abc
FINANCIAL

Configuring 32-Bit Hardware Services

June 11, 2012

Contents

About Hardware Services

Hardware services enable you to manage and use components such as cameras, scanners, and signature capture devices more effectively and efficiently. For example, with hardware services you can allow background checks ins. This means that as long as the computer is on and it is connected to the Internet members can check in whether or not DataTrak is open, if DataTrak is running in the background, or while you are browsing another page in DataTrak. This feature applies to attended or unattended regular and remote check ins.

Note: Background Check In requires a serial scanner.

Another benefit of hardware services is that DataTrak can support multiple camera types and document scanners. You can provide information about the camera and scanner when setting up hardware services in DataTrak.

Note: The Picture Save Path and the Scanner Save Path must be static; the folder name cannot change from day to day. Therefore, a camera that creates a new image folder every day, such as Creative Camera, cannot be used.

Signature capture devices can also be managed by hardware services, thus providing greater stability when capturing signatures in electronic entry or recurring services.

To take advantage of these features and benefits you must perform the following steps:

1. Install hardware services on your computer.

2. Set up hardware services in DataTrak.

3. Manage log files to save space on your computer.

Important! Two software versions (32-bit and 64-bit) are available for download, so please be sure to select and install the correct version for your computer.

This document provides step-by-step instructions for installing the 32-Bit Hardware Services. (For information about installing hardware services for 64-bit software, see Configuring 64-Bit Hardware Services.)

Installing 32-Bit Hardware Services

Before setting up 32-bit hardware services in DataTrak, you must download and install the hardware services software and signature service drivers on the club's computer.

The following are links to downloads for the signature service drivers, 32-bit socket service library, and 32-bit hardware service:

• SigPlus Basic Driver

• SigPlus .net Driver

• 32-bit Socket Service Library

• 32-bit Hardware Service

The 32-bit hardware service installation is a multi-step process that involves the following tasks:

1. Installing drivers for the signature service

   o Installing the basic driver

   o Installing the .net driver

2. Installing the socket service

   o Installing the socket service library

   o Running the socket service library batch process

3. Installing the hardware service

   o Uninstalling an earlier version (if applicable)

   o Installing the hardware service

   o Running the hardware service batch process

   o Updating the HardwareReader.ini file

Installing Drivers for the 32-Bit Signature Service

If you are using the signature service, you must install the following drivers:

1. Basic driver

2. .net driver

Note: Log information for signature captures is stored in the **reader** log. (For more information about logs, see Managing Logs.)

Installing the Basic Driver

Use the following instructions to install the basic driver.

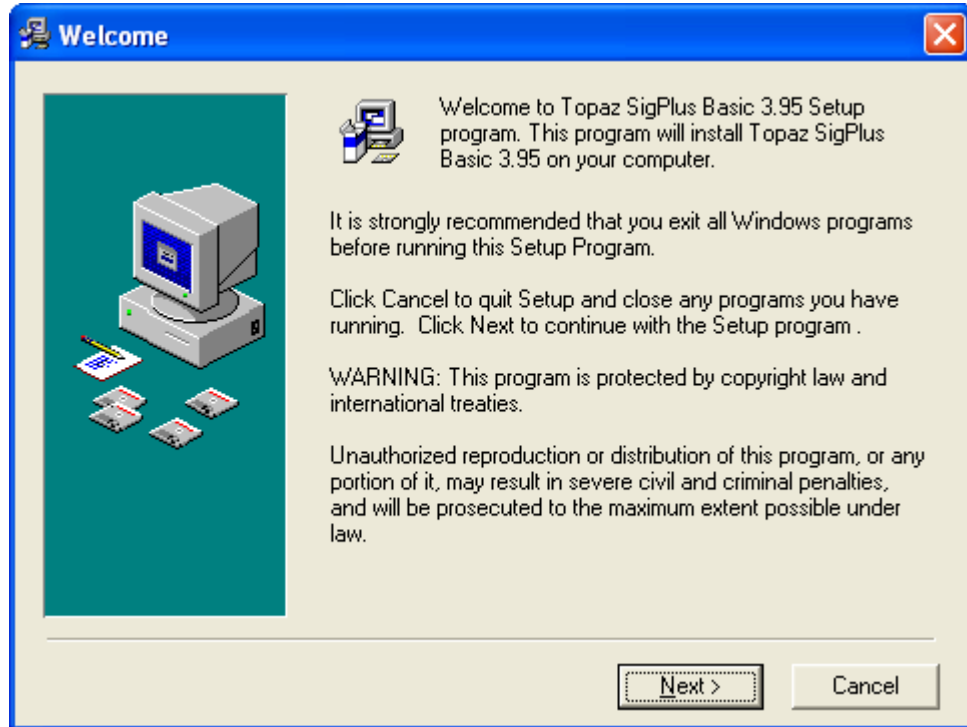**Important!** Exit all Windows programs before installing the basic driver.

To install the basic driver

1. Download the sigplusbasic.zip file.

2. Expand the sigplusbasic.zip file.

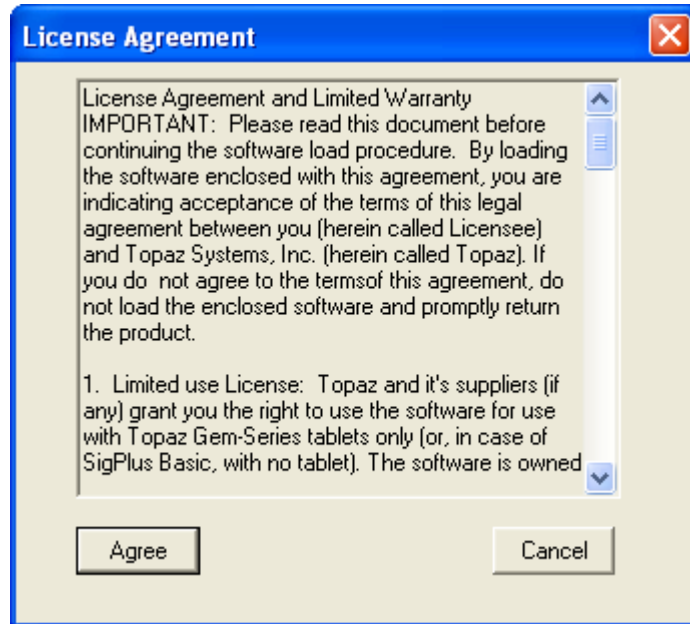3. Double-click **sigplusbasic.exe**.

   You should see the following message, after which the Welcome dialog box appears.
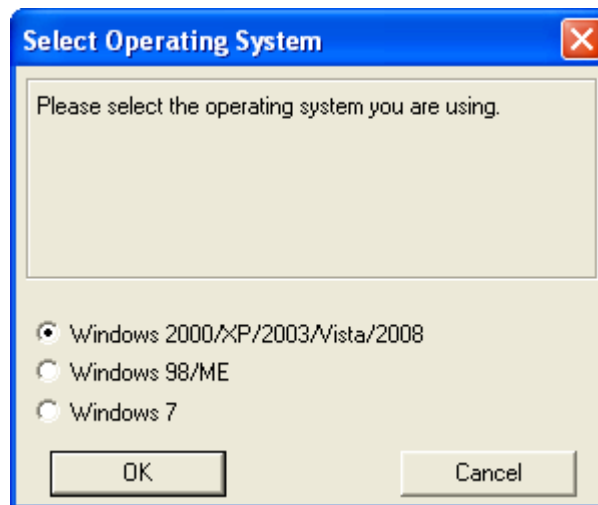
4. In the Welcome dialog box, click **Next**.

5. In the License Agreement dialog box, carefully read the information and then click **Agree** if you accept the terms.

6. In the Select Operating System dialog box select the appropriate operating system and then click **OK**.
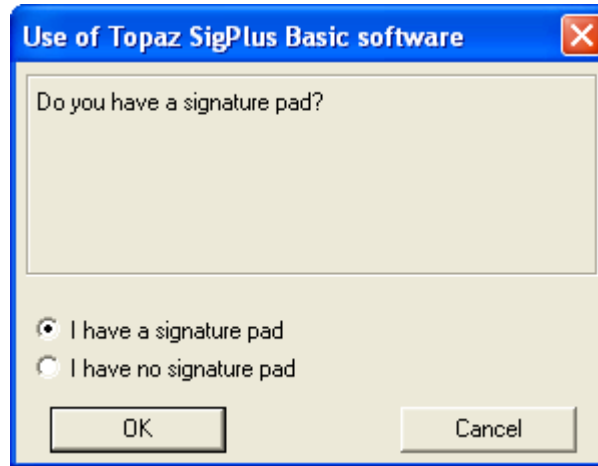
7. In the View Signatures With Word/Excel dialog box, click **No** and then click **OK**.

8. In the View Signatures With Adobe Acrobat dialog box, click **No** and then click **OK**.
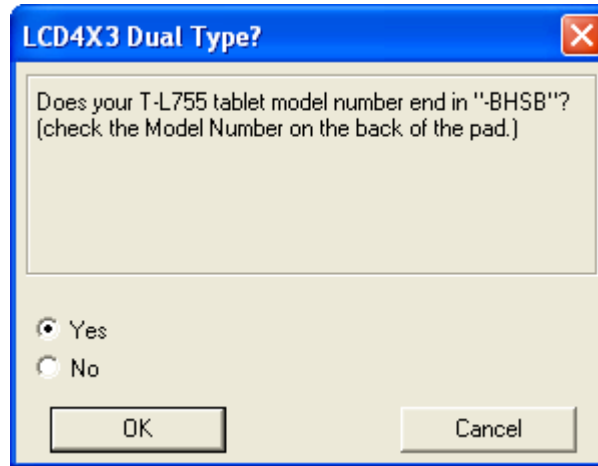
9. In the Use of Topaz SigPlus Basic Software dialog box, click the **I have a signature pad** radio button and then click **OK**.
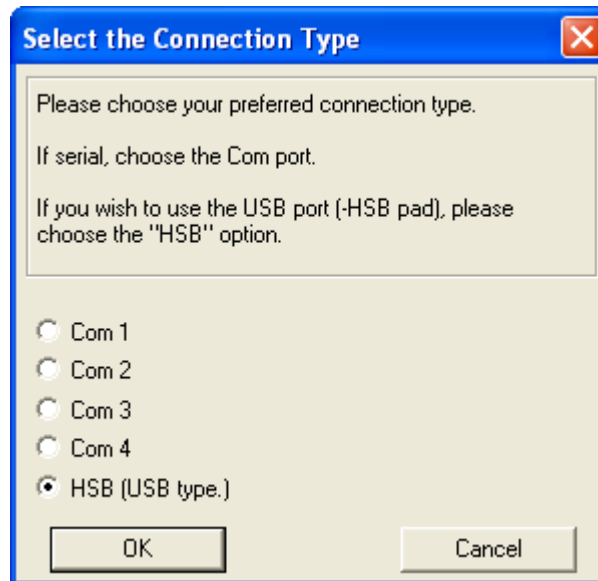

10. In the Choose the Tablet dialog box, select the appropriate signature pad and then click **OK**.
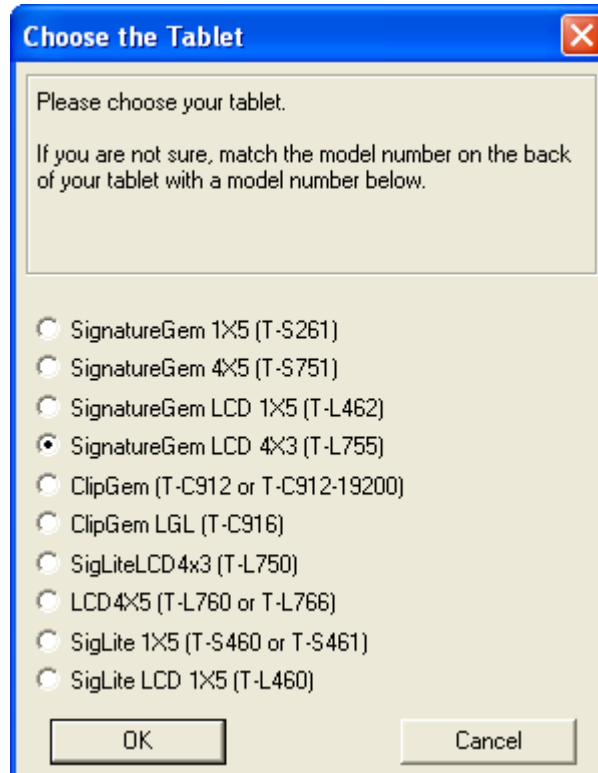
11. Depending on the tablet you chose earlier, indicate the model number and then click
    OK.

12. In the Select the Connection Type dialog box, click the radio button for the appropriate
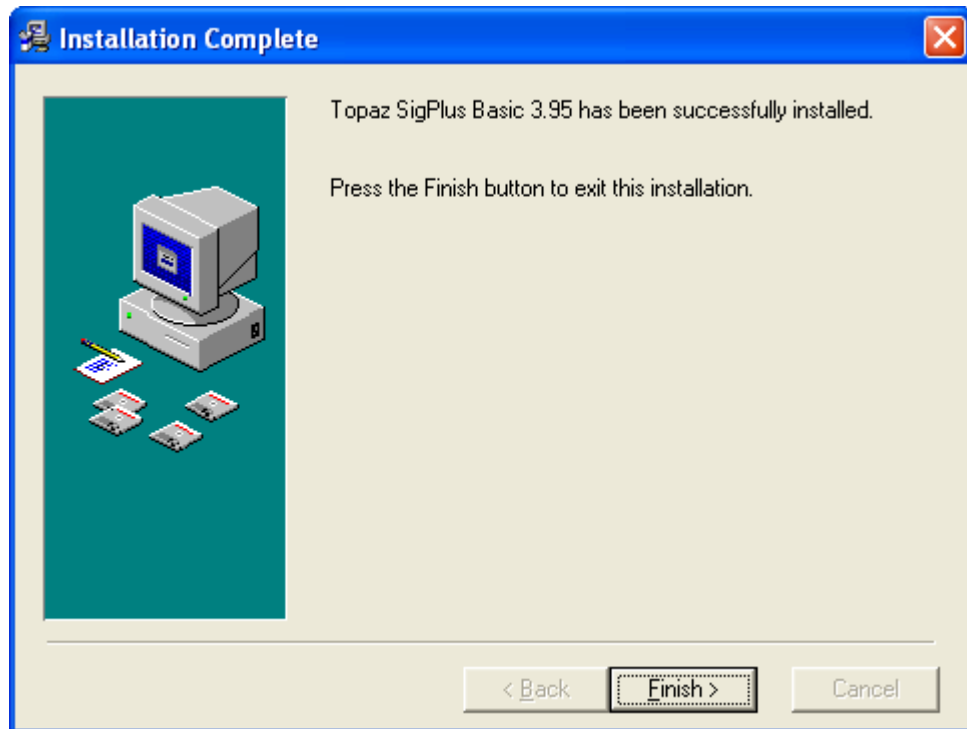   port setting.

13. When the USB TABLET MESSAGE dialog box appears

   o   Unplug your USB tablet if it is already plugged in.

   o   Cancel any Windows New Hardware Wizard installations that may be running.

   o   Click **OK**.
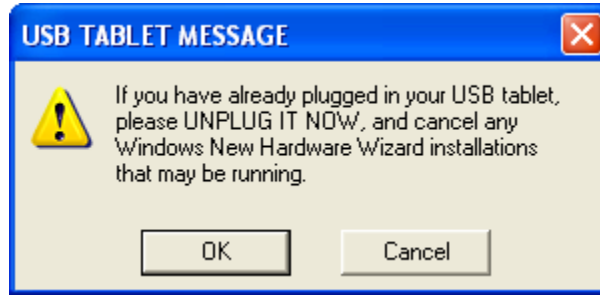
The installation process should take only a few seconds to complete.

14. When the Installation Complete dialog box appears, click **Finish**.

The SigPlusBasic driver installation process is complete.

Next, install the SigPlusNET driver.

Installing the .net Driver

To use the signature service, you must install the SigPlusNET driver.

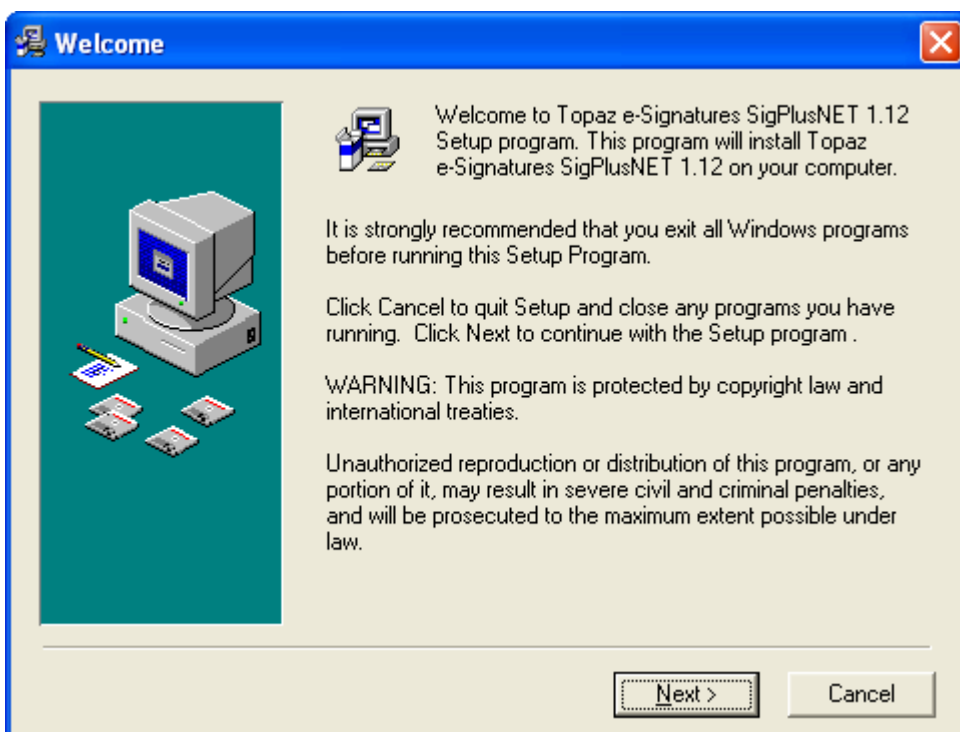**Important!** Exit all Windows programs before installing the .net driver.

To install the SigPlusNET driver

1. Download the sigplusnet.zip file.

2. Expand the sigplusnet.zip file.

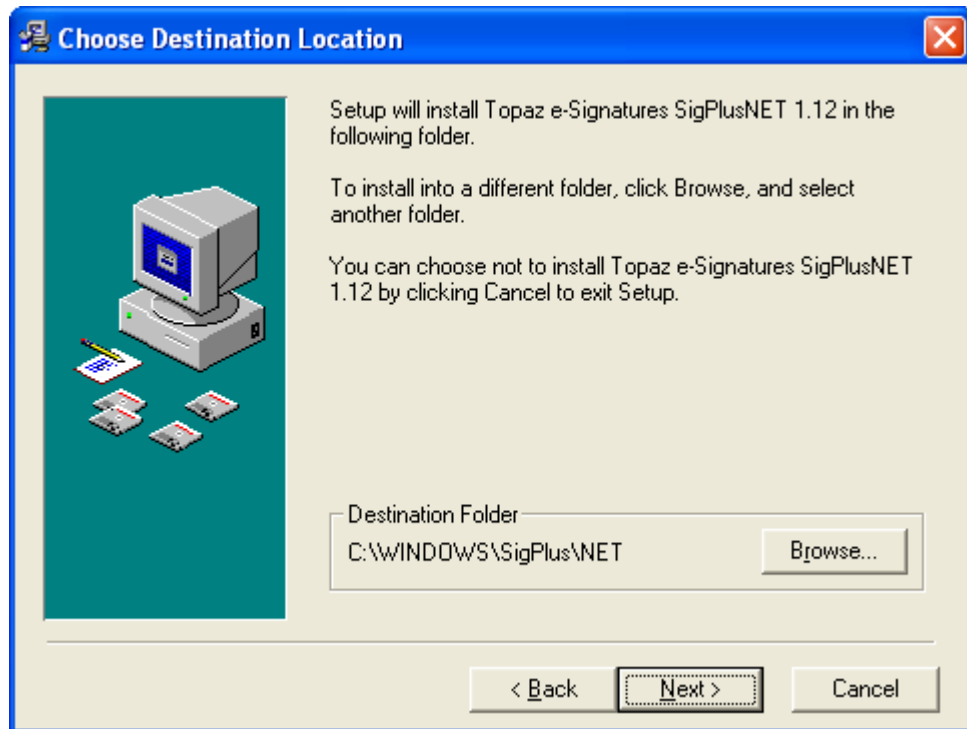3. Double-click **sigplusnet.exe**.

    You should see the following message, after which the Welcome dialog box appears.
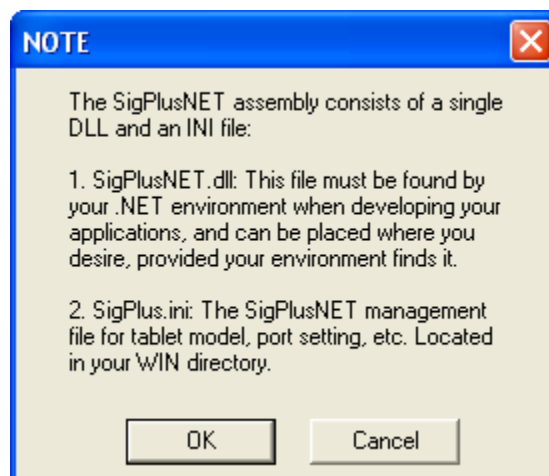

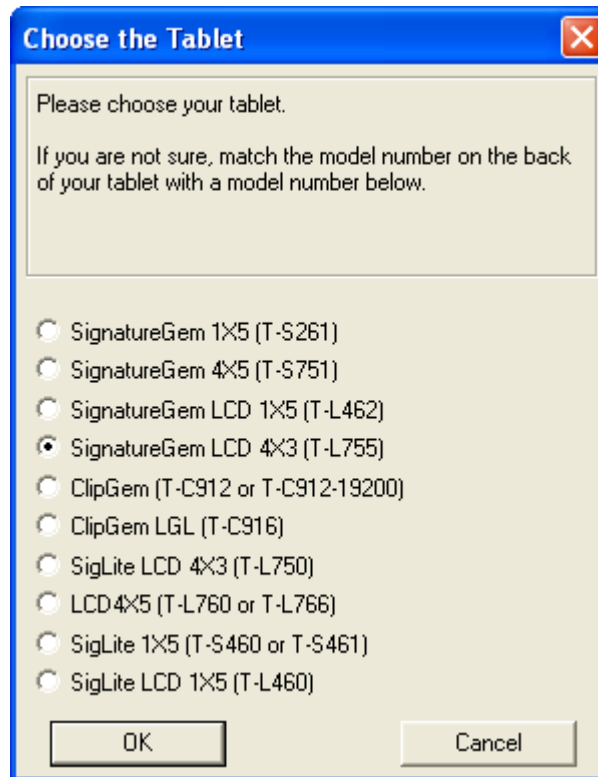4. In the Welcome dialog box, click **Next**.

5. In the Choose Destination Location dialog box, leave the destination folder as is and then click **Next**.
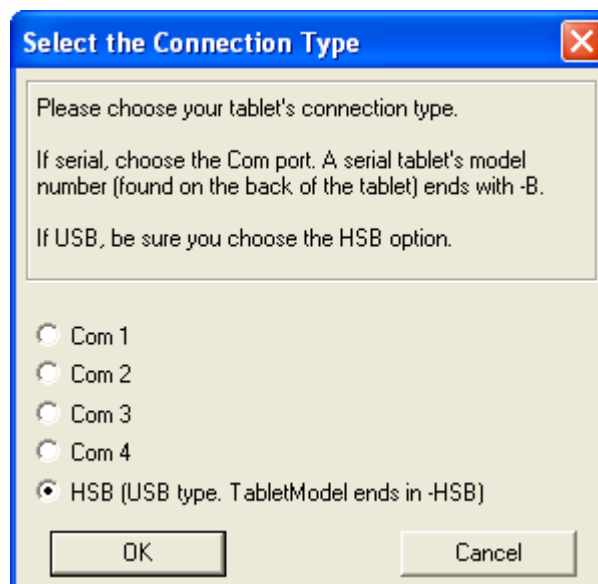

6. Read the information in the NOTE dialog box and then click **OK**.

7. In the Choose the Tablet dialog box, click the radio button for the appropriate signature capture device and then click **OK**.

Choose the Tablet

Please choose your tablet.

If you are not sure, match the model number on the back of your tablet with a model number below.

- ○ SignatureGem 1X5 (T-S261)
- ○ SignatureGem 4X5 (T-S751)
- ○ SignatureGem LCD 1X5 (T-L462)
- ● SignatureGem LCD 4X3 (T-L755)
- ○ ClipGem (T-C912 or T-C912-19200)
- ○ ClipGem LGL (T-C916)
- ○ SigLite LCD 4X3 (T-L750)
- ○ LCD4X5 (T-L760 or T-L766)
- ○ SigLite 1X5 (T-S460 or T-S461)
- ○ SigLite LCD 1X5 (T-L460)

OK   Cancel

8. In the Select the Connection Type dialog box, click the radio button for the appropriate port setting and then click **OK**.

Select the Connection Type

Please choose your tablet's connection type.

If serial, choose the Com port. A serial tablet's model number (found on the back of the tablet) ends with -B.

If USB, be sure you choose the HSB option.

- ○ Com 1
- ○ Com 2
- ○ Com 3
- ○ Com 4
- ● HSB (USB type. TabletModel ends in -HSB)
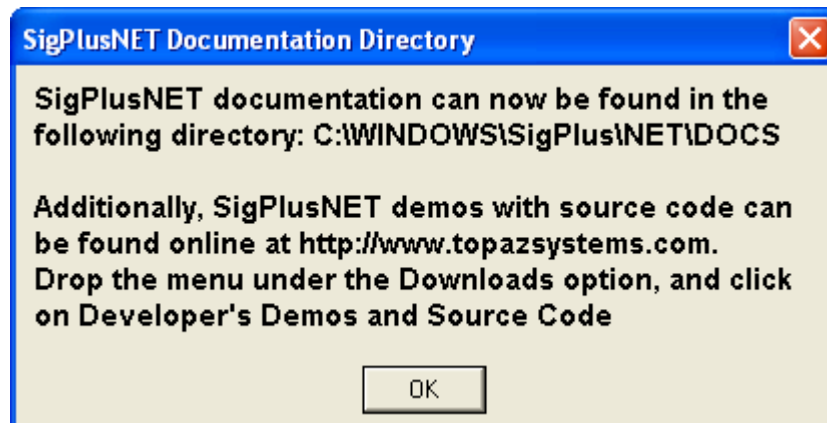
OK   Cancel

9. In the License Agreement dialog box, carefully read the information and then click **Agree** if you accept the terms.
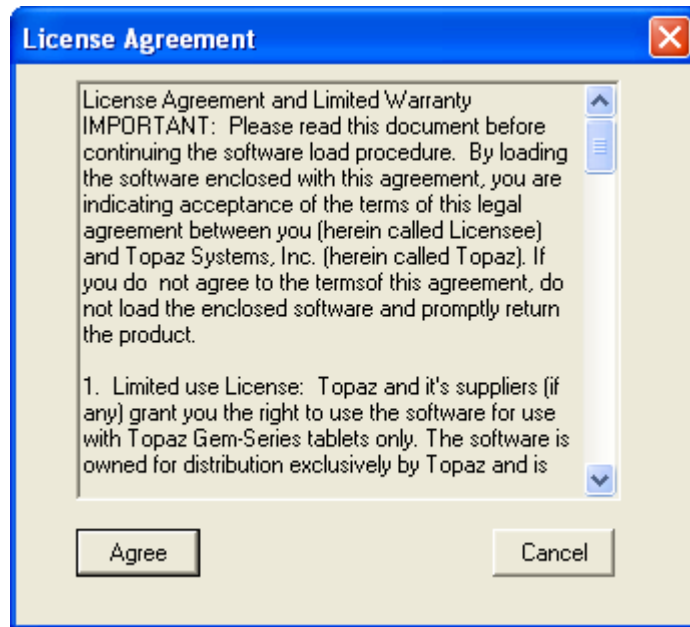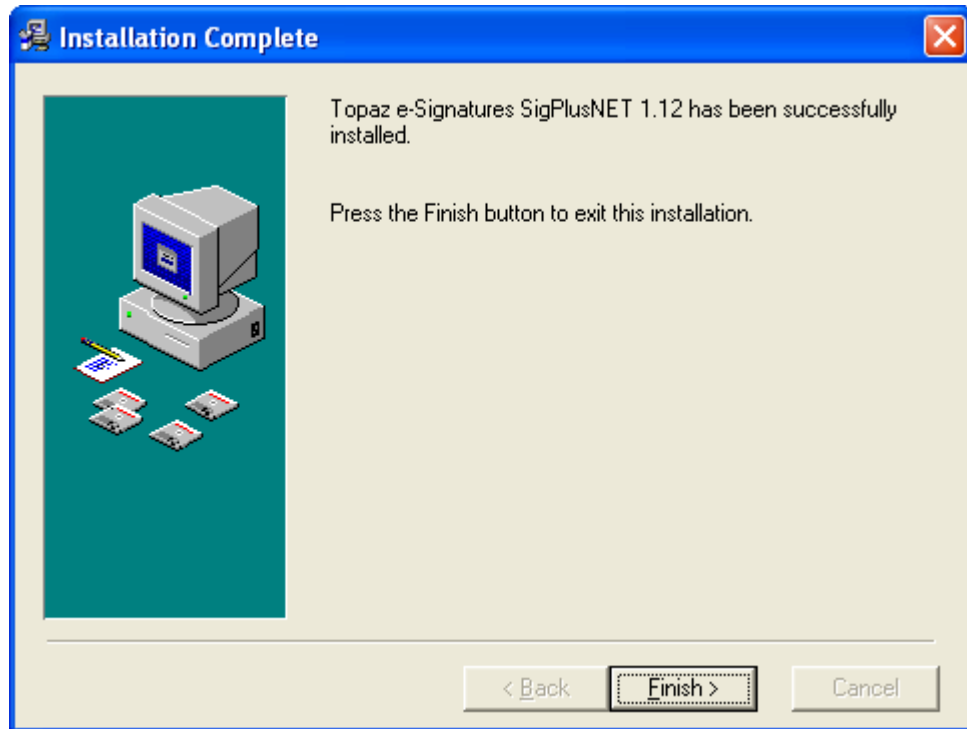

The installation process should take only a few seconds to complete.

10. In the SigPlusNET Documentation Directory dialog box, make note of the documentation's location and then click **OK**.

11. When the Installation Complete dialog box appears, click **Finish**.

The SigPlusNET driver installation process is complete.

Next, install the 32-bit socket service.

Installing the 32-Bit Socket Service

The socket service installation process involves the following steps:

1. Installing the 32-bit socket service library
2. Running the 32-bit socket service library batch process

Installing the 32-Bit Socket Service Library

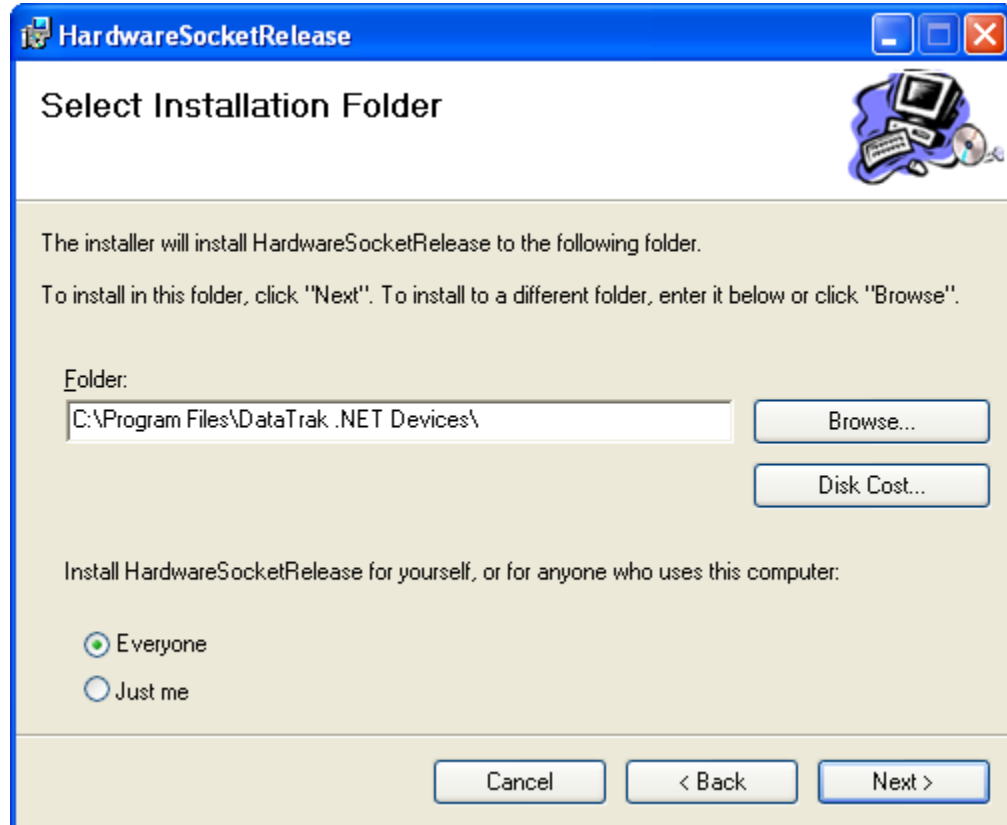The first step in the socket service installation process is to install the socket service library.

Important!   Please exit Internet Explorer before installing the socket service library.
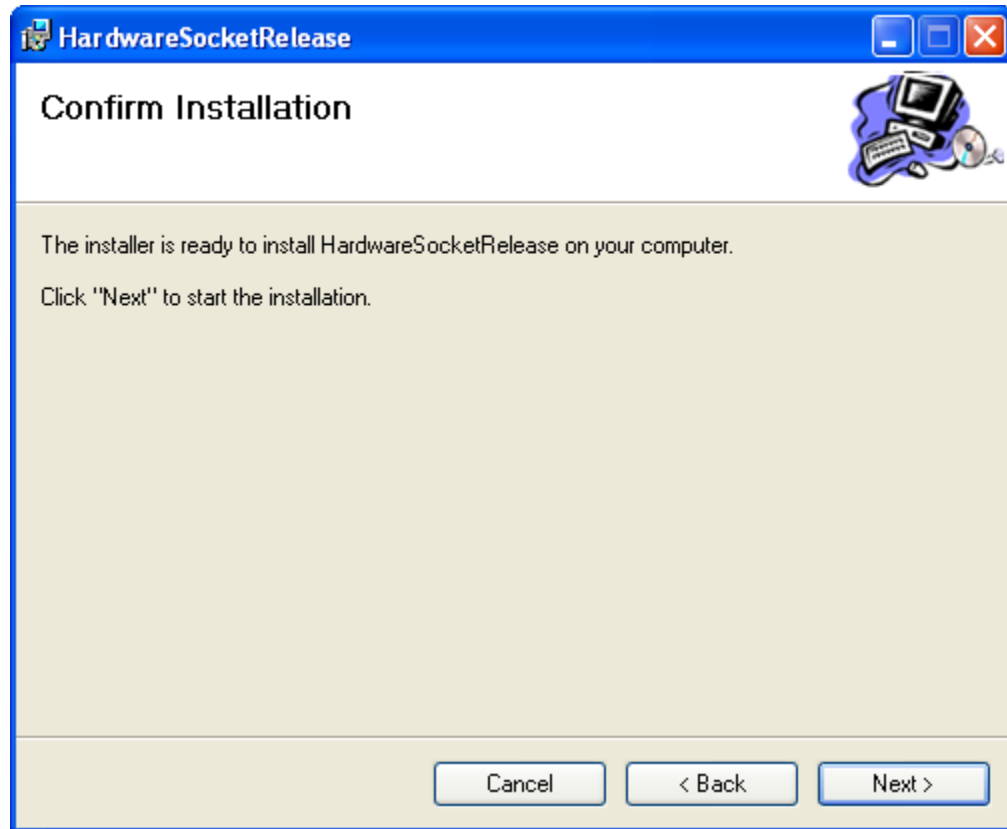
To install the socket service library

1. Download the 32-bit Socket Service Library zip file.
2. Expand the Socket Service zip file.
3. Double-click **setup.exe**.
4. In the HardwareSocketRelease Setup Wizard, click **Next**.

5. In the Select Installation Folder dialog box:

   o   Leave the **Folder** path as is.

   o   Click the radio button for **Everyone**.
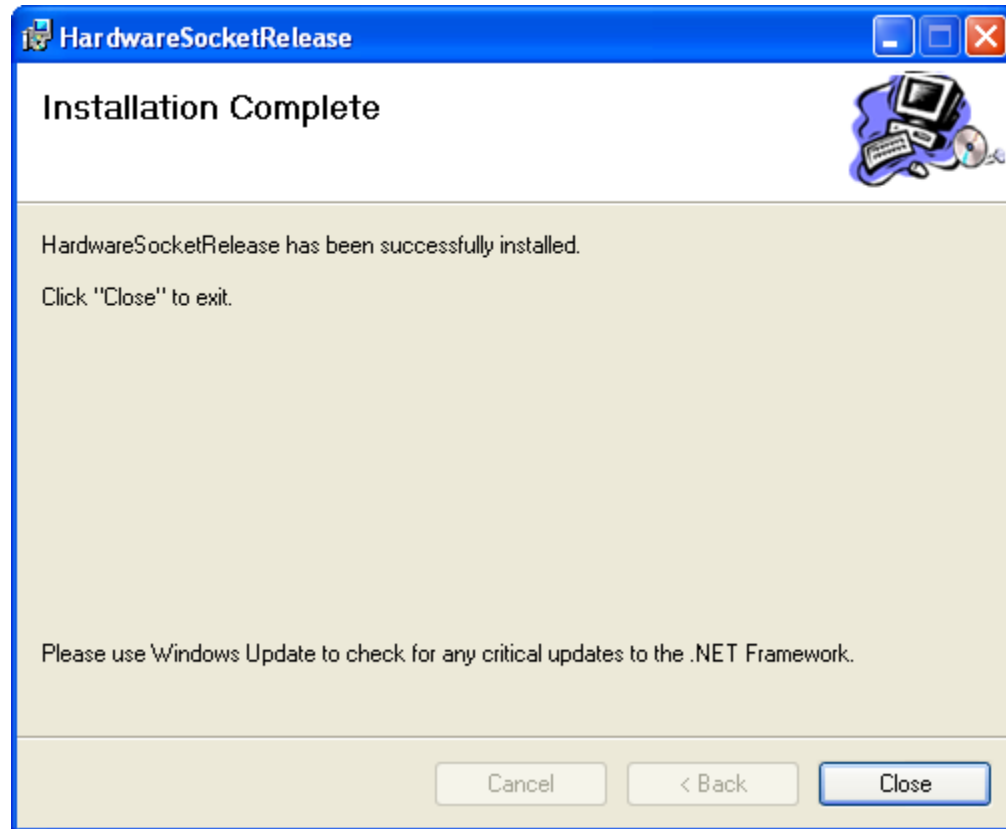
   o   Click **Next**.

6. In the Confirm Installation dialog box, click **Next**.

The installation process should take only a few seconds to complete.

7. When the Installation Complete dialog box appears, click **Close**.

The socket service library installation is complete and the following folder is created on your computer: `C:\Program Files\DataTrak .NET Devices`.
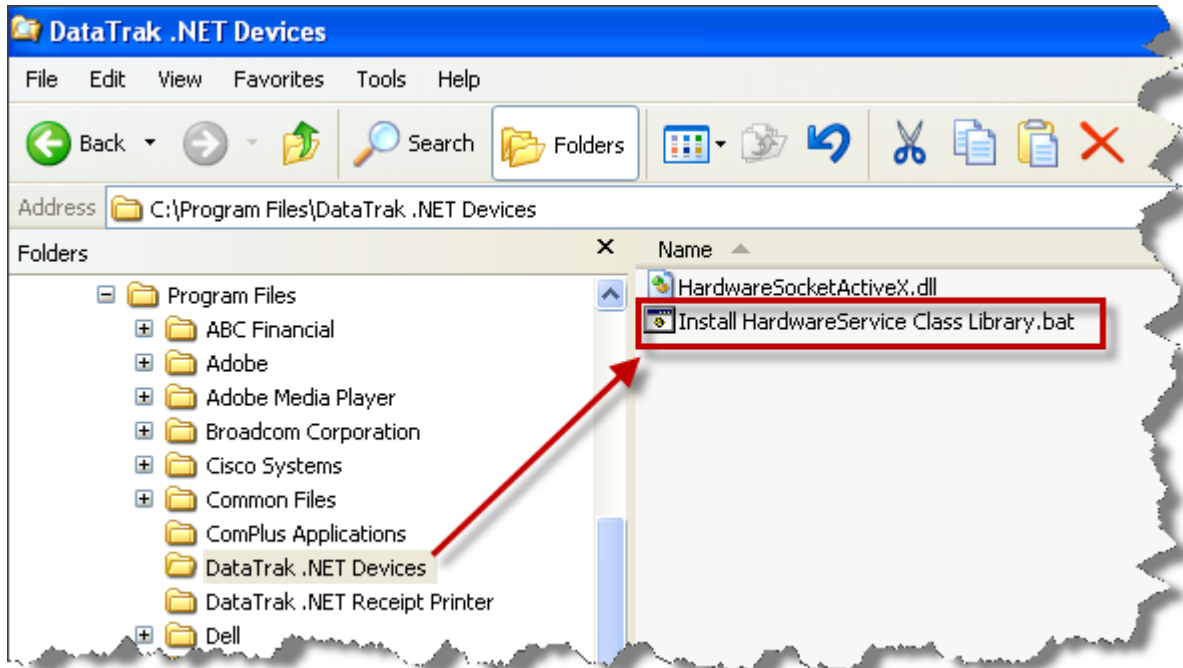
Next you will need to run the 32-bit socket service library batch process.

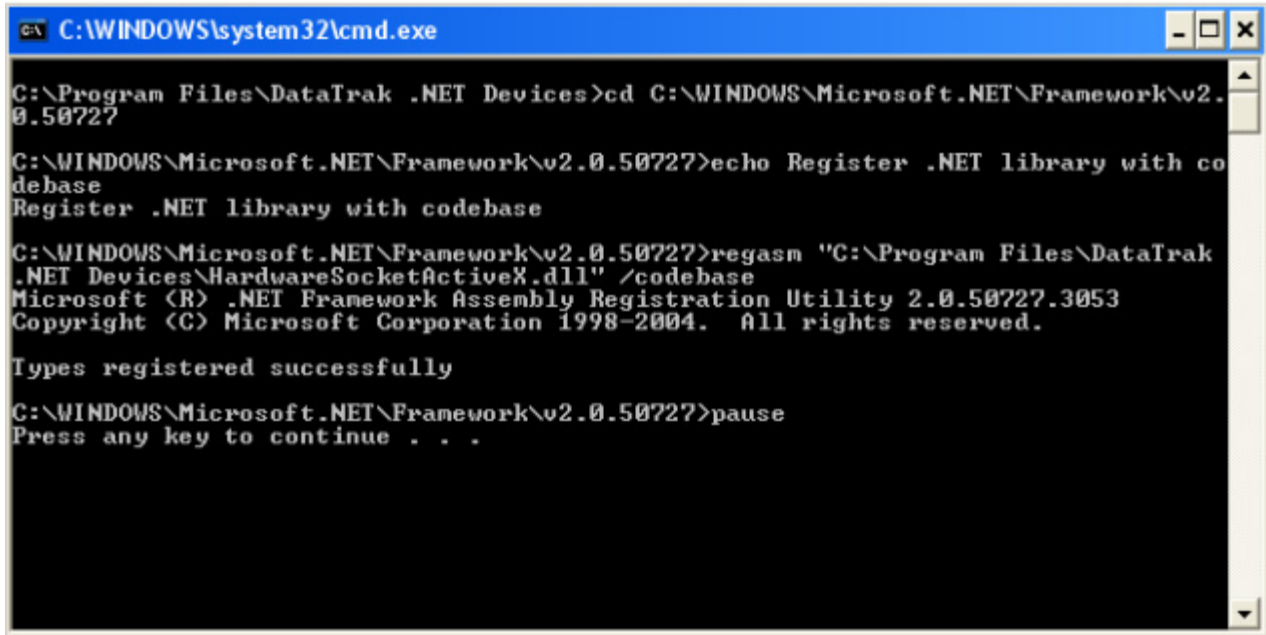## Running the 32-Bit Socket Service Library Batch Process

The next step in the hardware installation process is to run the socket service library batch process.

To run the socket service library batch process

1. Open the folder **C:\Program Files\DataTrak .Net Devices**.

2. Double-click the file **Install HardwareService Class Library.bat**.

The Windows session will open and the batch process will run.

3. When prompted, press any key to continue.

The socket service library batch process is complete.

Next you will need to install the 32-bit hardware service.

Installing the 32-Bit Hardware Service

The hardware service installation includes the following steps:

1. Uninstalling an earlier version (if applicable)
2. Installing the 32-bit hardware service
3. Running the 32-bit install service batch process
4. Updating the 32-bit HardwareReader.ini file

Important! Please exit Internet Explorer before installing the hardware service.

Uninstalling an Earlier Version

If you have received an updated version of the hardware service but an earlier version is already installed, you must uninstall the earlier version before installing the newer version.

Important! When uninstalling an earlier version of the hardware service, be careful that you **do not** remove the Hardware **Socket** Release.

To uninstall the hardware service

1. Open your computer's Control Panel.
2. Double-click **Add or Remove Programs**.
3. Click **HardwareServiceRelease**.
4. Click **Remove**.
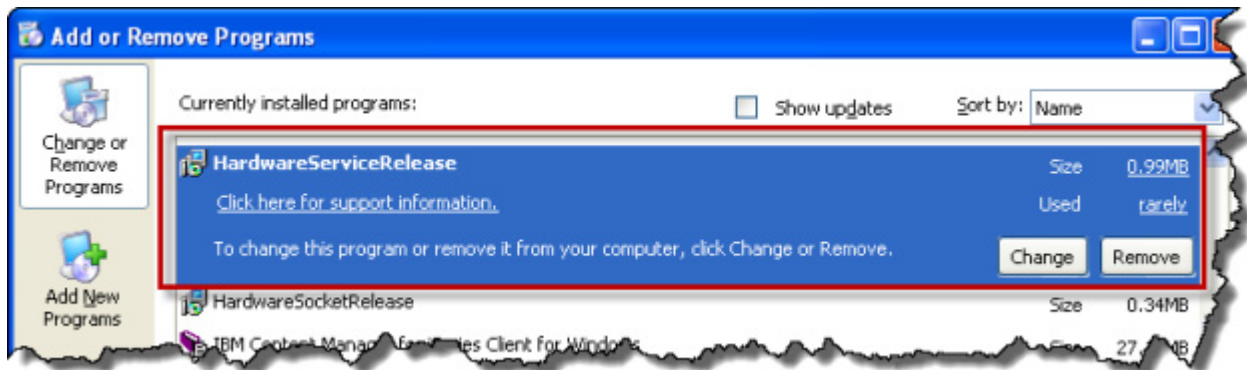
Installing the 32-Bit Hardware Service

Use the following instructions to install the hardware service.

To install the hardware service

1. Download the 32-bit Hardware Service zip file.
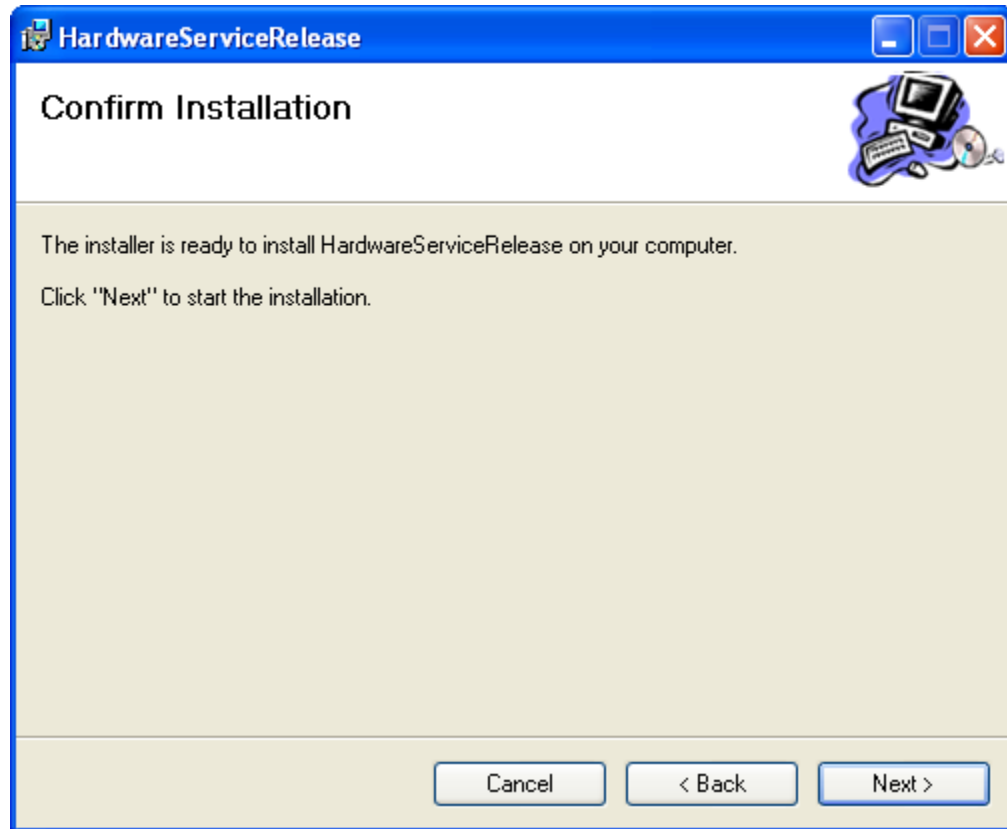2. Expand the Hardware Service zip file.
3. Double-click **setup.exe**.

4. In the HardwareService Release Setup Wizard dialog box, click **Next**.
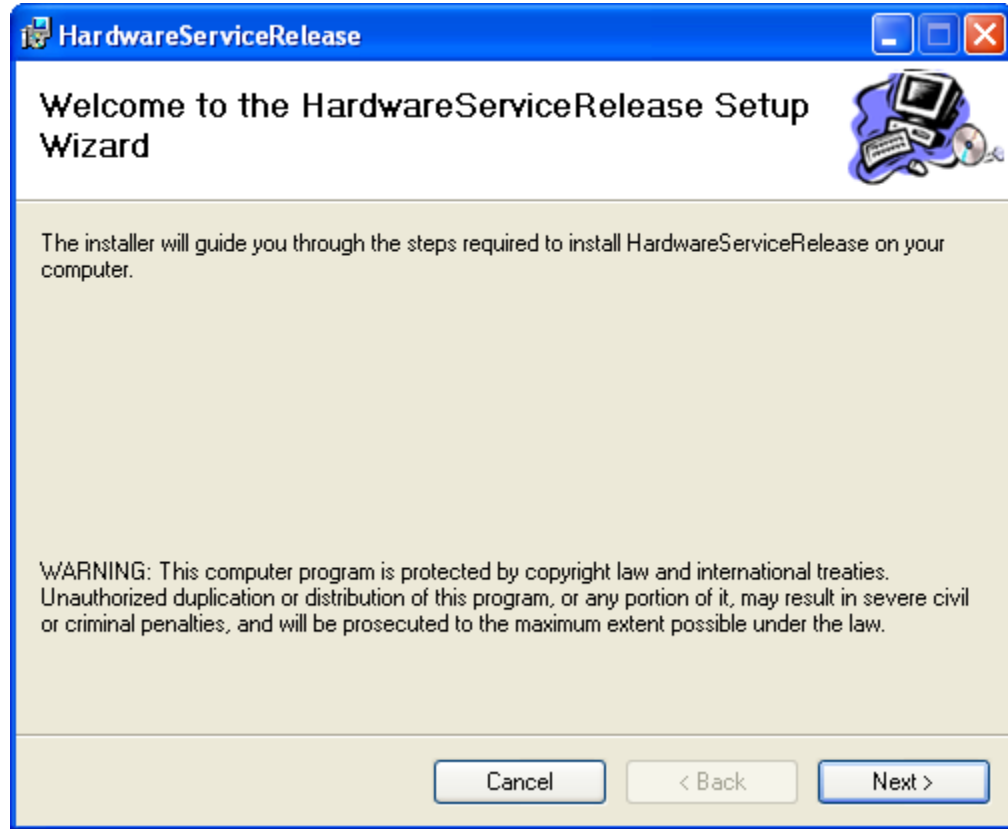
5. In the Select Installation Folder dialog box:

   o Leave the **Folder** path as is.

   o Click the radio button for **Everyone**.
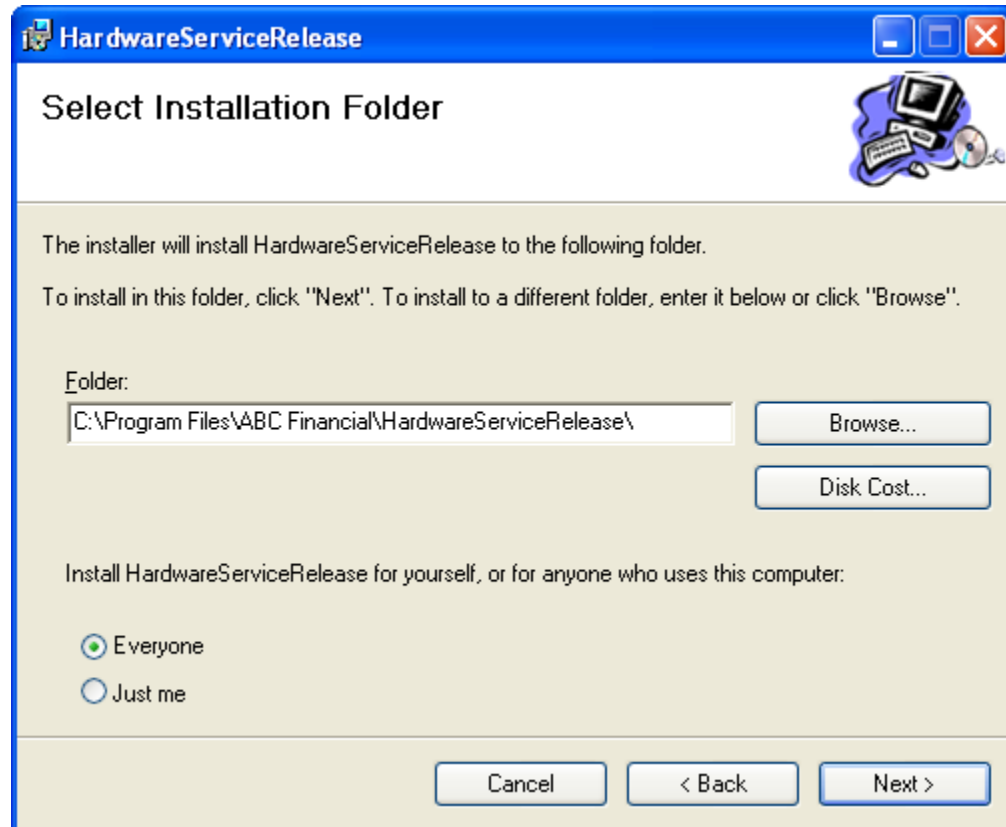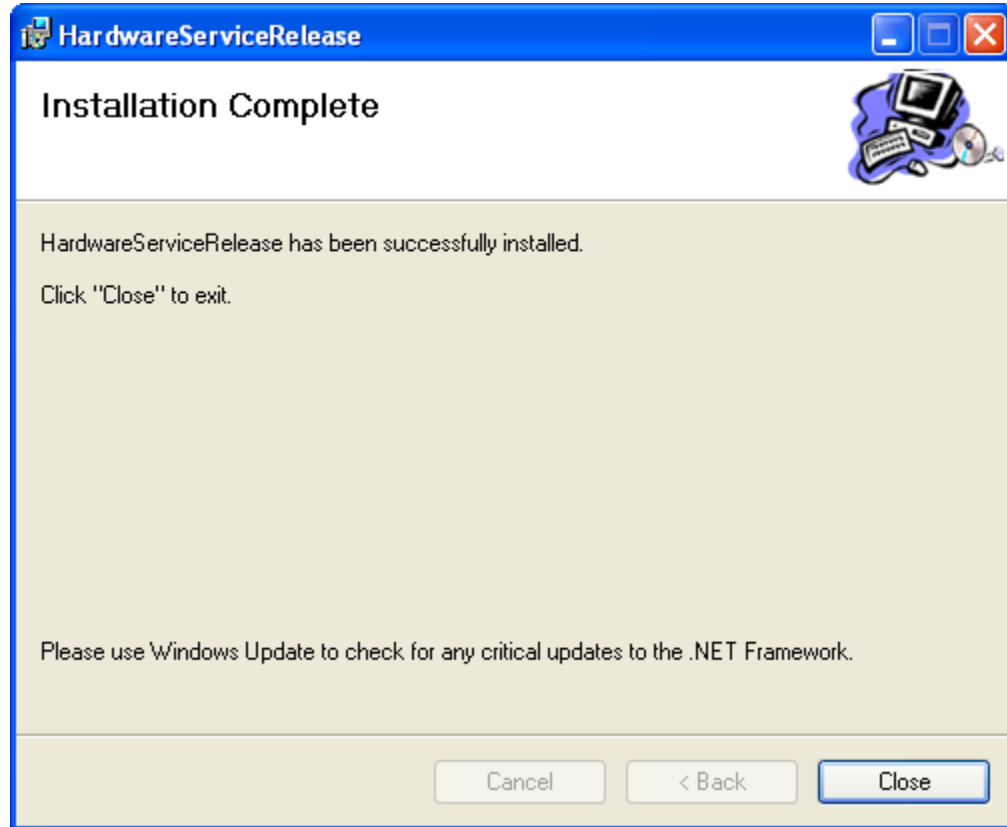
   o Click **Next**.

6. In the Confirm Installation dialog box, click **Next**.

The installation process should take only a few seconds to complete.

7. When the Installation Complete dialog box appears, click **Close**.

The hardware service installation is complete and the following folder is created on your computer: `C:\Program Files\ABC Financial\HardwareServiceRelease`.
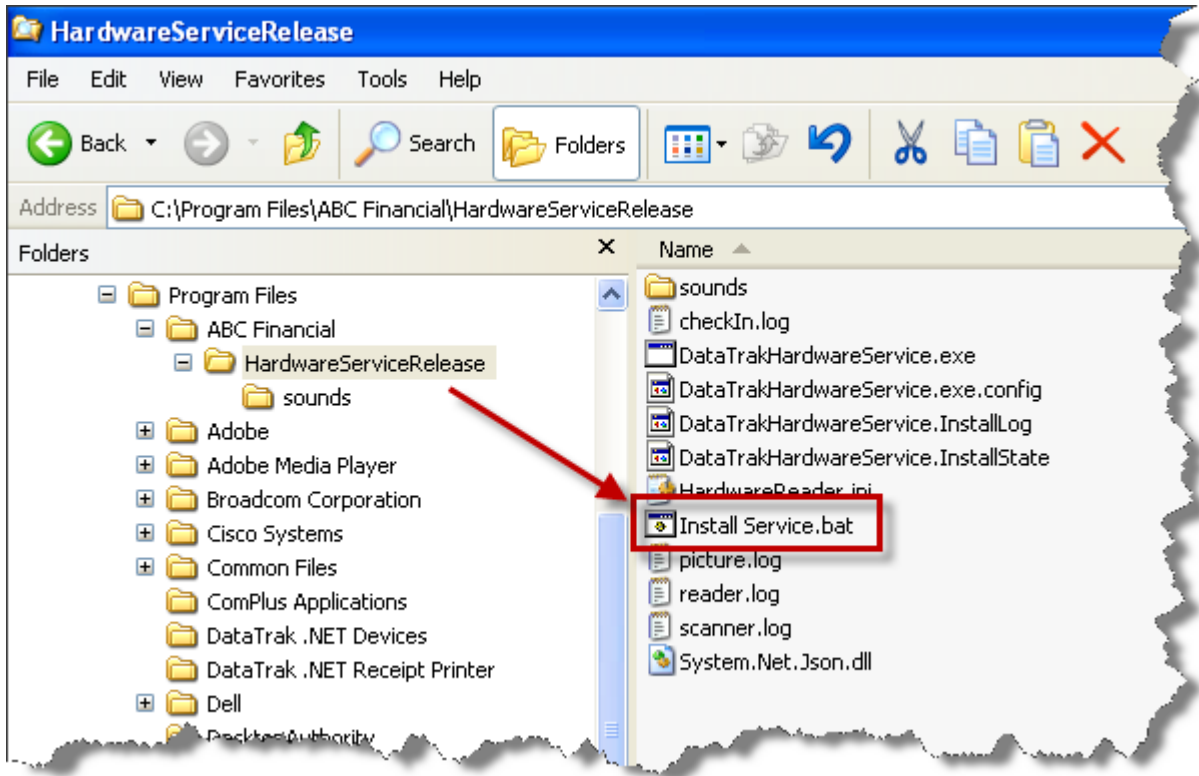
Next you will need to run the 32-bit hardware service batch process.

Running the 32-Bit Hardware Service Batch Process

The next step in the hardware installation process is to run the hardware service batch process.

To run the hardware service batch process

1. Open the folder **C:\Program Files\ABC Financial\HardwareServiceRelease**.

2. Double-click the file **Install Service.bat**.

The Windows session will open and the batch process will run.

3. When prompted, press any key to continue.

4. To verify that the hardware services are installed:

   o Click the computer's **Start** button, and then click **Control Panel**.

   o Double-click **Administrative Tools**.

   o Double-click **Services**.

   The list should contain an entry for **DataTrakHardwareService** with a status of **Started**.
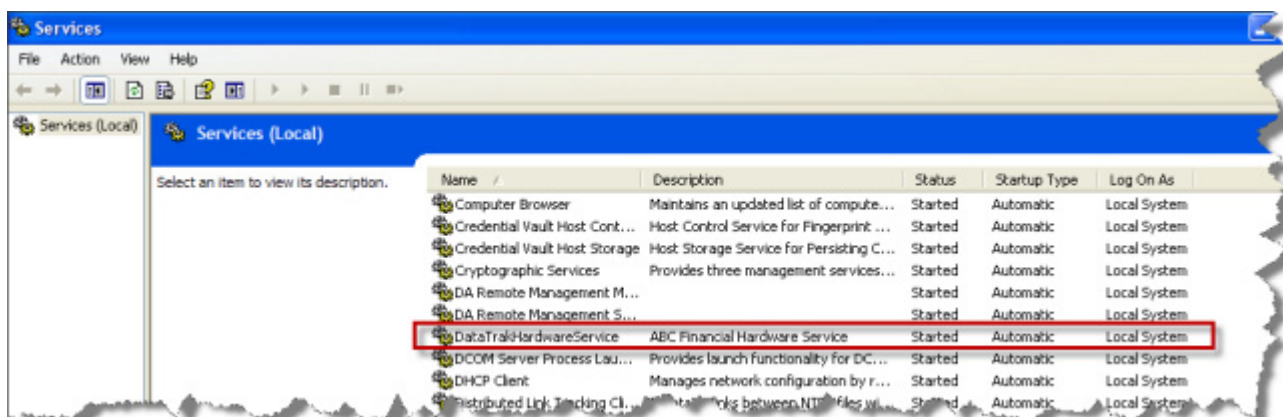
   o Double-click **DataTrakHardwareService** to open its Properties dialog box.

o   On the General tab, if the Service status is not *Started* click **Start** and then click **Apply**.
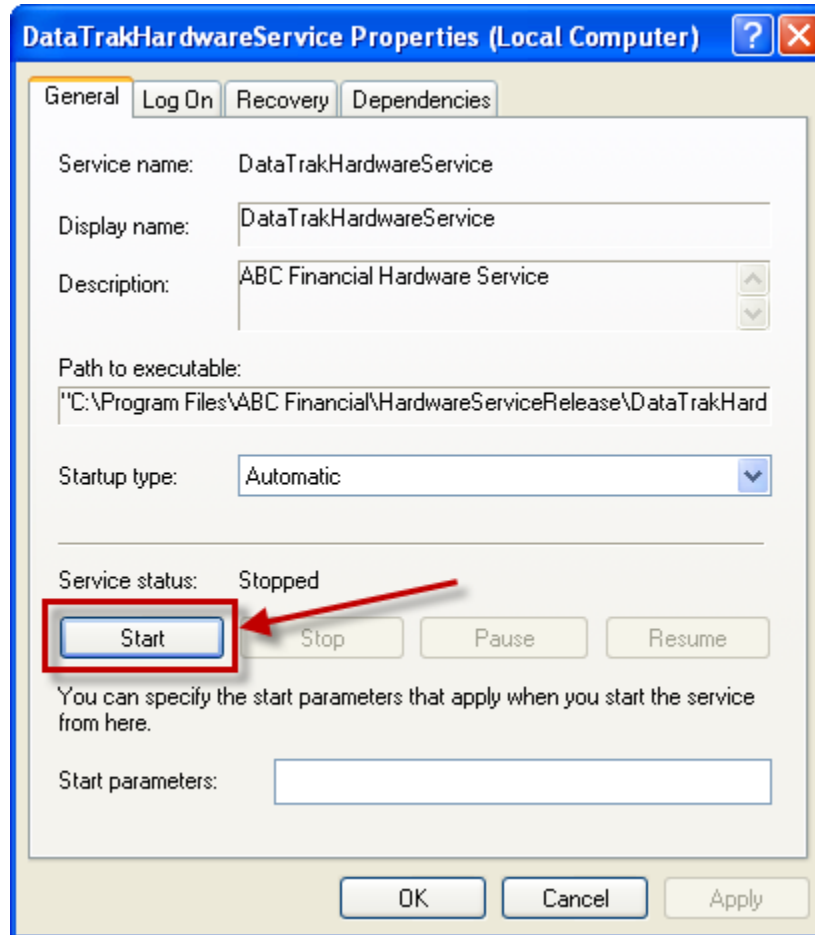
o   Click the **Recovery** tab.

o   Select **Restart the Service** from the First failure, Second failure, and Subsequent failures lists, and then click **OK**.
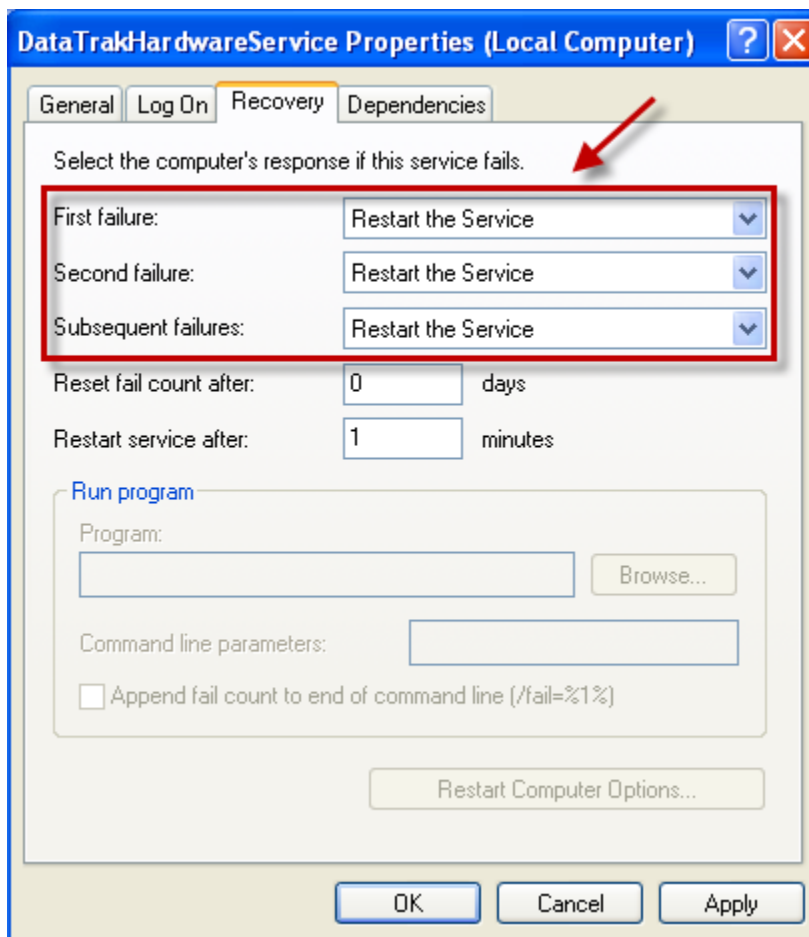
5.   Close the Services window.

6.   Close the Administrative Tools window.

The batch process is complete.

Next you must update the 32-bit HardwareReader.ini file.

Updating the 32-Bit HardwareReader.ini File

Before the hardware service installation is complete, you must verify that the club information in the HardwareReader.ini file is correct. If not you must update the `.ini` file, and then stop and restart the service.

To update the HardwareReader.ini file

1. Open the folder **C:\Program Files\ABC Financial\HardwareServiceRelease**.

2. Double-click the file **HardwareReader.ini**.
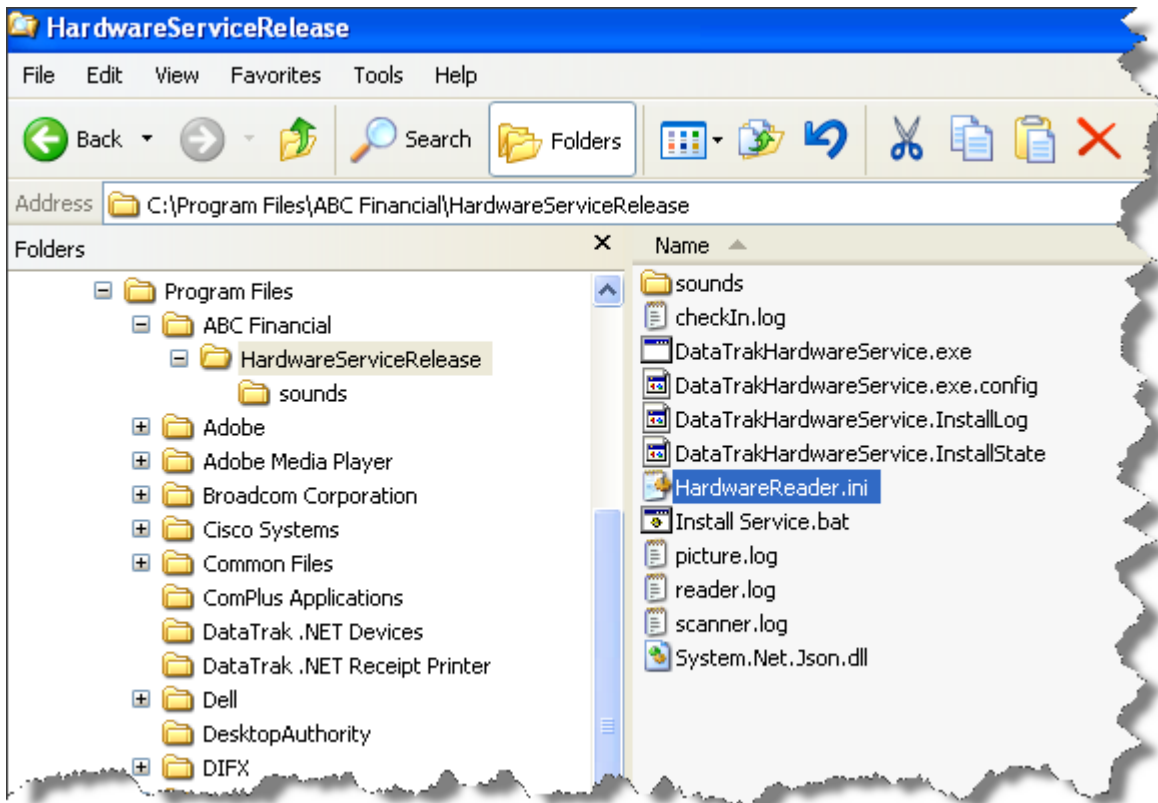
3. When the file opens, verify that the information in the ClubInfo section is correct. If changes are needed:

    o   Type the correct ClubNumber.

    o   Type the correct serialport for the serial scanner.

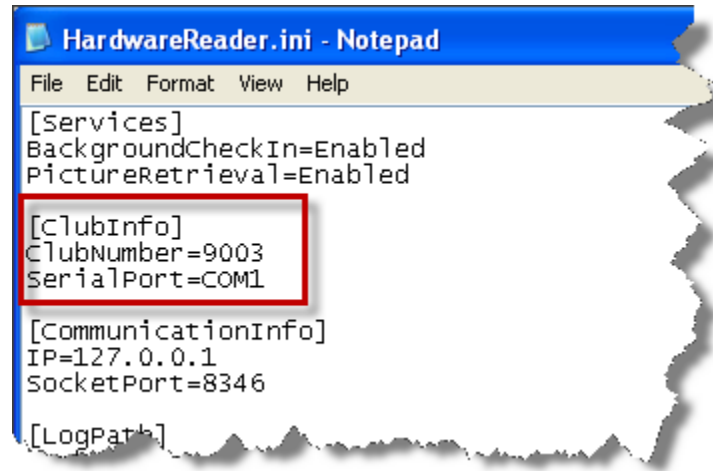4. Click **File > Save**.

5. When finished, stop and restart the service. (For more information, see Step 4 under Running the 32-Bit Hardware Service Batch Process.)

When the service has been restarted, the hardware installation process is complete!

Setting up 32-Bit Hardware Services in DataTrak

Once you have completed the hardware installation process, you can set up hardware services in DataTrak.

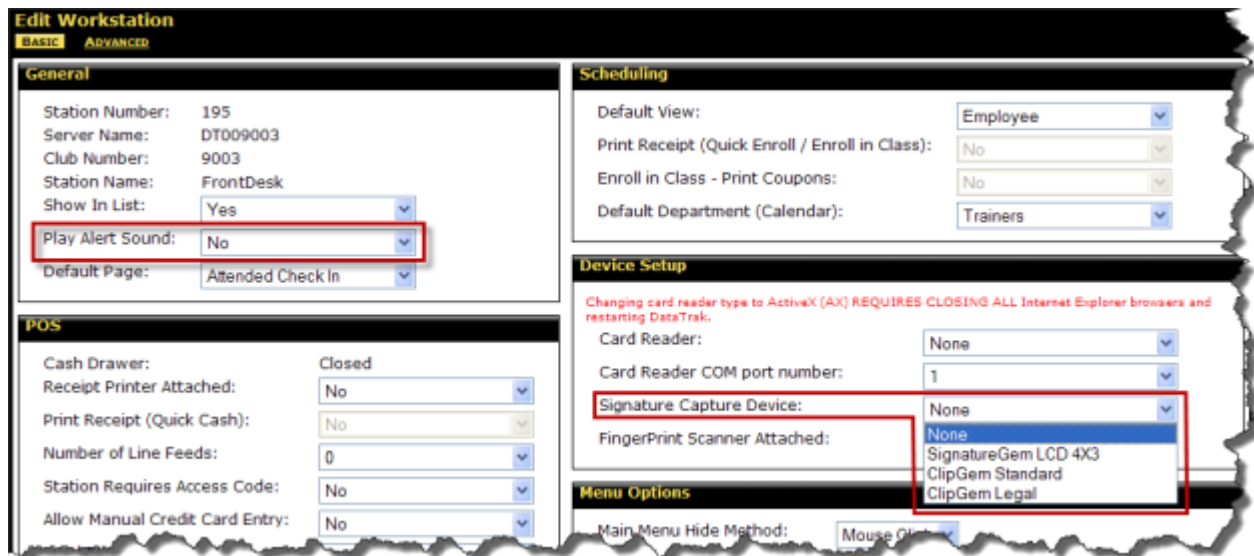*To set up hardware services in DataTrak*

1. Click **Setup**.

2. In the Settings sub-menu, click **Workstation**.

3. On the Basic tab in the General section, select **No** from the Play Alert Sound list.

   Note: When using background check in, the hardware service manages the sounds. Therefore, if Play Alert Sound is set to Yes, you will get double sounds. If set to No, you will get a single sound. If you do not want sounds, you must mute the speakers.

4. In the Device Setup section, select the **Signature Capture Device**.

   Note: The hardware service does not automatically detect which signature capture device is installed. You must select it from the list.

   The following is an example of the Basic tab.

5. Click the **Advanced** tab to access the Hardware Service Setup form.

6. In the Windows Service Enabled list, select **Yes**.

   At any time you can click the **Test Hardware Service** link next to this option to verify that the hardware service is installed and connected. A message will appear in the lower left-hand corner of the page to indicate a successful or failed connection.

   o If the test was successful, the message will appear as follows:

   Connection test successful, version installed is: 1.4.0.0

   Verify that the hardware service version is **1.4.0.0**.

   o If the test was unsuccessful, the message will appear as follows:

   Connection test failed.

   Please refer to the section on Installing the 32-Bit Hardware Service earlier in this document and make sure the service is started. If necessary, you may need to uninstall and then reinstall the hardware service.

7. To enable background check In, select **Yes** from the Background Check In Enabled list.

   Note: Background Check In requires a serial scanner.

8. To enable picture retrieval, select **Yes** from the Picture Retrieval Enabled list.

9. To use the signature service, select **Yes** from the Signature Service Enabled list.

   Note: Make sure to install the signature service drivers.

10. If you selected **Yes** for picture retrieval:

    o Type the Camera Software Exe Path (the location of the executable file).

    o Type the Picture Save Path (the folder in which to store the pictures).

    Note: The Picture Save Path must be static; the folder name cannot change from day to day. Therefore, a camera that creates a new image folder every day, such as Creative Camera, cannot be used.

11. To enable scanner retrieval, select **Yes** from the Scanner Retrieval Enabled list.

12. If you selected **Yes** for scanner retrieval:

    o Type the Scanner Software Exe Path (the folder that contains the executable file).

    o Type the Scanner Save Path (the folder in which to store the scanned documents).

    Note: The Scanner Save Path must be static; the folder name cannot change from day to day.

13. In the Electronic Agreement Contract Preview section, select **Yes** from the Preview Contract as Image list to view the contract as an image.

When set to Yes, the Electronic Agreement Entry or Recurring Services contract will appear as an image rather than appearing as an Adobe PDF within DataTrak.

14. Click **Save**.

The following is an example of the Hardware Service Setup page. In this example, the message in the lower left-hand corner indicates that a successful connection was made to the hardware service and displays installed version.

Managing Log Files

The hardware service creates and maintains the following log files: check in, error, picture, reader, and scanner. These log files store information about your hardware services and provide you with valuable information to troubleshoot issues you may encounter. You can find these log files on your hard drive at:

C:\Program Files\ABC Financial\HardwareServiceRelease

Over time, these log files will grow and may take up a lot of space on your computer. If you have successfully installed the hardware services and verified that they are working properly, you may disable the log files.

If you find that you need to view log files again you can re-enable logging at that time.
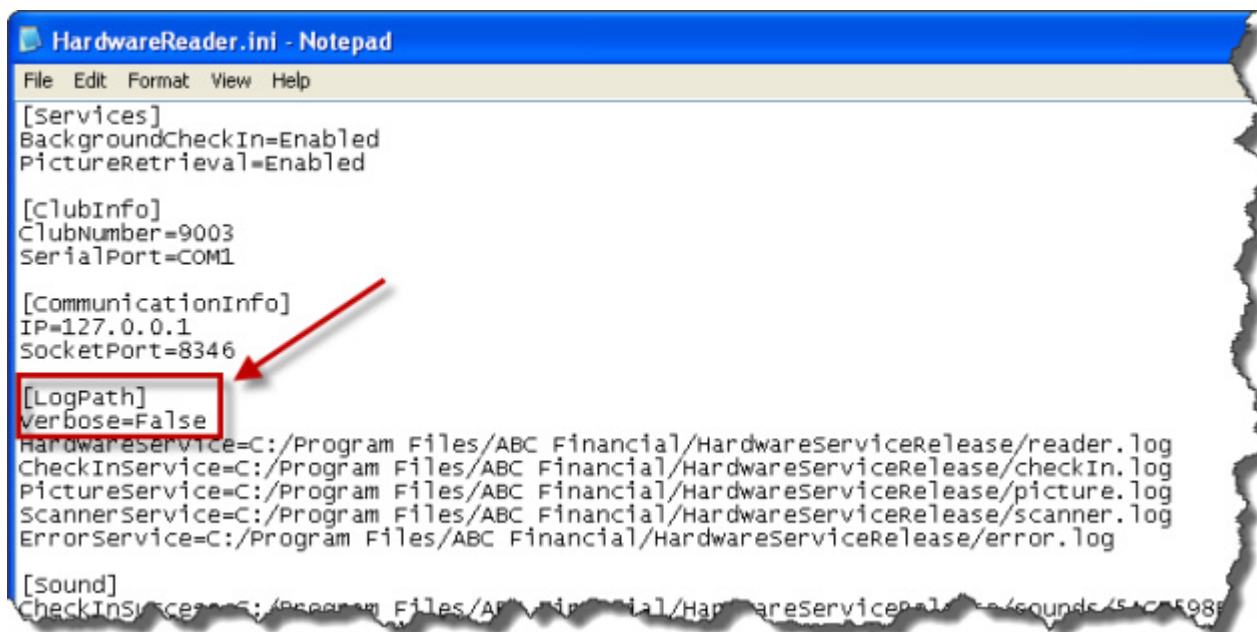
Disabling Logging

Once you confirm that the hardware services are set up correctly and are working properly, you can disable logging.

Note: After you disable logging, you must stop and restart the service.

To disable logging

1.   Open the folder **C:\Program Files\ABC Financial\HardwareServiceRelease**.

2.   Double-click the file **HardwareReader.ini**.

3.   In the [LogPath] section of the HardwareReader.ini file, change the verbose setting from True to **False**.

4.   Click **File > Save**.

5. When finished, stop and restart the service. (For more information, see Step 4 under Running the 32-Bit Hardware Service Batch Process.)

After logging has been disabled, the system will stop recording log information but the log files that were originally created will remain on your hard drive.

If you decide to re-enable logging, the system will resume recording log information in the appropriate log file.

Enabling Logging

If in the future you need to be able to view log files again, you can re-enable logging. After you re-enable logging you must stop and restart the service.

To enable logging

1. Open the folder **C:\Program Files\ABC Financial\HardwareServiceRelease**.

2. Double-click the file **HardwareReader.ini**.

3. In the [LogPath] section of the HardwareReader.ini file, change the verbose setting from False to **True**.

4. Click **File > Save**.

5. When finished, stop and restart the service. (For more information, see Step 4 under Running the 32-Bit Hardware Service Batch Process.)

Once logging has been re-enabled, the system will resume recording log information in the appropriate log file.