

Software Distribution

Quantrax have automated many of the processes involving in distributing new code to clients. This will greatly reduce the time taken to get fixes loaded onto clients' systems. The new procedures cover fixes to RMEx, new releases and new documentation and will be expanded shortly to include dialer software and other Quantrax products.

The new processes involve Quantrax staff loading new code or documentation onto our new FTP software distribution site and clients retrieving objects from that site. Clients will require a user-id and password to gain access to the site and these will be sent out via e-mail. All clients will have access to a common or public folder containing common objects such as new releases and fixes to the base code. Each client will also have exclusive access to a separate directory containing code that is specific to that client.

This procedure explains how to load and implement a complete new release.

Step 1 – Retrieve the SXRMXMOD PTF from the FTP Site

This special PTF is required in order to be able to load a complete release using the FTP Software Distribution site. Clients can sign on to the FTP Software Distribution site from a PC in their office and download objects from our FTP site to their PC. Any object can be downloaded, provided the client has appropriate access. Quantrax recommends using 'Core FTP Lite' to perform downloads. This software is available free from the internet, and Quantrax will provide support for users who use this option.

If you have already retrieved and loaded this PTF, you can skip this step and proceed directly to 'Step 3 - Retrieve New Release from the FTP Site'.

1. Start up Core FTP Lite and set up Quantrax as a new site. The Host IP address is 208.48.6.163. Use the default settings for all other fields.
2. If you do not choose to use Core FTP Lite, start up Internet Explorer and bring up the following website: <ftp://208.48.6.163/public/RMEx1.2>
3. You will be prompted to log on.
4. Enter your user-id and password.
5. On the left side of the CoreFTP window you will see your PC directories and on the right side of the window you will see the Quantrax FTP directories.
6. Create and select a directory on your local PC called 'QuantraxSoftware' and make sure that this directory on your PC is displayed in the left window.
7. The Quantrax FTP directories have entries for the entire system and individual PTFs. You will be able to navigate through the FTP site using standard windows buttons. Select the PTF directory.
8. Click on the PTF labeled '77616 Oct 28 12:53 SXRMXMOD.SXRMXMOD'
9. Click on the left arrow in the top left hand corner of the FTP window. This will copy the selected file (77616 Oct 28 12:53 SXRMXMOD.SXRMXMOD) to the the 'QuantraxSoftware' directory that is displayed on the PC you are using. The file name on your PC will be the same file name as on the FTP directory.

Step 2 – Loading the SXRMXMOD PTF to RMEx

If you have already retrieved and loaded this PTF, you can skip this step and proceed directly to 'Step 3 - Retrieve New Release' from the FTP Site.

Once you have downloaded the SXRMXMOD PTF to your PC, you must load it into your RMEx program library on your System i5.

On your PC, enter the following commands to copy the downloaded files to your iSeries:

1. Start a DOS session (using 'RUN')
2. Start FTP (IP address of your iSeries)
3. Press enter
4. Enter your user-id and password for your iSeries
5. Enter 'binary' and press enter
6. To copy the PTF to the SCMOD library, Enter: 'PUT
C:\QuantraxSoftware\SXRMXMOD SCMOD/@@RCV.@@RCV' and press enter.

Once the PTF has been uploaded using the steps above, it will be copied automatically to your production system. The smart code program that runs whenever the system is active checks these files periodically and moves the new code into the appropriate library.

Step 3 – Retrieve New Release from the Quantrax FTP Site

This step is performed only by clients. The client needs to sign on to the FTP Software Distribution site from a PC in their office and download objects from our FTP site to their PC. Any object can be downloaded, provided the client has appropriate access. Quantrax recommends using 'Core FTP Lite' to perform downloads. This software is available free from the internet, and Quantrax will provide support for users who use this option. .

1. Start up Core FTP Lite and sign on to the Quantrax site. The Host IP address is 208.48.6.163. Use the default settings for all other fields.
2. If you do not choose to use Core FTP Lite, start up Internet Explorer and bring up the following website: <ftp://208.48.6.163/public/RMEx1.2>
3. You will be prompted to log on.
4. Enter your user-id and password.
5. On the left side of the CoreFTP window you will see your PC directories and on the right side of the window you will see the Quantrax FTP directories.
6. The Quantrax FTP directories have entries for the entire system and individual PTFs. You will be able to navigate through the FTP site using standard windows buttons.
7. Create and select a directory on your local PC called 'QuantraxSoftware' and make sure that this directory on your PC is displayed in the left window.
8. Click on the file name on the FTP directory (right hand window) that you wish to download. For example, if you wish to download RMEx version 1.2, select directory RMEx1.2 and file SAVFRMXB. This indicates the save file for the RMEx base library.
9. Click on the left arrow in the top left hand corner of the FTP window. This will copy the selected file to the the directory that is displayed on the PC you are using. The file name on your PC will be the same file name as on the FTP directory.
10. The download will take approximately two hours using an ADSL connection. Most clients will have a much faster connection.

Step 4 – Loading a New Release of RMEx

Clients will run this step to upload an entire release from their PC to their iSeries. Clients will need to load a new release of RMEx only once every few months.

This step copies the data from your PC onto the iSeries: it does NOT put the new code into production. The new code is placed first into a save file library called SCINSTALL, and then restored into temporary libraries that will be used later in the upgrade process. To move the new RMEx code into production, you will need to complete this step first, and then complete 'Step 5 – Implementing a New Release of RMEx'.

1. Sign on to your iSeries and create the following library and files. .
 1. CRTLIB SCINSTALL
 2. CRTSAVF SCINSTALL/SAVFRMXB
 3. CRTSAVF SCINSTALL/SAVFRMXF
 4. CRTSAVF SCINSTALL/SAVFRMXM
2. If they were already present, you should clear them
 1. CLRSAVF SCINSTALL/SAVFRMXB
 2. CLRSAVF SCINSTALL/SAVFRMXF
 3. CLRSAVF SCINSTALL/SAVFRMXM
3. On your PC, enter the following commands to copy the downloaded files to you iSeries
 1. Start a DOS session (using 'RUN')
 2. Start FTP (IP address of the i5)
 3. Press enter
 4. Enter your user-id and password for your i5
 5. Type 'binary' and press enter
 6. Type 'PUT C:\QuantraxSoftware\SAVFRMXB SCINSTALL/SAVFRMXB.SAVFRMXB' and press enter
 7. Type 'PUT C:\QuantraxSoftware\SAVFRMXF SCINSTALL/SAVFRMXF.SAVFRMXF' and press enter
 8. Type 'PUT C:\QuantraxSoftware\SAVFRMXM SCINSTALL/SAVFRMXM.SAVFRMXM' and press enter
 9. Note that not all clients will need to run this last step (step 8). If you do not have custom programs in your MOD library, then step 8 will fail and it will not cause a problem.

Step 5 – Implementing a New Release of RMEx

Clients will undertake this step when they are ready to put the latest version of RMEx into production. All previous steps do not change the production system and can be run at any time. Step 5 – Implementing a New Release of RMEx needs to be scheduled. Please note that no users will be able to sign on to the system during this process.

Notify Quantrax at 301 657 2084 of your plan to upgrade and schedule support for the time of the upgrade and the first few hours of production on the new release.

Pre-Implementation

1. You will first need to determine what version of Intelec you presently are on. The current release is displayed when you sign into Intelec and get to the Main Menu. You **MUST** make a note of the Version you are on. **YOU WILL NEED THIS LATER.**
2. If you are upgrading from a version other than Intelec 8.26, you should review the prior documentation (e.g. 8.1, 8.2 and 8.25) depending what you are upgrading from.
3. If you are on Version 8.1, please make sure we have reviewed the encryption issues. You may need to run separate programs and you should have received separate documentation for this. If you are on a version older than 8.25 - You must upgrade to 8.26 prior to upgrading to RMEx.
4. Clients can install this update as long as no users are on the system. You can install the update at any time - at the end of a day (before nightly processing) or at the beginning of a day (after nightly processing has completed). You **MUST** have a backup from the last nightly processing that was run or take a separate back up of your data library if you are running this at the end of a day. The complete install should take an hour or less if you are going from a recent version of Intelec, but will vary depending on your data volumes and processor. If you are converting from Version 8.1 or before, the install will take longer.
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5. We recommend that you run the install at the end of a day and allow time to run nightly processing **AFTER** the install. Even though it is not necessary if you are on a more recent version of RMEX, it is best that you run a Nightly **AFTER** the install. If time is a limiting factor, you should create account processing queues after the install (You can use the option on the Utilities menu - UT at any menu, then, option 6).
6. Upgrades must be run on a dedicated system (No Intelec or RMEX jobs running).

Implementation

1. Ensure you have a backup of your data libraries.
2. Ensure that all users are signed RMEx.
3. Cancel the Smart Code processing program.
4. If you are using I-Tel, end the dialer server. If you have a dialer other than Intelec, cancel those programs.
5. Sign off RMEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an Intelec User ID. At this stage, do not allow users to sign on. The rest of the installation process takes about an hour. We will be creating some new logical files over the account and payment files.
6. Enter the following commands from a command line:
 1. ADDLIBLE SCLIB
 2. ADDLIBLE SCMOD
 3. CALL INSTALLNEFFollow the instructions on the screen. The device name should be *SAVF.
This option will take about 5 - 10 minutes. At one point in the installation, the system will check that the library SCLIB is not in use and if it is, it will display any jobs that will need to be cancelled. At the end of this step, you will be asked to make sure all users have signed off the system.
7. Sign off the system and then sign on again using the User ID QSECOFR. Enter the following commands from a command line:
 1. ADDLIBLE SCLIB
 2. ADDLIBLE SCMOD
 3. CALL INSTALLFIFThis step will take a few minutes.
8. Sign off the system and then sign on again using the User ID QSECOFR. Do NOT attempt to sign on using an RMEx User ID. Enter the following commands from a command line:
 1. ADDLIBLE SCLIB
 2. ADDLIBLE SCFIX
 3. ADDLIBLE SCMOD
9. What you now run, will depend on the version of Intelec you are currently on. Please select and run the CORRECT OPTION!
 1. If you are on Version RMEx 1.0 or 1.1, key in CALL INSTALRMX1 and press ENTER.
 2. If you are on Version 8.26, key in CALL INSTALRMX and press ENTER. (Only take this option if you are not on RMEx and only if you are on Version 8.26)
 3. If you are on Version 8.25, key in CALL INSTALRM5 and press ENTER. (Only take this option if you are not on RMEx and only if you are on Version 8.25)
10. Follow the instructions on the screen. The release implementation job is submitted and will run in batch. This step could run for over an hour, depending on your data volumes and processor. If you are on an older version of Intelec, the job will run for longer than if you are on a more recent version.

11. Check that the install program is running by using WRKACTJOB. Once the job has started, you should wait about 5 minutes and can leave if there are no messages.
12. This time taken for this step will depend on the amount of data on your system, and your processor speed. An estimate of the time taken to go from RMEx 1.0 to RMEx 1.2 is 30 minutes.
13. When this step is over, the installation of the new release is complete. You should check the job to make sure it has completed (WRKMSG QSECOFR) and use the WRKACTJOB command to make sure there are no messages.
14. The completion message "RMEx Release 1.2 has been installed" will be sent to INTELOPR when the implementation process is complete.

Post-Implementation

1. After Step 14 has completed, you should run nightly processing if you installed the code at the end of the day. Otherwise, continue with your regular work.
2. Please make sure that you send an e-mail to support@quantrax.com indicating that you have updated to the new version. This is very important.