

Eagle Systems

ProtoBase Release 6

Software Installation Guide

For Activant Version 4.0 (or higher) with RealVu™



ACTIVANT™

EL2176

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Overview

This document describes the process to install ProtoBase version 6 on an Activant 4.0 (or higher) system with RealVu. Read this entire document before you begin the process to ensure a successful installation. **It is important to type commands exactly as they are shown. Upper and lower case letters are read differently by the system.**

Additional Resources

If you have questions about the installation process described in this document, contact the Eagle Advice Line at (800) 322-3077.

Various resources are available to assist you in learning more about the ProtoBase version 6 release, the RealVu client application, and PCI compliance requirements. Refer to any of the following to learn more:

- *eLearning offerings* – From the Eagle Customer Site (http://www.activant.com/eaglecustomers/eagle_main_support.html), click the link for Learning Solutions. This is your entry to the many training seminars available. Look for any related to ProtoBase and sign up for those that interest you.
- *SDC offerings* – ProtoBase is a third-party software application from Southern DataComm (SDC) that Activant integrates into the Eagle system. SDC offers a variety of training materials:
 - From their website (<http://www.protobase.com/>) – To learn more about PCI requirements, click the Security link (near the top of the page).
 - From their training website (<http://training.protobase.com/>) – Access SDC’s training materials for ProtoBase version 6 and RealVu. There is no fee for using these materials. The first time you access the page, you will enter login information. After that, just click the “here” link to go directly to the material. On the Welcome page, use the drop-down list to select software and version (PbAdmin and RealVu v6.0x). A page displays with a list of available CBTs (training videos). Click a title to launch and watch the video.
- *Eagle Training Browser* – Check your local-installed Training Browser or the web version of the Training Browser for ProtoBase training materials. The web version of the Training Browser is available from the Eagle Customer site (http://www.activant.com/eaglecustomers/eagle_main_support.html). Click the link for Eagle Training Browser. From the Training Browser home page, click the App Maps link and then click the ProtoBase icon.
- *Eagle Online Help* – Topics are available from the Eagle online help. From the Contents tab, click to open the ProtoBase book. Open the Job Aids book and then open the ProtoBase book.

Secure Passwords Requirement

Starting with ProtoBase version 6, strict enforcement of passwords is required to protect credit card data. As you progress through the ProtoBase installation, one of the procedure steps will require you to enter a current valid administrator password. Then you will be prompted to change it. The installation program will provide the current administrator password, as well as a suggested replacement.

To complete the installation process, Activant recommends that you use the suggested replacement for the administrator password. Then, once the installation is successfully completed, you can update the password using the RealVu client application.

If you choose to update the administrator password, write it down on a separate piece of paper. Then place the piece of paper in a secured location with limited access.

When to Complete the Installation?

The installation requires a quiet system, with no activity on any of the terminals, no reports processing, and no system tasks active.

The best time to complete the installation is after the store is closed, and backup, Shutdown, and all end-of-day reports have completed processing. Or, in the morning prior to opening the store, provided no activity has taken place on the system since the night before.

The ProtoBase installation can take from 15 minutes to several hours to complete, depending on the amount of history and speed of the system. The RealVu client installation takes about 5 minutes to complete, per terminal. You can choose which terminals on which to install the client.

Tasks Prior to Installation

Before you install the ProtoBase software package, you must complete the following tasks:

- Verify your Activant account number
- Obtain Eagle system IP address
- Upload offline POS transactions
- Settle any transactions
- Complete a successful backup
- Ensure system is “quiet” and ready for installation

Verify Account Number

During the installation, you will be asked to verify your Activant account number. This is the same account number you use when placing a call to the Eagle Advice Line.

Obtain IP Address

Complete the following steps to determine your Eagle system IP address.

1. From the Main Menu, or from Network Access at the Function prompt, type **OSPREY** and press **<Enter>**. At Password, type **AVATAR** and press **<Enter>**.
2. At Selection, type **GETIP** and press **<Enter>**. The Network Configuration screen displays.

```
Network configuration:
IP class:                C
IP address:              192.168.1.1
Network address:        192.168.1
Host address:           1
Network address mask:   255.255.255.0
Broadcast IP address:   192.168.1.255
Router IP address:      192.168.1.253
Hop count metric:       1
Domain Name:            eagle.hardlines.net
Search domain(s):       none
Nameserver(s):          none
Static route(s):        none

Please press <Enter> to continue: █
```

3. On the screen, locate the IP address field and write down the number for your system here:
_____ You will need this address later to help you open RealVu.

4. Press <Enter> to exit the screen.
5. At Selection, type **EXIT** and press <Enter> to exit Osprey.

Upload Offline POS Transactions

If you have any offline POS transactions, they must be uploaded to the Eagle system before you continue with installation. If you recently used offline POS, follow your normal process for uploading offline POS transactions to the Eagle system. Use your normal methods to verify the upload was successful.

For more information about verifying the upload of offline transactions, refer to the Eagle online help topics. In online help, open the Point-of-Sale book, then the Offline POS book. Then select Uploading Transactions After Using Offline POS book and finally, Verifying the Upload of Offline Transactions topic.

Settle Transactions

Prior to installing the ProtoBase software, all existing transactions must be settled. Follow your normal process to settle transactions. Verify that the settlement was successful. Check PADMIN and verify that there are no unsettled credit card transactions on file in your Eagle system. The transaction file must be empty before you continue with the installation.

If you find any unsettled transactions, you must either manually perform a settlement now or wait until after auto-settle has occurred (and PADMIN is clear) and then resume the installation. For more information about manual settlements, refer to the Eagle online help topics. Open the ProtoBase book and then open the Credit Card Settlement topic.

Complete a Backup

Prior to installing the ProtoBase software, you must have completed a successful backup. Like the backup you complete every day, it is a precaution, in case you have to restore data.

No activity should have occurred on the system after you complete the backup and then install the ProtoBase software. If activity did occur (for example, after Shutdown, you had to manually settle transactions), then you must complete another backup.

Prior to installing the ProtoBase software, check Function MBC (from the Main Menu or from Network Access). Verify that the last backup with successful. If it was not successful, complete a manual backup before you continue.

Ensure Quiet System

The installation does require a quiet system, with no activity on any of the terminals, no reports processing, and no system tasks active. The installation process will automatically quiet the system (quitting any signed on users/terminals and terminating any active tasks).

Install ProtoBase Software Package

Complete the procedure steps in this section to install the ProtoBase software package. Use the CD provided by Activant, titled *ProtoBase Credit Authorization Optional Software Version: 4.04 (PB 6.00 – 11)*. If your CD has a higher software version number, it is OK to proceed with the installation.

You can ensure a successful installation by taking your time, read each step before you proceed, and type any commands exactly as shown in the procedure step. **Upper-case and lower-case letters are read differently by the system. Be careful, deliberate, and do not type ahead (wait for the system to respond to a command that you have entered before you type the next entry).**

This procedure must be completed from the Eagle system console terminal. The console is the terminal that plugs directly into the back of the CPU. It is within a few feet of the Eagle CPU.

1. If you are running applications on the console, exit to the Main Menu. At the Main Menu, type **QUIT** and press **<Enter>**. You are now at the console login prompt.
2. Type **NEWSOFT** at the console login prompt and press **<Enter>**.
The "Welcome to NEWSOFT!" screen displays. This screen contains information about the NEWSOFT procedure. **You must read the screen and understand the instructions before you continue.**
3. At the bottom of the screen, a message displays: Do you wish to install a software package(y/n) [default n]? Type **Y** (for yes) and press **<Enter>**. After a few minutes, a message displays on the screen asking you to select the drive to install the programs from.
4. To select CD-ROM, type **2** and press **<Enter>**. A message displays: Insert the program CD into the CD-ROM drive and press **<ENTER>**.
5. Insert the ProtoBase CD and press **<Enter>**. A screen similar to the following displays:

```
SOFTWARE:
                PB4.04  Quit

Press <ENTER> to select 'PB4.04' or Quit
Make a selection; Press <ENTER>
```

6. Press **<Enter>**. Enter selects the ProtoBase package (the software version may be higher than the example above). Then, press **<Enter>** again.

The message Copying programs displays. This process takes a few seconds to complete. When copying completes, the following screen displays:

```
COMMANDS:

                Cancel      Setup

Press <ENTER> to exit or
Make a selection; Press <ENTER>
```

7. Type **Setup** and press **<Enter>**. Be sure to type **Setup** exactly as it displays on the screen, with a capital "S" and the remaining letters lower-case.
Various status messages display on the screen, then a series of questions. Carefully read and answer each one to ensure that proper precautions have been taken and the installation will be successful. The next steps will help you answer the questions.
8. When your Activant account number displays, verify that this is your correct account number and then press **<Enter>**. If the account number is not correct, type your correct account number and then press **<Enter>**.
9. At Enter new password, type **pbadmin1** and press **<Enter>**.

10. At Confirm new password, type **pbadm1n1** and press <Enter>.

For more information about passwords, see the earlier section in this document, “Secure Password Requirement.” Remember, you have the option to change these default passwords after the installation is complete.

If for some reason you decide to not accept the defaults and you enter your own Administrative Password on this screen, write it down now on a separate piece of paper. Then place that paper in a secure location.

11. When you see a message that the software has been successfully installed, press <Enter>.
12. Remove the CD from the drive. The system will automatically reboot. When the console login displays, the system is ready for normal business use. Continue with the next section to install the RealVu client software.

Install RealVu™ Software

The RealVu software application replaces the PBADMIN program that you may have used with earlier versions of ProtoBase. For detailed information about RealVu, refer to the *RealVu User Manual* written by Southern DataComm, Inc.

You decide which PC on which to install RealVu. RealVu can be installed on more than one PC. Only the PCs on which you install RealVu will have access to the ProtoBase functions that you previously accessed via the PBADMIN program.

To install RealVu on a client PC, you must complete the following tasks:

- Install the Java client
- Install the RealVu software
- Open RealVu and fill in the Login dialog

Use the CD provided by Activant, titled *ProtoBase Credit Authorization Optional Software* Version: 4.04 (PB 6.00 – 11). If your CD has a higher software version number, it is OK to proceed with the installation.

Install Java

Java software must be installed on the PC before you can install the RealVu software. Java is a program from Sun Microsystems. Java is also known as the Java Runtime Environment, JRE, and Java Virtual Machine.

Even if Java is already installed on your PC, still follow the steps in this section. The process will confirm that Java is installed, and if needed, install the latest version.

1. On the PC, open an Internet browser window. Go to this web address:
<http://www.java.com/en/download/index.jsp>
2. Click the button for “Free Java Download” and follow the on-screen instructions.
3. After getting the message that Java was successfully installed, close the Browser window.
4. Open the Browser window, and open the Java page:
<http://www.java.com/en/download/index.jsp>
5. Click the link for “Do I have Java?” and on the next page, click the button for “Verify Installation.” In a few moments, a Congratulations message displays, indicating that Java is installed and verified.
6. Continue with the next section to install RealVu.

Install RealVu

RealVu is a software application that you will use to manage transactions, configuration, and users. The easy to use interface of RealVu allows you to complete a variety of tasks, such as verifying autoseattle and adding/deleting transactions.

1. At the client PC, insert the *ProtoBase Credit Authorization Optional Software CD* into the drive.
2. Double-click the My Computer icon on the desktop and then double-click the CD drive to open the folder.
3. In the `realvu\disk1\InstData\noVM` folder, locate the `install.exe` file. Double-click the file to start the installation. The RealVu Installer window displays.



4. Click Next to continue. The License Agreement window displays.
5. Click the option button to indicate you accept the agreement. Then click Next to continue. The Choose Install Folder window displays.



6. Use the default location that displays. Click Next to continue. The Pre-Installation Summary window displays.
7. Review the information that displays. Then click Install to continue. Status dialogs will display as the various modules are installed. After a few minutes, the Install Complete window displays.

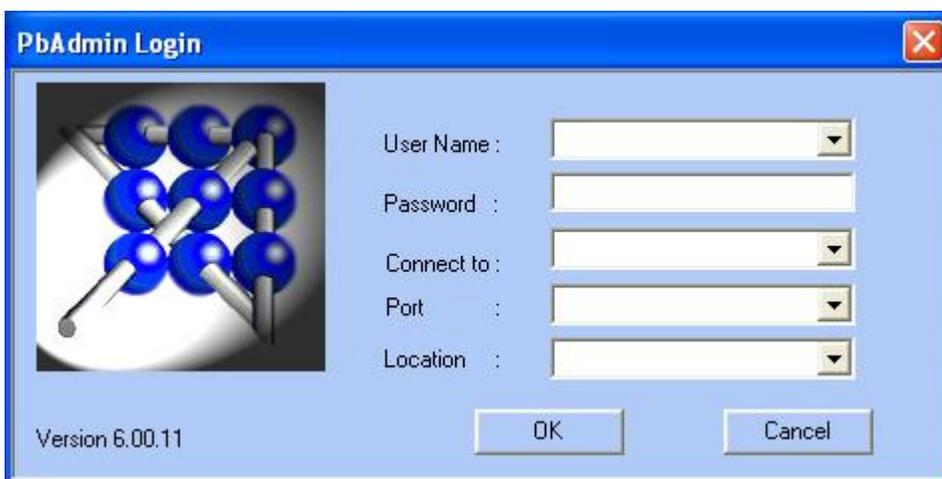


8. Click Done to close the window.
9. Remove the CD from the drive and continue with the next step to launch RealVu.

Open RealVu

Complete the following steps to open the RealVu application window and fill in the Login dialog.

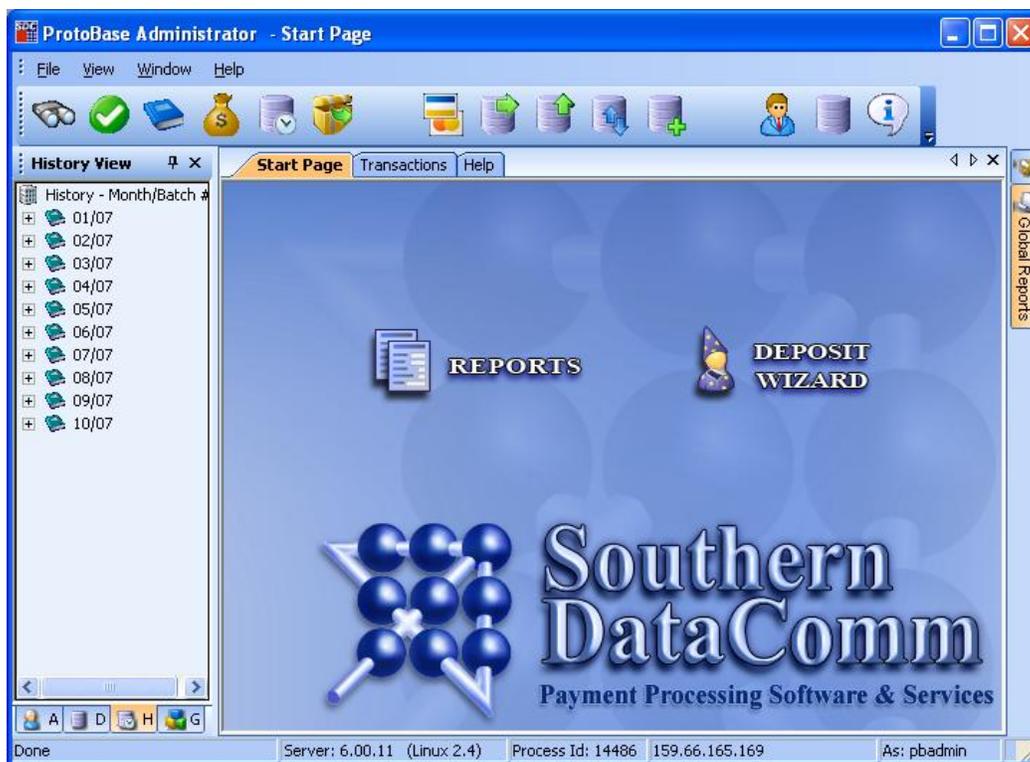
1. At the PC, from the Start menu, click All Programs, then Southern Datacomm Products, then RealVu. The RealVu Login window displays.



2. Fill in the fields as follows:
 - User Name – type **pbadmin**
 - Password – type **pbadmin**
 - Connect to – type **192.168.1.1** (normal system default) or the IP address that you noted on page 3, step 3.
 - Port – type **9292**
 - Location – leave this blank

Note: If you have never had Protobase Credit Authorization software on your system, a message “The attempt to connect was forcefully rejected” displays. This response is considered normal and will no longer occur once an Activant representative completes your

- file installation. If you have never had ProtoBase Credit Authorization software on your system, you have completed the installation.
3. Be aware of the following information that relates to passwords:
 - RealVu will prompt you to change the current STORE(x) password the first time you log in.
 - After 90 days have passed, you will again be prompted to change the password. This will automatically happen every 90 days.
 - Each time you change the password, write down the password and place it in a secure location, in case it is needed for future reference.
 4. Click OK. After a few moments, in the RealVu window, the Start Page displays.



5. Click OK to close and complete the installation.