp License Manager** APIs interact with data from the following e-automate tables:

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