



**Anthology, Inc.**

## **Installing and Setting up Offsite Sales module on a non-Turnkey System**

This document is meant for stores that have just purchased the Offsite Sales module to be used with their own hardware. This document will provide an overview of the requirements for installing the Offsite Sales module.

**NOTE:** This document will walk you through setting up the Offsite Server and Offsite workstations. You will not be able to use the system until you have a follow-up appointment with your Anthology Technician so they can verify the setup. Typically this is a 15-30 minute appointment. Be sure to schedule this in advance with them. Following the Setup Verification, you will need to also have scheduled the one hour training session with them as well.

### **GENERAL INFORMATION ON NETWORKING AND SYSTEM SETUP**

As of August 2007 we do not recommend nor do we support using Windows Vista. It is not recommended to attempt to run a network mix of XP and Vista machines.

While a simple network for home use using Windows Workgroups can be easily accomplished in Windows XP, setting up a business database network is more challenging. Anthology Inc. assumes that your consultant or you possess moderate to advanced knowledge of Windows networking and security/permissions.

Anthology Tech Support does not cover help with Windows networking issues. If you need assistance with configuring your network or computers, please contact an experienced local network technician, Microsoft Support, or Anthology Consulting Services. Please also understand that any assistance with this process from Anthology Consulting Services is billable. Please refer to the document titled "Anthology Maintenance Contract" for specifics on what is and is not covered under the maintenance contract.

Visual Anthology's ability to share its database depends on the Windows operating system. Although there are no special requirements for successfully networking Anthology other than a stable network environment, a dedicated server is strongly recommended for a trouble-free network, especially on systems with three or more users. Business-grade computers (*not*

home/consumer models) that are intended for networking are a must.<sup>1</sup> A fast and stable network depends on good hardware and proper cabling, as well as the proper configuration of any software running on the system.

Please refer to the documents titled “Anthology System and Hardware Recommendations” and “Dedicated Servers” for more information on hardware specifications.

Windows XP is the standard business operating system today. Windows XP Home can be used but has some notable limitations in security. If internal security is critical to your operation, XP Professional should be used on workstations. Large networks should consider a server with Windows 2003 Server as Microsoft limits the number of users in a workgroup or domain to 10 under XP Pro.

We neither recommend nor support accessing the Visual Anthology data over dial-up connections, virtual private networks (VPNs), wide area networks (WANs) or wireless networks.

If you will be connected to the internet via router, hub, or firewall, we strongly recommend that this device not be used as the network switch. Instead, a second switch reserved for the internal network will greatly improve the stability and reliability of the network.

The ‘Simple File Sharing’ that is Windows XP’s default setting for networking does not grant enough permissions to run a business database application like Anthology. To share the Anthology folder on the file server, you must turn off “Simple File Sharing” so that you can apply full permissions. Your local technician should be able to help with this, or Anthology Consulting Services can assist on a billable basis. Please arrange this type of assistance in advance.

To avoid database corruption due to a known XP Pro/Server issue, we recommend that you disable opportunistic locking. Please see NT/2000/XP Help under Opportunistic Locking for instructions, if necessary.

We also do not recommend using the following features- Fast User Switching, Roaming Profiles, Screen Saver forcing users to login, or Power Savers parking/hibernating the drive.

You should also consider having some sort of Anti-virus or anti-spyware product along with a hardware or software firewall. There are dozens of security products out there that can give you varying levels of protection, several are free. Please take the time to familiarize yourself with the product you use, Anthology tech support is not responsible for supporting these 3<sup>rd</sup> party products. Know that some products have their own firewall built into them, while most modern Routers also have firewalls built right into their hardware as well.

Lastly, many users have found it useful to set their Windows Updates, and other Security type software to schedule their updates to occur overnight instead of during the day time as this can cause undue lag on the network. In many cases stores have opted to disable these updates from automatically happening, instead opting to schedule a monthly occurring “Computer Maintenance” day in which they do disk drive maintenance (defrag, error scan) and complete the various updates. We strongly recommend that Windows Update be done only under your control rather than allow it to happen automatically without your knowledge.

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<sup>1</sup> A good indicator is the version of Windows XP installed: while business class units come with XP Pro installed, computers intended for home use usually have XP Home

## Adjustments to Security Software

Many computer systems these days come with a variety of security software. These could be Anti-Virus, Anti-Spyware, Anti-Malware products such as Norton AV Norton Security, McAfee, etc. These products often require all computers on the network to be explicitly 'allowed' to communicate on the network as a means to secure your local network. You are responsible for ensuring your network is properly configured. A common symptom of this not being done is the inability of workstations to browse the network or the server being unable to see the workstations on the network. Also you may need to add the VAL.EXE to the list of 'allowed' or 'exceptions' programs. Norton AV and Security contain a function called "Auto-Protect" that will automatically scan all files traveling on the network for potential viruses. While this is the more secure option, it will slow down your network traffic, such as Visual Anthology. Please see the document titled "SYS Network Security Permissions.pdf" for more information, this can be found in the Customer Zone under Documents.

\*\*A word about "Roaming Profiles". This is a feature available to some network configurations. Unless it is setup absolutely correctly will cause user random problems and we do not recommend it be used.

## The standard hardware/network setup for Offsite Sales module

The instructions contained here are meant for systems that will have one central laptop that will be the server for the offsite data (known hereafter as the Offsite Sever). This laptop will have the ability to run the main store's Anthology as well as a separate copy of the program with data on its local drive. Essentially the Offsite Server will have two icons on its desktop, one for Main Anthology and one for Offsite Anthology. You may also have additional laptops that will act as workstations to the Offsite Server as well; we will cover the setup for these in this document as well. In some rare cases you may also have purchased the additional licenses so all of the laptops can also function as regular workstations in the store when they are not out at events.

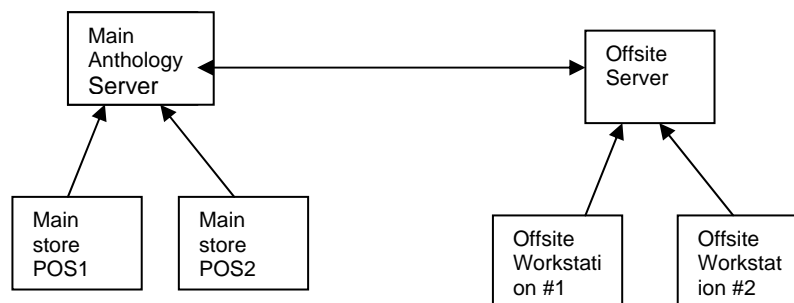


Fig 1- Typical Offsite setup, Offsite Sever laptop can run Main Anthology and Offsite copy with 2 other laptops that can only run the Offsite copy from the Offsite Server.

In some cases special arrangements may have been made for a setup that is other than this default layout. In those cases we will most likely arrange to login and do the setup work on a billable basis.

## Preparing the main Anthology Server

Your main system needs to be set to accommodate the addition of the Offsite Server. Follow the directions below to enable the extra station license.

- 1) With all users out of Anthology, at the Main Anthology Server, open your internet explorer browser
- 2) Go to the FTP URL provided to you in the separate email for the install files
- 3) There will be several files listed here. For the Main Anthology Server you only want to copy one file- VAL.SYS. Locate this file and right-click. Choose "Copy to Folder...".
- 4) You will be asked to choose a download location for the file. You should download it to your Anthology directory on the main server. Typically this is C:\Program Files\Anthology.
- 5) You will likely be asked to overwrite the old file, choose ok.

## Setting up the Offsite Server

This laptop will have the ability to run the Main Anthology as well as a 2<sup>nd</sup> icon to run the Offsite Anthology data stored on its own drive.

To that end the Offsite Server must be on the same network/workgroup as the other machines in the main system. Wireless networking **must** be turned off and the laptop must be connected to the main system via a regular network cable. In many cases it's not uncommon for the wireless networking connection to take precedence over the networked connection. You may need to manually turn off the wireless network card, most modern laptops have a built in switch to turn off the card. Otherwise you may need to go to Control Panel | Network Connections and right-click on the Wireless Connection and choose Disable whenever you are at the store.

## To Install the Offsite Anthology program

You will be doing a complete, fresh, install on this machine. Do not attempt to copy the existing anthology directory from the main server to the Offsite Server. You will be provided with an FTP folder location for which you can download the install files to the Offsite Laptop.

You will need full administrative rights on your server to install Visual Anthology, i.e. this means being logged onto the computer as the Administrator user.

Although you may choose to install Visual Anthology within any folder on the server, we suggest that you accept the default directory of "C:\Program Files\Anthology". This will simplify troubleshooting when calling for tech support.

After you install the Offsite copy, you will need to set the installation directory (C:\Program Files\Anthology) folder and sub-directories to be shared over the network. Each Anthology user must have full control and read and write access rights to this folder and its subdirectories, either by having those rights explicitly granted or by belonging to a group with such rights. If Windows XP Professional or Windows 2003 Server is set up properly, the Anthology installation program will create all of the sub-directories beneath the main Anthology folder, and these sub-directories will inherit the properties of the home folder. Improperly set permissions will cause a variety of error messages indicating that the user cannot modify files.

- 1) Open your Internet Explorer browser
- 2) Go to the FTP URL provided to you in the separate email for the install files
- 3) There should be at least an install.exe, val.sys, and OL.dll file included. You may also find some documentation and an Astation.sys depending on the needs of your specific Offsite Sales setup.
- 4) Do a single left click on one of the files, then press CTRL+A to highlight all of them.
- 5) Right click over any of the now highlighted files and choose "Copy to Folder..". You will be asked to choose a download location for these files. It is best if you download them all to one folder, ideally a C:\Temp folder that you create.
- 6) Once the files have downloaded you can begin the install process. Locate the install.exe in the folder you downloaded it to and double-click it. The install wizard should startup.
- 7) Choose Server Install and accept all defaults.
- 8) A new icon should be in your start menu or on the desktop. Right click and check the Properties | Shortcut tab to make sure that it points to C:\Program Files\Anthology\val.exe. Modify the Target field to show the following instead, use a capital O instead of a zero:  
  
"C:\Program Files\Anthology\val.exe" -O
- 9) Change the Icon name (general tab) to "OFFLINE ANTHOLOGY".
- 10) Click ok to save changes and close the window.
- 11) Do not open the Offsite copy just yet. Locate the files you downloaded in step #5. You must copy the OL.DLL file into the C:\Windows\System32 folder on this Offsite Server. Fail to do so and the Offsite module will not function properly.
- 12) With the above steps completed you may now open the Offsite Anthology icon and let the program do it's initial reindex.

- 13) Open the new icon to establish the new station license. You will need to go to Master Files | Stations | and fill in a Station Name and Shortcode. We recommend a name of "Offline- Offsite Server". Save changes.
- 14) If you'll be adding other laptops to serve as Offsite workstations you must also share the laptop drive or at least the installed directory created above.

### Setting up Offsite Anthology program

As you prepare to go out to an event you will be running a process that will copy all of the inventory, customers, and vendors to the offsite copy. Certain pieces of information will not be updated in the offsite copy during this process such as store address and printer selections. You will need to do some initial configuration of the Offsite copy in some areas before using the offsite set.

- 1) Ensure you have installed your receipt printer and any other report printers you may use while offsite.
- 2) **NOTE:** It is critical that you always use the same USB port to connect your receipt printer to as where you installed it. USB printers will try to reinstall with a new printer icon whenever they are connected to a different USB port than previously used. This would require you to reselect your printers in Anthology each time you connect to a different port.
- 3) Open the Offsite Anthology copy from the Offsite Server. Go to Tools | Options | Addresses and fill in the information requested. Be sure to save changes.
- 4) Go to Master Files | Stations | Details tab and select the Receipt and Report printer driver that you'll be using when offsite. Be sure to save changes.

### To create the Main System Anthology icon

- 1) On the Laptop, Map a network drive on the Offsite Server that points over to the main store's Anthology Server. We recommend you use our standard drive letter of G:.
- 2) While at the laptop create an icon on the desktop of the laptop that points back through the mapped drive to the val.exe icon. To do this open up the newly mapped drive letter back to the Main Server. Locate the Anthology install folder. Locate the VAL.EXE file and Right-Click, Send to Desktop.
- 3) Switch back to your desktop and locate the new icon marked "Shortcut to Val.exe". Right Click and choose Properties. On the General tab change the name to "MAIN ANTHOLOGY". Click ok to save changes and close the properties window.
- 4) Open the new icon to establish the new station license. You will need to go to Master Files | Stations | and fill in a Station Name and Shortcode. We recommend a name of "Offsite Server". Save changes.

- 5) You will also need to select the printers you will use while the Offsite server is at the store should you need to print receipts/reports. Set this up under Master Files | Stations | Details tab. You will need to have already installed the printers in the windows Printers & Faxes folders before you can select them in Anthology.

### Initializing the Offsite Anthology program

At this stage you should be ready to populate the offsite data set with the main system information. This step should only need to be done once, running it more than once could overwrite any sales you may have waiting in the Offsite Server waiting to be added to the main system.

- 1) At the laptop, open the MAIN ANTHOLOGY icon.
- 2) Go to the Tools menu
- 3) Click on "Refresh Offline Data". A new window will open. There are two fields, one marked "Online Data Path" and one marked "Offline Data Path". These are the locations of the Main Anthology data and the Offline Anthology data. The Online path should already be populated for you. Note that it points to the \Data folder underneath the Anthology folder.
- 4) This first time you will need to fill in the Offline Data Path. This must point to the local install of the Offsite Anthology that you ran on the Offsite Server laptop. If you used the default for the install it should be "C:\Program Files\Anthology\Data". Once this field is populated it will be saved for you.
- 5) Click Run on the "Refresh Offline Data" window to begin the initialization. This may take a few moments.
- 6) When the process is complete a message with flash and the "Date Last Refreshed" field will update to show the current date/time.
- 7) Click the F9 Cancel button to close the window.
- 8) Open the Offsite Anthology copy on this Offsite Server to let it complete its reindexing process. It will reindex upon the first opening of the offsite copy anytime you go offline.

### **Setting up the additional Offsite Workstations**

In this section you will begin setting up the additional laptops that will act as workstations to the Offsite Server when it is out at an event. You will need to map a drive letter back to the Offsite Server and do an install on these workstations.

- 1) On the Offsite Workstation, map a drive letter pointing back to the Offsite Server drive. We recommend using drive M if possible.

- 2) Either download the same install files to this Offsite Workstation or you can browse for them across the network
- 3) Once the files have downloaded you can begin the install process. Locate the install.exe in the folder you downloaded it to and double-click it. The install wizard should startup.
- 4) Choose WORKSTATION Install and accept all defaults. You will be asked for the location of the data on the Server. Point it back to the Offsite Server's install directory using the drive letter you mapped earlier in step 1 immediately above.
- 5) A new icon should be in your start menu or on the desktop. Right click and check the Properties | Shortcut tab to make sure that it points to the path going to the Offsite Server. Modify the Target field to have –O at the end of the path.
- 6) Change the Icon name (general tab) to “OFFLINE ANTHOLOGY”.
- 7) Click ok to save changes and close the window.
- 8) Do not open the Offsite copy just yet. Locate the files you downloaded previously. You must copy the OL.DLL file into the C:\Windows\System32 folder on this Offsite Workstation. Failure to do this step will cause data corruption.

### Setting up Offsite Workstations

You will need to do some initial configuration of the Offsite copy in some areas before using the offsite set.

- 1) At the Offsite Workstation ensure you have installed your receipt printer and any other report printers you may use while offsite.
- 2) NOTE: It is critical that you always use the same USB port to connect your receipt printer to as where you installed it. USB printers will try to reinstall with a new printer icon whenever they are connected to a different USB port than previously used. This would require you to reselect your printers in Anthology each time you connect to a different port.
- 3) Go to Master Files | Stations | List tab and give this station a name such as Offsite Workstation #1. Be sure to save changes.
- 4) Go to Master Files | Stations | Details tab and select the Receipt and Report printer driver that you'll be using when offsite. Be sure to save changes.

**NOTE:** This document will walk you through setting up the Offsite Server and Offsite workstations. You will not be able to use the system until you have a follow-up appointment with your Anthology Technician so they can verify the setup. Typically this is a 15-30 minute appointment. Be sure to schedule this in advance with them. Following the Setup Verification, you will need to also have scheduled the one hour training session with them as well.



## **Setting up Offsite Server to capture Credit Card Sales while Offline (Pcharge users)**

If you use Pcharge at the main store and will be accepting credit cards offline to be batch processed when you return, please following these steps. Bear in mind that this will not allow you to PROCESS credit cards while offline. This is only to enable the functionality so you can accept credit cards and store them for processing when you return home. We strongly encourage you to get the signature and phone number of each customer you will be taking credit cards from while at an event as you will not know if their card is good or not. Many stores also rent/buy an old style imprinting machine so they have proof of the card taken.

- 1) At the Offsite Server, open the My Computer icon. Browse to the Main Anthology Server's anthology folder.
- 2) Locate the CC.DLL file and Copy
- 3) Browse back to the Offsite Server's local drive, to its Anthology installation folder. Typically this is C:\Program Files\Anthology.
- 4) Paste the CC.DLL file into the Anthology directory.
- 5) Open the Offsite Anthology and go to Tools | Options | Credit Cards. Fill in the information on the Merchant and Merchant ID. You can simply open the Main Anthology and copy down that information.
- 6) Be sure to check the "Capture Credit Card Offline" box. Save changes.
- 7) You will need to go into Master Files | Stations | Details tab and fill in the Payment Server Path. This can just be pointed to your local C:\Program Files\Anthology directory.
- 8) Go to Master Files | Tenders. Select every credit card tender you will be using and ensure that the "Require Entry of CC Info" is checked on the Details tab. Save changes.

When you are returning from an offsite event where you took CC's offline you will be given the opportunity to export the transactions in a file to your Payment Server machine.

## **Install Symantec PCAnywhere on Offsite Server**

The Offsite Server computer should have Symantec PCAnywhere installed. This must be version 11.5 or higher and have Remote/Host capabilities. This allows Anthology tech support to remotely access your desktop during tech support and training. If you have decided to use an alternate method of remote access an additional tech support fee will be applied.