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From time to time, Activant makes changes to its software products. Therefore, information in this manual is subject to change, and the illustrations and screens that appear in the manual may differ somewhat from the version of the software provided to you.

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Publication No. EL2163-02 Publication Date: June 2008

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Overview

This document describes the process you will follow to upgrade your current version of ProtoBase to the newest version, ProtoBase version 6. Read this entire document before you begin the install process. That will provide you an overview of the process and help to ensure a successful conversion.

Additional Resources

If you have questions about the install 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, hover over the Support link and from the sub-menu, click Security.
 - o 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.
- RealVu User's Guide RealVu, a software application that replaces PBADMIN, has a User's Guide available on the CD you received with this manual. You can open and/or save the User's Guide on any PC.
- 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. Also, 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 install, one of the procedure steps will require you to enter a current valid administrator password. Then you will be prompted to change it. The install program will provide the current administrator password, as well as a suggested replacement.

To complete the install process, Activant recommends that you use the suggested replacement for the administrator password. Then, once the install 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 Install?

The install does require 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 install 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, as long as no activity has taken place on the system since the night before.

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

Tasks Prior to Install

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 install

Verify Account Number

During the install procedure, 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
       IP address:
                                     192.168.1.1
        Network address:
                                     192.168.1
        Host address:
                                     255.255.255.0
        Network address mask:
        Broadcast IP address:
                                     192.168.1.255
        Router IP address:
Hop count metric:
                                     192.168.1.253
        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. 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 install process. 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. Open the Point-of-Sale book > Offline POS book > Uploading Transactions After Using Offline POS book > 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 PBADMIN 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 install process.

If you find any unsettled transactions, you must either manually perform a settlement now or wait until after auto-settle has occurred (and PBADMIN is clear) and then resume the install process. 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 install does require a quiet system, with no activity on any of the terminals, no reports processing, and no system tasks active. The install process will automatically quiet the system (quitting any signed on users/terminals and terminating any active tasks).

Install ProtoBase Software Package

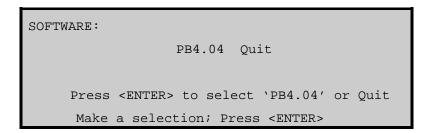
Complete the procedure steps in this section to install the ProtoBase software package. Use the CD provided by Activant, titled **ProtoBase Credit Authorization Optional Software** Version: 4.04 (PB 6.00 - 11).

You can ensure a successful conversion 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've entered before you type the next entry).

🖣 Important

- 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 the Eagle CPU.
- When typing any numbers during the procedure, you must use the numbers located above the letters on your keyboard. Do not use the number keypad on the right side of your keyboard.
 - 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>**.
- 3. 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.
- 4. 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>. A warning message alerts you that your system will be going down in 30 seconds.
- 5. After a few minutes, a message displays on the screen asking you to select the drive to install the programs from. To select CD-ROM, type **2** and press <Enter>.
- 6. A message displays: Insert the program CD into the CD-ROM drive and press <ENTER>. Insert the ProtoBase Credit Authorization Optional Software CD and press <Enter>.
- 7. A screen similar to the following displays.



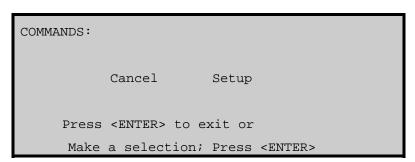
Press < Enter >. This selects the ProtoBase package.

A message displays: Copying programs It takes a few seconds for the copying programs routine to complete.

🖣 Im portant

If you receive the message "Do you want to refresh programs (Y / N)," type a Y and press Enter.

8. After copying programs, the following screen displays:



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 are lower-case.

Various status messages then display on the screen.

A series of questions then display. Carefully read and answer each one to ensure that proper precautions have been taken and the upgrade will be successful. Continue with the next steps to answer the questions.

- 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>.
- 10. If you receive the message "do not proceed until you have met the following criteria,". press Enter to proceed. Then type Y and press Enter when you are asked if you have a backup. The install process resumes.

🖣 Important

If you are already running RealVu version 6.00 (with ProtoBase 4.05, 4.06, etc.) you may not see all of the questions in steps 10 through 12, below.

11. When asked if all offline transactions have been uploaded to the Eagle system, type **Y** and press <**Enter**>. One of the tasks you completed prior to the install was to check for offline POS transactions. If you did not, and if offline POS transactions do exist, then any credit card transaction in that offline file will not be settled when you later upload the offline transactions.

A message displays that the system is checking for any unsettled transactions.

- 12. When asked if you have a current backup, type **Y** and press **<Enter>**. One of the tasks you completed prior to the install was to check for a current backup.
- 13. The following screen displays:

Months of history keep:

The selected months of history to keep represents the number of prior months of history. In other words, the current month plus the selected number of prior months of history are kept.

The PCI standard recommendation is to keep 6 months of history. The EAGLE recommendation is 12 months. However, if your business operation requires more, you can select to keep up to 24 months of history. Keeping more months of history increases the ProtoBase Optional Software Conversion time.

If you have any questions, please call Customer Support for assistance.

Months of history to keep (q to quit) [default: 12]:

At the prompt, **type the number**, for the number of months you want to keep. For example, if you want to keep 12 months, type **12**. Then press **<Enter>**.

- 14. When you receive a login warning that only 2 attempts to log in will be allowed, type Y to continue, and press <Enter>.
- 15. The following Password screen then displays:

Enter User: pbadmin

Enter Password: pbadmin

Enter new password: pbadmin1

Confirm new password: pbadmin1

- At Enter User, type **pbadmin** and press **<Enter>**.
- At Enter Password, type **pbadmin** and press < Enter>. This is the Administrative user/password usually used on Activant Eagle systems.

Activant strongly recommends that you use the suggested default password, **pbadmin1**, to complete the install.

At Enter new password, type **pbadmin1** and press **Enter**>. At Confirm new password, type **pbadmin1** 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 install 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.

- 16. The system continues the upgrade process, and in a few minutes a message displays that the software has been successfully installed. Press **Enter**> when you see that message.
- 17. **Remove the CD** from the drive. They 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 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). Note: the version number you receive could be higher.

Install Java

Before you can install the RealVu software, Java software must be installed on the PC.. Java is available on the same CD as RealVu.

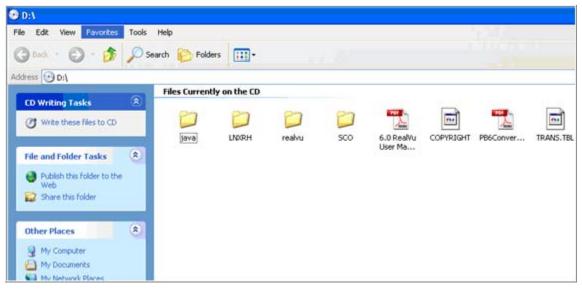
Even if Java is already installed on your PC, still follow the steps in this section. The process will confirm that Java is installed, and if needed, install the latest version.

- 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. Open the Java folder, and **double-click** on the Java icon (java.exe file).
- 4. Follow the prompts to install Java.

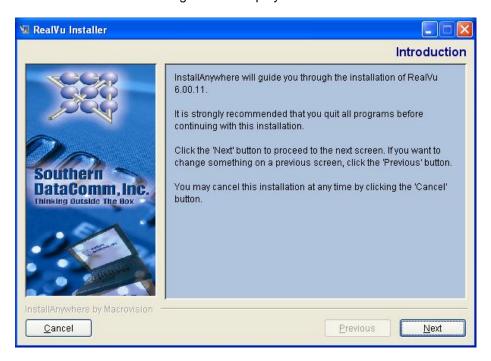
Install RealVu

RealVu is the software application that you will now use instead of PBADMIN. The easy to use interface of RealVu allows you to complete the same tasks that you did in PBADMIN, such as verifying autosettle and adding / deleting transactions.

- At the client PC, insert the ProtoBase Credit Authorization Optional Software CD into the drive.
- The CD will usually auto-run and display a screen showing a number of folders/icons. If the CD does not auto-run, double-click the My Computer icon on the desktop and then double-click the CD drive to open the folder.



3. Locate the install.exe file by double-clicking each of the following folders in succession: realvu, then disk1, then InstData, then noVM. Once you've located the install.exe file, double-click it to start the install. The following window displays. Click **Next** to continue.



- 4. The License Agreement window displays. Click the option button to indicate you accept the agreement. Then click **Next** to continue.
- The Choose Install Folder window displays. Use the default location that displays. Click Next to continue.



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

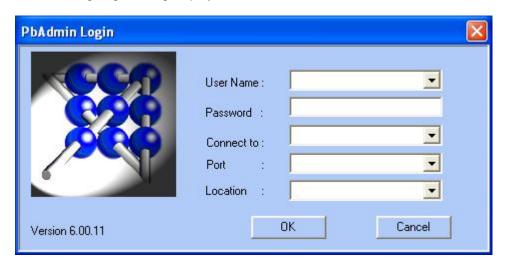


8. Remove the CD from the drive and continue with the next step to launch RealVu.

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 > Southern Datacomm Products > RealVu.
- 2. The following Login dialog displays:



Fill in the fields as follows:

User Name – type STORE1

Note: There are specific User Name accounts that must be kept, do not delete them, they are required by the Activant Eagle Advice Line to assist you in supporting and troubleshooting this application. The required user names are **STORE1**, **pbadmin**, and **activant**. Do not delete these User Names.

Password – type STORE1

Note: 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. At that time, create a strong password (at least 8 characters long, with at least one number or special character). In any new passwords that you create for use with this application, do not use "STORE1" as a password.
- 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.
- Connect to type **192.168.1.1** or the IP address that you noted on Page 2, step #3.
- Port type 9292
- Location leave this blank
- 3. Click OK. A Welcome dialog displays, click OK. After a few moments, the RealVu window, the Start Page displays.



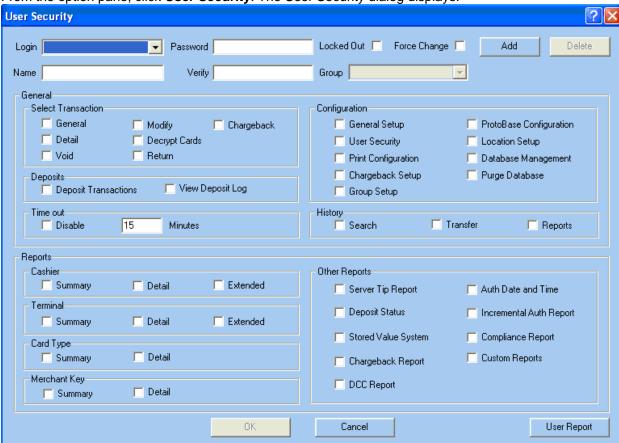
Add Users

You must now add individual user accounts, so that each user logs on to the application with their own specific User Security. You must do this for PCI Compliance regulations.

Complete the following procedure immediately after you display the RealVu window.

1. On the toolbar, click the **Administration** button.

2. From the option pane, click **User Security**. The User Security dialog displays.



- 3. Click the Add button (upper, right corner of the dialog). Then fill in the following fields:
 - Login, Name, Password and Verify (Password again) Password must be a minimum
 of 8 characters in length and contain a number or special character. If you are adding a
 User Record for a store employee other than yourself, select the Force Change
 checkbox. The password you enter is then temporary and the user must change it when
 he/she logs on for the first time.
 - Once set, a password is good for 90 days. After 90 days, a prompt displays to change the password. This happens automatically. Each time you change your password, write down the password and place it in a secure location, in case it is needed for future reference.
 - **Group** From the drop-down list, select the STORE that you want this user to be able to access. If you are multistore and you want this user to have access to all stores, select Test Group.
 - Remaining fields Set the remaining fields that apply to this user. If you want to select
 most of the fields, any easy way to do this is to select the All Yes tab. Then you must
 unselect Purge Database, Chargeback Setup and Group Setup. Only the Eagle Advice
 Line should have an account that can access these options.
- 4. Click OK.
- Repeat the process to add other user accounts. After that is complete, you are then finished with the conversion.