

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 and/or documentation onto our new FTP software distribution site and clients retrieving these 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 PTFs (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 to upgrade to a new release or 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 – Preparing for and Retrieving the Required Files from the Quantrax FTP Site

1. Quantrax will provide a UserID and password to access our FTP distribution site
2. Create a folder on your C drive named **QuantraxSoftware**
3. Go to a command line on your System i5 and type in the following **WRKOBJ NEWINSLIB**
 - o If the program exists then type in **CALL NEWINSLIB** on the command line
 - o If the program does not exist, you **MUST** download the file and install instructions for **SXF041612D**. Install **SXF041612D** before you upgrade
4. To access our FTP distribution site use ftp.quantrax.com or IP address 67.90.175.163

Note: If you would like to download a free version of Core FTP Lite, click here for instructions:
<http://quantrax.com/kb/CoreFTP/FTPwithCoreFTP.pdf>

5. Login using the UserID and password provided to you
6. You will be presented with 2 folders
 - o One will be your Quantrax assigned client code folder (custom mods)
 - o One will be the public folder (new releases and PTFs)
7. To access the new release files:
 - o Click on the public folder
 - o Click on the **RMEx3.0** folder

8. You will only need to do this step (8) if **NEWINSLIB** does NOT exist - Download the File named **SXF041612D** and the install instructions to your QuantraxSoftware folder. Install this file before continuing.
9. Download the File named **SXRMXMOD.SXRMXMOD** to your QuantraxSoftware folder
10. Download the File named **SAVFRMXB** to your QuantraxSoftware folder
11. Download the File named **SAVFRMXF** to your QuantraxSoftware folder

Step 2 – Loading the SXRMXMOD File to RMEEx

Loading the SXRMXMOD.SXRMXMOD file into your RMEEx program library on your System i5.

1. To copy SXRMXMOD.SXRMXMOD from you PC to your System i5
 - o Click on **Start**
 - o Click on **RUN**
 - o When the box appears with **cmd** in it press enter
 - o Key in **Start FTP** and the **IP address** of your System i5 and press enter (ex. Start ftp 192.169.8.4)
 - o Key in your iSeries **user-id** and press enter
 - o Key in your iSeries **password** and press enter
 - o Key in the word **binary** and press enter
 - o Key in the following to transfer the SXRMXMOD File to your SCMOD library

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

and press enter.

****To verify the File copied successfully, enter the following on a System i5 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 this step. This is usually caused by failing to enter the word **binary** as instructed.

Once the File has been uploaded using the steps above, the smart code program that runs whenever the system is active will periodically check and move the new code into the appropriate library.

Step 3 – Loading the New Release Files to RMEx

Loading the SAVFRMXB and SAVFRMXF files into your RMEx program library on your System i5.

This step copies the data from your PC onto the System i5: 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. Copy the release files to your System i5
 - 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 System i5 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 System i5

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 a System i5 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 this step. This is usually caused by failing to enter the word **binary** as instructed.

Step 4 – 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 4 – 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 Inteltec or RMEx software version you are on in order to upgrade to the latest version. 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 Inteltec, 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 RMEEx.
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 Inteltec, cancel those programs.
5. Sign off RMEEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an RMEEx 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:
 - o **ADDLIBLE SCLIB**
 - o **ADDLIBLE SCMOD**
 - o **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 RMEEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an RMEEx User ID. Enter the following commands from a command line:
 - o **ADDLIBLE SCLIB**
 - o **ADDLIBLE SCMOD**
 - o **CALL INSTALLFIF**This step will take a few minutes.
8. Sign off RMEEx and then sign on again using the User ID QSECOFR. Do not attempt to sign on with an RMEEx User ID. Enter the following commands from a command line:
 - o **ADDLIBLE SCLIB**
 - o **ADDLIBLE SCFIX**
 - o **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 RMEEx 1.0, you MUST Contact Quantrax

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

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

If you're current software version is RMEEx 2.0 or RMEEx 2.1:

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

If you're current software version is RME_x 2.2 or Higher:

- Key in **CALL INSTALR3.0** 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 "**RME_x Release X.X has been installed**" (X.X will be the version that is installed) will be sent to INTELOPR when the implementation process is complete. Please check the message to insure the correct version has been installed. You can also type in ?V in the Ready for Option field on the Main menu to make sure the created date has been updated. The created date should be the date the file was placed on the Quantrax FTP site.

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.