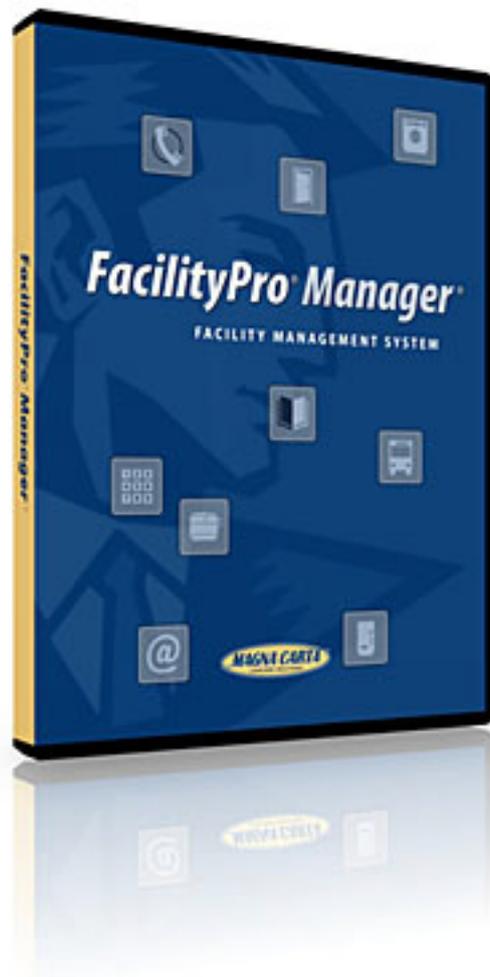


FacilityPro Manager

Installation Manual

filename: MAN7 FPMI UKED 3402.doc
revision date: 29072009
software version: 3.4



You must accept the enclosed License Agreement before you can use this product. If you do not accept the terms of the License Agreement, you should promptly return the product for a refund.

System requirements:

To use FacilityPro Manager on a PC you need:

- 1) Microsoft Windows XP, Windows 2000, Windows 2000 Server or Windows 2003 Server. For the Collector module (needed if the terminals of the site must be audited automatically) Windows 2003 Server is recommended;
- 2) For the use of the SQL database: Microsoft SQL Server 2000 or 2005. Microsoft SQL Server 2005 Express edition can also be used.
- 3) 512 MB RAM
- 4) 50 MB available hard-disk space, plus additional hard-disk space if the PC will be storing the database and/or reports
- 5) CD-ROM drive
- 6) VGA card: minimum VGA 640x280, 64K colors
- 7) Microsoft Mouse or compatible pointing device
- 8) Free USB-port for (optional) card reader
- 9) TCP/IP-network and 100 MB network card required if FacilityPro Manager is to run on more than one work station with one central database or if the terminals are to be audited and configured via the network.
- 10) Software COMET and HP iPAQ PDA are required if the (stand-alone) terminals are to be audited and configured manually.

For more information:

Visit the Magna Carta Website at <http://www.magna-carta.com/>

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TABLE OF CONTENTS

ABOUT THIS INSTALLATION MANUAL	4
1 INSTALLATION	5
1.1 Introduction	5
1.2 Installing Microsoft SQL Server Express edition	6
1.3 Creating a new SQL database for FacilityPro Manager	6
1.3.1 Creating a new SQL database with SQL Server Management Studio Express	6
1.3.2 Creating a new SQL database with SQL Server Enterprise Manager	9
1.4 Attaching an existing FacilityPro Manager database to SQL Server	12
1.4.1 Attaching a backup of an existing FacilityPro Manager database to SQL Server	13
1.4.1.1 <i>SQL Server Management Studio Express</i>	13
1.4.1.2 <i>SQL Server Enterprise Manager</i>	15
1.4.2 Attaching a copy of an existing FacilityPro Manager database to SQL Server	17
1.4.2.1 <i>SQL Server Management Studio Express</i>	17
1.4.2.2 <i>SQL Server Enterprise Manager</i>	19
1.5 Installing FacilityPro Manager	20
1.6 Defining the SQL database for FacilityPro Manager	23
1.7 Importing a PayPro Manager Paradox database	26
1.8 Installing and starting up the collector	28
1.9 Installing and starting up the PIM server	28
1.10 Connecting a PC card reader	29
1.11 Help	31
2 OTHER	32
2.1 Making a backup of your FacilityPro Manager database	32
2.1.1 SQL Server Management Studio Express	32
2.1.2 SQL Server Enterprise Manager	33

About this installation manual

This is the FacilityPro Manager installation manual (version MAN7 FPMI UKED 3402.doc).

When the text presents an enumeration that does not represent instructions to be carried out, this enumeration will be presented as follows, each item identified by a number and a bracket:

- 1) First point.
- 2) Second point, etcetera.

In each chapter, except the introduction, you will find instructions on how to perform the various tasks. These instructions always have a title which starts with **How**, for example **How to install FacilityPro Manager on a work station**. The instructions for the specific task are then given step by step, in the order in which they will be carried out, each step identified by a number and a full stop, as follows:

1. Step 1.
2. Step 2.
3. Step 3, etcetera.

These instructions suppose that you have some experience with computers. For the sake of completeness we will explain here some of the terms used in the instructions:

- 1) 'Click' means move the mouse to the area on the screen specified in the instruction, and press the left mouse button. If it is an instruction to click on a button, the name of that button will be given on a grey background, so that it will resemble what is seen on the screen. For example: Click on **OK**.
- 2) 'Double-click' means move the mouse to the area on the screen specified in the instruction, and press the left mouse button twice quickly.
- 3) 'Right-click' means move the mouse to the area on the screen specified in the instruction, and press the right mouse button.
- 4) 'Choose' will only be used when a menu or sub-menu is to be chosen, and means click on the mentioned menu option, which is printed in bold characters. For example: Choose **Card holders** from the menu **Cards**, means click on the menu **Cards** and then click on the sub-menu **Card holders**.
- 5) 'Select' means click on the specified item. Its background will become blue and the item has then been selected. For example: From the record list, select the record that you want to delete.
- 6) 'Press' always refers to the keys on the keyboard. The keys will have the format **<Tab>**.
For example: Press **<Tab>**.
- 7) 'Type' means enter data with the keyboard; the text that should be typed is presented in bold characters and between quotation marks.
For example: Type the name of cardholder **'John Johnson'**.

1 Installation

1.1 Introduction

Before getting started with FacilityPro Manager, you will need to install Microsoft SQL Server 2000 or 2005 or Microsoft SQL Server 2005 Express edition and you must install FacilityPro Manager on at least one work station. A database must be created with the chosen SQL Server and defined as the database for FacilityPro Manager. You might want to connect a PC card reader to one or several work stations. This chapter describes how to install the FacilityPro Manager software on the work stations and get it up and running with an SQL Server as its database server.

You should have been provided with the following software and hardware:

- 1) cd-rom with the file setup.exe, which installs FacilityPro Manager, and the FacilityPro Manager installation manual and user manual
- 2) hard copy FacilityPro Manager Installation Manual
- 3) hard copy FacilityPro Manager User Manual
- 4) Omnikey CardMan 5121 or 5321 PC card reader, optional
- 5) cd-rom with the files <CardMan512x_V1_1_0_37.exe>, <CardMan_Synchronous_API_V1_1_1_1.exe>, <chip32.dll> and <[cardkeys].ini>, optional with PC card reader
- 6) iPAQ, for manual auditing and configuring of terminals, optional
- 7) cd-rom with COMET software for iPAQ and manual, optional with iPAQ
- 8) cd-rom with the files <database_name.mdf> and <database_name.ldf>, containing a database designed for you, and other site specific files and manuals, optional

The work stations on which you want to install FacilityPro Manager must meet the following system requirements:

Minimal configuration

- 1) Operating System: Microsoft Windows XP, Windows 2000, Windows 2000 Server or Windows 2003 Server. For the Collector module (needed if the terminals of the site must be audited automatically) Windows 2003 Server is recommended.
- 2) For the use of the SQL database: Microsoft SQL Server 2000 or 2005. Microsoft SQL Server 2005 Express edition can also be used.
- 3) If the terminals are to be audited automatically the Collector module of FacilityPro Manager must be installed on a PC (preferably Windows 2003 Server) and run as a service.
- 4) Min. 512 MB RAM
- 5) Per work station, including the work station where the collector service runs, at least 50 MB free disk memory required for the program, plus additional free memory for storing the database and/or reports.
- 6) Cd-rom drive

- 7) VGA card: minimum VGA 640x280, 64K colors
- 8) Microsoft mouse or compatible pointing device
- 9) For CardPro module a free USB port to connect the PC card reader
- 10) TCP/IP-network and 100 MB network card required if FacilityPro Manager is to run on more than one work station with one central database or if the terminals are to be audited and configured via the network.
- 11) Software COMET and HP iPAQ PDA are required if the (stand-alone) terminals are to be audited and configured manually.

1.2 Installing Microsoft SQL Server Express edition

FacilityPro Manager can be used provided Microsoft SQL Server 2000 or 2005 or Microsoft SQL Server 2005 Express edition has been installed and is active. This paragraph provides basic instructions for installing, activating and setting up Microsoft SQL Server 2005 Express edition.

How to install Microsoft SQL Server Express edition:

1. Download .NET Framework 2.0 Redistributable Package (x86) from the Microsoft website: save to disk (file dotnetfx.exe) and then install.
2. Download Microsoft SQL Server 2005 Express edition from the Microsoft website: save to disk (file SQLEXPRESS.EXE), and then unpack/install. During install you must choose "mixed mode" as the authentication mode and you must supply a password. Otherwise you can choose 'next', 'install' and 'finish' everywhere.
3. Download SQL Server Management Studio Express from the Microsoft website: save to disk (file SQLServer2005_SSMSEE.msi), and then install.

1.3 Creating a new SQL database for FacilityPro Manager

SQL Server (all versions) can be managed with the Microsoft software SQL Server Management Studio Express or (older installs) with the software SQL Server Enterprise Manager. This paragraph provides instructions that you must carry out if you want to start with a new database for a new site. It assumes you have installed a Microsoft SQL Server and it is active

1.3.1 Creating a new SQL database with SQL Server Management Studio Express

This paragraph assumes and that you have installed SQL Server Management Studio Express.

How to create a new database for FacilityPro Manager with SQL Server Management Studio Express:

1. Click on the Windows **Start**-button.
2. Choose **Programs**.
3. Choose **Microsoft SQL Server 2005** (or **Microsoft SQL Server**).

4. Choose **SQL Server Management Studio Express**. You will see the “Connect to Server” screen (Figure 1-1). Make a note of the Server name. If the server name is not filled in you should fill in the Windows name of your computer (followed by ‘\SQLEXPRESS’ in the case of SQL Express edition).



Figure 1-1 SQL Server Express Edition “Connect to Server” screen

5. Click **Connect**. You will see the SQL Server Management Studio Express screen (Figure 1-2). By default the field ‘Authentication’ will be ‘Windows Authentication’. You can also choose to fill in ‘SQL Server Authentication’, in which case you should fill in User name ‘sa’ and the password chosen in step 2 of §1.2 in the case of SQL Express edition or the password defined by the system manager for SQL server authentication in the case of SQL Server 2000 or 2005.

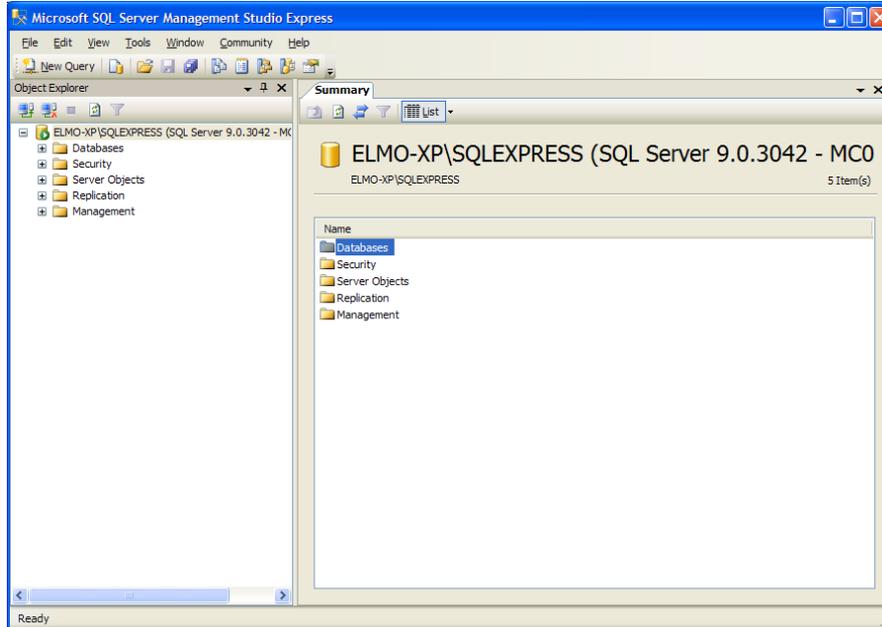


Figure 1-2 SQL Server Management Studio Express screen

6. Right-click on **Databases** in the list under ‘Object Explorer’.
7. Choose **New Database....** You will see the SQL “New Database” screen (Figure 1-3).

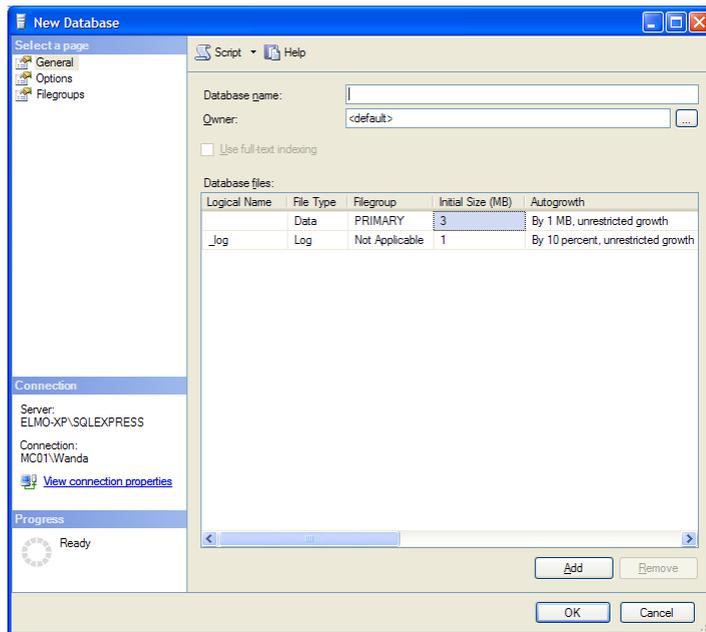


Figure 1-3 SQL "New Database" screen

8. Type the name for the FacilityPro Manager database, e.g. 'FPM database'.
9. Click **OK**. The SQL database is created and you will return to the SQL Server Management Studio Express screen (Figure 1-2).
10. Right-click on **Security**.
11. Choose **New**.
12. Choose **Login...**. You will see the SQL "Login-New" screen (Figure 1-4).

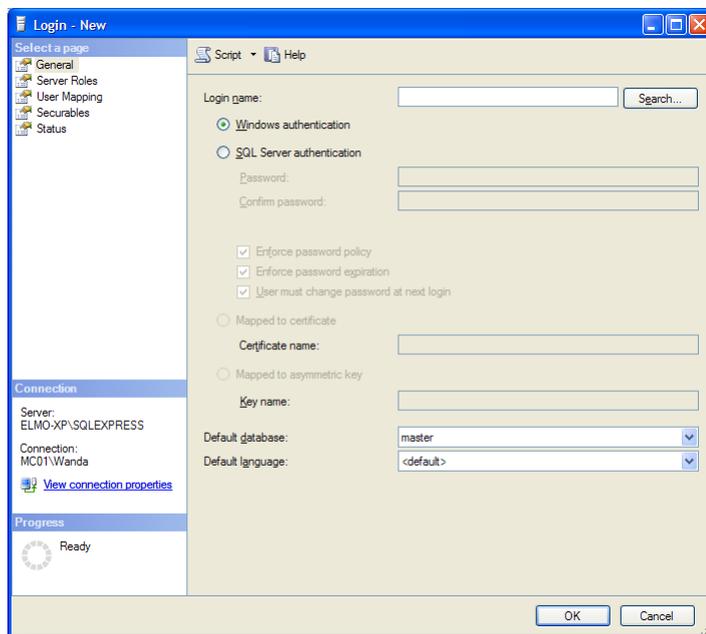


Figure 1-4 SQL "Login-New" screen

13. Type the login name, e.g. 'FacilityPro'.
14. Select the button 'SQL Server authentication'.

15. Type and confirm a password.
16. Click in the checkbox 'Enforce password policy' to uncheck all three checkboxes.
17. In the field 'Default database', select the database defined in step 8 from the dropdown
18. Select the page 'User mapping'.
19. Under 'Users mapped to this login' click in the checkbox next to the database defined in step 8 to check it.
20. Under 'Database role membership for: [this database]' click in the checkbox next to 'db_owner' to check it. This assigns the right to enter the database to the login name we are creating.
21. Click **OK**. You will return to the SQL Server Management Studio Express screen (Figure 1-2).

You have now created an empty database in the SQL server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.3.2 Creating a new SQL database with SQL Server Enterprise Manager

This paragraph assumes and that you have installed SQL Server Enterprise Manager.

How to create a new database for FacilityPro Manager with SQL Server Enterprise Manager:

1. On the SQL Server PC, click on the Windows **Start**-button.
2. Choose **All Programs**.
3. Choose **Microsoft SQL Server** (or **Microsoft SQL Server 2005**).
4. Choose **Enterprise Manager**. You will see the SQL Server Enterprise Manager screen (Figure 1-5).

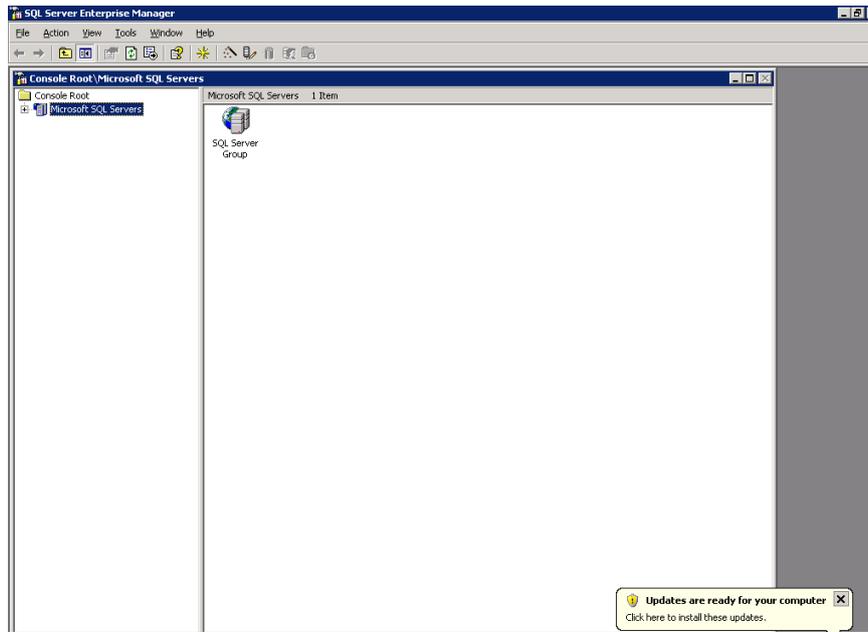


Figure 1-5

5. Navigate to Microsoft SQL Servers – SQL Server Group – (local)(Windows NT) – Databases
6. Right-click on **Databases**.
7. Choose **New Database....** You will see the SQL “Database Properties” screen (Figure 1-6).

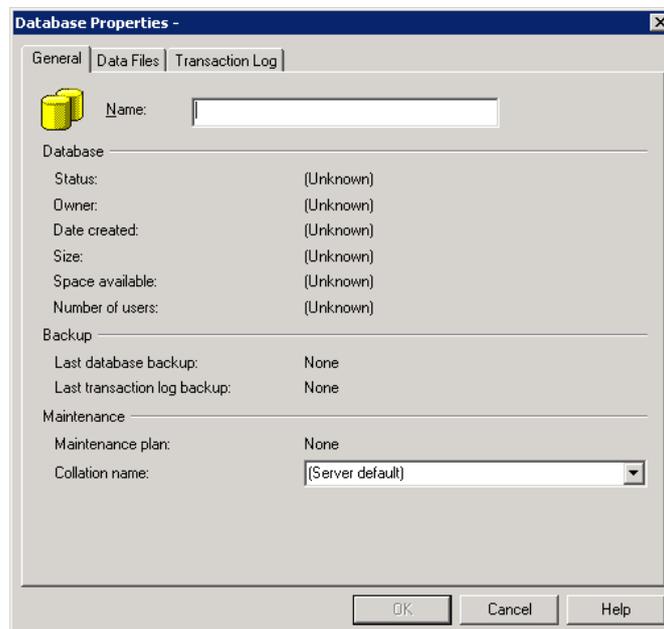


Figure 1-6

8. Type the name for the FacilityPro Manager database, e.g. '**FPM database**'.

9. Click **OK**. The SQL database is created and you will return to the Server Enterprise Manager screen (Figure 1-5).
10. Double-click on **Security**.
11. Right-click on **Logins**.
12. Choose **New login...** You will see the “New Login” screen (Figure 1-7). If you first see the warning message as in Figure 1-8, click **OK** first.

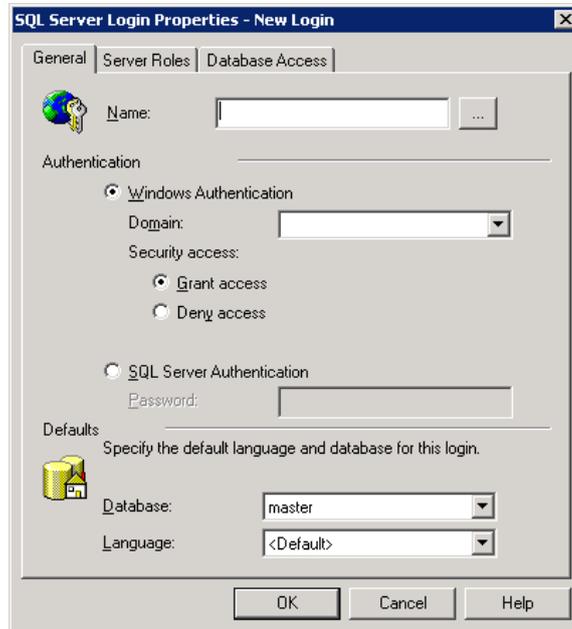


Figure 1-7

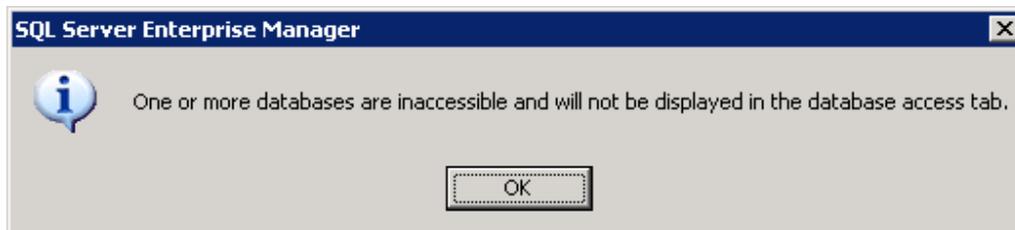


Figure 1-8

13. Type the login name, e.g. **'FacilityPro'**.
14. Select the radio button 'SQL Server authentication' and type a password.
15. In the field 'Database', select the database defined in step 8 from the dropdown.
16. Select the tab 'Database Access'. You will see the 'Database Access' tab (Figure 1-9).

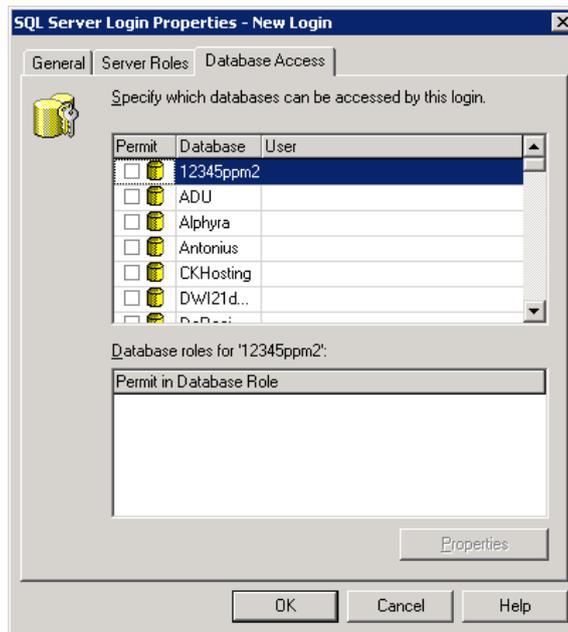


Figure 1-9

17. Under 'Specify which databases can be accessed by this login' click in the checkbox next to the database defined in step 8 to check it.
18. Under 'Datase roles for [this database]' click in the checkbox next to 'db_owner' to check it. This assigns the right to enter the database to the login name we are creating.
19. Click **OK**. You will see the 'SQL Confirm Password' screen (Figure 1-10).

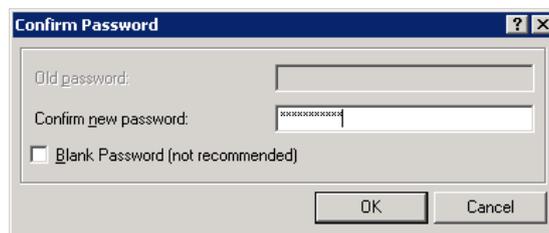


Figure 1-10

20. Type the password entered in step 14.
21. Click **OK**. You will return to the Server Enterprise Manager screen (Figure 1-5).

You have now created an empty database in the SQL server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.4 Attaching an existing FacilityPro Manager database to SQL Server

This paragraph provides instructions that you must carry out if you want to import an existing FacilityPro Manager or PayPro Manager SQL database. This could be:

- 1) A database from a site that has been in use with an earlier version of FacilityPro Manager or its predecessor PayPro Manager. When the SQL database for FacilityPro

Manager is defined (§1.6 'Defining the SQL database for FacilityPro Manager'), the database will be updated to the current version of FacilityPro Manager.

- 2) A database that has been set up by Magna Carta and shipped to you with FacilityPro Manager.

Note that the database to be attached may either be in the form of a backup file named [databasename.bak], or in the form of two files named [databasename_data.MDF] and [databasename_log.LDF].

You cannot attach a database that has been generated or used with a different version of Microsoft SQL Server than the version you are using.

It is assumed you have installed a Microsoft SQL Server and it is active.

If you want to import an existing PayPro Manager Paradox database, you must execute the instructions in §1.3 'Creating a new SQL database for FacilityPro Manager', §1.6 'Defining the SQL database for FacilityPro Manager' and §1.7 'Importing a PayPro Manager Paradox database'.

1.4.1 Attaching a backup of an existing FacilityPro Manager database to SQL Server

The instructions in this paragraph assume that you have a .bak file with the backup of a FacilityPro Manager database and that you have stored this file in a directory on the SQL Server PC.

1.4.1.1 SQL Server Management Studio Express

This paragraph assumes and that you have installed SQL Server Management Studio Express.

How to attach a backup of an existing database to SQL Server with SQL Server Management Studio Express:

1. Create a new, empty database with the name you want to give to the database (§1.3.1).
2. From the SQL Server Management Studio Express screen (Figure 1-2), right-click on **Databases** in the list under 'Object Explorer'.
3. Choose **Restore database**. You will see the "Restore database" screen (Figure 1-11).

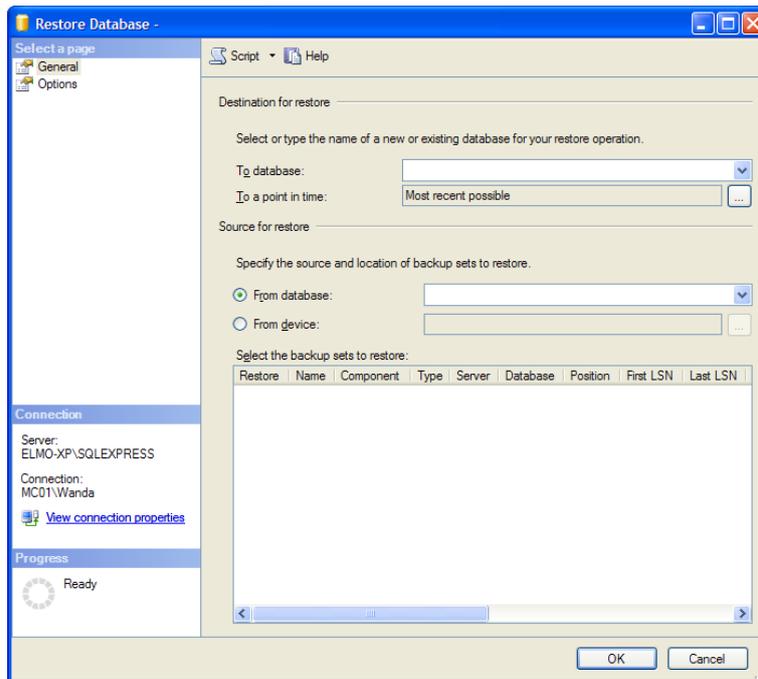


Figure 1-11

4. In the field "To database" type the name you want to give to the database (see step 1).
5. Click the radio button "From device".
6. Click the browse button (...).
7. Click **Add** and browse to the .bak file.
8. Click **OK**.
9. Click **OK**.
10. Click in the check-box under "Restore" for the backup file you have added to check it.
11. Click on **Options** under 'Select a page'.
12. Click in the field 'Overwrite the existing database' to check it.
13. Click on the browse button to the right of the First file (.mdf) shown under 'Restore the database as', browse to the directory where all your SQL databases are stored (standard C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\) and double click the .mdf file with the name you have chosen in step 1.
14. Repeat the previous step for the second file (.ldf) shown under 'Restore the database as', choosing the .ldf file with the name you have chosen in step 1, which will have 'log' added to the name.
15. Click **OK**. Wait for the message shown in Figure 1-12.

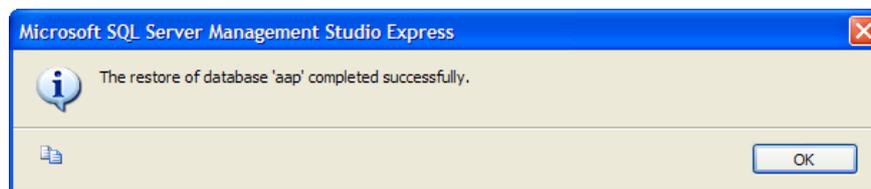


Figure 1-12

You have now attached a backup of an existing database to the SQL Server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.4.1.2 SQL Server Enterprise Manager

This paragraph assumes and that you have installed SQL Server Enterprise Manager.

How to attach a backup of an existing database to SQL Server with SQL Server Enterprise Manager:

1. Create a new, empty database with the name you want to give to the database (§1.3.2).
2. From the SQL Server Enterprise Manager screen (Figure 1-5), navigate to Microsoft SQL Servers – SQL Server Group – (local)(Windows NT) – Databases
3. Right-click on **Databases**.
4. Choose **All Tasks**.
5. Choose **Restore database...**You will see the SQL "Restore database" screen (Figure 1-13).

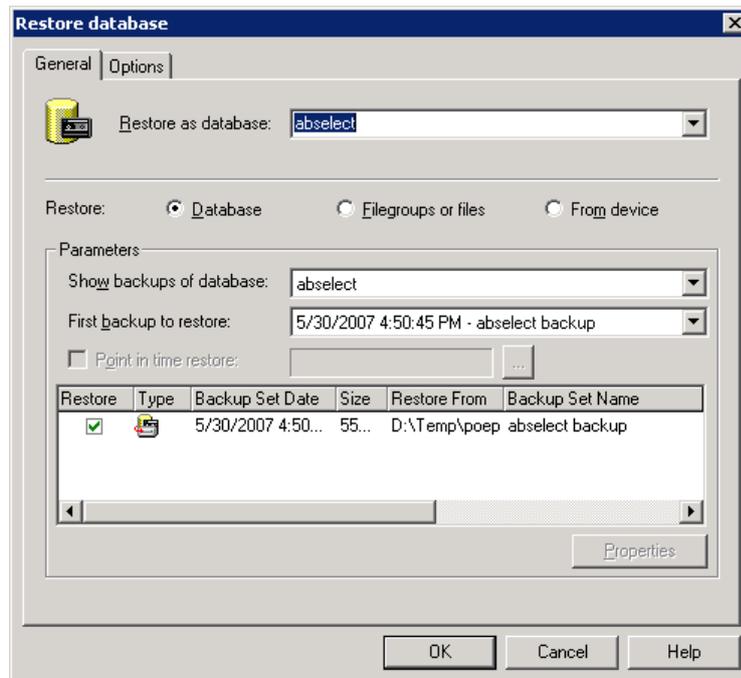


Figure 1-13

6. In the field "Restore as database" type the name of the database (see step 1).
7. Click the radio button "From device". You will see a screen as in Figure 1-14.

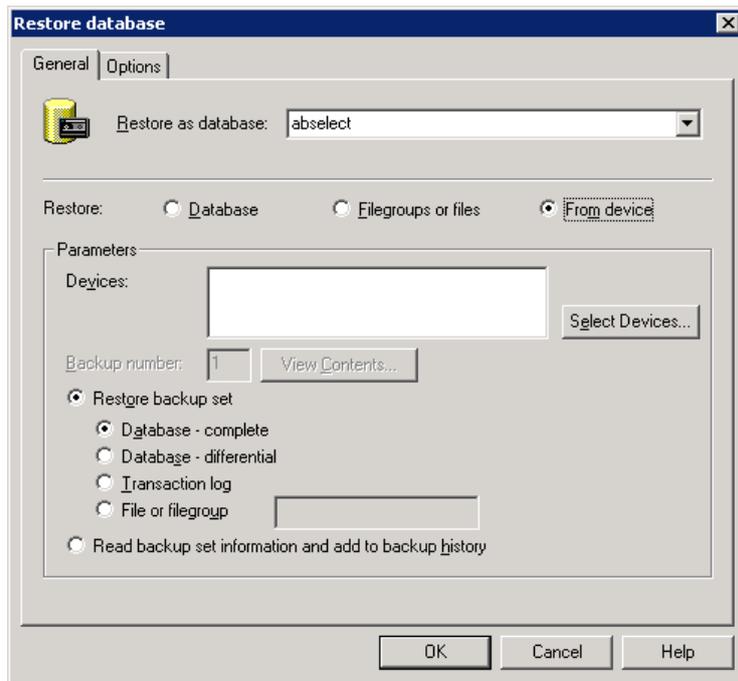


Figure 1-14

8. Click "Select devices". You will see the "Choose restore devices" screen (Figure 1-15).

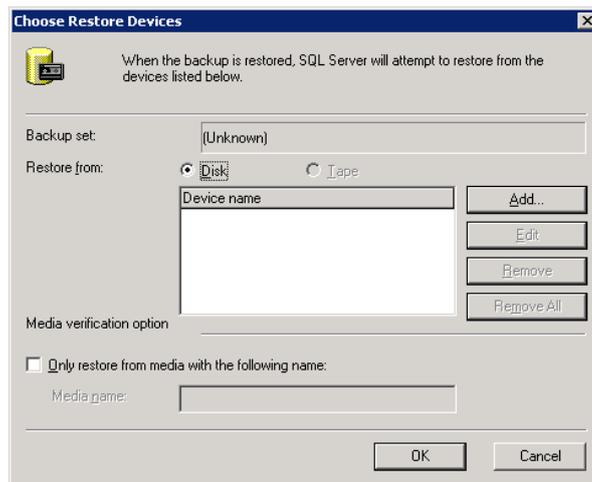


Figure 1-15

9. Click **Add**. You will see the "Choose restore destination" screen (Figure 1-16).

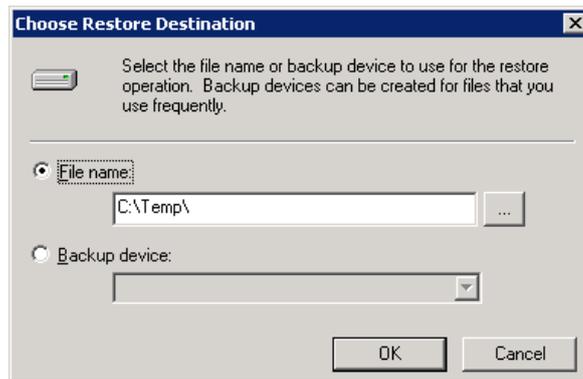


Figure 1-16

10. Click the browse button (...) and browse to the .bak file.
11. Click **OK** four times. Wait for the message shown in Figure 1-17.



Figure 1-17

You have now attached a backup of an existing database to the SQL Server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.4.2 Attaching a copy of an existing FacilityPro Manager database to SQL Server

The instructions in this paragraph assume that you have an .MDF and .LDF file and that you have stored these files in the directory used by SQL Server for databases.

1.4.2.1 SQL Server Management Studio Express

This paragraph assumes and that you have installed SQL Server Management Studio Express.

How to attach a copy of an existing database to SQL Server with SQL Server Management Studio Express:

1. Click on the Windows **Start**-button.
2. Choose **Programs**.
3. Choose **Microsoft SQL Server 2005** (or **Microsoft SQL Server**).
4. Choose **SQL Server Management Studio Express**. You will see the SQL Server Express Edition "Connect to Server" screen (Figure 1-1). Make a note of the Server name.
5. Click **Connect**. You will see the SQL Server Management Studio Express screen (Figure 1-2).

6. Right-click on **Databases** in the list under 'Object Explorer'.
7. Choose **Attach**. You will see the "Attach Databases" screen (Figure 1-18).

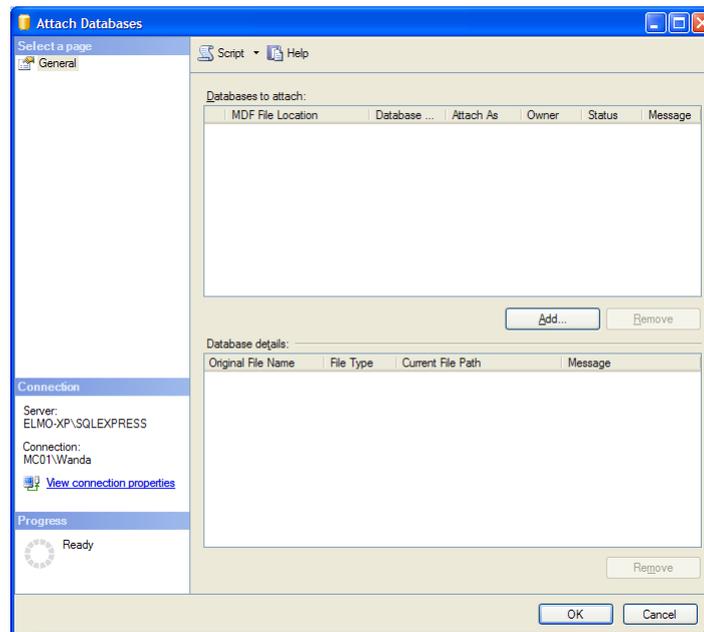


Figure 1-18

8. Click **Add**. You will see the "Locate Database Files" screen (Figure 1-19).

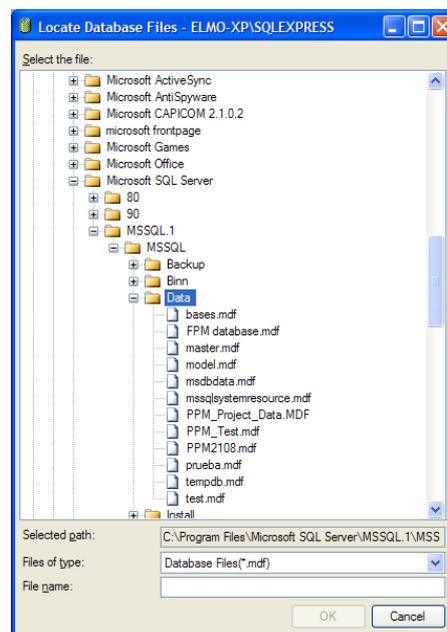


Figure 1-19

9. Navigate to the folder where the .MDF file of the existing SQL database has been stored.
10. Select the .MDF file.
11. Click **OK**. You will return to the SQL "Attach database" screen (Figure 1-18).

12. Click **OK**. You will return to the SQL Server Management Studio Express screen (Figure 1-2). The attached database will now be included in the list of databases, with the same name shown in the file name of the attached file [databasename_data.MDF].
13. Right-click on **Security**.
14. Choose **New**.
15. Choose **Login....** You will see the SQL "Login-New" screen (Figure 1-4).
16. Type the login name, e.g. '**FacilityPro**'.
17. Select the button 'SQL Server authentication'.
18. Type and confirm a password.
19. Click in the checkbox 'Enforce password policy' to uncheck all three checkboxes.
20. In the field 'Default database', select the database defined in step 10 from the dropdown.
21. Select the page 'User mapping'.
22. Under 'Users mapped to this login' click in the checkbox next to the database defined in step 10 to check it.
23. Under 'Datase role membership for: [this database]' click in the checkbox next to 'db_owner' to check it. This assigns the right to enter the database to the login name we are creating.
24. Click **OK**. You will return to the SQL Server Management Studio Express screen (Figure 1-2).

You have now attached a copy of an existing database to the SQL Server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.4.2.2 SQL Server Enterprise Manager

This paragraph assumes and that you have installed SQL Server Enterprise Manager.

How to attach a copy of an existing database to SQL Server with SQL Server Enterprise Manager:

1. On the SQL Server PC, click on the Windows **Start**-button.
2. Choose **All Programs**.
3. Choose **Microsoft SQL Server** (or **Microsoft SQL Server 2005**).
4. Choose **Enterprise Manager**. You will see the SQL Server Enterprise Manager screen (Figure 1-5).
5. Navigate to Microsoft SQL Servers – SQL Server Group – (local)(Windows NT) – Databases
6. Right-click on **Databases**.
7. Choose **All Tasks**.
8. Choose **Attach database....**You will see the SQL "Attach database" screen (Figure 1-20).

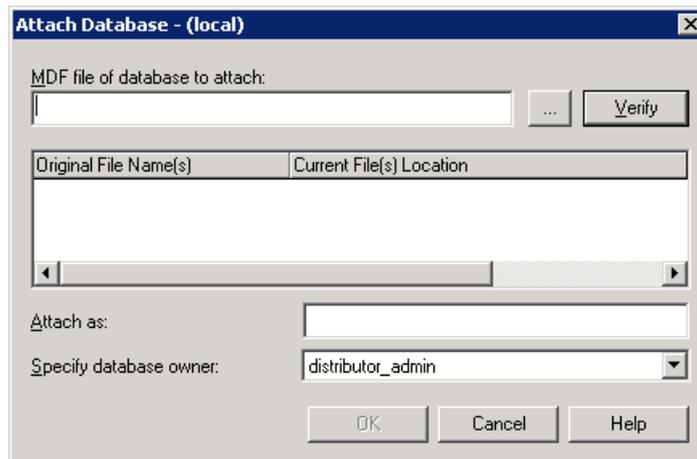


Figure 1-20

9. Click the browse button (...) and browse to the folder where the .MDF file of the existing SQL database has been stored.
10. Select the .MDF file.
11. Click **OK**. You will return to the SQL "Attach database" screen (Figure 1-20)..
12. Click **OK**. You will return to the SQL Server Enterprise Manager screen (Figure 1-5). The attached database will now be included in the list of database, with the same name shown in the file name of the attached file [databasename_data.MDF].
13. Double-click on **Security**.
14. Right-click on **Logins**.
15. Choose **New login....** You will see the "New Login" screen (Figure 1-7). If you first see the warning message as in Figure 1-8, click **OK** first.
16. Type the login name, e.g. '**FacilityPro**'.
17. Select the radio button 'SQL Server authentication' and type a password.
18. In the field 'Database', select the database defined in step 10 from the dropdown.
19. Select the tab 'Database Access'. You will see the 'Database Access' tab (Figure 1-9).
20. Under 'Specify which databases can be accessed by this login' click in the checkbox next to the database defined in step 10 to check it.
22. Under 'Database roles for [this database]' click in the checkbox next to 'db_owner' to check it. This assigns the right to enter the database to the login name we are creating.
23. Click **OK**. You will see the 'SQL Confirm Password' screen (Figure 1-10).
24. Type the password entered in step 17.
21. Click **OK**. You will return to the Server Enterprise Manager screen (Figure 1-5)

You have now attached a copy of an existing database to the SQL Server. In §1.6 'Defining the SQL database for FacilityPro Manager' you will fill in this database as the database to be used by FacilityPro Manager.

1.5 Installing FacilityPro Manager

Before installing FacilityPro Manager you must create a new database or attach an existing database with your SQL server (see §1.3 'Creating a new SQL database for FacilityPro Manager' or §1.4 'Attaching an existing FacilityPro Manager database to SQL Server'). Otherwise, you

will not be able to define in FacilityPro Manager which SQL database is to be used (see §1.6 'Defining the SQL database for FacilityPro Manager').

In order to manage a site with FacilityPro Manager, you will have to install the program on one or more computers, which we call the work stations. For each work station you must follow the procedure described below. If the terminals will communicate with FacilityPro Manager through a network, one work station will be the collector work station, and will audit and configure the terminals automatically at predefined times. On this collector work station one must install the collector module of FacilityPro Manager (which runs as a service), and one can, but need not, install the rest of the FacilityPro Manager software.

How to install FacilityPro Manager on a work station:

1. Insert the FacilityPro Manager cd in the cd-rom drive of the work station.
2. Click on the Windows **Start**-button.
3. Choose **Run**.
4. Click on the **Browse**-button.
5. Click on the arrow next to the field 'Look in:'.
6. Select the icon for the FacilityPro Manager installation cd.
7. Select the **FacilityPro Manager** sub-folder.
8. Click on the **Open**-button.
9. Select the set-up program **Setup.exe**.
10. Click on the **Open**-button.
11. Click on **OK**. The installation of FacilityPro Manager onto this work station will start. You will see the "Installation Options" screen (Figure 1-21).

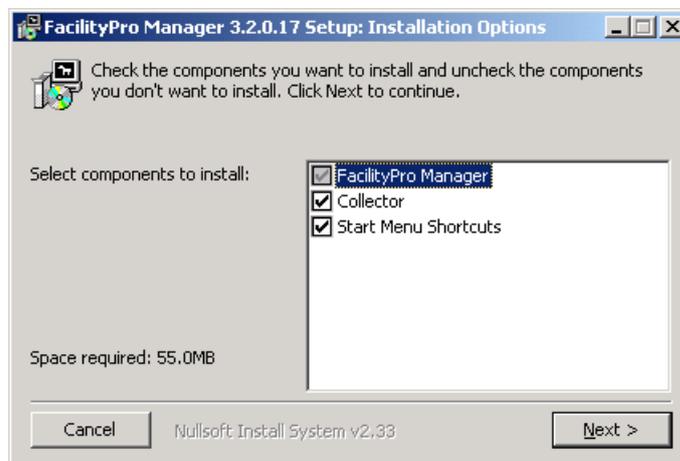


Figure 1-21 The "Installation Options" screen of the FacilityPro Manager setup program

12. If this work station is not going to be the collector work station, click in the check-box 'Collector' to un-check it.
13. If you do not want a shortcut to FacilityPro Manager to be included in the Windows Start Menu (under Programs), click in the check-box 'Start Menu Shortcuts' to un-check it.
14. Click **Next**. You will see the "Installation Folder" screen (Figure 1-22).

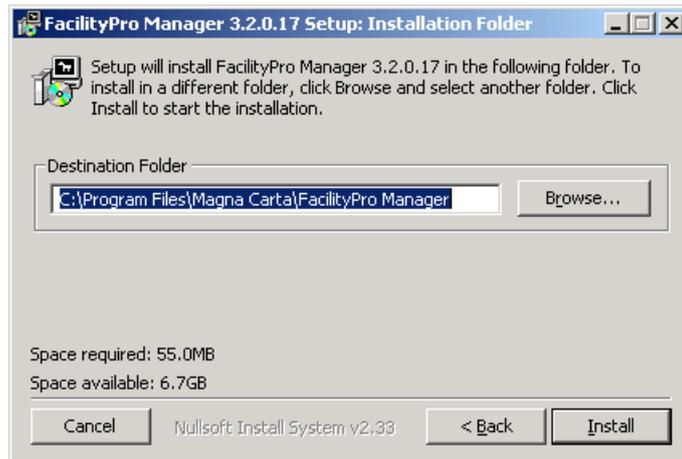


Figure 1-22

15. Click **Install**. If you will see the warning shown in Figure 1-23, Click **OK**.

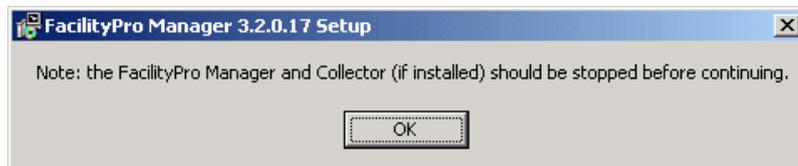


Figure 1-23

16. The program is installed. A Word file with this installation manual will open automatically, providing you with instructions for the further steps of the installation. FacilityPro Manager will automatically start up. You will see the “Select Database” screen of FacilityPro Manager (Figure 1-26).
17. If the SQL database that you want to use has not yet been created in your SQL server (see §1.3 ‘Creating a new SQL database for FacilityPro Manager’ or §1.4 ‘Attaching an existing FacilityPro Manager database to SQL Server’), click **Cancel**. You will see the error screen shown in Figure 1-24. Click **OK**, and first create the database in the SQL server. Then proceed with §1.6.



Figure 1-24

18. If the SQL database that you want to use has already been created in your SQL server (see §1.3 ‘Creating a new SQL database for FacilityPro Manager’ or §1.4 ‘Attaching an existing FacilityPro Manager database to SQL Server’), you can continue with step 5 of §1.6 ‘Defining the SQL database for FacilityPro Manager’, after finishing the next step.
19. The “Setup: Completed” screen will indicate that the install has been completed (Figure 1-25). Click **Close**.

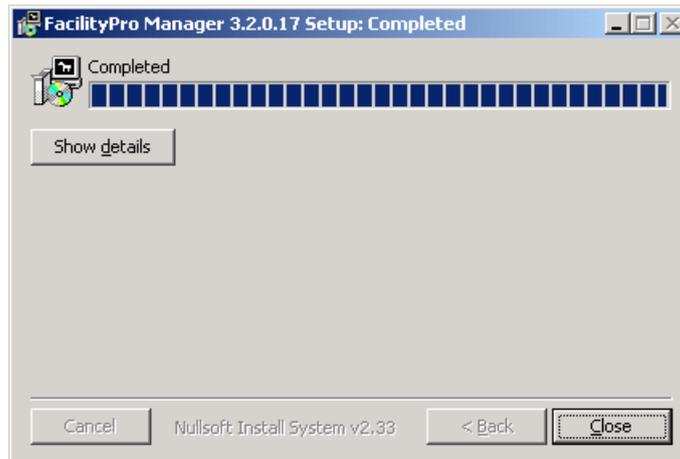


Figure 1-25 The “Setup: Completed” screen of the FacilityPro Manager setup program

FacilityPro Manager has now been installed on this work station. The program files are in the folder C:\Program Files\Magna Carta\FacilityPro Manager\bin. The file FacilityPro.exe is the file which starts up the program itself. The folder C:\Program Files\Magna Carta\FacilityPro Manager\data contains a standard FacilityPro Manager SQL database in the files <pp.ldb> and <ppm.mdb>.

How to un-install FacilityPro Manager from a work station:

1. Click on the Windows **Start**-button.
2. Choose **Settings**.
3. Choose **Control Panel**.
4. Double-click **Add/Remove Programs**.
5. Select **FacilityPro Manager** from the list.
6. Click the **Add/Remove**-button. You will see the message ‘Are you sure you want to completely remove the selected application and all of its components?’.
7. Click on **Yes**.

1.6 Defining the SQL database for FacilityPro Manager

How to define the SQL database for FacilityPro Manager:

1. Click on the Windows **Start**-button.
2. Choose **Programs**.
3. Choose **FacilityPro Manager**.
4. Choose **FacilityPro Manager**. You will see the “Select Database” screen of FacilityPro Manager (Figure 1-26).

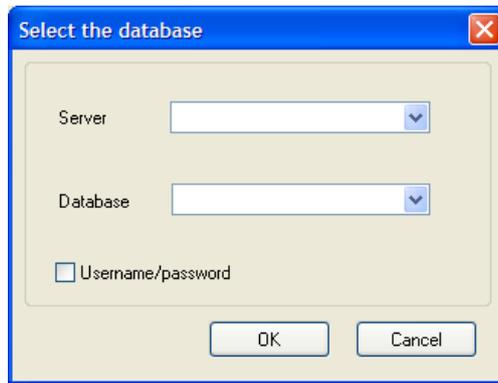


Figure 1-26 The “Select the database” screen of FacilityPro Manager

5. Type the server name of your SQL Server (it should be the Windows name of your computer, followed by ‘\SQLEXPRESS’ for Express edition, if you use Microsoft SQL Server Studio Express see step 4 of §1.3.1 or §1.4.1.1 or §1.4.2.1).
6. Type the database name that you entered in step 8 of §1.3.1 ‘Creating a new SQL database with SQL Server Management Studio Express’ or §1.3.2 ‘Creating a new SQL database with SQL Server Enterprise Manager’) or the name of the database that you attached to your SQL Server in §1.4 ‘Attaching an existing FacilityPro Manager database to SQL Server.
7. Click **OK**.
8. If you are defining a new database, follow steps 9 through 12 and then continue with step 15, otherwise continue from step 13.
9. Type login name and password if asked. You will see Figure 1-27.

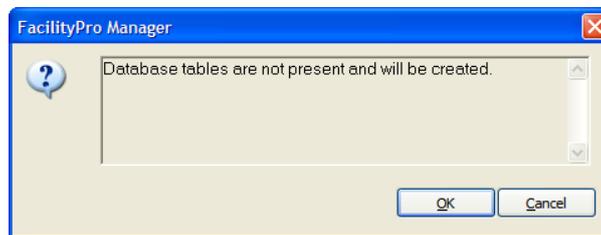


Figure 1-27

10. Click **OK**. You will see Figure 1-28.

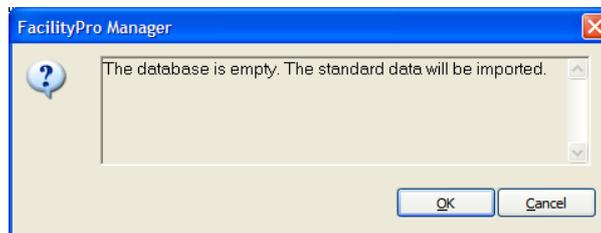


Figure 1-28

11. Click **OK**. You will see Figure 1-29.

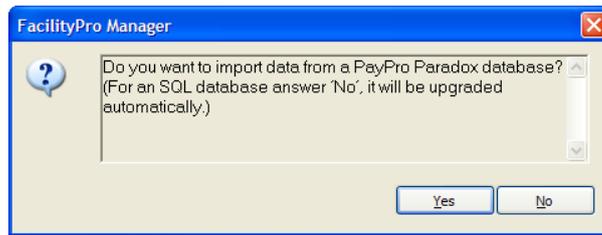


Figure 1-29

12. Click **No**. The database will be loaded with standard data, after which you will see the FacilityPro Manager login screen (Figure 1-30). Please continue with step 15.

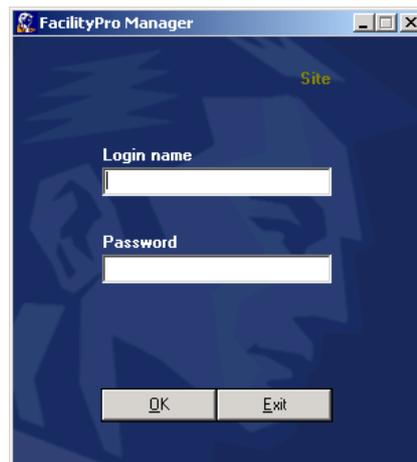


Figure 1-30 The FacilityPro Manager Login screen

13. Type login name and password if asked. You will see Figure 1-31.

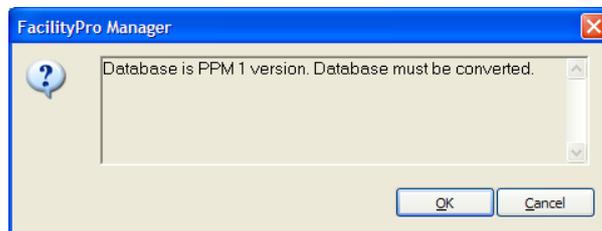


Figure 1-31

14. Click **OK**. If you see a message similar to the one in Figure 1-32, click **Yes**. You will see the FacilityPro Manager login screen (Figure 1-30).

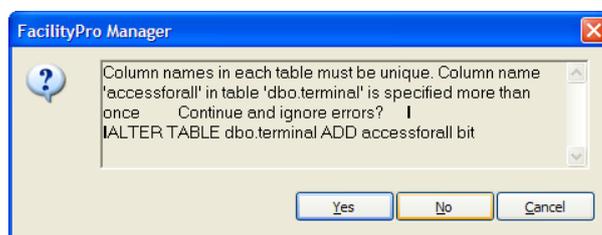


Figure 1-32

15. Type your Admin name and password. Note: the password field is 'case-sensitive', you must consider lower and upper case characters as different characters. After a fresh

install you can login using Admin = "customer" and Password = "customer". You are advised to create new logins and erase this standard one for obvious reasons.

16. Click **OK**. You will see the opening screen of FacilityPro Manager. Refer to your FacilityPro Manager user manual for further instructions on how to use the program.

1.7 Importing a PayPro Manager Paradox database

If you want to import an existing PayPro Manager Paradox database into FacilityPro Manager you must first start up FacilityPro Manager with an empty database (see §1.3 'Creating a new SQL database for FacilityPro Manager' and §1.6 'Defining the SQL database for FacilityPro Manager'). Then follow the instructions in this paragraph.

Note: You are advised to first run the maintenance program on the Paradox database using the Paradox version of the PayPro Manager software that you have presumably been using (see PayPro Manager user manual).

How to import a PayPro Manager Paradox database into FacilityPro Manager

1. Click on the Windows **Start**-button.
2. Choose **Programs**.
3. Choose **FacilityPro Manager**.
4. Choose **FacilityPro Manager**. You will see the FacilityPro Manager login screen (Figure 1-30).
5. Type your Admin name and password.
6. Click **OK**, once or twice to see the opening screen of FacilityPro Manager.
7. Choose menu **File**.
8. Choose **Import**.
9. Choose **Import site....** You will see the screen shown in Figure 1-33.

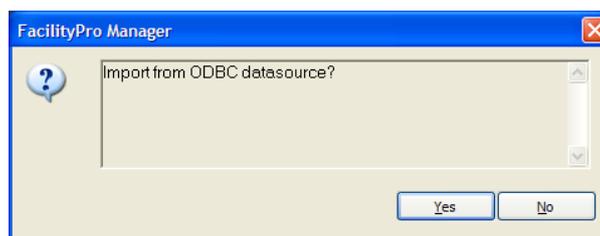


Figure 1-33

10. Click **No**. You will see a browse screen.
11. Browse to the directory where the Paradox database to import is stored and select any of the files with .db extension from that directory.
12. Click **Open**. You will see the screen shown in Figure 1-34. If you see the message "Lost connection with database" you need to install the BDE administrator (which comes with the install of Paradox versions of PayPro Manager) to be able to access the data in the Paradox database.

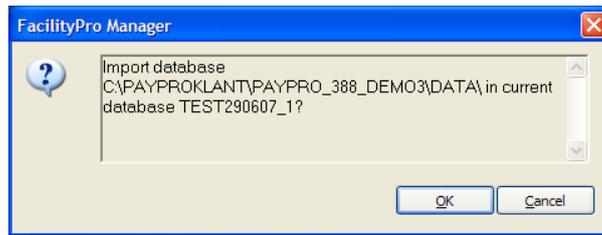


Figure 1-34

13. Click **OK**.
14. Each time you see a screen similar to the screen shown in Figure 1-35, click **Yes** if you want to import the data in the table mentioned and click **No** otherwise.

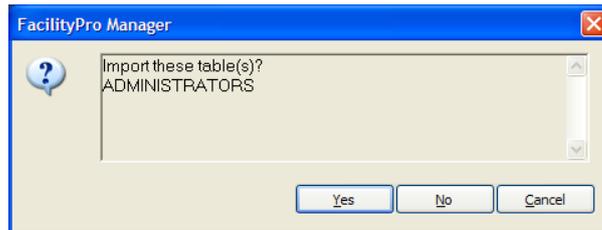


Figure 1-35

Each time you see a screen similar to the screen shown in Figure 1-36, click **Yes**.

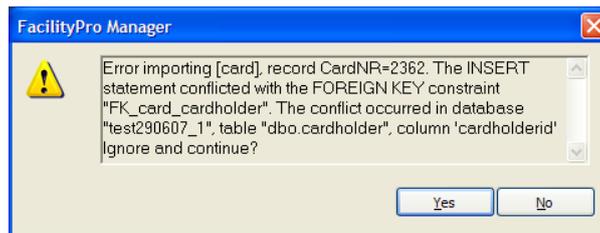


Figure 1-36

15. If a table is very large you will see a screen as in Figure 1-37. Click **Yes** if you want to import the data in the table mentioned and click **No** otherwise. Importing large Paradox tables might take considerable time.

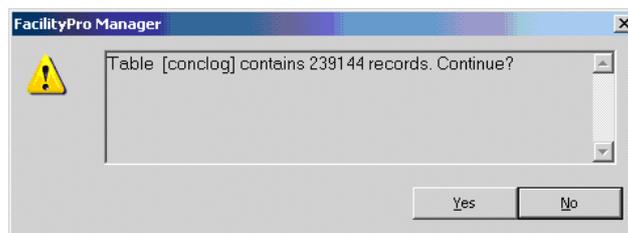


Figure 1-37

16. When the import is complete you will hear a double beep and see the message "The import has been completed". You have now completed the import.

1.8 Installing and starting up the collector

If the terminals on the site are to be configured and audited automatically at predefined times over the network, one (or more) work station(s) must be configured as collector. For each terminal that is to be visited by the collector the field 'Collector' must be filled in correctly.

How to install and start up the collector module on a work station:

Note: in order to be able to execute these instructions, the check box 'Collector' must have been left checked during installation of FacilityPro Manager on this work station (see Figure 1-21).

1. Ensure that there are terminals in the database which have this work station defined as their collector (in the field 'Collector', see FacilityPro Manager user manual). Otherwise, the collector service cannot be started.
2. Run the file <col_install.bat> which is in the directory C:\Program Files\Magna Carta\FacilityPro Manager\bin. This uninstalls the collector if it has already been installed, and then installs the collector (latest version). If you are running this file for the first time, you will receive an error message because the uninstall will fail. Just run the file again, and make sure you end with the message "Service installed successfully".
3. Run the file <col_start.bat> which is in the directory C:\Program Files\Magna Carta\FacilityPro Manager\bin. You will see a dos screen with the message "starting service". When the dos screen disappears, the collector service has been started.
4. In FacilityPro Manager you can fill in for this collector at what time and with which frequency you want the terminals that have a network connection and of which the field 'Collector' is filled in with the name of this work station, to be audited and configured. By default this is once a day at midnight.

The collector service can be stopped and started from the tab 'Collector' of the work stations data screen.

1.9 Installing and starting up the PIM server

PIM (Post Issuance Management)

The PIM module allows you to make changes to the FacilityPro cards on site without actually having the card in hand. These changes can be:

- 1) adding value to the card balance
- 2) changing the user group or cost account a card belongs to
- 3) adding value to the counter of a token on the card
- 4) unblocking a card that has previously been hotlisted and then blocked

The changes are stored in the FPM database and effected when a card is inserted at a terminal. The PIM and Autoload modules can not be implemented simultaneously.

You need to know the IP address of the PC where you will install the PIM server.

How to install and start up the PIM server:

1. Run the file <PIM_install.bat> which is in the directory C:\Program Files\Magna Carta\FacilityPro Manager\bin. This uninstalls the PIM server if it has already been installed, and then installs the PIM server (latest version). If you are running this file for the first time, you will receive an error message because the uninstall will fail. Just run the file again, and make sure you end with the message "Service installed successfully".
2. Run the file <PIM_start.bat> which is in the directory C:\Program Files\Magna Carta\FacilityPro Manager\bin. You will see a dos screen with the message "starting service". When the dos screen disappears, the PIM server has been started.
3. In FacilityPro Manager the field 'Card update (PIM)' of the site record should be checked. The IP address of the PIM server should be entered as the value of the parameter 'Server_IP' of the machine types of all the terminals on the site where one wants PIM to be implemented. Lastly, the authorisation levels for 'Card.card update (PIM)' and at least one of the functions 'Card.new balance', 'Card.change token values', 'Card.new tokens' and 'Card.hotlist' should have the value 'Available'. You are referred to the user manual of FacilityPro Manager for instructions.

1.10 Connecting a PC card reader

You might want to use a PC card reader on one or more of the work stations. A PC card reader can read and write cards. To read and write FacilityPro cards, you will install a PC card reader.

The correct card keys must be loaded into the PC card reader for it to work with FacilityPro cards. This is done by Magna Carta or a dealer authorized by Magna Carta to do so. The following PC card readers are supported:

- 1) Ominikey CardMan 5121 PCSC reader.
- 2) Ominikey CardMan 5321 PCSC reader.

Other PC card readers can be used, but are not supported and this manual does not explain how to install or use them:

- 1) Mifare Omnikey Serial reader for contactless Mifare cards.
- 2) PCSC (PC Smart Card) readers. There are a number of different PCSC readers, each of which can read and write different types of PC Smart Cards. If you want to use a PCSC reader, please check with your dealer whether FacilityPro Manager can work with your type of PCSC reader.
- 3) Mifare MC Serial reader for contactless Mifare cards.

How to connect a Ominikey CardMan 5121 or 5321 PCSC reader to a work station:

1. Run the file < CardMan512x_V1_1_0_37.exe> (or < CardMan5x21_V1_1_1_5.exe> for CardMan 5321).
2. Run the file <CardMan_Synchronous_API_V1_1_1_1.exe> (or < CardMan_Synchronous_API_V1_1_1_3.exe> if you used 1.1.1.5 in step 1).
3. Insert the USB connector into a USB port of the work station. On some XP systems installation of the driver for the Omnikey CardMan 5121 will be completely automatic. If so, continue with step 10. Otherwise Windows will open the Hardware Wizard and ask for the driver location.
4. Choose "No, not this time".
5. Click **Next**.
6. Choose "Install from a list or specific location".
7. Click **Next**.
8. Browse to <<CardMan512x PCSC driver V1.1.0.37>> (or << C:\Omnikey\CardMan5x21 PCSC driver V1.1.1.5>>) and click **Next**. The driver will be installed.
9. Click **Finish**.
10. Go to the directory <<CardMan_Synchronous_API_V1_1_1_1>> (or <<C:\Omnikey\CardMan_Synchronous_API_V1_1_1_3 >>) and run Setup.exe. Uncheck the option to install the SDK (software development kit).
11. Remove the reader from the USB port and then reconnect.

The card reader is now connected, but before you can use it, you will have to insert the correct data on the tab 'PC card reader' of the work station record. You will also have to use the action button **Read Cardkeys.ini** to provide FacilityPro Manager with the keys it needs to be able to initialise, read or write cards with a card reader. Instructions can be found in the user manual of FacilityPro Manager, and are also included below:

How to read the cardkeys into the FacilityPro database:

1. Choose menu **Configuration**.
2. Choose **Site options**.
3. Click on the tab 'Other'.
4. Click **Read Cardkeys.ini**.
5. Browse to the file with the cardkeys that you should have received on your cd with software or on a cd with the Omnikey CardMan PCSC card reader. There are different files for different types of cards, e.g. <mifare.ini> or <cardkeysmf.ini>.
6. Klik Open. (You do not receive any message, but the cardkeys are read).

How to insert the correct data in the work stations table:

1. Choose menu **Configuration**.
2. Choose **Work stations**.
3. Click on the tab 'CIS'.
4. Click in the check-box 'Enable CIS' to check it and activate the CIS function for your work station.
5. Click on the arrow next to the field 'Reader' and select 'PCSC'.
6. Click on the function button **Apply**.
7. Click on **OK**.

1.11 Help

If you need any explanation on how to use FacilityPro Manager you can find it in three ways:

- 1) In the FacilityPro Manager user manual.
- 2) By choosing **Help** from the menu **Help** of FacilityPro Manager. This will bring the FacilityPro Manager user manual on screen for you, through which you can navigate in the usual manner of windows help screens.
- 3) By pressing **<F1>** from any screen of FacilityPro Manager. The text of this user manual relevant to that screen will appear.

2 Other

2.1 Making a backup of your FacilityPro Manager database

2.1.1 SQL Server Management Studio Express

How to make a backup of your FacilityPro Manager database

1. Click on the Windows **Start**-button.
2. Choose **Programs**.
3. Choose **Microsoft SQL Server 2005** (or **Microsoft SQL Server**).
4. Choose **SQL Server Management Studio Express**. You will see the SQL Server Express Edition “Connect to Server” screen (Figure 1-1). Make a note of the Server name.
5. Click **Connect**. You will see the SQL Server Management Studio Express screen (Figure 1-2).
6. Double-click on **Databases**.
7. Right-click the database you want to backup.
8. Choose **Tasks**.
9. Choose **Backup....** You will see the ‘Backup Database’ screen (Figure 2-1).

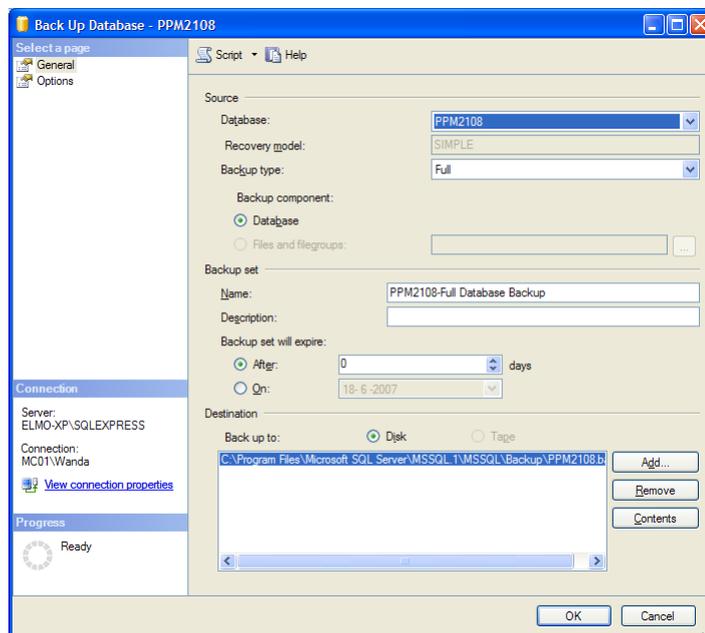


Figure 2-1

10. Click on **Add**. You will see the ‘Select backup destination’ screen (Figure 2-2).

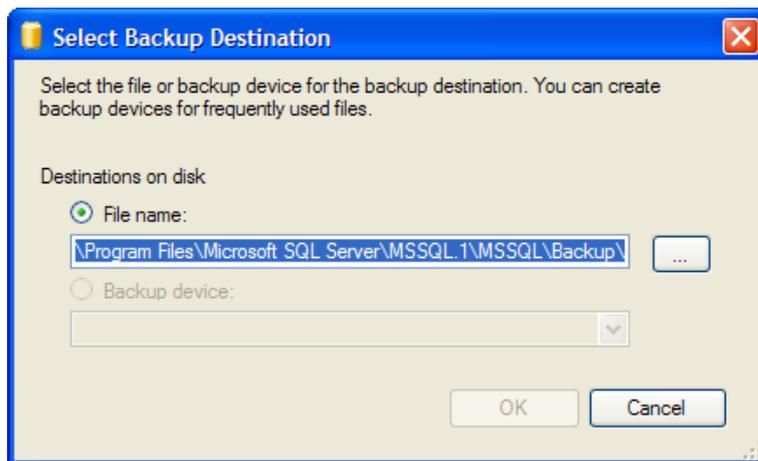


Figure 2-2

11. Type the name of the destination file, including the path name, for the backup. It should have an extension .bak. By default, the path C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup is used, and the name of the database is used as the name of the backup, followed by .bak.
12. Click on **OK**.
13. Select the page 'Options'.
14. Select the radio button 'Overwrite all existing backup sets'.
15. Click on **OK**. Wait for confirmation of a successful backup (Figure 2-3). The backup is in the file specified in step 11.

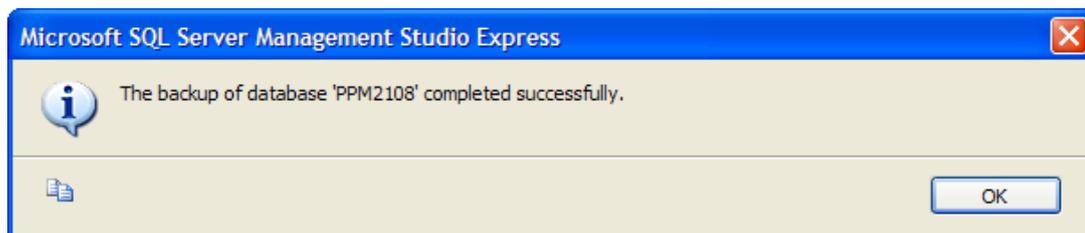


Figure 2-3

2.1.2 SQL Server Enterprise Manager

How to make a backup of your FacilityPro Manager database

1. On the SQL Server PC, click on the Windows **Start**-button.
2. Choose **All Programs**.
3. Choose **Microsoft SQL Server** (or **Microsoft SQL Server 2005**).
4. Choose **Enterprise Manager**. You will see the SQL Server Enterprise Manager screen (Figure 1-5).
5. Navigate to Microsoft SQL Servers – SQL Server Group – [Server name] – Databases and double-click to see a list of databases.
6. Right-click the database you want to backup.
7. Choose **All Tasks**.
8. Choose **Backup database....** You will see the SQL Server Backup screen (Figure 2-4).

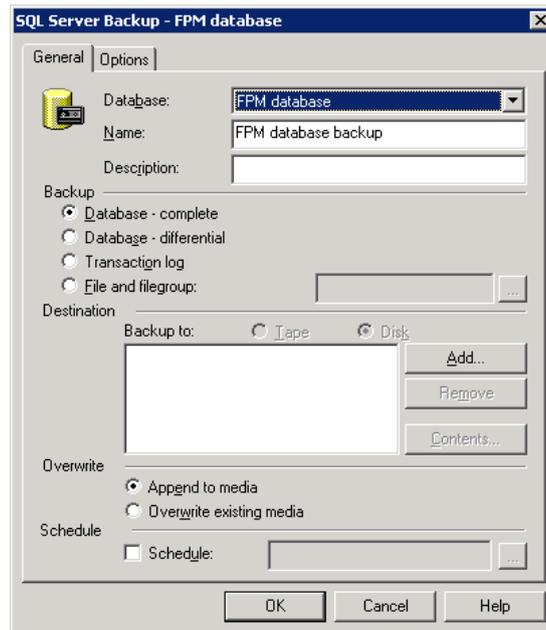


Figure 2-4

9. Click on **Add**. You will see the 'Select backup destination' screen (Figure 2-5).



Figure 2-5

10. Type the name of the destination file, including the path name, for the backup.
11. Click on **OK**.
12. Select the radio button 'Overwrite existing media'.
13. Click on **OK**. Wait for confirmation of a successful backup (Figure 2-6). The backup is in the file specified in step 10.

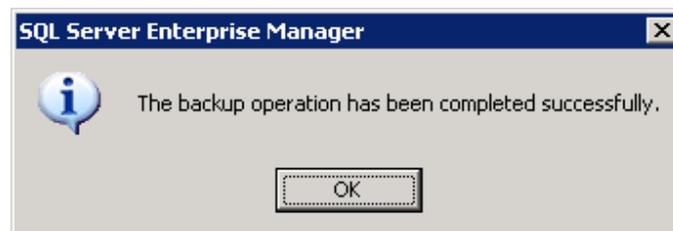


Figure 2-6