Nuance® Equitrac® Office and Express 5.7 Installation Guide

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Symbols Used In This Guide

- **Note**
  The accompanying text provides cross-reference links, tips, or general information that can add to your understanding of the topic.

- **Caution**
  The accompanying text provides key information about a step or action that might produce unexpected results if not followed precisely.

- **Warning**
  *Read the accompanying text carefully.* This text can help you avoid making errors that might negatively affect program behavior.
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Introduction

Nuance® Equitrac® Office and Nuance® Equitrac® Express are server-based print management and cost recovery solutions which measure, monitor, and manage document output on the network. By regulating devices on the network, and local desktop printers, Equitrac (Office/Express) tracks and controls photocopies, print jobs, scan jobs, and faxes with minimal administration.

There are several different installation methods available to get Equitrac (Office/Express) up and running. Read this chapter before beginning the installation to confirm the best option for your organization, the system requirements, and the tasks to complete before installing the software.
Chapter 1: Introduction

Installation Overview

Equitrac Office and Equitrac Express provide installation wizards to guide you through the server, client, and optional component installs.

There are several different types of deployment. Depending on the size of the Equitrac (Office/Express) deployment and your network requirements, you can choose to install all server components on a single machine or you can deploy across multiple servers. Follow the instructions indicated to install the components in the correct order.

<table>
<thead>
<tr>
<th>Deployment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local</td>
<td>• All Equitrac (Office/Express) server components are installed on a single machine. See Local Installation Workflow on page 23.</td>
</tr>
<tr>
<td>Remote</td>
<td>• Equitrac (Office/Express) server components are deployed across multiple networked machines. See Remote Installation Workflow on page 31.</td>
</tr>
<tr>
<td>Upgrade</td>
<td>• An existing Equitrac (Office/Express) installation currently in place. See Upgrade Equitrac Office/Express on page 88.</td>
</tr>
<tr>
<td>Cluster</td>
<td>• Equitrac (Office/Express) components are distributed in a Windows Server 2008/2008 R2 cluster environment. See the Cluster Deployment Guide.</td>
</tr>
<tr>
<td>High Availability Printing</td>
<td>• Equitrac (Office/Express) print servers are distributed in a Windows High Availability cluster environment. See the Print Submission High Availability for DRE Setup Guide.</td>
</tr>
</tbody>
</table>

NOTE: Refer to the ReleaseNotes.pdf on the Equitrac Product Download site for potential important installation or upgrade information not contained in this document.

Preparing the Network and Database

Although the Equitrac Office and Express installation process is quite simple, you must gather network details and prepare the database prior to the install. It is recommended that the SQL Server or Oracle databases be installed prior to installing Equitrac Office or Express, otherwise Equitrac Office or Express will not perform the required database setup and will quit the install routine without installing any components.

Prior to installation, do the following:

- Plan the system roles.
- Gather all required licenses.
- Determine the installation destination for each of the Equitrac Office and Express components. If you deploy on a single machine, the install is referred to as "local". See Local Installation Workflow on page 23. If you deploy across multiple servers, the install is considered "remote". See Remote Installation Workflow on page 31.
- Ensure that you have Administrator privileges on all machines that must be installed and configured on the network.
- Verify that your network configuration is prepared to handle the communication between Equitrac Office or Express components, including document routing to the network printers.
Chapter 1: Introduction

- Install and configure TCP/IP protocol on the intended print server machine and on network printers.
- Install and configure the SQL Server or Oracle databases, otherwise the required database setup will not be performed and the installation will quit without installing any components.

The database can be configured to use Windows Authentication Mode or mixed mode authentication (Windows Authentication and SQL Server Authentication). Use Windows Authentication Mode where possible, as it provides secure validation and encryption of passwords.

- If installing Web Client, ensure the appropriate Internet Information Services (IIS) version is installed. See Installing the Web Client on page 48.
- If installing DCE in a high availability cluster setup, install the Couchbase server included in the Equitrac Installer download zip file. Couchbase is a NoSQL document database used to distribute the DCE cache. When installing Couchbase on Server 2008 or 2008 R2, Microsoft, ensure that .NET Framework 4.5 is installed as it is required for DCE. Refer to the Print Release High Availability Setup Guide for complete Couchbase installation and configuration for DCE High Availability (HA) deployment.
- When setting up a high availability (HA) environment with Couchbase for distributed caching, a Network Load Balancer (NLB) should be set up in front of DCE to distribute the workload across all available DCE servers in your environment. The NLB is not needed when using Windows failover clustering or Hyper-V clustering HA solution.

Visual Studio 2015 Requirements

Equitrac 5.7 Server and Client installers use Windows 10 Universal CRT for Visual Studio 2015. Universal CRT is a Windows OS component that enables C Run-time Library (CRT) functionality on Windows operating systems and must be installed prior to installing Equitrac Office and Express on a non-Windows 10 OS (such as Windows 7, 8.0, 8.1, Server 2008, 2008 R2, 2012, 2012 R2 and 2016).

The installer checks if the Universal CRT is installed, and if it is not found, an error message pops up, and the installation stops. The error message displays the URL to where the Universal CRT can be downloaded from.

Go to https://support.microsoft.com/en-us/kb/2999226 and download the appropriate Visual Studio 2015 VCRedist package for your operating system.
Equitrac Office and Express Components

Equitrac Office and Equitrac Express are comprised of both core and optional components. Core components are essential and must be installed on a Windows Server system. You can purchase optional components to customize the functionality to suit your needs.

Core Server Components

Every Equitrac (Office/Express) installation relies upon a set of core components to provide basic accounting functionality. Core components can reside on a single server or be deployed across multiple servers as outlined in Remote Installation Workflow on page 31.

<table>
<thead>
<tr>
<th>Core Component</th>
<th>Description</th>
</tr>
</thead>
</table>
| Core Accounting Server (CAS) | • verifies users, calculates print charges, and assigns charges to an appropriate user or group account  
• contains an accounting database where all printer, user, department, billing code, transaction, and balance information is stored  
• provides primary and secondary pricing structures to track different costs/billing scenarios  
• provides dual pricing capabilities |
| Document Routing Engine (DRE) | • routes network print jobs to the appropriate device  
• communicates with attached printers to determine size and attributes of each print job; passes the information to CAS  
• fully integrated with the Windows printing subsystem  
• enables the Port Monitor to receive and route print jobs to parallel or network-connected printers |
| Device Control Engine (DCE) | • enables document flow from client workstations to output devices such as printers, digital copiers, scanners, and plotters  
• provides transaction tracking at the device level  
• communicates via different interfaces to control and management copy, fax, and hardware devices such as PageCounter  
• provides the ability to optionally configure caching of login credentials, enabling users to log in on embedded clients and PageCounters even when network connection to CAS is lost |
| Scan Processing Engine (SPE) | • optional core component required to use the Equitrac (Office/Express) scanning features  
• coordinates all scan features once authentication has taken place |
| Device Web Server (DWS) | • manages and controls embedded applications on web-based MFPs  
• device login information is sent to DWS, which communicates with DCE, and then DCE contacts CAS to verify the user account |
| Device Control Server (DCS) | • manages and controls Nuance card readers  
• DCS is also required to communicate with DWS in order to work with some web-based MFPs |
| Device Monitoring Engine (DME) | • tracks device status to proactively identify maintenance or replacement needs  
• provides status information to the reporting engine  
• can redirect jobs based on device status |
Optional Components

Optional components extend the functionality of Equitrac Office or Equitrac Express, and may require additional licensing. Some optional components must be installed on a Windows Server; others are client-based and require a separate workstation. For details of these components, refer to the Equitrac Office and Express Administration Guide.

<table>
<thead>
<tr>
<th>Optional Component</th>
<th>Description</th>
</tr>
</thead>
</table>
| Workstation Client         | • set of features that provide job information and billing prompts to the user submitting a print request<br>• Client Billing<br>• Desktop Printing<br>• Follow-You Printing<br>• Cost Preview<br>• Prompt for Login<br>  
  • the Workstation Client includes an optional module to enable accurate tracking of ports configured with the standard TCP/IP port monitor (See Workstation Client Installation on page 59)<br>• the workstation client includes Print Assistant functionality for Equitrac Express |
| Web Client                 | • allows users and system administrators to perform Equitrac-related tasks using a web browser<br>  
  • Web Client consists of Web System Manager for managing Equitrac accounts with a base set of System Manager functions, the Scan Client for managing and monitoring scan jobs for an Equitrac user, User Dashboard for Equitrac users to view and manage their personal account, Web Reports to display reports in table, pie, and graph formats, and Web Deposit (an Equitrac Express feature) for accepting funds into an Equitrac system through a web-based user interface. |
| Release Station            | • acts as single point of release to control print jobs from a secure print queue (also called Secure Printing)<br>• installation also loads a configuration utility to manage secure printing |
| Deposit Station            | • allows users to transfer funds from a payment card to an existing Equitrac Express printing account |
| Campus Card                | • enables users to pay for printing and copying with a third-party account |
| Print Assistant            | • configure a pop-up window on user PCs to preview print job attributes, including cost, number of pages and more<br>• information is collected from devices automatically over the network |
| Interface Module           | • supports control terminal devices (such as PageCounter, PageControl Touch) used to release documents and control copier and scanner access<br>• supports controller interfaces to enable communication with multi-function devices |
| Rules & Routing            | • create rules to determine the handling of print jobs that meet specific criteria<br>• rules can accept, hold, deny or re-route print jobs based on rule criteria |
| Mobile Printing            | • allows mobile devices, such as smart phones, tablets, and laptops, to print to a physical device without being connected to the local network |
Additional Licensed Features

You can further extend the Equitrac (Office/Express) functionality by licensing these additional features:

<table>
<thead>
<tr>
<th>Optional Component</th>
<th>Description</th>
</tr>
</thead>
</table>
| Smart Card               | • enables users to authenticate through a smart card reader connected directly to control terminals  
                          Note: The Smart Card solution is only for 64-bit systems.                                                                                           |
| Data Source              | • enables a third-party print tracking system to upload transaction data to the Equitrac Office or Express Core Accounting Server                                                                                  |
| Uplink                   | • enables central coordination of print transaction and accounting data from multiple sites (i.e. remote campus locations)  
                          • uploads transaction and account data from remote instances of CAS to the main accounting server                                                                 |
| UNIX Print Server        | • controls and tracks printers connected through a UNIX printer server  
                          • requires a connection to the CAS service running on a Windows Server  
                          Note: Does not support the Equitrac (Office/Express) Workstation Client Billing Popup features.                                                                 |
| Server Clustering        | • enables printing and tracking in Windows cluster environments  
                          For more information, see the Cluster Deployment Guide.                                                                                             |
| Additional Print Server licenses | • enables tracking and/or monitoring for an additional 100 printers                                                                                                                                 |
| Mobile Printer           | • allows mobile devices to print to a physical device without being connected to the local network  
                          • one license is required for each physical printer used for mobile printing                                                                        |
Equitrac Office and Express Administrative Applications

Equitrac (Office/Express) Administrative Applications provide the tools to configure and manage network printing and tracking. When deploying Equitrac Office or Express, you must install the Administrative Applications on each machine that will host CAS.

When installing CAS, the installation wizard also selects all Administrative Applications, forcing you to install these tools on the CAS server system. If you want to manage the system remotely, simply install the Administrative Applications on another machine within the deployment. If you correctly identify the master CAS server, and have Admin Access Permissions when you launch the tools, you can easily manage the system remotely. For information on setting Access Permissions, see the *Equitrac Office and Express Administration Guide*. Refer to the *Equitrac Office and Express Administration Guide* for detailed information on these tools.

### Admin Tool

<table>
<thead>
<tr>
<th>Admin Tool</th>
<th>Primary Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Manager</td>
<td>• manage system settings and configuration, including licensing</td>
</tr>
<tr>
<td>Accounts Manager</td>
<td>• set up accounts and maintain account details</td>
</tr>
<tr>
<td>Reports Manager</td>
<td>• run standard and customized reports</td>
</tr>
<tr>
<td>Department Manager</td>
<td>• manage accounts within a designated department only</td>
</tr>
<tr>
<td>Device Management Console</td>
<td>• track device status to identify faults before they become problems</td>
</tr>
</tbody>
</table>

**Partner Integrated Connectors**

Equitrac (Office/Express) also comes with several partner integrated connectors for select MFPs. All connectors require an External Data Connector license. Connector files and instructions are included on the Equitrac (Office/Express) software DVDs.

The following table lists and describes the available connectors.

<table>
<thead>
<tr>
<th>Connector</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RightFax</td>
<td>• a command line import utility to receive RightFax print transaction data to send to CAS</td>
</tr>
<tr>
<td>KIP</td>
<td>• a command line import utility to import KIP plotter print transaction data to send to CAS</td>
</tr>
<tr>
<td>SAP</td>
<td>• a command line import utility to import SAP records into CAS</td>
</tr>
<tr>
<td>eCopy version 4.3.5</td>
<td>• Equitrac passes users' login ID and email address to eCopy. Scan transactions are recorded by Equitrac</td>
</tr>
<tr>
<td>and version 5</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** For information on system requirements for these connectors, consult your connector manufacturer’s applicable manuals.
Chapter 1: Introduction

Supported Card Hardware

For print vending, Equitrac (Office/Express) supports the following card hardware. All supported vending hardware connects to the Release Workstation via a serial port. If you need to connect to a vending device not shown in the table below, contact Equitrac support for details.

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Accepted card reader models</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Control Technologies Inc.</td>
<td>ACT-355</td>
</tr>
<tr>
<td>B.E.A.R</td>
<td>DCS-2000</td>
</tr>
<tr>
<td>Cartadis</td>
<td>TC11, TCRS</td>
</tr>
<tr>
<td>Equitrac</td>
<td>DebitLog</td>
</tr>
<tr>
<td>Infineer or Absec</td>
<td>6202/6208/6406/6502</td>
</tr>
<tr>
<td>Intercard</td>
<td>AS 3880</td>
</tr>
<tr>
<td>Jamex</td>
<td>7114 (James Payment Controller)</td>
</tr>
<tr>
<td>Schlumberg-DANYL</td>
<td>D/AUX</td>
</tr>
<tr>
<td>Xafax</td>
<td>AS 6200</td>
</tr>
<tr>
<td>XCP</td>
<td>5870 (Unit or Value cards), 5871/5571/5812, 5512 (Unit or Value cards)</td>
</tr>
</tbody>
</table>

Virtual Server Support

Equitrac Office and Equitrac Express are fully supported on all hardware platforms compatible with Windows Server 2008, 2008 R2, 2012, 2012 R2 and 2016. The use of Equitrac (Office/Express) under virtual environments such as Virtual Server or VMWare is generally supported and is expected to work correctly, as long as such environments fully support the server operating system, as Equitrac (Office/Express) does not make any assumptions about the underlying hardware platform. Care must be taken when configuring the virtual environment to ensure adequate CPU and memory resources are available to the systems running the Equitrac solution. If adequate resources are not defined or available there can be an impact on performance. Consult your account representative for details.

Account Synchronization Support

Equitrac (Office/Express) supports account synchronization with Active Directory (AD), Active Directory Lightweight Directory Services (AD LDS) and Lightweight Directory Access Protocol (LDAP).

AD LDS synchronization is supported under certain conditions. Refer to Microsoft TechNote entitled "Synchronize with Active Directory Domain Services" (http://technet.microsoft.com/en-us/library/cc794836(WS.10).aspx) for further information.
**Virus Scanning Setup**

To ensure successful communication between Equitrac (Office/Express) services, there are certain folders and file extensions that you should exclude from virus scanning.

**Server Folders to Exclude**

It is recommended that the following server folders are excluded from virus scanning:

- The folder and sub-folders containing Equitrac Office or Express
- The SPOOL folder that the Windows spooler service is configured to use. The default location for all printer spool files is `%SystemRoot%\System32\Spool\Printers`.
- `C:\Users\<userid>\AppData\Local\Temp`
- `C:\Users\<userid>\AppData\Local\Equitrac`

Where `<userid>` is the account under which the Equitrac services are running.

The installation path depends on the location where Equitrac was installed on the server. If Equitrac services are installed on another drive letter or at another location, substitute that drive letter and path in the paths listed above.

On a cluster, also exclude cache folders on any shared disks used by Equitrac (Office/Express) components, including the spool folders used by print spooler shared disks.

**File Extensions to Exclude**

Exclude the following file extensions from virus scanning:

- database files (mdf, ldf)
- trace log files (log)

**DCE Caching Requirements**

**Distributed Cache for DCE**

The Equitrac Express and Office 64-bit installers have been wrapped in a bootstrapper executable in order to install a Distributed Cache service when DCE is selected. The Distributed Cache service is not installed on your system if DCE is not installed. The Client installers and the 32-bit Administrative installers do not use distributed cache, and the service is not part of these installers.

When DCE is selected during Standard installation, there is the option to include DCE in a high availability (HA) setup or not. If DCE is not selected as part of an HA setup, then a Distributed Cache service for DCE is automatically installed on the local DCE as part of the Equitrac installation process.

The Distributed Cache service is automatically installed via the Simple install, but the option to select DCE as part of a HA setup is not available, and a Distributed Cache is service installed locally.
Couchbase Server for DCE High Availability

If DCE is part of a high availability (HA) setup, then the Couchbase server is required when installing DCE. Couchbase is a NoSQL document database used to distribute the DCE cache and must be installed and configured in your solution before installing DCE. The Couchbase Server Community Edition installation file is included in the Equitrac Installer zip file. Additional Couchbase versions can be downloaded from https://www.couchbase.com/downloads, where you can select the version that best suits your deployment and server platform.

When installing Couchbase, you set the required IP/hostname for the server nodes, data bucket names and Admin credentials. When setting up Couchbase, the administrator needs to configure the parameters required for the Couchbase fields that the EQ DCE installer prompts for during installation.

When installing DCE for HA, the Couchbase server connection information, such as the IP/hostname of the virtual server, the connection string to the Couchbase database, and the administrator's credentials on the Couchbase server node are required. The credentials are needed so DCE can create the indexes on the server for non HA setup. Indexes must be manually created on the Couchbase cluster nodes in HA installations. The Couchbase node and bucket is configured on each DCE service start-up in order to setup the node, bucket and add the indexes. If the node and bucket are already configured then they will not be modified.

Any changes to the Couchbase server connection or administrator credentials can be done after installation by updating the Equitrac (Office/Express) installed program. Changes can also be made by modifying the connection string environment variable and credential registry keys and restarting the DCE service. Changes to the Couchbase nodes or data buckets can be made through the Couchbase console website.

When setting up an HA environment with Couchbase, a Network Load Balancer (NLB) should be set up in front of DCE to distribute the workload across all available DCE servers in your environment. The NLB is not needed when using Windows failover clustering or Hyper-V clustering solution for HA.

If installing Couchbase on Server 2008 or 2008 R2, Microsoft, ensure that.NET Framework 4.5 is installed on the server as it is required for DCE.

Couchbase is a standalone server, and is not uninstalled along with Equitrac Office or Express.

Ports 8091, 8093, 9101-9105 and 9111 are used by Couchbase. If these ports are in use by another process then the DCE and Couchbase will not function correctly. See the Port Communications list in the Equitrac Office and Express Planning Guide for the list of Equitrac component related ports.

DCE HA only applies to HP OXPd, Lexmark and Ricoh, and may not work with other Equitrac supported embedded clients. Refer to the Print Release High Availability Setup Guide for complete Couchbase installation and configuration for DCE HA deployment.
System Requirements

Before installing Equitrac Office or Express, ensure that the client and server machines you plan to use meet the minimum operating requirements outlined below. To maximize performance in high-volume print environments, additional disk space, memory, and a faster processor is required.

32-bit server components are not supported in Equitrac (Office/Express) version 5.7. CAS, DRE, DCE, DME, SPE and Web Client are only available in 64-bit. Administrative applications, Auxiliary applications and Workstation Client are available in both 32-bit and 64-bit installers.

A direct upgrade from an earlier version of Equitrac running 32-bit server components to version 5.7 running 64-bit cannot be done. If you currently have any 32-bit server components installed on a 64-bit system, you must remove them and then re-install the 64-bit components. See Planning an Upgrade on page 88.

If installing the Web Client, review the Prerequisites on page 48 for details on configuring IIS with ASP.NET for the various Windows Servers.

Server and Client Requirements

<table>
<thead>
<tr>
<th>Components</th>
<th>Supported Platforms</th>
<th>Minimum Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Microsoft SQL Server 2008/2008 Express SP3 (or higher)</td>
<td>Processor: 2 GHz or greater</td>
</tr>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Microsoft SQL Server 2008 R2/2008 R2 Express SP1</td>
<td>Memory: 2 GB or greater</td>
</tr>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Microsoft SQL Server 2012/2012 Express</td>
<td>Hard disk: 1 GB or greater (SQL Server 2008/2008 R2 and Oracle)</td>
</tr>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Microsoft SQL Server 2014/2014 Express</td>
<td>Hard disk: 2.2 GB or greater (SQL Server 2012 or higher)</td>
</tr>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Microsoft SQL Server 2016/2016 Express</td>
<td></td>
</tr>
<tr>
<td>Core Accounting Server (CAS) – Database</td>
<td>Oracle*11g R2, 12c</td>
<td></td>
</tr>
<tr>
<td>Device Control Engine (DCE) – Non HA Setup</td>
<td>SharePoint Server 2007 SP3 (or higher), 2010 and 2013</td>
<td>Memory: 2 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – Non HA Setup</td>
<td>RightFax Server 9.4 and higher</td>
<td>Hard disk: 1 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – HA Setup with Couchbase on DCE Node</td>
<td>SharePoint Server 2007 SP3 (or higher), 2010 and 2013</td>
<td>Memory: 6 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – HA Setup with Couchbase on DCE Node</td>
<td>RightFax Server 9.4 and higher</td>
<td>Hard disk: 2 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – HA Setup with Couchbase on Separate Node</td>
<td>Windows Server 2012, 2012 R2, 2016 Hyper-V cluster</td>
<td>Memory: 6 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – HA Setup with Couchbase on Separate Node</td>
<td></td>
<td>Hard disk: 2 GB or greater</td>
</tr>
<tr>
<td>Couchbase Server – NoSQL Database for DCE Caching</td>
<td>Couchbase Enterprise Edition 4.5</td>
<td>Processor: 4 x 2 GHz or greater</td>
</tr>
<tr>
<td>Couchbase Server – NoSQL Database for DCE Caching</td>
<td>Couchbase Community Edition 4.1</td>
<td>Memory: 4 GB</td>
</tr>
</tbody>
</table>
## Components

<table>
<thead>
<tr>
<th>Components</th>
<th>Supported Platforms</th>
<th>Minimum Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Routing Engine (DRE) Print Server</td>
<td>• Windows Server 2008, 2008 R2, 2012, 2012 R2, 2016 (x64)</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td>–with Rules and Routing or Secure Document Release</td>
<td>• SUSE Linux SLES 11 SP3 for Novell OES 2015 (x64)</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td></td>
<td>• SUSE Linux SLES 11 SP4 for Novell OES 2015 SP1 (x64)</td>
<td>• Hard disk: 1 GB or greater + allocation for print jobs</td>
</tr>
<tr>
<td></td>
<td>• Red Hat Enterprise 6.5, 7.0 and 7.2 (x64)</td>
<td></td>
</tr>
<tr>
<td>Device Web Server (DWS) Device Control Server (DCS)</td>
<td>• Windows Server 2008, 2008 R2, 2012 R2, 2016 (x64)</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td></td>
<td>• Microsoft ASP.NET 4.5 for DCS</td>
<td>• Memory: 2 GB or greater + 2 GB dedicated to DWS</td>
</tr>
<tr>
<td></td>
<td>• Processor: 2 GHz or greater</td>
<td>• Hard disk: 1 GB or greater</td>
</tr>
<tr>
<td>Core Accounting Server (CAS) Device Monitoring Engine (DME) – Cluster Server</td>
<td>• Windows Server 2008, 2008 R2, 2012 R2 failover cluster</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2012, 2012 R2, 2016 Hyper-V cluster</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td>Device Control Engine (DCE) – Cluster Server (Couchbase on DCE Node)</td>
<td>• Windows Server 2008, 2008 R2, 2012 R2 failover cluster</td>
<td>• Hard disk: 1 GB or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2012, 2012 R2, 2016 Hyper-V cluster</td>
<td></td>
</tr>
<tr>
<td>Document Routing Engine (DRE) Print Server – Cluster Server</td>
<td>• Windows Server 2008, 2008 R2 failover cluster</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2012, 2012 R2, 2016 Hyper-V cluster</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Hard disk: 1 GB or greater + allocation for print jobs</td>
</tr>
<tr>
<td>System Manager</td>
<td>• Windows Server 2008 (x86, x64)</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td>Accounts Manager</td>
<td>• Windows Server 2008 R2, 2012, 2012 R2, 2016(64)</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td>Department Manager</td>
<td>• Windows 7 Professional/Enterprise/Ultimate (x86, x64)</td>
<td>• Hard disk: 50 MB or greater</td>
</tr>
<tr>
<td>Reports Manager</td>
<td>• Windows 8 Professional/Enterprise (x86, x64)</td>
<td></td>
</tr>
<tr>
<td>Release Station</td>
<td>• Windows 8.1 Professional/Enterprise (x86, x64)</td>
<td></td>
</tr>
<tr>
<td>Device Monitoring Console</td>
<td>• Windows 10 (x86, x64)</td>
<td></td>
</tr>
<tr>
<td>Workstation Client Print Assistant (Equitrac Express feature)</td>
<td>• Windows 7 Professional/Enterprise/Ultimate (x86, x64)</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows 8 Professional/Enterprise (x86, x64)</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows 8.1 Professional/Enterprise (x86, x64)</td>
<td>• Hard disk: 50 MB or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows 10 (x86, x64)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Citrix/Terminal Server</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mac OS 10.8.5 to 10.12.1</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Microsoft .NET Framework 4.5 must be installed on Windows 8, 8.1 and 10 prior to installing the Windows Client.
Web Client Requirements

<table>
<thead>
<tr>
<th>Component</th>
<th>Supported Platforms</th>
<th>Minimum Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Requirements</td>
<td>• Windows Server 2008 (x64 with IIS 7.0 and .NET 4.5)</td>
<td>• Processor: 2 GHz or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2008 R2 (x64 with IIS 7.5 and .NET 4.5)</td>
<td>• Memory: 2 GB or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2012/2012 R2 (x64 with IIS 8.0 and .NET 4.5)</td>
<td>• Hard disk: 1 GB or greater</td>
</tr>
<tr>
<td></td>
<td>• Windows Server 2016 (x64 with IIS 10.0 and .NET 4.6)</td>
<td>• Import an SSL certificate and use the HTTPS protocol (recommended)</td>
</tr>
<tr>
<td></td>
<td>• x86 refers to 32-bit architecture; x64 refers to 64-bit architecture (IA64 chip set is not supported)</td>
<td></td>
</tr>
<tr>
<td>Supported Web Browsers</td>
<td>• Latest version of Google Chrome</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Latest version of Mozilla Firefox</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Internet Explorer 11</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Microsoft Edge (for Windows 10)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mac Safari</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Supported browsers must have JavaScript and cookies enabled. In Internet Explorer, the Web Client root URL must be added to the Trusted Sites list</td>
<td></td>
</tr>
<tr>
<td>Additional Requirements for Web Deposit (Equitrac Express feature)</td>
<td>• Microsoft SQL Server 2008/2008 Express SP3 (or higher)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Microsoft SQL Server 2008 R2/2008 R2 Express SP1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Microsoft SQL Server 2012/2012 Express</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Microsoft SQL Server 2014/2014 Express</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Microsoft SQL Server 2016/2016 Express</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Equitrac External Data Connector license for each server offering Web Deposit services</td>
<td></td>
</tr>
</tbody>
</table>

Other System Considerations:

- For all software platforms, ensure that the latest service packs are applied.
- High printing volumes and/or large installations may require substantially higher performance hardware.
- Users/Site Network Administrators are responsible for securing Microsoft® Client Access Licenses as required.
- x86 refers to 32-bit architecture; x64 refers to 64-bit architecture (IA64 chip set is not supported).
- Tracking Direct IP Printing via DRC is not supported on Citrix®/Terminal Server.
- Windows® Server 2008 Server Core, 2012 Server Core and 2016 Server Core are not supported.
- The default communication between the Client web browser and the IIS server is unencrypted, therefore, Equitrac strongly recommends implementing Secure Socket Layer (SSL) and Transport Layer Security (TLS) on the IIS server to ensure that all communication between client web browser and the IIS server is encrypted and secure. Purchase an SSL Certificate from a trusted Certificate Authority (CA), and install it on the IIS server. The CA can be a locally implemented Microsoft® Enterprise CA or a third party CA. Refer to your certificate provider’s documentation for complete installation and deployment.
- LPR and CUPS are supported on Red Hat print servers.

**NOTE:** The system operating requirements are updated regularly. Please refer to the latest Equitrac (Office/Express) Technical Specifications document available from the Equitrac Partner Portal for the most up-to-date information.
Additional Documentation

To learn more about the advanced features and functionality of Equitrac Office or Express, refer to the table below for an outline of the product guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>When to refer to this guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Guide</td>
<td>Use this guide to evaluate and plan an Equitrac Office or Express deployment on your network.</td>
</tr>
<tr>
<td>Administration Guide</td>
<td>After installing Equitrac Office or Express, use this guide to configure the product for use in your organization.</td>
</tr>
<tr>
<td>Cluster Deployment</td>
<td>If you are deploying Equitrac Office or Express in a Server 2008/2008 R2 cluster environment, use this guide to plan the installation.</td>
</tr>
<tr>
<td>Print Submission High Availability for DRE</td>
<td>Use this guide if you are deploying Equitrac Office or Express in a high availability print server setup using Network Load Balancing or Hyper-V clustering.</td>
</tr>
<tr>
<td>Print Release High Availability</td>
<td>Use this guide if you are deploying Equitrac Office or Express in a high availability print release setup using Network Load Balancing and Couchbase NoSQL database.</td>
</tr>
<tr>
<td>Embedded Guides Available for Various Manufacturers</td>
<td>Use these manufacturer specific guides for Equitrac embedded clients.</td>
</tr>
<tr>
<td>Print Server Module Guides:</td>
<td>If your deployment utilizes a UNIX print server, use these guides to configure the print server after the installation is completed.</td>
</tr>
<tr>
<td>• Linux iPrint</td>
<td></td>
</tr>
<tr>
<td>• Red Hat Enterprise</td>
<td></td>
</tr>
<tr>
<td>• Web Deposit Guide (Equitrac Express Feature)</td>
<td>Use this guide to plan and configure the Web Deposit application in the Equitrac Web Client.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Help</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Client Help</td>
<td>Online help found within the Web Client application used to plan and configure Equitrac Office or Express.</td>
</tr>
<tr>
<td>Release Station Help</td>
<td>Instructions and reference information about using Release Station to release jobs for print.</td>
</tr>
</tbody>
</table>
Nuance Combined Client

Nuance offers a Combined Client component that integrates Equitrac print and AutoStore scan functionality on specific embedded client-configured MFPs. The Combined Client should be used if you plan to use the embedded client in both Equitrac and AutoStore environments.

The Nuance Combined Client is configured through the Nuance Device Registration Service (DRS). DRS is a single interface used to manage applications, register, unregister and update devices or groups of devices, and to perform other administrative tasks, such as:

- Manage applications, device groups, and devices in a central location
- Manage updates to multiple devices through a single interface
- Implement and configure device authentication methods

When a user logs into a Combined Client enabled device, the client connects to the embedded web server hosted by Equitrac or AutoStore. The embedded web server uses the device IP address to retrieve device configuration data from DRS. This data determines how the Combined Client behaves and how it contacts the Equitrac or AutoStore servers. The device properties determine the print and scan functions that are available to users.

**NOTE:** Equitrac and AutoStore can both be installed and run on the same server, however, depending on your environment and current server set-up, they may need to be installed on separate servers.

Prerequisites: Before Setting up Combined Client

Before setting up and registering a Combined Client in DRS, you must first configure the Equitrac embedded device in System Manager. Refer to the specific embedded device documentation for setup and configuration options.

To configure the Combined Client for Equitrac and Autostore, do the following:

1. Install and configure Equitrac Office or Express.
2. Configure the embedded client in System Manager.
3. Obtain the DRS software and Installation Guide from the Equitrac Partner Portal.
4. Install and configure DRS as per the DRS Installation Guide.
5. Once installed, open DRS and click the Help button, and then navigate to the "Device and application setup" section for general setup and configuration instructions.

Refer to the specific Nuance Combined Client sections within DRS Help for client setup and configuration instructions.

**NOTE:** DRS is not supported on an Oracle database.
Server Installation

This chapter provides the steps required to install all Equitrac Office or Express components on either a single machine, or across multiple machines. A “Local” installation places all Equitrac Office or Express server components and Administrative Applications on a single machine. This type of installation is appropriate for small site deployment. If installing all components on a single machine, refer to Local Installation Workflow on page 23.

Equitrac (Office/Express) server and client components can be installed across multiple machines to balance the print and transaction load. This distribution of components is called a “Remote” installation, and involves two or more networked machines that will house specific Equitrac Office or Express components. You must determine the appropriate network deployment for your enterprise before installing a single Equitrac Office or Express component. If deploying Equitrac (Office/Express) across a large site, refer to Remote Installation Workflow on page 31.

Equitrac (Office/Express) offers a “Simple Install” to quickly install a default set of core components, features and Administrative applications, or a “Standard Install” to customize the installed core and optional components, Administrative and auxiliary applications, along with the database platform and its location within the environment.

If upgrading to Equitrac Office or Express version 5.7 from an earlier version, refer to Chapter 5: Upgrade Equitrac Office/Express on page 88.

Refer to the ReleaseNotes.pdf on the Equitrac Product Download site for potential important installation or upgrade information not contained in this document.
Chapter 2: Server Installation

Local Installation Workflow

Before installing Equitrac Office or Express, ensure that the network and database are prepared for the installation. See Preparing the Network and Database on page 8 for instructions.

1 Install Couchbase Server – The Couchbase server is required when installing DCE in a high availability (HA) setup with a Network Load Balancer. Couchbase must be installed and configured on your system before installing DCE. Installing Couchbase Server on page 23. You do not need to install the Couchbase server if installing DCE in a standard non-HA environment.

2 Install Server Components – Install the Equitrac Office or Express server components and the Administrative Applications on the server system(s). See Installing Server Components on a Single Machine on page 24 or Installing Server Components Across Multiple Machines on page 32.

3 Configure the Database – Configure a SQL or Oracle database to communicate with Equitrac Office or Express. See Configuring the Database on page 36.

4 Apply Licenses – Activate and register all Equitrac Office or Express server components. You require the serial numbers for each component. See Applying Equitrac Office and Express Licenses on page 37.

5 Verify the Installation – Create a printer and ensure that print tracking is successful. See Verifying the Server Installation on page 45.

Installing Couchbase Server

In an Equitrac high availability (HA) setup with a Network Load Balancer (NLB), the Couchbase server must be installed and configured on your system before installing DCE. The Couchbase Server Community Edition installation file is included in the Equitrac Installer zip file.

In a Equitrac HA environment with NLB, Couchbase must be installed on all cluster nodes dedicated for the DCE cache. However Couchbase does not need to be on the same node as DCE. In an HA setup, the NLB is placed in front of DCE, and distributes the workload evenly across all available DCE servers.

To install and configure Couchbase, do the following:

1 Ensure that .NET Framework 4.5 is installed and running on the server, as this is needed for DCE.
2 Download and run the Couchbase Server executable following the Installation Wizard prompts.
3 Configure the Couchbase Database Path and server Hostname.
4 Create Data Buckets. A data bucket refers to a container Couchbase uses to provide data persistence and data replication. Data stored in buckets is highly-available and reconfigurable without server downtime.
5 Create an Administrator account for the Couchbase server. These Admin credentials will be used when setting up the DCE Remote Cache Connection during Equitrac installation. See DCE HA Setup on page 30.

This is a basic overview of the installation and configuration process. Refer to the Print Release High Availability Setup Guide for complete Couchbase installation and configuration for a DCE HA deployment.

NOTE: If Couchbase Server is already installed on your system, you must use the same Administrator Account and Password that was used for the previous install.
Installing Server Components on a Single Machine

When installing Equitrac Office or Express, the installation wizard allows you to select the server components and features to install per machine. For a local installation, install all server components on the same machine. If you are installing all components on a single machine, you only need to run the wizard once. When installing Equitrac Office or Express on a single machine, you can use either the Simple install to obtain a default set of server components and features, or the Standard install to customize the desired components and features to suit your environment. Both methods can be modified after installation.

32-bit server components are not supported in Equitrac (Office/Express) version 5.7. CAS, DRE, DCE, DME, SPE and Web Client are only available in 64-bit. Administrative applications, Auxiliary applications and Workstation Client are available in both 32-bit and 64-bit installers.

**NOTE:** For Windows Servers 2008, 2008 R2, 2012, 2012 R2 and 2016, make sure the server is up to date with the latest service packs, or manually download and install the latest version of Windows Installer from [www.microsoft.com](http://www.microsoft.com). Windows Installer 4.5 is required to install Equitrac (Office/Express) 5.7. If you do not have Windows Installer 4.5 the following error displays: "This installation package cannot be installed by the Windows Installer service. You must install a Windows service pack that contains a newer version of the Windows Installer Service."

To install Equitrac Office or Express locally on a single machine, do the following:

1. Close all other applications on the server prior to running the Equitrac Office or Express installation.
2. Obtain the Equitrac Office or Express software zip file from the Equitrac Product Download site. The product software is available as individual component installers (e.g. server or print client) or as a complete package with all installers, product documentation and the Microsoft SQL Server 2008 Express application file. Alternatively, use the physical distribution DVD to run the appropriate installer, if available.
3. Obtain the product serial number and activation code to enable the software functionality after installation.
5. Select and run the Installer file ([Equitrac.Office.exe](#) or [Equitrac.Express.exe](#)) to launch the 64-bit Equitrac Office or Express Installation wizard.
6. Read and accept the terms of the **Nuance End User License Agreement**, and click **Install** to continue.
7. At the **Welcome** screen, click **Next** to begin the installation process.

**NOTE:** Although some of the following screenshots may display Equitrac Express, they apply to both Equitrac Office and Express. The differences between the products are noted when applicable.
8 On the Select language screen, choose the interface language and the installation method, and then click Next.

- **Standard Install** – (default selection) Allows Administrators to install a customizable set of core server and optional components, Administrative and auxiliary applications, along with the database platform and its location within the environment. Go to Standard Install on page 26 to complete a customized installation.

- **Simple Install** – Installs a default set of core components and features including CAS, DRE (with iQueue), DCE, DCS, DWS, WebClient, Administrative applications and user Documentation. If desired, the default components and applications can be modified after installation. Go to Simple Install on page 25 to complete the Simple installation.

**CAUTION:** You cannot change the display language after installation. To change the language, you must uninstall and reinstall Equitrac Office or Express, and set the language. The display language is independent of the regional language on the machine. For example, Equitrac can display Italian even if the regional setting is French.

**Simple Install**

When the Simple install is selected on the Select language screen, the Service Log On Credentials screen opens.

1 On the Service Log On Credentials screen, enter the Account and Password of the user who will run the Windows services. Alternatively, click the Browse button to search for valid user from a specific location. Click the Test Credentials button to verify the user, and click Next to continue.

2 On the Ready to install Equitrac Express (or Office) screen, click Install to start the installation process.

3 Once installed, click Finish to exit the installation wizard and begin initial configuration in System Manager.
Chapter 2: Server Installation

Standard Install
When the Standard install is selected on the Select language screen, the Select Features screen opens.

1. On the Select Features screen, choose the features you want to install, and click Next.

![Select Features screen](image)

By default, all main Server Components (except the Scan Processing Engine) and all Administrative Applications are selected for installation. Deselect all options not required for the machine you are installing to. Any feature not selected by default can be installed during initial installation, or they can be installed afterwards.

Optional Components
The Scan Processing Engine (SPE) is an optional server component required to run the Equitrac (Office/Express) scan feature.

The I-Queue is an optional feature of DRE. The I-Queue is a single Follow-You Printing queue where all printers are combined into a single pull group. The I-Queue only supports secure printing, and holds print jobs until the user releases them at a networked printer via Follow-You Printing. When the I-Queue feature is installed, an I-Queue Printer is auto-created on the DRE print server.

The Smart Card Service and Driver is an optional feature of DCE (available on 64-bit operating systems only). It is required in order to support authentication from a device via a Smart Card.

Web Client is a package of web applications allowing both system administrators and users to perform Equitrac related tasks using a web browser. Web Client includes Web System Manager (installed by default), Web Reports (installed by default), User Dashboard (installed by default), Scan Client (optional) and Web Deposit (optional Equitrac Express feature). For more information see Installing the Web Client on page 48.

**NOTE:** To change the default installation folder for any of the program features, select the feature icon and then click the Browse button to open the Change destination folder dialog box. The top-level Server Components icon must be selected to change the location of the individual Server components.
2 On the **Service Log On Credentials** screen, enter the **Account** and **Password** of the user who will run the Windows services. Alternatively, click the **Browse** button to search for valid user from a specific location. Click the **Test Credentials** button to verify the user, and click **Next** to continue.

![Service Log On Credentials](image)

**NOTE:** The **Account** field contains the account name in domain\username format. If you are using a SQL Express database that is not on a domain and you are using local accounts, you must enter computername\username. If neither domain or computer name prefix is specified, the user is handled as local user.

3 On the **Windows Firewall Exceptions** screen, select either a **manual** or **automatic** setup method for the firewall exceptions, and then click **Next** to continue.

4 On the **Database platform** screen, select either the **SQL Server** or **Oracle** database, and click **Next**.
   - If **SQL Server** is selected (default selection), additional database location and authentication information is required.
   - If **Oracle** is selected, the Oracle client is automatically located by the installer and the wizard advances without requiring any additional database information.

5 If **SQL Server** is specified, select any available database server from the **Database Instance** drop-down list, and then click **Next**. Alternatively, the database server address, and optionally the instance name, can be typed in the **Database Instance** field.

![Database platform](image)
6 On the **Database Credentials** screen, select the authentication type of the selected SQL Server:

- **Windows Authentication** (default selection): select this option when the user running the Windows Service account connects to the database server. This user was specified on the Service Log On Credentials screen.

- **SQL Authentication**: enter the user credentials in the Login and Password fields, (this can be another Windows user or a SQL Server user). Click the **Test Connection** button to check the connection to the database with the selected user, then click **Next**.

7 If the specified SQL Express database (“eqcas”) already exists (e.g., in the case of an upgrade), the **Database Already Exists** screen appears. Select whether to **Replace** or **Keep** the existing database, and click **Next**.

8 If any of the Web Client features are selected for installation, the **Web Client - Application Pool** screens appears. For more detailed setup information and prerequisites, see **Installing the Web Client** on page 48.

9 On the **DCE High Availability Setup** screen, decide if DCE will be part of a High Availability setup or not.
Chapter 2: Server Installation

Standard Non DCE HA Setup

If DCE is not part of a High Availability setup, do the following:

1. Ensure the **DCE will be part of a High Availability Setup** checkbox is NOT selected on the **DCE High Availability Setup** screen, and click **Next** to continue.

2. On the **DCE Local Cache Connection** screen, enter the **Administrator account** and **Password** to use with Distributed Cache, and click **Next** to continue to the **Ready to Install** screen.

![DCE Local Cache Connection screen](image)

**NOTE:** The Administrator Account and Password are required if there is the need to address the distributed cache in your environment. Any changes to the distributed cache are directed by support. An Equitrac service account or domain cannot be used as the distribute cache system is not synchronized with Active Directory (AD). The account name cannot contain spaces, control or any ()<>@;:\/[]?={} characters, and must use valid UTF8 encoding.

**NOTE:** If installing Equitrac on a server with distributed cache already installed, provide the Administrator credentials used with the pre-existing installation.

3. On the **Ready to install Equitrac Express** (or Office) screen, click **Install** to start the installation process. The installation wizard copies files, sets up services, and creates shortcuts to the Administrative Applications.

4. At the end of the process, click **Finish** to exit the installation wizard and begin initial configuration.

5. The Processing Distributed Cache System progress screen appears and closes when complete.
DCE HA Setup

If DCE will be part of a High Availability cluster setup, do the following:

**NOTE:** Couchbase must be installed before installing DCE for HA. See [Installing Couchbase Server](#) on page 23.

1. Select the **DCE will be part of a High Availability Setup** checkbox, and enter the **Virtual Server name**: The IP address or hostname of the virtual server configured in the network load balancer (NLB), and click **Next**. This must be the same for all DCEs within the cluster.

2. On the **DCE Remote Cache Connection** screen, do the following:
   a. Enter the **Connection string** to the Couchbase database. The string is in the `couchbase://hostname/bucketname` format.
   b. Enter the **Administration account** and **password** of the Couchbase server node. These are the Administrator credentials used when initially installing and configuring Couchbase server.
   c. Click the **Test Connection** button to verify the connection to the Couchbase database, then click **Next**.

3. On the **Ready to install Equitrac Express** (or Office) screen, click **Install** to start the installation process. The installation wizard copies files, sets up services, and creates shortcuts to the Administrative Applications.

4. At the end of the process, click **Finish** to exit the installation wizard and begin initial configuration.

5. After installing the Equitrac Office or Express components, continue to [Configuring the Database](#) on page 36.
Remote Installation Workflow

Follow the steps shown below to deploy the Equitrac server and client components across multiple machines.

1. **Install CAS** – Run the installation wizard, and select only CAS and the Admin Apps in the Select Features screen. If deploying a single CAS only, install all Administrative Applications on this machine. See **Installing the Master CAS** on page 33.

2. **Configure the Database** – Configure an Oracle or SQL database to communicate with Equitrac (Office/Express). See **Configuring the Database** on page 36.

3. **Apply Licenses** – Activate and register licenses for all Equitrac Office or Express components. You require the serial numbers for each component, and the machine name where each component will be installed. See **Applying Equitrac Office and Express Licenses** on page 37.

4. **Grant Access** – Configure the Admin permission so that a user who will have Administrative privileges on the DRE Print Server (configured later) also has administrative access to the master CAS. See **Installing the Subsidiary CAS and Uplink** on page 39.

5. **Install the Subsidiary CAS & Uplink** – If deploying more than one CAS, run the installation wizard and select only CAS and the Admin Apps in the Select Features screen. Configure the Uplink feature. See **Installing the Subsidiary CAS and Uplink** on page 39.

6. **Install the DREs** – On each machine that will host a DRE, run the installation wizard and select only Document Routing Engine and System Manager in the Select Features screen. See **Install DRE** on page 40.

7. **Install Couchbase Server** – The Couchbase server is required when installing DCE in a high availability (HA) setup with a Network Load Balancer (NLB). Couchbase must be installed and configured on your system before installing DCE. See **Installing Couchbase Server** on page 23. You do not need to install the Couchbase server if installing DCE in a standard non-HA environment.

8. **Install the DCEs** – On each machine that will host a DCE, run the installation wizard and select only Device Control Engine. See **Install DCE** on page 41.

9. **Install the DMEs** – On each machine that will host a DME, run the installation wizard and select only Device Monitoring Engine and Device Management Console in the Select Features screen. See **Install DME** on page 41.

10. **Install the SPEs** – On each machine that will host an SPE, run the installation wizard and select only Scan Processing Engine in the Select Features screen. See **Install SPE** on page 41.

11. **Verify the Installation** – Create a printer and ensure that print tracking is successful. See **Verifying the Server Installation** on page 45.


13. **Install Release Station** – Install the Release Station software on a dedicated workstation (optional). Within a secure print environment, this station is used to release documents held in the secure queue. See **Installing Release Station** on page 56.

14. **Install MobileDCE** – Install the MobileDCE software on a portable server (e.g., a laptop). Use MobileDCE if you require a print and copy tracking solution that does not depend on a network connection to CAS. See **Installing MobileDCE** on page 57.
Installing Server Components Across Multiple Machines

Run the Server installation wizard on each machine within the deployment, and select only the components required per machine. Follow the order of the steps shown in the Installation Workflow on the previous page for each machine.

<table>
<thead>
<tr>
<th>Component</th>
<th>Select these features:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master CAS</td>
<td>• Core Accounting Server</td>
</tr>
<tr>
<td></td>
<td>• All Administrative Applications</td>
</tr>
<tr>
<td>Subsidiary CAS</td>
<td>• Core Accounting Server</td>
</tr>
<tr>
<td></td>
<td>• System Manager</td>
</tr>
<tr>
<td>DRE</td>
<td>• Document Routing Engine</td>
</tr>
<tr>
<td></td>
<td>• I-Queue (optional)</td>
</tr>
<tr>
<td>DCE</td>
<td>• Device Control Engine</td>
</tr>
<tr>
<td></td>
<td>• Device Web Server (optional)</td>
</tr>
<tr>
<td></td>
<td>• Smart Card Service and Driver (optional)</td>
</tr>
<tr>
<td></td>
<td>• Device Control Server</td>
</tr>
<tr>
<td>DME</td>
<td>• Device Monitoring Engine</td>
</tr>
<tr>
<td></td>
<td>• Device Monitoring Console</td>
</tr>
<tr>
<td>SPE</td>
<td>• Scan Processing Engine</td>
</tr>
</tbody>
</table>

Note: The DME component is not bundled with the Equitrac Express Small Campus Edition.

NOTE: The Simple install option cannot be used when installing individual features and applications across multiple machines. The Simple install contains a default set of core components, features and Administrative applications that cannot be modified during installation.
Installing the Master CAS

NOTE: For Windows Servers 2008, 2008 R2, 2012, 2012 R2 and 2016, make sure the server is up to date with the latest service packs, or manually download and install the latest version of Windows Installer from www.microsoft.com. Windows Installer 4.5 is required to install Equitrac (Office/Express) 5.7. If you do not have Windows Installer 4.5 the following error displays: “This installation package cannot be installed by the Windows Installer service. You must install a Windows service pack that contains a newer version of the Windows Installer Service.”

1 Close all other applications on the server prior to running the Equitrac Office or Express installation.

2 Obtain the Equitrac Office or Express software zip file from the Equitrac Product Download site. The product software is available as individual component installers (e.g. server or print client) or as a complete package with all installers, product documentation and the Microsoft SQL Server 2008 Express application file. Alternatively, use the physical distribution DVD to run the appropriate installer, if available.

3 Obtain the required product serial number and activation code to enable the software functionality after installation.

4 Ensure that Windows 10 Universal CRT for Visual Studio 2015 is installed prior to installing Equitrac Office or Express on a non-Windows 10 OS (such as Windows 7, 8.0, 8.1, Server 2008, 2008 R2, 2012, 2012 R2 and 2016).

5 Select and run the Installer file (Equitrac.Office.exe or Equitrac.Express.exe) to launch the Equitrac Office or Express 64-bit Installation wizard.

6 Read and accept the terms of the Nuance End User License Agreement, and click Install to continue.

7 At the Welcome screen, click Next to begin the installation process.

NOTE: Although some of the following screenshots may display Equitrac Express, they apply to both Equitrac Office and Express. The differences between the products are noted when applicable.

8 On the Select Language screen, select the language you want to display in the user interface, and click Next.

NOTE: You cannot change the display language after installation. To change the language, you must uninstall and reinstall Equitrac Office or Express, setting the language during installation.

NOTE: The Simple install option cannot be used when installing individual features and applications across multiple machines. The Simple install contains a default set of core components, features and Administrative applications that cannot be modified during installation.
9 On the **Select Features** dialog, only select the Core Accounting Server (CAS) from the Server Components and all Administrative Applications (System Manager, Accounts Manager, Reports Manager, Department Manager and Device Monitoring Console), and click the **Next** to continue. If desired, you can change the default installation folder with the **Browse** button.

10 On the **Service Log On Credentials** screen, enter the **Account** and **Password** of the user who will run the Windows services. Alternatively, click the **Browse** button to search for valid user from a specific location. Click the **Test Credentials** button to verify the user, and click **Next** to continue.

**NOTE:** The **Account** field contains the account name in domain\username format. If you are using a SQL Express database that is not on a domain and you are using local accounts, you must enter computername\username. If neither domain or computer name prefix is specified, the user is handled as local user.

11 On the **Windows Firewall Exceptions** screen, select either a **manual** or **automatic** setup method for the firewall exceptions, and then click **Next** to continue.

12 On the **Database platform** screen, select either a **SQL Server** or **Oracle** database, and click **Next**.
   - If **SQL Server** is selected (default selection), additional database location and authentication information is required.
   - If **Oracle** is selected, the Oracle client is automatically located by the wizard and the wizard advances directly to the Install screen without requiring any additional database information.
13 If SQL Server is specified, select any available database server from the Database Instance drop-down list, and then click Next. Alternatively, the database server address, and optionally the instance name, can be typed in the Database Instance field.

14 On the Database Credentials screen, select the authentication type of the selected SQL Server:

- **Windows Authentication** (default selection): select this option when the user running the Windows Service account connects to the database server. This user was specified on the Service Log On Credentials screen.

- **SQL Authentication**: enter the user credentials in the Login and Password fields, (this can be another Windows user or a SQL Server user). Click the Test Connection button to check the connection to the database with the selected user, then click Next.

15 If the specified SQL Express database ("eqcas") already exists (e.g., in the case of an upgrade), the Database Already Exists screen appears. Select whether to Replace or Keep the existing database, and click Next.

16 Click Install to start the installation process. The installation wizard copies files, sets up services, and creates shortcuts to the Administrative Applications.

17 At the end of the process, click Finish to exit the installation wizard and begin initial configuration. After installing the Equitrac Office or Express components, continue to Configuring the Database on page 36.
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Configuring the Database

After installing CAS, additional configuration is required for Microsoft SQL Server or Oracle databases only. If you installed the SQL Express database, the Wizard starts the services when the installation is complete without any further configuration.

**NOTE:** A user installing Equitrac Office or Express needs sysadmin privileges to the SQL Express database engine and/or instance.

When using Mixed Mode authentication on a SQL Server, the Equitrac SQL scripts creates the eqcas user account in the eqcas database and grants this ID Database Owner rights (DBO). The Equitrac service will use this eqcas account for the ODBC connection.

When using Windows authentication on a SQL Server, the domain user starting the Equitrac services must be granted DBO privileges to the eqcas database. Please consult Microsoft on the best methods to accomplish this. The Equitrac service will use this Windows account for the ODBC connection.

Microsoft SQL Server Configuration

For general instructions on implementing Microsoft SQL Server, refer to the Microsoft SQL Server documentation.

1. On your SQL Server database system, create a database named `eqcas`.
2. Open SQL Server Management Studio, connect to the `eqcas` database and execute the `SQLServerInit.sql` script located on CAS in `C:\Program Files\Equitrac\Office` or `Express\Database`.
3. Remove all connections to the eqcas database.
4. Connect to the same instance and run the `SQLServerOpt.sql` script to streamline functionality.

**NOTE:** If you name the SQL Server database something different from `eqcas`, you must also change the database name accordingly in the `SQLServerInit.sql` script and the `SQLServerOpt.sql` script.

5. Start the EQ Scheduler service and then the Equitrac Core Accounting Server service (EQ CAS).

Equitrac Office or Express is now configured to use the Microsoft SQL Server database.

Oracle Database Configuration

For general instructions on implementing an Oracle database, refer to your Oracle documentation. These instructions configure the Oracle database to function with Equitrac (Office/Express).

1. On your Oracle database server, create a database named `eqcas`.
2. Using an Oracle provided tool, such as SQL *Plus, connect to the `eqcas` database and execute the `OracleServerInit.sql` script located on CAS in `C:\Program Files\Equitrac\Office` or `Express\Database`.
3. On the accounting server, create an `eqcas` ODBC System DSN and verify communication with this DSN to your Oracle database system.
4. Modify the registry to use the newly created ODBC data source:
   a. Open the Windows registry editor on the CAS computer.
   b. Navigate to the `HKEY_LOCAL_MACHINE\SOFTWARE\Equitrac\CAS\database` value.
Chapter 2: Server Installation

5. Set its DSN child value to eqcas with the same name as in step 3.

d. Specify the user credentials in the User and Password child values. These values specify the user account which is used for the eqcas ODBC data source. The DSN name is to be the same.

To ensure your Oracle database properly executes the long statements in the final SQL script, open a command prompt, navigate to C:\Program Files\Equitrac\Office or Express\Tools and execute the following command.

eqdbloader -f <full path to OracleServerLoader.sql> -d <your Oracle ODBC system DSN> -u <your Oracle Admin user> -p <your Oracle Admin password>

For example:

eqdbloader -f "c:\Program Files\Equitrac\Express\Database\OracleServerLoader.sql" -d Oracle_DSN -u eqcas -p eqcas

6. Start the EQ Scheduler service and then the Equitrac Core Accounting Server service (EQ CAS).

Equitrac Office or Express is now configured to use the Oracle database.

Applying Equitrac Office and Express Licenses

When Equitrac Office or Express are installed for the first time on a specified machine, a limited default license is generated and applied during installation. The auto-generated default license allows full operation of System Manager’s features for 45 days, however, there is a limit of only one of each licensable item.

After installation, obtain and register the full component license(s) in the System Manager Administrative Application before the 45 day default license expires. A new default license cannot be generated by reinstalling the Equitrac product on the same machine. When applying the full license(s), the default license is automatically overwritten.

Licensing requires a combination of serial numbers and activation codes to enable each Equitrac Office or Express component. There are two ways to enter this license information: automatically via an Internet connection, or manually by requesting the codes via telephone or email. Regardless of the preferred method, use the following instructions to apply licenses and activate components.

To license Equitrac Office or Express, do the following:

1. Open System Manager by selecting Start > All Programs > Equitrac Office or Equitrac Express > System Manager.

2. In the Select accounting server dialog box, choose the Core Accounting Server (CAS) with which System Manager is associated, then click Connect.

   CAS coordinates all Equitrac (Office/Express) components and acts as a guardian for the device resources. System Manager must be able to establish a connection with CAS before the Administrative Applications will open and you can begin configuration. CAS collects information from and writes to a single accounts database, so you can connect to only one accounting server at a time.

3. Click the System Manager > Licensing link in the left pane.

4. Under Current tasks, click Add license or click <Add...> in the right pane.

5. When the Equitrac Office or Express activation window opens, click Next to begin the activation process.

6. Enter the serial numbers for the components you want to activate. These serial numbers were supplied with your software. After you enter each number, click Add to add it to the list, then enter additional numbers as required.
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7 When all numbers are entered, click **Next**.

8 Select **Automatic online activation** or **Manual activation**, and click **Next**. Select **Manual Activation** if you do not have a connection to both the Internet and CAS.

9 For **Manual activation**, do the following:
   a. Contact Equitrac support to obtain the corresponding activation codes.
   b. After receiving the required activation codes, click **Finish** to continue.
   c. In the Add licensing Information dialog box, enter the **Activation code**, and click **Add**.

The activated software license displays in System Manager.

10 For **Automatic online activation**, do the following:
   a. Follow the Activation wizard prompts to provide contact information. If you have already registered one or more Equitrac components, the Activation wizard fills the form with previously-collected data.
   b. The Activation wizard displays a **Collecting information...** message while retrieving system data. If you want to omit technical details about your system, click the **Show technical details** button and select the information you do not want to transmit. You must transmit the following:
      - Accounting server serial number
      - Domain-qualified print server name
      - Organization name as registered in Windows
      - Fully-qualified CAS server DNS name
   c. When the Activation wizard is ready to transmit the information, review the collected data. Choose whether to send optional data with your activation request.

   **NOTE:** The Activation wizard transmits the data using an HTTP connection to the Equitrac activation server. If the connection fails, the Activation wizard prompts for verification that you have configured the default gateway correctly, and that the Internet is accessible from this machine. You can retry or cancel the activation request at this point.

   d. The Activation wizard transmits the data and Equitrac returns the status of the activation code(s). The Wizard automatically records the license activation in System Manager, and displays the following activation results:
      - Serial number
      - Activation code
      - Status (either **Success**, **Invalid**; the serial number and activation code is an invalid combination, or **Denied**; the serial number was valid but not accepted).

   **If the License is Invalid**

   If the status is **Invalid**, ensure that you entered all serial numbers and activation codes precisely. Each component requires a separate license—unless you purchased an Enterprise license. If the problem persists, contact the Equitrac Customer Support Center to resolve this problem.
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If the Serial Number is Denied

If the status is Denied, the serial number may already be registered to a different system ID. Contact the Equitrac Customer Support Center to resolve this problem.

When the License is Successful

After successfully licensing Equitrac (Office/Express), go to Verifying the Server Installation on page 45 to complete the local install, or proceed to Installing the Subsidiary CAS and Uplink on page 39 to continue installing the remaining server components for a remote install.

NOTE: After applying the full license(s), the 45 day default license is automatically overwritten and removed from the system.

Installing the Subsidiary CAS and Uplink

If you deployed more than one accounting server, you can uplink the subsidiary CAS to the master CAS. This allows the subsidiary servers to upload data to the master CAS, while also keeping a copy on its local server. You can then run consolidated reports on the master CAS to view transaction and account data from all CAS servers, or you can run reports on individuals servers.

Optionally, you can set the subsidiary servers not to post transactions to the master CAS. This allows the master CAS to act as a license distribution server for users and embedded devices. The transactions remain local to each subsidiary server.

Configure the CAS Servers

1. Open System Manager and navigate to Configuration > Network environment > Uplink.

2. Enter the Name of the designated master CAS.

3. Select the Uplink time of day for the subsidiary CAS to connect to the master CAS.

   By default, Equitrac (Office/Express) sets the uplink time at 1:00 am—a time that CAS is not heavily accessed by DRE, DCE, DME, or client workstations. If your site experiences a heavy load on CAS at 1:00 am, then change this to a different time. Sites with multiple subsidiary servers should stagger the uplink time.
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4 Press the **Synchronize enterprise license** button to initially license the subsidiary CAS from the master CAS. Thereafter, at each uplink, the master CAS re-licenses the subsidiary CAS as long as the total number of licenses is not exceeded.

5 The **Transaction set** options allow you to configure how the subsidiary and master CAS handle data transactions.
   - **Do not post transactions** – the subsidiary servers do not send transactions to the master CAS.
   - **Post individual transactions** – the subsidiary servers send individual transactions to the master CAS. This option allows the master CAS to view transaction and account data from all CAS servers.
   - **Collate transactions** – the subsidiary servers bundle transactions in one of two ways: **Daily** or **Hourly**. Equitrac (Office/Express) collates daily transactions at the time you selected in **Uplink time of day**. You can also select the **By Network user** option to send or to separate the transactions per network user.

6 Click **OK** to save the changes.

**Run Subsidiary Reports**

To run reports from the master CAS that contain only the transaction data from the subsidiary CAS, do the following:

1 Open a command prompt, navigate to `C:\Program Files\Equitrac\Office` or `Express\Accounting Service` and execute the following command:
   ```
   eqrptload.exe -a <accounting server> -f reports\uplinkreportlist.csv -u
   ```
   where `<accounting server>` represents the system name of your accounting server.
   For example: `eqrptload.exe -a PRINTSV1 -f reports\uplinkreportlist.csv -u`

2 When the command prompt displays the message **EQRptLoad success**, all of the uplinked reports loaded successfully. You can select any uplinked report in the Select report to open dialog box.

See the “**Creating & Running Reports**” chapter in the *EQUITRAC OFFICE AND EXPRESS ADMINISTRATION GUIDE* for details.

**CAUTION:** When installing the Equitrac components, you must enter the same user credentials for each machine. These credentials are used to start and run all services. If you fail to enter the same credentials on all components, CAS will not respond to requests by DCE, DRE, DME or SPE.

**Installing Specific Equitrac Server Components**

EQUITRAC Office or Express server components can be installed across multiple machines to balance the print and transaction load. The following components are only available on 64-bit operating systems.

**Install DRE**

You can install a single Print Server (DRE) or multiple print servers to distribute the load across servers.

To install a DRE, select only the Document Routing Engine server component and the System Manager Administrative Tool from the Select Features screen. Perform these steps for each DRE you install. See **Install the Server Components** on page 42.
I-Queue is an optional feature of DRE. The I-Queue is a single Follow-You Printing queue where all printers are combined into a single pull group. The I-Queue allows end users to send their print requests to the I-Queue printer, and then release their jobs at any available network configured MFP through secure document release. When the I-Queue feature is installed, an I-Queue Printer is auto-created on the DRE print server.

**Install DCE**

You can install a single Device Control Engine (DCE) or multiple engines to manage the communication load from control terminal devices.

To install a DCE, select only the Device Control Engine server component from the Select Features screen. See **Install the Server Components** on page 42. Perform these steps for each DCE you install. The DCE sub-features Device Web Server (DWS) and Device Control Server (DCS) are installed by default, but the Smart Card Service and Driver is an optional feature and is not installed by default. If DWS and Smart Card Service are installed, they must reside on the DCE machine.

DWS is required in order to manage and control embedded applications on web-based MFPs. When a user logs in at a web based device, the login data is sent to DWS, which communicates with DCE, and then DCE contacts CAS to verify the user account.

The Smart Card Service and Driver is required in order to support authentication from a device via a Smart Card.

DCS is required to manage and control Nuance Ethernet card readers. DCS is also required to communicate with DWS in order to work with some web-based MFPs.

When DCE is selected during Standard installation, there is the option to include DCE in a high availability (HA) setup or not. If DCE is not selected as part of an HA setup, then a Distributed Cache service for DCE is automatically installed on the local DCE as part of the Equitrac installation process.

If DCE will be part of the HA setup, then the Couchbase server must be installed and configured on your system before installing DCE. See **Installing Couchbase Server** on page 23, and **DCE HA Setup** on page 30 for more details.

**Install DME**

You can install one or more Device Monitoring Engines (DME), but you only need one Device Management Console.

To install a DME, select only the Device Monitoring Engine server component from the Select Features screen. See **Install the Server Components** on page 42. You can install the Device Management Console on any server within the deployment, but it's best to install the console on the CAS Server system. Refer to the "Device Monitoring with DME" chapter in the Equitrac Office and Express Administration Guide for more information.

**Install SPE**

The Scan Processing Engine (SPE) is an optional server component required to run the Equitrac (Office/Express) scan feature. You can install a single SPE or multiple engines to manage the scan load balancing. To install an SPE, select only the Scan Processing Engine component from the Select Features screen. See **Install the Server Components** on page 42.
Install the Server Components

To install specific server components, do the following:

1. Close all other applications on the server prior to running the Equitrac Office or Express installation.

2. Obtain the Equitrac Office or Express software zip file from the Equitrac Product Download site. The product software is available as individual component installers (e.g. server or print client) or as a complete package with all installers, product documentation and the Microsoft SQL Server 2008 Express application file. Alternatively, use the physical distribution DVD to run the appropriate installer, if available.

3. Obtain the required product serial number and activation code to enable the software functionality after installation.


5. Select and run the Installer file (Equitrac.Office.exe or Equitrac.Express.exe) to launch the Equitrac Office or Express Installation wizard.

   **NOTE:** Although some of the following screenshots may display Equitrac Express, they apply to both Equitrac Office and Express. The differences between the products are noted when applicable.

6. At the **Welcome** screen, click **Next** to begin the installation process.

7. Read and accept the terms of the **End-User License Agreement**, and click **Next** to continue.

8. On the **Select Language** screen, select the language you want to display in the user interface, and click **Next**.

   **CAUTION:** You cannot change the display language after installation. To change the language, you must uninstall and reinstall Equitrac Office or Express, setting the language during installation. The display language is independent of the regional language set on the machine. For example, Equitrac (Office/Express) can display Italian even if the regional setting is French.

   **NOTE:** The **Simple install** option cannot be used when installing individual features and applications across multiple machines. The Simple install contains a default set of core components, features and Administrative applications that cannot be modified during installation.
9 On the **Select Features** screen, choose the features you want to install. Click the **Next** button to continue.

![Select Features Screen]

By default, all Server Components (except the Scan Processing Engine) and all Administrative Applications are selected for installation. Deselect all options not required for the machine you are installing to. Any feature not selected by default can be installed during initial installation, or they can be installed afterwards.

**NOTE:** To change the default installation folder for any of the program features, select the feature icon and then click the **Browse** button to open the **Change destination folder** dialog box. The top-level **Server Components** icon must be selected to change the location of the individual Server components.

10 If CAS is in cluster environment or is not selected for installation, the **Core Accounting Server Location** screen appears. Enter the fully qualified domain name or fixed IP address of the CAS server. Click **Test Connection** to validate a connection across the network, and click **Next** to continue. Optionally, click **Next** without testing the CAS server.

![Core Accounting Server Location Screen]
On the **Service Log On Credentials** screen, enter the **Account** and **Password** of the user who will run the Windows services. Alternatively, click the **Browse** button to search for valid user from a specific location. Click the **Test Credentials** button to verify the user, and click **Next** to continue.

![Service Log On Credentials](image)

**NOTE:** The **Account** field contains the account name in domain\username format. If you are using a SQL Express database that is not on a domain and you are using local accounts, you must enter computername\username. If neither domain or computer name prefix is specified, the user is handled as local user.

**CAUTION:** When installing the Equitrac components across multiple machines, you MUST enter the same user credentials for each machine. These credentials are used to start and run all services. If you fail to enter the same credentials on all components, CAS will not respond to requests by DCE, DRE, DME or SPE.

On the **Windows Firewall Exceptions** screen, select either a **manual** or **automatic** setup method for the firewall exceptions, and then click **Next** to continue.

![Windows Firewall Exceptions](image)

Click **Install** to start the installation process. The installation wizard copies files, sets up services, and creates shortcuts to the Administrative Applications.

At the end of the process, click **Finish** to exit the installation wizard and begin initial configuration.
Chapter 2: Server Installation

Verifying the Server Installation

After the server components are installed, you need to verify the following:

1. The device is registered in System Manager.
2. Print transactions are recorded in the database.
3. The printer spool is setup correctly.

Once verification is successful, you can install additional components or begin initial configuration.

Add a Printer on a TCP/IP Printer Port

Device registration and monitoring require printer ports. To create printer ports, do the following:

1. Using the standard Windows interface, open the Add Printer wizard.
2. Follow the prompts to Add a local printer and Create a new port.
3. Select Standard TCP/IP Port as the type of port you want to create and click Next.
4. Specify a Hostname or IP Address, and click Next.
   - The wizard supplies a Port name based on the printer name or IP address. If another naming convention is preferred, rename the port accordingly.
   - Ensure the Query the printer and automatically select the driver to use checkbox is not selected.
5. Specify the Manufacture and model to install the printer driver, and click Next.
   - **NOTE:** If the device is part of a pull group, it must use the same drivers as all other devices in the pull group. You must select the model of the pull group driver, not the model of the device. Although DRE is a 64-bit server you must also load the 32-bit driver to the server.
6. Specify the version of the print driver to use, and click Next.
7. Enter the Printer name, and click Next. This is the name of the device that is displayed in System Manager.
8. Select to share or not to share the printer with others, and click Next. If sharing the printer, enter a Share name, and optionally provide a printer location and any comments.
9. Click the Print a test page button, and click Finish to close the Add Printer wizard.
10. Confirm that the test page printed successfully.

Device Registry Confirmation

After the printer ports have been set up, confirm that Equitrac (Office/Express) is able to monitor the print queue of the new printer.

1. Open System Manager by selecting Start > All Programs > Equitrac Office or Equitrac Express > System Manager.
2. If necessary, select the local server and click Connect. The System Manager window displays.
3. Select the Devices link in the left pane. When you select the link, the application retrieves device information from any network configured devices.
4 Verify that the right pane displays a physical device with the name you specified within the Add Printer wizard. If the device is not listed, disregard the remaining steps in this procedure, and refer to Installation Troubleshooting on page 57.

5 In the right pane, select and expand the device to view the print queue for the newly added device.

6 Select the print queue to review default information such as pricing and device behavior. Equitrac (Office/Express) is installed with default pricing of 0.01 per page.

**Test Page Tracking**

Verify that Equitrac (Office/Express) has successfully recorded the Print test transaction in the database by generating a report to view the transaction information.

1 Open Accounts Manager by selecting Start > All Programs > Equitrac Office or Equitrac Express > System Manager.

2 In the left pane, click the Reporting link. A list of report groups displays in the right pane.

3 In the right pane, expand the Detailed Activity option.

4 Click the Detailed activity by network user link.

5 Click OK to maintain the Select report criteria default values and generate the report. The generated report displays a test print transaction charged to the automatically-generated account of the user who initiated the test print.

The successful generation of this report indicates that the Equitrac server is correctly installed and is ready for further configuration.

If the report did not generate successfully, refer to Installation Troubleshooting on page 57.

**Spool Setting Verification**

On each printer managed by DRE, confirm the following:

1 Open the Printer properties dialog box, and switch to the Advanced tab.

2 Verify that the Spool print documents so program finishes printing faster option is selected; and not the Print directly to the printer option.

   By default, printers installed on Windows Servers 2008, 2008 R2, 2012, 2012 R2 and 2016 are set to Spool print documents so program finishes printing faster > Start printing immediately, and do not need to be changed. The Start printing after last page is spooled option can also be selected.

**CAUTION:** If the Print directly to the printer option is selected, a job may start printing before the job details can be sent from a client workstation to DRE. In this case, DRE does not know to hold the job until data such as release key or billing code can be associated to the job, or to wait for a cost preview dialog box for users to accept or cancel the print job.
Granting Access Permissions

If you create Domain groups that contain specific Administrative Users, you can assign access to one or more Administrative Application by group. For example, one Administrator may need access only to Reports, but another might need access to both Reports and Accounts. Construct your Domain groups within Windows accordingly before you change the permissions within Equitrac (Office/Express).

1. Open System Manager by selecting Start > All Programs > Equitrac Office or Equitrac Express > System Manager.
2. In System Manager, navigate to Configuration > Security and Authentication > Access permissions.
3. In the Permissions dialog box, click the link beside Admin (Admin refers to System Manager). See the Equitrac Office and Express Administration Guide for detailed description of each item.

4. In the Select Group dialog box, select the Domain that contains the group who will also have Administrative privileges on the DRE Print Server machine. All members of the group will be granted the same privileges. If you want to assign access to only one user, you must create a group on the Domain containing that user only.
5. Select the Group that contains the user, then click OK.

**NOTE:** The account that is running CAS, DCE, or DRE services has full permission to all Equitrac (Office/Express) components and Administrative Applications.
Installing the Web Client

The Equitrac Office or Express Web Client is a package of web applications allowing both system administrators and users to perform Equitrac related tasks using a web browser.

The Web Client consists of the following web applications that can be installed together or separately. See the Web Client Help for setup and configuration details.

- **Scan Client** – monitors and manages an Equitrac user’s scan jobs. It displays user scans sent to all available scan destinations via Equitrac controlled devices.
- **Web Reports** – enables users to access and review reports via a web browser.
- **User Dashboard** – enables users to access and manage their personal account via a web browser.
- **Web System Manager** – provides a web interface to manage Equitrac accounts, activate licenses, manage devices and account settings using a set of the standard System Manager functionality accessible via a web browser.
- **Web Deposit** – an Equitrac Express feature which enables organizations, such as colleges and universities, to accept deposits into an Equitrac system—from credit and debit cards to direct banking, direct debits, m-payment, e-wallets, commercial pre-paid cards, and vouchers through a web-based user interface. See the Web Deposit Setup Guide for details.

**NOTE:** To use Internet Explorer on server operating systems, make sure that the http://localhost/EQWebClient URL is added to the Trusted Sites list.

**NOTE:** The default communication between the client web browser and the IIS server is unencrypted. It is recommended to implement Secure Socket Layer (SSL) security on the IIS server to ensure that all communication between client web browser and the IIS server is encrypted and secure. For more information, refer to your certificate provider’s documentation.

Prerequisites

Web Client requires Internet Information Services (IIS) web server with the following features enabled on the target machine:

- Common HTTP Features (HTTP Errors, Static Content)
- ISAPI Extensions, ISAPI Filters
- On Windows Server 2016: .NET Extensibility 4.6, ASP.NET 4.6
- On Windows 8 and 8.1: .NET Framework v4.5
- On Windows 10: .NET Framework v4.5
In Windows Server 2008/2008 R2:

![Wizard screenshot for Windows Server 2008/2008 R2]

In Windows Server 2012/2012 R2:

![Wizard screenshot for Windows Server 2012/2012 R2]
In Windows Server 2016:

![Select server roles dialog box](image)

**NOTE:** If any listed prerequisite is missing, the installation stops with an error message describing the issue.

## Installation

The Web Client applications communicate with CAS and can be installed either on the same machine CAS is deployed to, or independently from the CAS server. This section describes the installation of the Web Client using the server installer. After installing the Web Client, some additional configuration steps may be required for the Scan Client and Web Deposit applications. See the [Web Deposit Setup Guide](#) for more details.

To silently install the Web Client from a command line, see [Silent Installation](#) on page 69.

The installation can be started as described in [Installing Server Components on a Single Machine](#) on page 24.
During installation the following Web Client related screens appear:

1. **On the Web Client - Application Pool screen**, specify a user account that will run the Web Client applications.
   a. Select the *Provide account for Equitrac Express Web Client Application Pool* checkbox.
   b. Enter the *Account* and *Password* for the Windows account that has access to the SQL Server.
   c. Click the *Test Connection* button to check the connection to the database, and click *Next*.

   **NOTE:** Scan Client connects to the Equitrac database directly. If the database is configured to use Windows authentication, the application pool user should have rights to connect to the database. Scan Client displays a critical error message when opened if this account is not properly configured.

   **NOTE:** Web Deposit has its own database which can be configured to use Windows authentication (see the *Web Deposit Setup Guide* for more details). In this case, the application pool user should be a user that has rights to connect to the Web Deposit database. When entering the *Account*, domain accounts must use the domain name (e.g. *domain\username*). If you are using a local account, you must enter the computer name, followed by the account name (e.g. *computername\userid*).

2. **On the Web Client - Single Sign-On screen**, select the *Single Sign-On* feature, then click *Next* to enable users to access the Web Client automatically with their Windows user accounts.

   **NOTE:** Use the Single Sign-On feature if Equitrac is running in a domain environment and potential Web Client users are domain members.

3. **If the Scan Client is selected for installation and CAS is not being installed, or is not already installed on the same computer**, additional Scan Client database related screens appear.

   **On the Scan Client - Database platform screen**, select the type of database used by the Equitrac server, and then click *Next*.
   - If *SQL Server* is selected (default selection), additional Scan Client database information is required.
   - If *Oracle* is selected, the Oracle client is automatically located by the installer and the wizard advances without requiring any additional Scan Client database information.
4 When using a SQL Server database, the database address and authentication settings must be specified on the Scan Client – Database Settings screen.

a Select any available database server from the Database drop-down list. Alternatively, the database server address, and optionally the instance name, can be typed in the Database field.

b Connect using Windows Authentication (default selection): select this option when the user running the Web Client application pool connects to the database server. This user was specified on the Web Client – Application Pool screen.

NOTE: If a user was not defined in the Web Client – Application Pool dialog (the default ApplicationPoolIdentity user) then the Windows authentication option is disabled.

—Or—

Connect using SQL Authentication: enter the user credentials in the Login and Password fields. This can be another Windows user or a SQL Server user.

c Click the Test Connection button to check the connection to the database with the selected user, then click Next.

NOTE: When SQL Express database is used by Equitrac Office or Express, remote access should be enabled in the SQL Express (disabled by default). To do this, enable the TCP/IP connection with the SQL Express configuration console and make sure that the SQL Server Browser service is running.
5 If **Web Deposit** is selected for installation, the location and authentication mode of the Web Deposit database should be provided on the **Web Deposit - Database** screen. For detailed setup and configuration information, see the **Web Deposit Setup Guide**.

![Web Deposit - Database](image)

![Web Deposit - Database](image)

- In the **SQL Server that you are installing to** field, specify the address and optionally the instance name of the SQL Server.
- Select **Windows authentication credentials of the application pool user** if Windows authentication is used on the specified SQL Server. In this case, Web Deposit will connect the user that was specified at the Web Client - Application Pool Identity dialog.

  **NOTE:** If a user was not defined in the **Web Client – Application Pool** dialog (the default ApplicationPoolIdentity user) then the Windows authentication option is disabled.

  —Or—

  Select the **SQL Server authentication using the Login and Password below** option if the specified SQL Server uses its own authentication. In this case, enter the **Login** and the **Password** of the SQL Server user that are later used by Web Deposit.

- Click **Next** to continue.

6 Click **Install** to start the installation process.

7 At the end of the process, click **Finish** to exit the installation wizard and begin initial configuration.

**NOTE:** During installation a new Equitrac application pool and a new **EQWebClient** web application using port 80 are created in IIS.

After the installation, it is recommended to set SSL certification in IIS for using the HTTPS protocol. For more information refer to the Microsoft Knowledge Base article "**How To Set Up an HTTPS Service in IIS**".

When you use the Web Client for the first time after restarting its application pool (e.g. installation or a computer reboot), the Web Client behaves very slow (you may wait for more than 30 seconds). It is recommended to open Web Client in a web browser before end-users start working with it.
Chapter 2: Server Installation

Verifying the installation

After installing the Web Client, verify the installation:

1. Open Web Client by selecting Start > All Programs > Equitrac Office or Equitrac Express > Web Client.
   
   —Or—

   Open a web browser on the machine where Web Client is installed and enter the http://localhost/EQWebClient in the Address field. Make sure that JavaScript and cookies are enabled for the web browser.

   **NOTE:** If the Web Client is used for the first time after initial installation or a computer reboot, it may take more than 30 minutes to load.

2. Web Client opens. Depending on the installation settings, different pages may display:

   • If Single Sign-On was not selected, the Login page displays.
   
   • If Single Sign-On was selected, the Web Client tries to log in the user who is running the web browser. The web browser may ask for Windows user credentials. If the login is not successful, the Login page displays with error message. Otherwise, another page displays depending on the rights of the logged-in user and the installed web applications.

3. Web Client can communicate with CAS if login is successful or failed, but not with a communication error.

4. If Scan Client was installed, login with an Equitrac user or a Windows user with Equitrac administrative rights and start Scan Client. If the scan jobs list screen appears, then Scan Client can connect to the server database. If the logged-in user only has access to the Scan Client, then Scan Client starts automatically.

5. If Web Deposit was installed, login with an Equitrac user and start Web Deposit. See the Web Deposit Setup Guide. If the logged-in user only has access to Web Deposit, then Web Deposit starts automatically.

6. For further verification, repeat these steps from another computer.

Configuration

After installing the Web Client some additional reconfigurations may be required (for example, there is a change in CAS settings or a change to the Web Client authentication is required). Most of the modifications can be done with the interactive installation wizard, but some can only be done manually.

Change Configuration with the Installer

Use the installer to change the following configurations:

• Install or uninstall Scan Client
• Install or uninstall Web Reports
• Install or uninstall User Dashboard
• Install or uninstall Web Deposit
• Install or uninstall Web System Manager
• Modify the CAS address (if CAS is not installed on that same computer)
• Specify another user for the Web Client application pool
• Switch on or off Single Sign-On
To modify the installation with the Installer, do the following:

1. Start the installer (see **Installing Server Components on a Single Machine** on page 24):
   - Open **Control Panel > Programs and Features** and select the **Equitrac Office or Express** and click **Change**.
   - Or—
     Launch the installer file (MSI).

2. In the **Maintenance Type** dialog, select the **Change** option. The same wizard dialogs are displayed as in case of normal installation, where the configurations can be changed.

### Change the Configuration Manually

To change the configuration manually, complete the following:

#### Specify the user for the Web Client application pool

Specifying the user for the application pool can also be done with the installer (recommended).

1. Start the Internet Information Management console and stop the **Equitrac** application pool.
2. Edit the settings of the **Equitrac** application pool and specify its user credentials.
3. Restart the **Equitrac** application pool.

#### Switch on or off Single Sign-On for Web Client

Switching on/off Single Sign-On can also be done with the installer (recommended).

1. Start the Internet Information Management console and stop the **Equitrac** application pool.
2. Change the authentication method of the **EQWebClient** web application.
   - To switch on Single Sign-On, enable **Windows authentication** and disable all others.
   - To switch off Single Sign-On, enable **Anonymous and Forms authentications** and disable all others.
   - Restart the **Equitrac** application pool.

#### Change the CAS address

Changing the address of CAS can also be done with the installer (recommended).

1. On the computer where the Web Client is installed, start the Internet Information Management console and stop the **Equitrac** application pool.
2. Open the registry editor of Windows (**regedit.exe**).
3. Navigate to the **HKEY_LOCAL_MACHINE\SOFTWARE\Equitrac\Common** value.
4. Change the **CASName** value to the host name or IP address of the computer where CAS is installed.
5. Restart the **Equitrac** application pool.

**NOTE:** This is required only when the Web Client and CAS are installed on different machines.
Change the Web Client address and port used by CAS

Web Client acquires certain Equitrac settings from CAS, for example, used currency symbol. When Web Client starts, these settings are downloaded from CAS and then Web Client registers itself to CAS in order to receive notifications about changing of any settings. For the registration, Web Client sends its address and port to CAS which can be used by CAS to send notifications. By default, Web Client sends the NetBIOS name of the computer where Web Client is running on.

In some network environments (CAS and Web Client are in separate subnets or DNS is not available for CAS), the default behavior cannot be performed. In these cases, the registration address of Web Client should be modified manually as follows:

1. Start the Internet Information Management console and stop the Equitrac application pool on the computer where Web Client is installed.
2. Open the `web.config` configuration file from the installation folder of Web Client (by default `C:\Program Files\Equitrac\WebClient`) in a text editor (for example, Notepad).
3. This is an XML file. Find the `<configuration>/<appSettings>` element.
4. Locate the `WebServerAddressAndPortForCAS` key and change its value to the address of Web Client.
5. Save and close `web.config`.
6. Restart the Equitrac application pool.

Changing the Web Deposit configuration

For more information on how to change the Web Deposit configuration, see the `Web Deposit Setup Guide`.

Installing Release Station

The Release Station software is included in the Equitrac server installation wizards. Run the wizard on the server you want to use as a Release Station, and scroll down in the list of program features to select the Release Station option under Auxiliary Applications.

Refer to the “Release Station” chapter in the `Equitrac Office and Express Administration Guide` for configuration information.
Chapter 2: Server Installation

Installing MobileDCE

MobileDCE is an Equitrac Express feature that allows for tracking prints and copies without depending on a network connection to CAS. MobileDCE can be installed on a portable server (e.g. a laptop).

To install MobileDCE, do the following:

1. Locate the MobileDCE.msi on the Equitrac Express Product Download site, or download it from the software download website.
2. Run MobileDCE.msi on the laptop which will update user PIN data and collect transactions from the PageCounter terminals.
3. Click Next on the MobileDCE Install Wizard to start the installation.
4. Read and accept the License Agreement, and then click Next.
5. Select a language, and click Next.
6. Select a destination folder to install MobileDCE, and click Next.
7. Enter an Accounting server name, and click Next.
8. Click Install, and then Finish to complete the installation.

Refer to the "Using MobileDCE Server" section in the Equitrac Office and Express Administration Guide for configuration information.

Installation Troubleshooting

If the Device Does Not Display in System Manager

If a device is not displaying, Refresh the System Manager window often while adding new or converted devices. CAS requires about 30 seconds of time to update all required environment variables before populating System Manager with device information. If the System Manager devices view is open while adding new devices or converting ports, you may solve the problem with a simple refresh.

The Report Did Not Generate

If you received an error message during the report generation test, either the report definitions did not load, or the CAS service is not running. Open the Windows Services Administration tool, and look at the status of the CAS service. If the status is not Started, right-click on the service and select Start from the menu. Run the test again to generate the report.

If you see an error message again, the report definitions may not be loaded.

If Licensing Failed

If licensing fails during Automatic Activation, ensure that the Accounting Server is available prior to activation. CAS controls licensing for all components, and if unavailable during activation, the activation fails. Components remain in an unlicensed state until CAS confirms a valid license.
Chapter 2: Server Installation

After initial licensing, components cache their assigned license codes locally and use the cached information if the accounting server is unavailable. However, these temporary cached licenses will expire.

Ensure that you entered all serial numbers precisely. Remember that each component requires a separate license, unless you purchased a Suite license.

If the Serial Number Is Denied

If you apply a license and the Licenses view shows the status as “Denied”, the serial number may already be registered to a different system ID. Call the Customer Support Center to resolve this problem.

If Installing Web Client with the Default Application Pool Identity Fails

Installing Web Client with the default application pool identity requires Windows Server 2008 (64-bit) Service Pack 2 or later.

If Installing Web Client without Installed IIS Fails

In case IIS is not installed or ASP.NET component of IIS is not enabled, if you select Web Client and press the Next button, the error message appears. Ensure that when you close the message box, the feature selection dialog remains open. This way, you can deselect Web Client. This also applies to silent installation.
Workstation Client Installation

Topics
- Workstation Client Overview
- Installing Workstation Client on Windows Clients
- Installing Workstation Client on a Citrix or a Terminal Server
- Installing Workstation Client on Mac Systems
- Configuring Printers for Mac Systems

Workstation Client Overview

One or more Equitrac Workstation Client components can be installed on any network workstation. Desktop Printing, Messaging Client, and Interactive Print Rules are not supported for Mac clients. Although Equitrac Messaging Client is not supported for Mac users, the Mac Client has its own message popup capability. The Mac popup will display Equitrac messages except those generated by Interactive Print Rules.

- **Print Assistant** (Equitrac Express feature)
  Provides the following features:
  - **Rename Document** – Allows users to rename their documents.
  - **Release Key** – Allows users the option to install the release key feature. This is not compatible with Login or Billing Code prompts.

- **Workstation Direct IP Printing (DRC)**
  Direct IP printing enables Follow-You Printing and provides print tracking on par with DRE server-based print tracking. The Desktop Printing feature is also installed with DRC (Document Routing Client).
  Provides the following features:
  - **I-Queue** – A single Follow-You Printing queue where all printers are combined into a single pull group.
  - **Managed Queue** – A printing mode that enables users to print to a queue using a selected vendor specific printer driver. The print queue with the selected printer driver is automatically installed and updated on workstation computers. Print jobs are submitted to one print queue and then released on any MFP assigned to the Managed Queue.

- **Desktop Printing**
  Install if supporting printing to local desktop printers.
Chapter 3: Workstation Client Installation

- **Windows Network Printing**
  Installs the EQPrintProvider.dll which communicates with DRE on Windows print server for print tracking. This feature is not needed with DRC Direct IP printing or when tracking local desktop printing.

- **Client Billing popup**
  Install if deploying Equitrac (Office/Express) in an environment that will use billing codes to support a charge-back system.

- **Prompt for Login (user authentication)**
  Install to enable a prompt that requires users to enter their Windows login credentials when submitting a print request.

- **Cost Preview**
  Install on each workstation to enable a pop-up window to preview job attributes and corresponding pricing prior to submitting the print job to the printer or queue.

- **Equitrac Messaging Client**
  Install to enable message popups on client workstations. An alternative to using the installer to install this feature is to copy the EQMsgClient.exe from the Tools folder on the CAS server to each workstation, and place a shortcut in the Startup group.

- **Interactive Print Rules**
  Enables users to interact with rules providing multiple options.

### Installing Workstation Client on Windows Clients

Workstation Client for Windows Clients can be installed one workstation at a time, or installed silently across multiple workstations. For silent installation on Multiple Workstations, see [Workstation Client Installation](#) on page 78.

**NOTE:** For Windows Servers 2008, 2008 R2, 2012, 2012 R2 and 2016, make sure the server is up to date with the latest service packs, or manually download and install the latest version of Windows Installer from [www.microsoft.com](http://www.microsoft.com). Windows Installer 4.5 is required to install Equitrac (Office/Express) 5.7. If you do not have Windows Installer 4.5 the following error displays: "This installation package cannot be installed by the Windows Installer service. You must install a Windows service pack that contains a newer version of the Windows Installer Service."

**WARNING:** Do not install any Equitrac Client services on any computer running any Equitrac Server services. If these services are installed on the same computer, the Equitrac Server may crash and will need to be reinstalled. You cannot run the Repair option on the server if it crashes, a complete reinstall is required.

### Installing on a Single Workstation

1. Confirm that each Windows workstation is resolving communications to the CAS and DRE servers by hostname. On a Client machine, open a command prompt and type `ping hostname` where the hostname is the name of the machine hosting the master CAS or DRE.
2. Close all other applications on the server prior to installing the Workstation Client.
3. Obtain the Equitrac Office or Express Client software file from the Equitrac Product Download site. The Client Installer is available as an individual installation file or as part of a complete package with all installers, product documentation and the Microsoft SQL Server 2008 Express application file. Alternatively, use the physical distribution DVD to run the appropriate installer, if available.
4 Obtain the required product serial number and activation code to enable the software functionality after installation.

5 Ensure that Windows 10 Universal CRT for Visual Studio 2015 is installed prior to installing Workstation Client on a non-Windows 10 OS (such as Windows 7, 8.0, 8.1, Server 2008, 2008 R2, 2012, 2012 R2 and 2016).

6 Select and run the 64-bit Installer file (Equitrac.Office.x64.Client.msi or Equitrac.Express.x64.Client.msi), or select and run the 32-bit Installer file (Equitrac.Office.x86.Client.msi or Equitrac.Express.x86.Client.msi) to launch the Equitrac Office or Express Installation wizard.

7 From the Welcome screen, click Next.

8 Read and accept the End-User License Agreement, and then click Next to continue.

9 Select the language version of the clients you want to install.

10 On the Custom Setup screen, select the client applications to install on the workstation, and click Next.

   NOTE: You can check the disk space requirements on the workstation to ensure that enough space is available for the selected components. Click Disc Usage to view the disk space analysis.

11 On the Core Accounting Server Location screen, enter the fully qualified domain name or fixed IP address of the CAS server, and click Test Connection to validate a connection across the network, and then click Next to continue. Otherwise just click Next without testing the CAS server.

12 On the Windows Firewall Exceptions screen, select either a manual or automatic setup method for the firewall exceptions, and then click Next to continue.

13 Click Install to start the installation process. The installation wizard copies files, sets up services, and creates shortcuts to the Administrative Applications.

   CAUTION: If the cache directory specified for the Temporary File Location during the client installation is on the network, the shared engine (SE) will not start. The SE runs under the system account and you cannot give Equitrac \SYSTEM access to the share on the network. You must ensure that the Local System account has write access into this directory. The cache directory also must reside on the local client machine, not on the network.

14 When setup is complete, click Finish to close the installation wizard.

   NOTE: You must install Desktop Printing feature in order for several client features (Prompt for Login, Cost Preview, Interactive Print Rules, Print Assistant, Client Billing popup and DRC) to work.
Chapter 3: Workstation Client Installation

Installing Workstation Client on a Citrix or a Terminal Server

**NOTE:** Popups do not display if the print server is also on the Citrix/Terminal Server. Popups only display for printers defined in the user’s Citrix/Terminal Server session. To track jobs sent to local printers attached to the user’s workstation, the Desktop Printing option must also be installed on the server.

1. Confirm that each Citrix or Terminal server is resolving communications to the CAS and DRE servers by hostname. On a Client machine, open a command prompt and type ‘ping hostname’ where the hostname is the name of the machine hosting the master CAS or DRE.
2. Close all other applications on the server prior to installing the Workstation Client.
3. Obtain the Equitrac Office or Express Client software file from the Equitrac Product Download site. The Client Installer is available as an individual installation file or as part of a complete package with all installers, product documentation and the Microsoft SQL Server 2008 Express application file. Alternatively, use the physical distribution DVD to run the appropriate installer, if available.
4. Obtain the required product serial number and activation code to enable the software functionality after installation.
5. Select and run the 64-bit Installer file (Equitrac.Office.x64.Client.msi or Equitrac.Express.x64.Client.msi), or select and run the 32-bit Installer file (Equitrac.Office.x86.Client.msi or Equitrac.Express.x86.Client.msi) to launch the Equitrac Office or Express Installation wizard.
6. From the Welcome screen, click Next.
7. Read and accept the End-User License Agreement, and then click Next to continue.
8. Select the language version of the clients you want to install.
9. On the Custom Setup screen, select the client applications to install on the workstation, and click Next.
   - To select or deselect an item, click on the hard drive icon beside the feature and select one of the following options:
     - Will be installed on local hard drive.
     - Entire feature will be installed on local hard drive.
     - Entire feature will be unavailable.
10. The Client installation displays a warning that it must stop the Print Spooler service during the file installation, which briefly disables printing on this workstation. Click Yes to continue or No to abort the installation.
12. Enter the CAS server name in the Accounting server field. Click Next to continue.

   **CAUTION:** If the cache directory specified for the Temporary File Location during the client installation is on the network, the shared engine (SE) will not start. This happens since the SE runs under the system account and there is no way to give the Equitrac \SYSTEM access to the share on the network. You must therefore ensure that the Local System account has write access into this directory. The cache directory also must reside on the local client machine, not on the network.
13. When setup is complete, click Finish to close the installation wizard.
Installing Workstation Client on Mac Systems

Equitrac (Office/Express) Client for MacOS X enables you to print to Equitrac printers defined on Windows print servers from Mac OS X workstations. The Mac Client allows direct printing over TCP/IP. You must have a valid Client Billing license to use and configure Mac Clients.

The Mac OS X Client programs require Mac OS 10.8.5 or higher for Equitrac (Office/Express) 5.7. If you try to install the Mac Client is on a Mac OS 10.7 (or lower) system, the installation is aborted. If an earlier version of the Mac Client is already installed on a Mac OS 10.7 (or lower) system, an upgrade to the latest Mac OS X Client is not supported.

Mac Client can be installed on a single workstation, or batch installed across multiple workstations using Apple Remote Desktop (ARD).

Obtain the Equitrac_Office_MacOSX_xxxx.zip or Equitrac_Express_MacOSX_xxxx.zip file from the Equitrac Product Download site or from the physical distribution DVD. The zip files contain the MacOS X Client Installer (Equitrac_Office_MacOSX_xxxx.pkg or Equitrac_Express_MacOSX_xxxx.pkg), and the Equitrac Print Utility (EQPrintUtilityX.app) for setting Client Printers and Preferences.

Configuring the Mac Client Preferences

Before installing the Mac Client and Mac DRC on the workstation, run the Equitrac Print Utility and set the CAS address and desired the Client preferences. After setup, DRC will pick up the CAS address at startup.

To configure the Mac Client Preferences, do the following:

1. Login to the Mac Client with Administrator privileges.
2. Run the EQPrintUtilityX.app and select Preferences from the Printer Utility menu to open the Preferences window.

3. Select the desired popup options:
   - **Client Billing** – the popup prompts for a client billing code.
   - **Prompt For Login** – requires the user to provide authenticated login credentials before the popup displays.
Chapter 3: Workstation Client Installation

- **Cost Preview** – provides a summary of the cost for a print transaction before the user sends the document to the printer.
- **ReleaseKey** – requires the user to provide a numeric release key to print documents. (Equitrac Express feature)
- **Allow rename document** – allows the user to rename their documents at print time, if desired. (Equitrac Express feature)

4 Enter the CAS Server name or IP address.

**NOTE:** By default this field is blank. If a value is not entered in this field, the Mac DRC will set the IP address to 127.0.0.1, and the DRC will not function properly.

5 In the DRC system name section, select what identifier to use for the Mac DRC.

- **IP address** – the Mac computer IP address.
- **Bonjour name** – the Mac computer's local network name.
- **DNS hostname** – the user-specified string.

**NOTE:** The identifier must be stable and unique across the CAS database, and must be resolvable from Windows, since it will be used by other system components (e.g. System Manager) to open the network connection and to communicate with the Mac DRC.

If using **IP address**, do the following:

- Select **Skip link local addresses** if you DO NOT want the system to use a link-local IP address. Link-local IP addresses can be self-assigned by Mac OS X when DHCP services are not available or when the computer is part of a Zero configuration network. If the IP address, cannot be found, then no connection is made.
- Select the network **Interface** from the drop-down list.
  - **any** – get IP address from the first available interface. Typically, interface en0 is first.
  - **en0** – get IP address from en0 interface. Typically, hard wired Ethernet.
  - **en1** – get IP address from en1 interface. Typically, wireless card (e.g. AirPort).
  - **other** – additional available network connection with an IP address other than Ethernet or wireless (e.g. Firewire or USB). For example, if a Firewire connection is available, the field would be populated with "en1;fw0".

**NOTE:** The Ethernet port and wireless card have different IP addresses.

If using **Bonjour name**, then your computer's name is appended with ".local", and any spaces are replaced with hyphens. For example, if your computer's name is *My Computer*, the its Bonjour name would be *My-Computer.local*. The Bonjour name is generated by Mac OS X.

If using **DNS hostname**, do the following:

- Enter the hostname identifier or click **Generate** to populate the field. It is recommended to qualify the DNS hostname with the network domain name. For example, computer_1.nuance.com
- Select **Register with DNS server** to enable the Mac client to register the specified hostname with DNS server every 24 hours.
6 In the **Login options** section, do the following:
   a Select **Cache login** to enable the user login credentials to be cached locally, and validated against CAS. If selected, the user is only prompted to login at the first print job, and all following print jobs do not require a login. However, if the user's cached credentials change (e.g. new PIN1 or password), they will be prompted to login again. The **Prompt For Login** option must be selected in order to cache the user login credentials. The user credentials are cached on the Mac Keychain for secure password storage.
   b Select **Prompt for password** if you want users to enter a password at login. If selected, the user must enter both primary and secondary user credentials.
   c In the **User ID label** field, enter the display name for the User ID on the login popup. For example, enter 'PIN1' as the User ID label if user's are to enter their Primary PIN as the user ID.

7 Select the **Ignore 'Command and Control' print jobs** checkbox to skip 'control' print jobs that are issued by some print drivers to send commands to the printer hardware.

   For example, a user prints document "Untitled" but gets two popups: one for document named "Untitled", and one for document named "Report Status - 16". Report Status - 16 is a 'control' print job issued by the driver. If the checkbox is selected, then the printer ignores any job named "Report Status - 16". Extra popups can be suppressed by filtering out 'control' print jobs by name.

8 Click **OK** to save the settings and close the Preferences window.

**Installing the Mac Client and Mac DRC**

To install the Mac Client on a workstation, do the following:

1 Login to the Mac Client with Administrator privileges.
2 Uninstall the previous version of Equitrac Mac client, if installed.
3 Run the **Equitrac_Office_MacOSX_xxxx.pkg** or **Equitrac_Express_MacOSX_xxxx.pkg** file.
4 On the Installer **Welcome** screen click **Continue** to start the installation.
5 Select a **Destination** drive (if applicable) where you want to install the software, and click **Continue**.

   **NOTE:** The installation process skips this step if only one drive is available. The software installs by default to the boot drive.
6 Select the installation type: **Standard** or **Custom** (for DRC).

7 To install a standard Mac client, do the following:
   a. Click the **Install** button.
   b. Enter your **Name** (user ID) and **Password**, and click **OK**.

8 To install Mac DRC, do the following:
   a. Click the **Customize** button to open the **Custom Install** screen.
   b. Select the **Equitrac Document Routing Engine** checkbox, and click **Install**. The **Equitrac Print Client** is selected by default.
   c. On the login popup, enter your **Name** (user ID) and **Password**, and click **OK**.

9 Click **Close** to complete the client installation.

10 Logout of the Mac system and login again to enable printer functionality. Users logged in to the system during installation, must log out and then log back in before printing functions become available to them.
Setting Languages

The Mac OS allows users to set the Preferred languages list in the System Preferences. The EQLoginController application goes through the Preferred languages list until it finds the first supported language in the list. If no localized language is supported (or selected), it defaults to English. If the Preferred languages list is changed in the System Preferences, then the EQLoginController must be restarted.

Configuring Printers for Mac Systems

Ensure that the CAS and DRE components have communication with the Mac workstation. If EQPrintUtilityX cannot communicate with DRE, the list of printers will not display when you attempt to add a new device.

Mac Client Printers

1. Login to the Mac Client with Administrator privileges.
2. Run the EQPrintUtilityX and select File > New Printer from the Printer Utility menu.
3. In the DRE Address field, enter the DRE server IP address, and click Get Printers.
   The Equitrac Printer Utility queries DRE for a list of accessible printers.
4. Select the appropriate printer from the list, and click OK.

Mac DRC Printers

1. Login to the Mac Client with Administrator privileges.
2. Run the EQPrintUtilityX and select File > New IP Printer from the Printer Utility menu.
3. Enter the IP Address and Name of the printer, and click OK.
   The new printer displays in the available printers list.
Chapter 3: Workstation Client Installation

Test the Client Installation

Print a document. Depending on the client options you installed, you may need to enter your login credentials. Ensure that the client popup displays, then select a billing code, and accept cost preview information if configured.

File Location and Ownership

The Equitrac installer files are placed in these locations on the Mac:

/Library/Application Support/Equitrac/
/Library/LaunchAgents/
/Library/LaunchDaemons/
/usr/libexec/cups/backend/eqtrans
/usr/libexec/cups/backend/eqpmom

Ownership:

eqpmom - root
eqtrans - root

How to Restart the Mac DRC Service

To restart the Mac DRC service, do the following:

1. Login to the Mac Client with Administrator privileges.
2. Unpack the Equitrac_Office_MacOSX_xxxx.zip or Equitrac_Express_MacOSX_xxxx.zip file.
3. Open the Terminal application.
4. Type `sudo`.
5. Select Tools, and then drag & drop EQRestartDRC.sh from the Finder into the Terminal window.
6. Press Enter.
7. Enter the Admin account password.

Troubleshooting

If there is an MAC Client installation problem, verify the following:

- The Name/IP displayed in the CAS Server field in the EQPrintUtilityX.app > Preferences dialog is set to a valid CAS machine name IP, and not 127.0.0.1.
- The Name/IP displayed in the CAS Server field in the EQPrintUtilityX.app > Preferences dialog can be pinged from a MAC workstation.
- The workstation license is available on the CAS server.
Silent Installation

Topics

Server Installation
Workstation Client Installation
Installation Examples
Using Transforms to Set Options
Silent Installation Troubleshooting

If you plan to deploy the same Equitrac Office or Express features across several servers, silent installation can be used to simplify the installation process. Silent installation is handled by the Microsoft Windows Installer by specifying options and features to install from the Equitrac Office or Express install package to the Windows installer. This document outlines each feature that can be installed, but these features can be combined into one command to install multiple components on a single server.

If you are upgrading to Equitrac Office or Express version 5.7 from an earlier version, refer to Upgrade Equitrac Office/Express on page 88.

NOTE: For Windows Servers 2008, 2008 R2, 2012, 2012 R2 and 2016, make sure the server is up to date with the latest service packs, or manually download and install the latest version of Windows Installer from www.microsoft.com. Windows Installer 4.5 is required to install Equitrac (Office/Express) 5.7. If you do not have Windows Installer 4.5 the following error displays: “This installation package cannot be installed by the Windows Installer service. You must install a Windows service pack that contains a newer version of the Windows Installer Service.”
Server Installation

Equitrac server components (CAS, DRE, DCE, DME, SPE) and Web Client are only available in 64-bit. Administrative applications, Auxiliary applications and Workstation Client are available in both 32-bit and 64-bit installers.

Running Windows Installer in Silent Mode

To run the Windows Installer in silent mode requires running the appropriate executable file—specifying what features to install, how to configure the product, and to run it in silent mode.

- **64-bit server components, Administrative and Auxiliary applications**: Equitrac.[Office].[Express].exe
- **32-bit Administrative and Auxiliary applications**: msiexec /i Equitrac.[Office].[Express].x86.msi
- **64-bit Workstation Client**: msiexec /i Equitrac.[Office].[Express].Client.x64.msi
- **32-bit Workstation Client**: msiexec /i Equitrac.[Office].[Express].Client.x86.msi

Example:

Equitrac.[Productname].exe ADDLOCAL="[Features]" [OPTIONS] /q

- **[Productname]** can be Office or Express
- **ADDLOCAL** specifies the features to install separated with "," (comma)

**NOTE:** ADDLOCAL can be missing from the command line. In this case, most of the server components (CAS, DCE, DME and DRE), all the administrative applications, Web System Manager and the documentation are installed.

**NOTE:** If the ADDLOCAL parameter is specified, it must contain the **Common** value to install and configure the required common files. If you want to install a specific component (for example, Documentation), specify it as one of the feature names in the ADDLOCAL parameter.

Example:

ADDLOCAL="Common,CAS,AdministrativeApplications,SystemManager,Documentation,IQueue"

- **[OPTIONS]** are the various options that can be specified

**NOTE:** If any server component (CAS, DCE, DME, DRE or SPE) is selected for the installation, you have to specify SRVCUID and SRVCPWD options. For more details on these parameters, see below. Otherwise, the installation fails.

- **/q** specifies to install in "quiet" mode

The INSTALLFOLDER option is a common option which has effect for all features. It can be used to override the default installation folder.

To automatically setup Windows Firewall Exceptions option, set SET_FIREWALL_RULES=1.
Core Accounting Server (CAS)

Features

To install the Core Accounting Server, the following features are specified in ADDLOCAL:

- **Common** – These are common components essential for every installation of the product, regardless of which features being installed. This feature has to be installed.
- **CAS** – This feature installs the Core Accounting Server (CAS) feature, Scheduler feature, and associated tools.

Options

To install the Core Accounting Server, the following options must be specified to the installer:

- **CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server. If this option is not specified, its default value is the local computer name.
- **LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:
  - "en" – English
  - "es" – Spanish
  - "fr" – French
  - "it" – Italian
  - "de" – German
  - "pt" – Portuguese
  - "zh" – Chinese
- **SRVCUID** – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\UserID). If this option is not specified, the installation fails.
- **SRVCPWD** – This option specifies the password of the account under which the services will run. If this option is not specified, the installation fails.
- **CAS_DBTYPE** – This option specifies the type of database to which CAS will connect. Its default value is "SQLSERVER". The following values can be specified:
  - "SQLSERVER" – Microsoft SQL Server or Microsoft SQL Express
  - "ORACLE" – Oracle
- **CAS_DBSERVER** – This option is only specified when installing CAS with a Microsoft SQL Server or SQL Express database type. This parameter specifies the SQL Server database to which CAS will connect. If a port number also has to be specified, use the comma ("," ) character as a port separator (e.g. "hostname,port"). If this option is not specified, its default value is "\SQLEXPRESS".
- **CAS_DBLOGONTYPE** – This option selects the authentication mode used to connect to the specified SQL Server or SQL Express. Its default value is "WinAuth". The following values can be specified:
  - "WinAuth" – Windows authentication
  - "SqlAuth" – SQL authentication
**CAS_DBUID** – This option specifies the account name of the user who will connect to the Equitrac Express or Office repository. This option has effect only if the selected database platform is SQL Server or SQL Server Express (the CAS_DBTYPE option is “SQLSERVER”).

**CAS_DBPWD** – This option specifies the password of the user who will connect to the Equitrac Express or Office repository. This option has effect only if the selected database platform is SQL Server or SQL Server Express (the CAS_DBTYPE option is “SQLSERVER”).

**CAS_DBOVERWRITE** - This option indicates that existing database should be deleted and the new one created when the user installs CAS and database type is SQL Server or SQL Express. In this case, installer detects if database is Express and if database with name “eqcas” already exists.

**Document Routing Engine (DRE)**

**Features**
To install the Document Routing Engine, the following features are specified in ADDLOCAL:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**DRE** – This feature installs the Document Routing Engine feature, port monitor, and supporting files.

**ManagedQueue** – This feature enables Managed Queue printing.

**IQueue** – This feature enables I-Queue printing.

**NOTE:** If installing I-Queue on multiple DREs, you need to first download the Nuance certificate from the Nuance Partner Portal, and then distribute it across all associated DREs before silent installation.

**Options**
To install the Document Routing Engine, the following options must be specified to the installer:

**CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server. If this option is not specified, its default value is the local computer name.

**LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese

**SRVCUID** – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\UserID). If this option is not specified, the installation fails.
**SRVCPWD** – This option specifies the password of the account under which the services will run. If this option is not specified, the installation fails.

**EQDRENAME** – This option only needs to be specified if installing DRE on a cluster. Based on your network configuration, use a name or IP address that other components can use to connect to the DRE server. On a cluster, this will be the name or IP address associated with the resource group in which DRE will run.

### Device Control Engine (DCE)

#### Features

To install the Device Control Engine, the following features are specified in ADDLOCAL:

- **Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.
- **DCE** – This feature installs the Device Control Engine feature and supporting files.
- **DWS** – This feature installs the Device Web Server for web-based MFPs.
- **DCE_SmartCard** – This feature installs the Smart Card authentication mode.
- **DCS** – This feature installs the Device Control Server feature and supporting files.

#### Options

To install the Device Control Engine, the following options must be specified to the installer:

- **CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server. If this option is not specified, its default value is the local computer name.
- **LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:
  - "en" – English
  - "es" – Spanish
  - "fr" – French
  - "it" – Italian
  - "de" – German
  - "pt" – Portuguese
  - "zh" – Chinese
- **SRVCUID** – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\UserID). If this option is not specified, the installation fails.
- **SRVCPWD** – This option specifies the password of the account under which the services will run. If this option is not specified, the installation fails.
- **DCE_CACHE_DISTRIBUTED** – This option specifies if DCE is part of a High Availability setup or not.
- **DCE_VSN** – This option specifies the IP/hostname of the virtual server configured in the Network Load Balancer.
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**DCE_COUCHBASE** – This option specifies the connection string to the Couchbase database. The string is in the `couchbase://hostname/bucketname` format.

**COUCHBASE_USERNAME** – This option specifies the Administrator's username on the Couchbase server node.

**COUCHBASE_PASSWORD** – This option specifies the Administrator's password on the Couchbase server node.

**Device Monitoring Engine (DME)**

**Features**

To install the Device Monitoring Engine, the following features are specified in ADDLOCAL:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**DME** – This feature installs the Device Monitoring Engine service.

**Options**

To install the Device Monitoring Engine, the following options must be specified to the installer:

**CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server. If this option is not specified, its default value is the local computer name.

**LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese

**SRVCUID** – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\UserID). If this option is not specified, the installation fails.

**SRVCPWD** – This option specifies the password of the account under which the services will run. If this option is not specified, the installation fails.

**Scan Processing Engine (SPE)**

**Features**

To install the Scan Processing Engine, the following features are specified in ADDLOCAL:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**SPE** – This feature installs the Scan Processing Engine.
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Options

To install the Scan Processing Engine, the following options must be specified to the installer:

**CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server. If this option is not specified, its default value is the local computer name.

**LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese

**SRVCUID** – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\UserID). If this option is not specified, the installation fails.

**SRVCPWD** – This option specifies the password of the account under which the services will run. If this option is not specified, the installation fails.

Administrative Applications

Features

To install the various administrative applications, the following features are specified in ADDLOCAL:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**AdministrativeApplications** – These are all the common tools and libraries used by the various administrative applications and must be installed regardless of which applications are going to be installed.

**SystemManager** – Include this feature to install the System Manager administrative application. It enables administrators to maintain system settings and configuration.

**AccountManager** – Include this feature to install the Accounts Manager administrative application. It enables administrators to set up accounts and maintain account details.

**ReportManager** – Include this feature to install the Reports Manager. It enables administrators to view and maintain standard and customized reports.

**DeviceMonitoringConsole** – Include this feature to install Device Monitoring Console which enables administrators to monitor device status and faults.

**DepartmentManager** – Include this feature to install Department manager which enables department administrators to maintain account settings.
Options

To install the Administrative Applications, the following options must be specified to the installer:

**LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese

Auxiliary Applications

Features

To install the various optional public workstation applications, the following features are specified in **ADDLOCAL**:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**AuxApplications** – These are all the common libraries used by the various auxiliary applications and must be installed regardless of which auxiliary applications are going to be installed.

**F.ReleaseStation** – Include this feature to install Release Station. Your users can release print jobs held at the print server when secure printing is configured.

**F.Cashier** – Include this Equitrac Express feature to install the Cashier for staff to record transactions against user accounts; a subset of Accounts Manager functionality.

**F.DepositStation** – Include this Equitrac Express feature to install Deposit Station. Your users can transfer funds from value cards to their Equitrac accounts.

**F.EQXLPD** – Include this option to make EQXLPD available for configuration. EQXLPD is a Windows service that provides extended LPD functionality to enable administrators to map or modify user IDs for incoming LPR print jobs.

Options

To install the Auxiliary Applications, the following options must be specified to the installer:

**LANGUAGE** – This specifies the installation language. If this option is not specified, the default installation language is English. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese
Web Client

Features
To install the Web Client, the following features can be specified in ADDLOCAL:

**Common** – These are common components essential for every installation of the product, regardless of features being installed. This feature has to be installed.

**ScanClient** – This feature installs Scan Client.

**WebSystemManager** – This feature installs Web System Manager.

**UserDashboard** – This feature installs User Dashboard.

**WebReports** – This feature installs Web Reports.

**WebDeposit** – This feature installs Web Deposit.

Options
The following options effect all Web Client features:

**CASNAME** – This is the name of the Core Accounting Server. Based on your network configuration use a fully qualified domain name or fixed IP address. If this option is not specified, its default value is the local computer name.

**WC_APPPOOL_UID** – Specify the account name of the user who will run the Web Client Application Pool in IIS. If this option is not specified, the default "ApplicationPoolIdentity" user will be set.

**WC_APPPOOL_PWD** – Specify the password of the user who will run the Web Client Application Pool in IIS. This option is only has effect if the **WC_APPPOOL_UID** option is also specified.

**WC_SSO** – Enable or disable the Single Sign-On authentication mode of Web Client. If it is set to “0” or not specified, Single Sign-On will be disabled, which is the default setting.

The following options have effect only for Scan Client and if CAS is not installed on the same machine:

**WC_SCANCLIENT_DBTYPE** – Selects the database platform used by the Equitrac Express or Office repository. If it is “2”, Scan Client will be configured to use Oracle. Otherwise Scan Client will connect to a SQL Server or SQL Server Express database, which is the default setting.

**WC_SCANCLIENT_SQLADDRESS** – Specify the location (server name and optionally the database instance) of the Equitrac Express or Office repository. This option has effect only if the selected database platform is SQL Server or SQL Server Express (the **WC_SCANCLIENT_DBTYPE** option is not “2”). If a port number also has to be specified, use the comma ("，“) character as a port separator (e.g. "hostname,port"). If this option is not specified, its default value is ".\SQLEXPRESS".

**WC_SCANCLIENT_SQLUID** – Specify the account name of the user who will connect to the Equitrac Express or Office repository. This option has effect only if the selected database platform is SQL Server or SQL Server Express (the **WC_SCANCLIENT_DBTYPE** option is not “2”). If this option is not specified, Windows authentication will be used meaning the Web Client application pool user connecting to the database.

**WC_SCANCLIENT_SQLPWD** – Specify the password of the user who will connect to the Equitrac Express or Office repository. This option has effect only if the selected database platform is SQL Server or SQL Server Express (the **WC_SCANCLIENT_DBTYPE** option is not “2”) and the **WC_SCANCLIENT_SQLUID** option is also specified.
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The following options only effect Web Deposit:

**WC_DEPOSIT_SQLADDRESS** – Specify the location (server name and optionally the database instance) of the Web Deposit repository. If a port number also has to be specified, use the comma ("," character as a port separator (e.g. "hostname,port"). If this option is not specified, its default value is ".\SQLEXPRESS".

**WC_DEPOSIT_SQLUID** – Specify the account name of the user who will connect to the Web Deposit repository. If this option is not specified, Windows authentication will be used meaning the Web Client application pool user connecting to the database.

**WC_DEPOSIT_SQLPWD** – Specify the password of the user who will connect to the Web Deposit repository. This option has effect only if the WC_DEPOSIT_SQLUID option is also specified.

**NOTE:** Windows authentication for database connections is not allowed if a user is not specified for the application pool. For example, if WCSCANCLIENT_DBTYPE is not "2" and WC_APPPOOL_UID and WC_SCANCLIENT_SQUID are not specified, the installation will be aborted. Or, if WC_APPPOOL_UID is not specified, the installation will be aborted.

**Workstation Client Installation**

**Running Windows Installer in Silent Mode**

When installing the Workstation Client across multiple workstations, Administrators can silently install the Client with scripted responses. Equitrac (Office/Express) integrates with your operating system's push utility to allow it to silently push the client installation from a central shared folder on a network server to the client workstations.

If deploying I-Queue to multiple workstations or DREs, you need to first download the Nuance certificate from the Nuance Partner Portal, and then distribute it across all associated workstations and DREs before silently installing the Workstation Client.

To silently install the Workstation Client, do the following:

1. Connect to the machine where you want to install the Workstation Client software.
2. Add the Nuance certificate to the workstation or DRE.
3. Copy the Equitrac Office or Express client install files to the root folder of the C drive.
4. Open a command prompt and type the following:
   ```
   msiexec /i "c:\Equitrac.[Office].[Express].Client.x64.msi" CASNAME="yourcasname"
   LANGUAGE="lang" ADDLOCAL="options" /q
   ```
5. Replace "yourcasname" with the name of the CAS server.
6. Replace "lang" with the correct language abbreviation:
   - "en" – English
   - "es" – Spanish
   - "fr" – French
   - "it" – Italian
   - "de" – German
   - "pt" – Portuguese
   - "zh" – Chinese
Replace the “options” variable with the components you have licensed or plan to use. Separate the options with a comma, and do not use spaces between the commas.

Options

To silently install the Equitrac Workstation Client, the following options must be specified.

Common – Required option for all commands. Installs the common files required for any type of install.
DesktopPrinting – Installs the Desktop Print Tracking feature.
ClientBilling – Installs the Client Billing feature.
PromptForLogin – Installs the Prompt for Login feature.
DocumentRename – If using Release Stations, use this option to install the Document Rename feature that allows users to rename documents.
ReleaseKey – Use this Equitrac Express option to install the release key feature. This is not compatible with Login or Billing Code prompts.
CostPreview – Installs the Cost Preview feature.
NetworkPrinting – This option tracks Windows DRE printing to Windows print servers.
DRC – Installs the Document Routing Client for Direct IP printing.

NOTE: For the DRC option, you must also select DesktopPrinting if you require a popup from one of the other options (Client Billing, Prompt for Login, Cost Preview, ReleaseKey, DocumentRename, Interactive Rules). Do not install on a server where DRE is installed, as they are not compatible.

IQueue – This feature enables I-Queue printing.
ManagedQueue – This feature enables Managed Queue printing.
InteractiveRules – This function allows a server-based print rule to interact with the end user when running on a Windows print server. This change does not apply to workstation rules or copy rules.
EQMsg – This option displays messages in the Windows system tray via the Equitrac Message Client.

Installing the Windows Print Client with DRC

To install the Windows Print Client with the DRC feature installed, you must add the Nuance certificate to the Trusted Publishers store before the Client is installed. Otherwise, a Windows Security message appears.

To add the certificate to all of the client workstations using a Group Policy object (GPO), do the following:

1. Install the Equitrac print client on a workstation.
2. Select the Always trust software from ”Nuance Communications, Inc” checkbox and click Install.
3. After installation, select Start and run mmc.exe.
4. In the Microsoft Management Console select File > Add\Remove Snap-in.
5. Select Certificates from the snap-ins list, and click Add.
6. Select Computer account and click Next.
Chapter 4: Silent Installation

Leave the default setting **Local computer** and click **Finish**.

Click **OK**.

Navigate to **Certificates (Local computer) > Trusted Published** and select **Certificates**.

Right-click the Nuance certificate and click **All Tasks > Export**.

In the Certificate Export Wizard, click **Next**.

Leave the default setting **DER encoded binary x.509 (.CER)**, and click **Next**.

Enter a file name and path, and then click **Save**. Alternatively, click **Browse** to select a file name and path.

Click **Next**, and then click **Finish**.

This certificate needs to be distributed to all of your computers that will install this software. To distribute the certificate, do the following:

1. Open the **Group Policy Editor** and navigate to **Computer Configuration\Windows Settings\Security Settings\Public Key Polices**.
2. Import the certificate under the Trusted Publishers Certificates.

**Setting I-Queue Driver Defaults**

I-Queue driver defaults are only effective if the I-Queue feature is installed on the client workstations. The driver defaults apply to both I-Queue and I-Queue Direct, and can be overwritten by the end user.

**IQUEUE_DEFAULT_PAPERSIZE** – This specifies a default value for paper size. The following values can be specified:

   "1" – Letter
   "9" – A4

**IQUEUE_DEFAULT_COLOR** – This option specifies a default value for color. The following values can be specified:

   "1" – Monochrome
   "2" – Color

**IQUEUE_DEFAULT_DUPLEX** – This option specifies a default value for duplex. The following values can be specified:

   "1" – Simplex
   "2" – Duplex long-edge
   "3" – Duplex short-edge

Example for installing Equitrac Office or Express interactively with the I-Queue defaulted to A4, color, duplex:

```
msiexec /i Equitrac.[Office].[Express].Client.x64.msi IQUEUE_DEFAULT_PAPERSIZE=9 IQUEUE_DEFAULT_COLOR=2 IQUEUE_DEFAULT_DUPLEX=2
```

Example for installing Equitrac Office or Express interactively with the I-Queue defaulted to monochrome:

```
msiexec /i Equitrac.[Office].[Express].Client.x64.msi IQUEUE_DEFAULT_COLOR=1
```
Installation Examples

The following are some installation examples using management tools on a server. All parameters are case-sensitive and must be typed as shown.

NOTE: The Nuance certificate must be pre-trusted before running a silent install. If the Nuance certificate is not already added, then a Windows security popup appears requesting that you "Always trust software from "Nuance Communications, Inc" to add the certificate, and the silent install stops.

Installing CAS

Microsoft SQL Server

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,DepartmentManager" CASNAME="EQCASSERVER" LANGUAGE="en" CAS_DBSERVER="DBSERVERNAME\EQINSTANCE" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Microsoft SQL Express

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,DepartmentManager" CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Oracle

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,Department_Manager" DBTYPE="ORACLE" CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Clustered CAS with Microsoft SQL Server

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,DepartmentManager" CASNAME="EQCASSERVER" LANGUAGE="en" CAS_DBSERVER="DBSERVERNAME\EQINSTANCE" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Installing DRE

Standalone Print Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DRE" CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q
Clustered Print Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DRE" CASNAME="EQCASSERVER"
EQDRENAME="EQCLUSTEREDDRE" LANGUAGE="en" SRVCUID="DomainName\equitrac"
SRVCPWD="password" /q

Installing DCE

Standalone DCE Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DCE" CASNAME="EQCASSERVER"
LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
COUCHBASE_USERNAME="Administrator" COUCHBASE_PASSWORD="Password" /q

Standalone DCE Server with DWS, DCS and Smart Card

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DCE,DWS,DCS,DCE_SmartCard"
CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
COUCHBASE_USERNAME="Administrator" COUCHBASE_PASSWORD="Password" /q

Clustered DCE Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DCE" CASNAME="EQCASSERVER"
LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
COUCHBASE_USERNAME="Administrator" COUCHBASE_PASSWORD="Password" /q

High Availability DCE Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DCE" DCE_CACHE_DISTRIBUTED="1"
DCE_VSN="loadbalanceaddress" DCE_COUCHBASE="couchbase://couchbaseaddress/default"
COUCHBASE_USERNAME="Administrator" COUCHBASE_PASSWORD="Password"
CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
/q

Installing DME

Standalone DME Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DME" CASNAME="EQCASSERVER"
LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Clustered DME Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,DME" CASNAME="EQCASSERVER"
LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q
Chapter 4: Silent Installation

Installing SPE

Standalone SPE Server

Equitrac.[Office].[Express].exe ADDLOCAL="Common,SPE" CASNAME="EQCASSERVER"
LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password" /q

Installing Administrative Applications

Administrative applications are available in both 64-bit and 32-bit installers. The following examples use the 64-bit installer. For 32-bit installers replace Equitrac.[Office].[Express].exe with msiexec /i Equitrac.[Office].[Express].x86.msi.

All Administrative Applications

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,DepartmentManager" LANGUAGE="en" /q

System Manager and Accounts Manager

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,AdministrativeApplications,SystemManager,AccountManager" LANGUAGE="en" /q

Reports Manager

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,AdministrativeApplications,ReportManager" LANGUAGE="en" /q

Department Manager

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,AdministrativeApplications,DepartmentManager" LANGUAGE="en" /q

Installing Auxiliary Applications

Auxiliary applications are available in both 64-bit and 32-bit installers. The following examples use the 64-bit installer. For 32-bit installers replace Equitrac.[Office].[Express].exe with msiexec /i Equitrac.[Office].[Express].x86.msi.

Release Station

Equitrac.[Office].[Express].exe ADDLOCAL="Common,AuxApplications,F.ReleaseStation"
LANGUAGE="en" /q

Cashier

Equitrac.Express.exe ADDLOCAL="Common,AuxApplications,F.Cashier" LANGUAGE="en" /q
Deposit Station

Equitrac.Express.exe ADDLOCAL="Common,AuxApplications,F.DepositStation" LANGUAGE="en" /q

EQXLPD

Equitrac.[Office].[Express].exe ADDLOCAL="Common,AuxApplications,F.EQXLPD" LANGUAGE="en" /q

Documentation

Equitrac.[Office].[Express].exe ADDLOCAL="Common,AuxApplications,Documentation" LANGUAGE="en" /q

Installing the Web Client

Entire Web Client with CAS

This example sets an application pool user, does not enable Single Sign-On, CAS uses SQL Server Express database and sets the default local SQL Server Express database for Web Deposit with Windows authentication:

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,ScanClient,UserDashboard,WebDeposit,WebReports,WebSystemManager" CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
WC_APPPOOL_UID="DomainName\equitrac" WC_APPPOOL_PWD="password" /q

This example sets an application pool user, enables Single Sign-On, CAS uses SQL Server Express database and sets the default local SQL Server Express database for Web Deposit with Windows authentication:

Equitrac.[Office].[Express].exe
ADDLOCAL="Common,CAS,ScanClient,UserDashboard,WebDeposit,WebReports,WebSystemManager" CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
WC_APPPOOL_UID="DomainName\equitrac" WC_APPPOOL_PWD="password" WC_SSO="1" /q

Installing the Scan Client

This example installs only the Scan Client on a computer where CAS is not installed. It sets the default application pool, disables Single Sign-On and sets the Equitrac Express or Office repository settings, which means SQL Server database with SQL authentication:

Equitrac.[Office].[Express].exe ADDLOCAL="Common,ScanClient" CASNAME="EQCASSERVER"
WC_SCANCLIENT_DBTYPE="1" WC_SCANCLIENT_SQLADDRESS="DBSERVERNAME\EQINSTANCE"
WC_SCANCLIENT_SQLUID="DomainName\equitrac" WC_SCANCLIENT_SQLPWD="password" /q

This example installs only Scan Client on a computer where CAS is not installed. It sets an application pool user, enables Single Sign-On and sets the Equitrac Office or Express repository settings, which means Oracle database:

Equitrac.[Office].[Express].exe ADDLOCAL="Common,ScanClient" CASNAME="EQCASSERVER"
WC_APPPOOL_UID="DomainName\equitrac" WC_APPPOOL_PWD="password" WC_SSO="1"
WC_SCANCLIENT_DBTYPE="2" /q
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Installing Web Deposit

This example installs only Web Deposit with the default application pool, disables Single Sign-On and sets a SQL Server database for Web Deposit with SQL authentication:

```
Equitrac.Express.exe ADDLOCAL="Common,WebDeposit" CASNAME="EQCASSERVER"
WC_DEPOSIT_SQLADDRESS="DBSERVERNAME" WC_DEPOSIT_SQLUID="DomainName\deposit"
WC_DEPOSIT_SQLPWD="password" /q
```

This example installs only Web Deposit with a specified application pool user, enables Single Sign-On sets a SQL Server database for Web Deposit with Windows authentication:

```
Equitrac.Express.exe ADDLOCAL="Common,WebDeposit" CASNAME="EQCASSERVER"
WC_APPPOOL_UID="DomainName\equitrac" WC_APPPOOL_PWD="password" WC_SSO="1"
WC_DEPOSIT_SQLADDRESS="DBSERVERNAME" /q
```

Installing Web System Manager

This example installs only Web System Manager with the default application pool and disables:

```
Equitrac.[Office].[Express].exe ADDLOCAL="Common,WebSystemManager"
CASNAME="EQCASSERVER" /q
```

Installing All Components

This example installs all components where CAS is using a Microsoft SQL Express database:

```
Equitrac.[Office].[Express].exe
ADDLOCAL="Common,DRE,IQueue,CAS,DCE,DWS,DCS,DCE_SmartCard,DME,SPE,AdministrativeApplications,SystemManager,AccountManager,ReportManager,DeviceMonitoringConsole,DepartmentManager,ScanClient,WebDeposit,WebSystemManager,WebReports,UserDashboard,AuxApplications,F.ReleaseStation,F.Cashier,F.DepositStation,F.EQXLPD,Documentation"
CASNAME="EQCASSERVER" LANGUAGE="en" SRVCUID="DomainName\equitrac" SRVCPWD="password"
WC_APPPOOL_UID="DomainName\equitrac" WC_APPPOOL_PWD="password" WC_SSO="1"
COUCHBASE_USERNAME="Administrator" COUCHBASE_PASSWORD="Password" /q
```

Installing Batch Files

When running batch files to install Equitrac components, add a '\^' to the end of line that is not the end of a command.

```
Equitrac.[Office].[Express].exe
ADDLOCAL="Common,AdministrativeApplications,ReportManager" LANGUAGE="en" /q
```

Installing the Workstation Client

This example installs Client Billing and Cost Preview for Network DRE Windows print servers on the client workstations. The client UI will be in German.

```
msiexec /i Equitrac.[Office].[Express].Client.x64.msi CASNAME="EQU_CAS_SRV" LANGUAGE="de"
ADDLOCAL="Common,ClientBilling,CostPreview,NetworkPrinting" /q
```
Using Transforms to Set Options

A transform is a collection of changes applied to an installation. For example, these can be used to embed the service username and password into a transform so they do not need to be specified on the command-line.

Transforms Example

The following procedure describes a scenario using Orca to generate a transform to hardcode using the Equitrac services username and password.

1. Open the msi using Orca.
2. In the Transform menu, select New Transform.
3. Alter the Property table for the following properties:
   a. Add the property SRVCUID and set it to the name of the account under which the services will run.
   b. Add the property SRVCPWD and set it to the password of the account under which the services will run.
4. In the Transform menu, generate the transform and save the MST file.

To apply the transform, specify the MST file in the TRANSFORMS property during installation. For example, for a transform that is used to hardcode the SRVCUID and SRVCPWD properties named serviceaccount.mst, specify TRANSFORMS=serviceaccount.mst instead of the SRVCUID and SRVCPWD properties.

Example for installing DRE with this transform:

```
Equitrac.[Office].[Express].exe ADDLOCAL="Common,DRE" CASNAME="EQCASSERVER"
LANGUAGE="en" TRANSFORMS="serviceaccount.mst"
```

Properties Set Through a Transform

**CASNAME** – This is the name of the Equitrac Core Accounting Server. Based on your network configuration, use a name or IP address that other components can use to connect to the server.

**LANGUAGE** – This specifies the installation language. The following values can be specified:

- "en" – English
- "es" – Spanish
- "fr" – French
- "it" – Italian
- "de" – German
- "pt" – Portuguese
- "zh" – Chinese

**CAS_DBTYPE** – This option specifies the type of database to which CAS will connect. The following values can be specified:

- "SQLSERVER" – Microsoft SQL Server or Microsoft SQL Express
- "Oracle" – Oracle
CAS_DBSERVER – This option is only specified when installing CAS with a database type of Microsoft SQL Server. This parameter specifies the SQL Server database to which CAS will connect.

SRVCUID – This option specifies the name of the account under which the services will run. Domain accounts should be qualified with the domain name (e.g. DomainName\ UserID).

SRVCPWD – This option specifies the password of the account under which the services will run.

EQDRENAME – This option only needs to be specified if installing DRE on a cluster. Based on your network configuration, use a name or IP address that other components can use to connect to the DRE server. On a cluster, this will be the name or IP address associated with the resource group in which DRE will run.

I-Queue Driver Defaults

I-Queue driver defaults are only effective if the I-Queue feature is installed. The driver defaults apply to both I-Queue and I-Queue Direct, and can be overwritten by the end user.

IQUEUE_DEFAULT_PAPERSIZE – This specifies a default value for paper size. The following values can be specified:

"1" – Letter
"9" – A4

IQUEUE_DEFAULT_COLOR – This option specifies a default value for color. The following values can be specified:

"1" – Monochrome
"2" – Color

IQUEUE_DEFAULT_DUPLEX – This option specifies a default value for duplex. The following values can be specified:

"1" – Simplex
"2" – Duplex long-edge
"3" – Duplex short-edge

Example for installing Equitrac Office or Express interactively with the I-Queue defaulted to A4, color, duplex:

Equitrac.[Office].[Express].exe IQUEUE_DEFAULT_PAPERSIZE=9 IQUEUE_DEFAULT_COLOR=2 IQUEUE_DEFAULT_DUPLEX=2

Example for installing Equitrac Office or Express interactively with the I-Queue defaulted to monochrome:

Equitrac.[Office].[Express].exe IQUEUE_DEFAULT_COLOR=1

Silent Installation Troubleshooting

Issues can be identified by reviewing the trace logs that are generated in the %TEMP% directory of the user under which the installation is run. There are three log files generated:

- Equitrac_Express_Setup_20160905211137.log - contains all other tracing information
- Equitrac_Express_Setup_20160905211137DB.log - traces out information about installing the database
- Equitrac_Express_Setup_20160905211137PM.log - traces out information about installing the DRE Port Monitor
This chapter provides detailed instructions to upgrade to Equitrac Office or Express version 5.7 from a previous version.

Refer to the ReleaseNotes.pdf on the Equitrac Product Download site for potential important installation or upgrade information not contained in this document.

**NOTE:** If you require assistance while upgrading, contact the Technical Support Centre:
Phone: 1.877.EQUITRAC (1.877.378.4872) or +1.519.885.2417 for calls outside of North America.

### Planning an Upgrade

When planning an upgrade to Equitrac Office or Express version 5.7 consider the following:

- If upgrading from Equitrac (Office/Express) 4.x, you must have a valid 4.x maintenance license applied in **System Manager > Licensing** prior to upgrading. The upgrade only proceeds if the license is found/validated by the Installer. Equitrac 5.7 requires new licenses and cannot function with the existing 4.x licenses after the upgrade is complete. After upgrading to version 5.7 System Manager removes the old 4.x licenses and applies the 5.7 licenses. It is recommended that you write down your existing 4.x licenses, and obtain the new 5.7 licenses before proceeding with the upgrade. The 4.x licenses are removed immediately after installing 5.7, and Equitrac cannot function until the 5.7 licenses are applied.

- 32-bit server components are not supported in Equitrac (Office/Express) version 5.7. A direct upgrade from an earlier version of Equitrac running 32-bit server components to version 5.7 running 64-bit cannot be done. If you currently have any 32-bit server components installed on a 64-bit system, you must remove them and then re-install the 64-bit components. 32-bit Administrative applications (e.g System Manager, Reports Manager) and Workstation Client components can be upgraded on 64-bit systems.

- You must be running at least Equitrac (Office/Express) 4.2.6 in order to upgrade to version 5.7. A direct upgrade from version 4.2.5 or lower to version 5.7 is not supported.

- If upgrading from versions 4.2.1 through 4.2.5 to version 5.7, you first need to fully upgrade all components to 4.2.6, and then upgrade to 5.7. You do not need to uninstall the earlier version of Equitrac when upgrading from 4.2.6 to 5.7, and the database will upgrade accordingly.
Chapter 5: Upgrade Equitrac Office/Express

- If upgrading from version 4.2.0 (or lower), you must uninstall the current version of Equitrac (Office/Express) and any applicable hotfixes, and then fully install all components to version 4.2.6. After installing 4.2.6, you can then perform a direct upgrade to 5.7. Do not perform a partial upgrade to version 4.2.6, as all Equitrac Office or Express components need to be running at least 4.2.6 in order to upgrade to version 5.7.

- If upgrading from version 5.1 (or lower) to version 5.7, and have existing Equitrac printer ports configured, you will be prompted to keep or remove the Equitrac ports. Keep these ports as they will be converted to standard TCP/IP ports while maintaining the printer port definitions after upgrading DRE.

  **NOTE:** When upgrading from Equitrac (Office/Express) 5.1 (or lower) to 5.7, you must open a command window as Administrator, and run the Installer from the command line.

- If upgrading from 5.5 (or lower) to 5.7, and you currently have physical devices on TCP/IP ports that are not registered in System Manager, CAS attempts to pull licenses to those devices after upgrade. After the upgrade, all devices on TCP/IP ports appear in System Manager, and are tracked in the Equitrac database. To prevent licenses being pulled to these devices, set the Tracking Behavior in the physical device summary to "Do not track or record print transactions on this device" after the upgrade.

- Existing e-Queue Ports will be converted to standard TCP/IP ports and will continue to function as before when upgrading to version 5.7. However, new e-Queue ports cannot be created.

- Existing Port type devices will be removed from System Manager once the DRE they are associated with is upgraded to version 5.7.

- After upgrading CAS, DRE configurations from version 5.5 or lower will continue to be supported until the DRE is upgraded. The Output Options will be migrated to 5.7 once CAS is upgraded.

  **NOTE:** When upgrading DRE, stored/cached print jobs will be lost due to database schema changes in version 5.7.

- If an earlier version is installed on a Small Business Server 2011 system, a direct upgrade cannot be performed as Small Business 2011 is not supported in version 5.7. A new install on another supported server is required.

- If upgrading a small deployment, you can schedule a period of downtime and perform the upgrade quickly. You must upgrade CAS first, then upgrade the remaining components in any order.

- If performing this upgrade for a large deployment, you should consider a phased upgrade. Phasing the upgrade allows you to upgrade different components at different times, which will minimize the print/scan/copy/fax interruption within your site. See Phased Upgrade Workflow on page 90.

- If you made any changes to the User Dashboard pages, you must back them up before performing an upgrade. These pages are not translated, and any changes will be lost when installing Equitrac Office or Express.

**Performing an Upgrade**

A direct upgrade from Equitrac (Office/Express) version 4.2.0 or lower to version 5.7 is not supported. If you are upgrading from version 4.2.0 (or lower), you must uninstall the current version of Equitrac Office or Express and any applicable hotfixes, and then install version 4.2.6 and then upgrade to 5.7. Refer to Uninstall Equitrac Office/Express on page 95 and Server Installation on page 22 for either Local or Remote installation details.

Whether performing a phased upgrade, or upgrading all components during a period of scheduled downtime, the following instructions guide you through the Equitrac installation wizard.
Chapter 5: Upgrade Equitrac Office/Express

Backing up your CAS database prior to performing an upgrade is recommended. Before upgrading, ensure that all machines within the current Equitrac Office or Express deployment meet the operating requirements. See Additional Documentation on page 20.

If upgrading from Equitrac Office or Express 5.2 to 5.7, and DWS is currently installed, you must uninstall version 5.2, and manually remove the DWS service prior to the upgrade. To remove the DWS service, open a command window as Administrator, and run the `sc delete EQDWSSrv` script from the command line.

If you installed remote server components (server components hosted on a different machine other than the master CAS), perform these steps to upgrade each machine within the Equitrac Office or Express deployment.

If you deployed the Equitrac Express Small Campus Edition and all server components are installed on a single system, perform these steps only once to upgrade the server, then run the client installation wizard to upgrade clients.

During the upgrade, all CAS information is maintained—not overwritten.

Upgrade the Equitrac (Office/Express) components in the following order:

1. Master CAS
2. Licenses
3. Subsidiary CAS (if applicable)
4. DRE/DME (Typically, DME is installed on the DRE server)
5. DCE
6. SPE
7. Release Stations (if applicable)
8. Web Client
9. Client workstations

**Phased Upgrade Workflow**

Perform a phased upgrade in the following order:

1. **Upgrade CAS and local services.**
   Run the installation wizard on the master CAS server, and install only CAS and the Administrative Applications on this server. After the upgrade, remote services (DRE, DCE) and client workstations require version 5.7 licenses to continue to communicate with the upgraded CAS.

**CAUTION:** If your deployment uses multiple CAS servers with uplink enabled, you cannot use the phased process to upgrade your CAS servers. You must upgrade all CAS servers at the same time, so your Equitrac Office or Express implementation will experience a period of downtime during this upgrade.

2. **Upgrade the remote services.**
   Run the installation wizard on the machines that contain all remote services, except for the client workstations. If you deployed multiple CAS, upgrade the remote instances of CAS in this step. All client workstations will continue to communicate with the upgraded remote services (DRE, DCE) and the upgraded CAS.

3. **Upgrade the workstations.**
   Run the client installation wizard on the workstations.
Upgrade Server Components

Whether upgrading all components on a single server, or performing an large phased upgrade across multiple servers, you must upgrade CAS first, then upgrade the remaining components.

**NOTE:** For Windows Servers 2008 and 2008 R2, make sure the server is updated to .NET 4.5, as this version is required to install Equitrac (Office/Express) 5.7. Windows Servers 2012 and 2012 R2 already have .NET 4.5 installed, and do not need to be updated. Windows Installer 4.5 can be downloaded from www.microsoft.com. If you do not have Windows Installer 4.5 the following error displays: "This installation package cannot be installed by the Windows Installer service. You must install a Windows service pack that contains a newer version of the Windows Installer Service."

To upgrade the server components, do the following:

1. For Equitrac (Office/Express) version 4.2.6, continue to step 2.
   —Or—
   For Equitrac (Office/Express) versions 4.2.1 through 4.2.5, first upgrade all components to 4.2.6, and then upgrade to 5.7.
   —Or—
   For Equitrac (Office/Express) version 4.2.0 or lower, uninstall the current version of Equitrac Office or Express from the server, leaving the Equitrac database and printer ports in place. See **Complete the uninstall wizard to finish removing the product.** on page 97 for detailed uninstall instructions. After uninstalling the current version, you can then install version 4.2.6 and then upgrade to 5.7.

   **NOTE:** If you attempt to run the Setup.exe file without first uninstalling the current version of Equitrac Office or Express from the server, the following error message pops up.

2. Start the installer and steps through the installation wizard as described in **Installing Server Components on a Single Machine** on page 24.
   During the installation, on the Select Features dialog choose the features you want to install. Ensure that you select only the appropriate components to upgrade for this machine. In most cases, these will be the same components that were installed with the previous version of the product.

3. Finish the installation. The selected components will be upgraded on this machine.

4. After you upgrade the master CAS, apply all Equitrac Office/Express 5.7 licenses immediately (including DRE, DCE, Workstation Client licenses, etc). Refer to **Applying Equitrac Office and Express Licenses** on page 37 for instructions.
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Upload Reports

Follow the instructions below for your database type. These instructions update the CAS database to accept new report definitions. If you are using a SQL Express database, you do not need to perform this task.

SQL Database Configuration:

To set up Equitrac (Office/Express) reports within SQL Server, open a command prompt, navigate to C:\Program Files\Equitrac\Office or Express\Accounting Service and execute the following command:

```
eqrptload.exe -a <accounting server> -f reports\reportlist.csv -u -v reports\variables.csv -h reports\globalstyle.txt
```

where `<accounting server>` represents the system name of your accounting server.

For example:

```
eqrptload.exe -a PRINTSV1 -f reports\reportlist.csv -u -v reports\variables.csv -h reports\globalstyle.txt
```

Oracle Database Configuration:

To set up Equitrac (Office/Express) reports within the Oracle database, open a command prompt, navigate to C:\Program Files\Equitrac\Office or Express\Accounting Service and execute the following command:

```
eqrptload.exe -a <accounting server> -f reports\reportlist.csv -u -v reports\variables.csv -h reports\globalstyle.txt
```

where `<accounting server>` represents the system name of your accounting server.

For example:

```
eqrptload.exe -a ACCTSRV-1 -f reports\reportlist.csv -upload -v reports\variables.csv -h reports\globalstyle.txt
```

Upgrading Client Components

Ensure that the CAS servers are upgraded before upgrading client workstations. Apply the appropriate client license(s) within System Manager prior to performing this upgrade.

Upgrading Windows Clients

For the upgrade use the client installer as described in Installing Workstation Client on Windows Clients on page 60. During the installation, complete the following steps:

1. Choose the features you want to install. Ensure that you select only the appropriate components to upgrade for this machine. In most cases, these will be the same components that were installed with the previous version of the product.

2. The client installation displays a warning that it must stop the Print Spooler service during the file installation, which briefly disables printing on this workstation. Click Yes to continue.
Upgrading Mac Clients

When upgrading the Mac Client from Equitrac (Office/Express) 4.1.1 or earlier to 5.7, you must remove the current Mac Client license assignments in System Manager before rolling out new clients.

Previous versions of Equitrac (Office/Express) used the Mac workstation’s IP address as the license identifier, and as of version 4.2.0, the Mac Client pulls a license from CAS using the workstation’s serial number as the identifier. If the IP address license assignments are not removed before upgrading, then you may run out of licenses as new clients use serial number license assignments, and cannot use the IP address licenses.

1. Open System Manager, click Licensing in the left pane, and select the Assignment View tab.
2. Under Workstation Client, remove all Mac entries with an IP address assignment.
3. Click Refresh to apply the changes.

After upgrading to Equitrac (Office/Express) 5.7, new and existing Mac Clients start to pull licenses from CAS using the serial number license assignment.

Upgrading in Silent Mode

A direct upgrade from Equitrac (Office/Express) 4.2.0 or lower to version 5.7 is not supported. Before upgrading, the previous version 4.2.0 (or lower) must be uninstalled — leaving the database and printers in place. Next, you need to install version 4.2.6, and then upgrade to 5.7. See Uninstalling in Silent Mode on page 97 for uninstallation details.

Equitrac server components (CAS, DRE, DCE, DME, SPE) and Web Client are only available in 64-bit. Administrative applications, Auxiliary applications and Workstation Client are available in both 32-bit and 64-bit installers.

Run the appropriate executable to upgrade to version 5.7 — specifying the installer package to run, and what features to install.

- 64-bit server components, Administrative and Auxiliary applications: Equitrac.[Office].[Express].exe
- 32-bit Administrative and Auxiliary applications: msiexec /i Equitrac.[Office].[Express].x86.msi
- 64-bit Workstation Client: msiexec /i Equitrac.[Office].[Express].Client.x64.msi
- 32-bit Workstation Client: msiexec /i Equitrac.[Office].[Express].Client.x86.msi

Example:

Equitrac.[Office].exe ADDLOCAL="[Features]" [OPTIONS] /q

- The /i parameter specifies the name of the msi package to install
- ADDLOCAL specifies the features to install
- [OPTIONS] are the various options that can be specified
- /q specifies to upgrade in “quiet” mode
Chapter 5: Upgrade Equitrac Office/Express

Known Issues

DWS

When upgrading from Equitrac Office or Express version 5.2 to 5.7 with DWS currently installed, you must uninstall version 5.2, and manually remove the DWS service prior to the upgrade. To remove the DWS service, open a command window as Administrator, and run the `sc delete EQDWSSrv` script from the command line.

OCR Language Support

When upgrading from a previous version of Equitrac Office or Express to version 5.7, there may be invalid configurations shown on the OCR language selection dialog in System Manager. Version 5.7 supports only 1 Asian language at a time, and if more than 1 Asian language was part of the OCR language setup in the previous version, this configuration will not be valid after the upgrade. Although the list of languages will display in the OCR language selection dialog, they are invalid, and must be reset after the upgrade.
Uninstall Equitrac Office/Express

To uninstall Equitrac Office or Express, you must remove both server and client components from the appropriate machines. In the case of Mac clients, you must run the Client installation wizard, then select Remove from the options. This chapter provides uninstall instructions for the server and client components, and details how to restore printers to defaults.

**Uninstalling Client Components**

Equitrac Client components must be uninstalled before the server components are uninstalled.

**Windows (Local Uninstall)**

To uninstall the Client package, do the following:

1. From the workstation Start menu, open Control Panel > Programs and Features.
2. Select the client package you want to remove.
3. Click Uninstall, and then click Yes when prompted to remove the client package from the computer.

**Windows (Silent Uninstall)**

To perform a silent uninstall, do the following:

1. Connect to the machine where you want to uninstall the Client.
2. Open a command prompt, and type the following:
   
   ```plaintext
   msiexec /x "<path>\Equitrac.[Office].[Express].Client.x64.msi" /q
   
   where <path> is the full path to the location where you copied the client.msi file.
   ```

   The workstation will reboot automatically after the uninstall is complete. If you need to suppress the reboot, enter the following command instead:

   ```plaintext
   msiexec /x "<path>\Equitrac.[Office].[Express].Client.x64.msi" /q /norestart
   ```
Mac

To uninstall the Mac Client, do the following:

1. Login to the Mac Client with Administrator privileges.
3. To remove the Mac Client from a single workstation, do the following:
   a. Select **Uninstall > EquitracUninstall** from the Finder.
   b. Click **Run**.
   c. Enter your **Name** and **Password**, and click **OK**.
4. To remove the Mac Client from multiple workstations at one time, do the following:
   a. Copy the `EquitracUninstall.sh` script onto each workstation via Apple Remote Desktop (ARD).

Run the uninstall script via ARD on each workstation.

Uninstalling Server Components

The uninstall automatically removes any Equitrac program files on the machine, including CAS, DCE, DRE, DME, Web Client and Administrative Applications. After you remove the server files, verify that the files have been removed, and clean the server registry. You must perform the uninstall on each machine that Equitrac Office or Express is currently deployed on.

To uninstall Equitrac (Office/Express), do the following:

1. From the Start menu, go to **Control Panel > Programs and Features**.
2. Remove any Equitrac hotfixes that may be installed.
3. Select **Equitrac Office Setup** or **Equitrac Express Setup** from the list of programs, and uninstall the product from the computer.
4. Click **Uninstall** and click **Yes** when prompted to remove the software.
5. Complete the uninstall wizard to finish removing the product.

If you attempt to uninstall Equitrac Office or Express from a single cluster node while the DRE or DCE cluster resources are assigned to Cluster Applications (groups), the uninstall fails. All DRE and DCE service resources assigned to cluster groups must be deleted before uninstalling Equitrac Office or Express. Once the DRE and DCE resources are removed from the cluster groups, then Equitrac Office or Express can be uninstalled from the single cluster node. However, the deleted DRE and DCE resources are now unavailable to all remaining nodes in the cluster even though those nodes may still have Equitrac Office or Express installed on them. See the Cluster Deployment Guide for more details.
Uninstall Couchbase Server

If DCE is installed on your system, then the Couchbase server was automatically installed along with DCE. Couchbase is a standalone program, and is not uninstalled with Equitrac Office or Express.

To uninstall Couchbase, do the following:
1. From the Start menu, go to Control Panel > Programs and Features.
2. Select Couchbase Server from the list of programs, and uninstall the product from the computer.
3. Click Uninstall and click Yes when prompted to remove the software.

Complete the uninstall wizard to finish removing the product.

Uninstalling in Silent Mode

To silently uninstall any Equitrac server components on the machine (such as CAS, DCE, DRE, DME, Web Client and Administrative Applications) run the following command:

Equitrac.[Office].[Express].exe /uninstall /quiet