Software Distribution

Quantrax has automated many of the processes involved 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.

NOTE: Only download code when directed to by Quantrax. If you feel you need a PTF that appears on the Quantrax FTP software distribution site contact us before downloading it.

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

To make the process more efficient, most of the commands below can be copied and pasted.

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 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. Create a folder on your hard drive called **QuantraxSoftware**

   o If using Core FTP Lite, set up Quantrax as a new site. The Host IP address is 67.90.175.163. Use the default settings for all other fields.

   o If you are not using Core FTP Lite, start up Internet Explorer and bring up the following website: ftp://67.90.175.163/public/RMEx2.0

2. You will be prompted to log on.

3. Enter your user-id and password.

4. Download the PTF **SXRMXMOD.SXRMXMOD** to the **QuantraxSoftware** folder

   o If using Core FTP Lite - On the left side of the window you will see your PC directories/folders and on the right side of the window you will see the Quantrax FTP directories.

   o Click on the **QuantraxSoftware** folder on the left

   o Click on the PTF labeled **SXRMXMOD.SXRMXMOD** on the right

   o Click on the left download arrow in the top corner of the FTP window. This will copy the **SXRMXMOD.SXRMXMOD** to the the **QuantraxSoftware** directory that was created on the PC you are using. The file name on your PC will be the same file name as the FTP directory.

Step 2 – Loading the SXRMXMOD PTF to RMEx

Once you have downloaded the SXRMXMOD.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. Copy SXRMXMOD.SXRMXMOD to your I-Series
- Click on **Start**
- Click on **RUN**
- When the box appears with **cmd** in it press enter
- Key in **Start FTP** and the **IP address** of your iSeries and press enter (ex. Start ftp 192.169.8.4)
- Key in your iSeries **user-id** and press enter
- Key in your iSeries **password** and press enter
- Key in the word **binary** and press enter
- Key in the following to transfer the SXRMXMOD PTF to your SCMOD library

PUT C:\QuantraxSoftware\SXRMXMOD.SXRMXMOD SCMOD/@@RCV.@@RCV

and press enter.

**To verify the PTF copied successfully, enter the following on an AS400 command line (one at a time), hit enter and check that the objects are there:

WRKOBJ OBJ(SCMOD/INSTALLNEF)

and

WRKOBJ OBJ(SCMOD/INSTALLFIF)

If either of these objects do not exist, YOU MUST START OVER with step 1. This is usually caused by failing to enter the word **binary** in step 1 and 2 instructions.

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

<mark>DO NOT DO ANY STEPS HIGHLIGHTED IN YELLOW UNLESS INSTRUCTED SPECIFICALLY BY QUANTRAX TO DO SO:</mark>

1. Downloading the new Release files from the FTP
- If using Core FTP Lite, set up Quantrax as a new site. The Host IP address is 67.90.175.163. Use the default settings for all other fields.
- If you are not using Core FTP Lite, start up Internet Explorer and bring up the following website: ftp://67.90.175.163/public/RMEx2.2
2. You will be prompted to log on.
3. Enter your user-id and password.
4. Download the PTF **SAVFRMXB** to the **QuantraxSoftware** folder

- ○ If using Core FTP Lite - On the left side of the window you will see your PC directories/folders and on the right side of the window you will see the Quantrax FTP directories.

- ○ Click on the **QuantraxSoftware** folder on the left

- ○ Click on the PTF labeled **SAVFRMXB** on the right

- ○ Click on the left download arrow in the top corner of the FTP window. This will copy the **SAVFRMXB** to the the **QuantraxSoftware** directory that was created on the PC you are using. The file name on your PC will be the same file name as the FTP directory

5. Download the PTF **SAVFRMXF** to the **QuantraxSoftware** folder

- ○ If using Core FTP Lite - On the left side of the window you will see your PC directories/folders and on the right side of the window you will see the Quantrax FTP directories.

- ○ Click on the **QuantraxSoftware** folder on the left

- ○ Click on the PTF labeled **SAVFRMXF** on the right

- ○ Click on the left download arrow in the top corner of the FTP window. This will copy the **SAVFRMXF** to the the **QuantraxSoftware** directory that was created on the PC you are using. The file name on your PC will be the same file name as the FTP directory

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.

1. Sign on to your iSeries and create the following library and files:

- ○ **CRTLIB SCINSTALL**
- ○ **CRTSAVF SCINSTALL/SAVFRMXB**
- ○ **CRTSAVF SCINSTALL/SAVFRMXF**

2. Clear the following files:

- ○ **CLRSAVF SCINSTALL/SAVFRMXB**
- ○ **CLRSAVF SCINSTALL/SAVFRMXF**

3. Copy the release files to your I-Series

- ○ Click on **Start**

- ○ Click on **RUN**

- ○ When the box appears with **cmd** in it press enter

- ○ Key in **Start FTP** and the **IP address** of your iSeries and press enter (ex. Start ftp 192.169.8.4)

- ○ Key in your iSeries **user-id** and press enter

- ○ Key in your iSeries **password** and press enter

- ○ Key in the word **binary** and press enter

- ○ Key in the following commands to transfer the release files to your I-Series

   PUT C:\QuantraxSoftware\SAVFRMXB SCINSTALL/SAVFRMXB.SAVFRMXB

   and press enter

   PUT C:\QuantraxSoftware\SAVFRMXF SCINSTALL/SAVFRMXF.SAVFRMXF

and press enter

**To verify the New Release copied successfully, enter the following on an AS400 command line (one at a time), hit enter and check that the files are there:

DSPSAVF FILE(SCINSTALL/SAVFRMXB)

and

DSPSAVF FILE(SCINSTALL/SAVFRMXF)

If you do not see a list of files within each of the above commands, YOU MUST START OVER with step

3. This is usually caused by failing to enter the word **binary** in step 4 instructions

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 **MUST** use the proper call command below, under the section titled Implementation - **#9**, based on the current Intelec or RMEx software version you are on in order to upgrade to version RMEx2.0. If you do **NOT** see a call command for your current version you **MUST** contact Quantrax before proceeding with the upgrade. The current release is displayed on the Main menu when you sign into RMEx.

2. 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.

3. 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).

4. Upgrades must be run on a dedicated system (No jobs running).

Implementation

1. Ensure you have a backup of your data libraries.

2. Ensure that all users are signed off of 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 RMEx 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:
   - **ADDLIBLE SCLIB**
   - **ADDLIBLE SCMOD**
   - **CALL INSTALLNEF**

   Follow 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 RMEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an RMEx User ID. Enter the following commands from a command line:
   - **ADDLIBLE SCLIB**
   - **ADDLIBLE SCMOD**
   - **CALL INSTALLFIF**

   This step will take a few minutes.

8. Sign off RMEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an RMEx User ID. Enter the following commands from a command line:
   - **ADDLIBLE SCLIB**
   - **ADDLIBLE SCFIX**
   - **ADDLIBLE SCMOD**

9. Implementing the upgrade
   Choose the call command below based on your current version of software. You will **ONLY run 1** of the below commands:

   If you're current software version is older than RMEx 1.0, you MUST Contact Quantrax

   If you're current software version is RMEx 1.0 or RMEx 1.2:

   - Key in **CALL INSTALRMX1** and press ENTER

   If you're current software version is RMEx 2.0 or Higher:

   - Key in **CALL INSTALR2.2** and press ENTER

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.

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 to upgrade 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 2.2 has been installed**" will be sent to INTELOPR when the implementation process is complete. Make sure the correct version has been installed.

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.