Epicor Eagle™ eConnect Setup and User Guide

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Contents

Before You Begin

Prerequisites
- Your Eagle system must be running Eagle for Windows Level 19.1 or higher
- Terminal Services is not supported with eConnect.
- Eagle for Windows is not recommended on Domain Controllers.
- eConnect 3.0 and above requires .Net 4.0 Framework (FULL) Installed.
- Your PCs must have the following Service Packs installed:
  - PCs running Windows XP: Service Pack 3 or higher with .Net 3.5 Service Pack 1 and .Net 4
  - PCs running Windows Vista: Service Pack 1 or higher with .Net 3.5 and .Net 4 Service Pack 1
  - PCs running Windows 7 (32 or 64bit) with .Net 4
  - PCs running Windows 8.0 , 8.1 (32 or 64bit) No Service Packs required
  - Servers running Windows Server 2003: Service Pack 2 or higher with .Net 3.5 Service Pack 1 and .Net 4.
  - Servers running Windows Server 2008 (32 or 64bit): with .Net 4

Overview of eConnect 3
Your Eagle Server acts as a software repository for the distribution of new Eagle for Windows software levels, and as a command repository from which all eConnect Clients pick up instructions. When you receive a new Eagle for Windows software level, you'll run the "Load" process from the eConnect Manager Console, which packages the CD into a distributable form and places it on the Eagle Server, ready for distribution to all clients. The eConnect Manager Console must have internet access for registration, licensing, and future electronic delivery service; however, the eConnect Clients do not require any special access or configuration, other than the ability to talk to the Eagle server as they already do during normal operation.

Depending on the number of clients and size of your network, you may choose to schedule the "distribution" process over several nights. This process causes the eConnect Clients to pick up the new Eagle for Windows software and place it in a hidden folder on the PC's hard drive so that it is like having its own copy of the CD ready for installation at any time. Once all stations report that the distribution process is complete, you are ready to install new software on your Eagle Server. After installation is complete on the server, you'll return to the eConnect Manager Console and initiate the "Install" process which tells the client PCs to update Eagle for Windows now. Once the clients have updated, they report their completion status and any errors to the eConnect Manager Console, where you can review this information.

eConnect 3 Software Update Flow

1. If this is your first time installing or using eConnect:
   - Install eConnect on all PCs
   - Identify the Client PC that will be the Manager Console for eConnect

- Register your eConnect product with Epicor.
- Perform the Eagle for Windows Test Update process to verify compatibility with your network and client PCs.

2. After receiving Eagle client and server software CDs, load the client CD in the Manager Console.

3. Distribute the software update to all PCs (this may be scheduled across multiple days)

4. Update the Eagle Server using standard procedures described in the Conversion Guide you received with the software.

5. Launch the install of client software from the Manager Console.

## How Does eConnect Work with Network Master / Network Client Configuration?

The Network Master PC still continues to be the software update source for its Network Clients. The eConnect Manager Console is simply the initiator of tasks and the message collector for all responses from eConnect clients. The eConnect Manager Console uses the Eagle server to distribute the software updates to the eConnect Clients and collects the data from the responses of the clients on the Eagle. Thus, the Eagle server acts as a holding tank or repository for eConnect messaging and software packages.

eConnect must be installed on all Eagle For Windows stations. When software is distributed through eConnect to all stations, eConnect distinguishes between the Network Master PC/ Clients, and prepares the software on the Network Master. The Network Clients report back that this step is skipped because they are not the Master. After you install new Eagle server software, you initiate the Install Now or ASAP command to all stations. eConnect updates the Network Master(s). Then the Network Clients install from the Network Master.

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Installing eConnect for the First Time

Using eConnect.msi or the Full CD Installer, do the following to install eConnect.

1. Double click the eConnect.msi to run the initial installation on each PC.
2. Select the PC that will be your eConnect Manager Console.
3. Open the eConnect Console from the Epicor symbol on the task bar.
4. From *This Station* tab, click *Configure*. From the Configure window, click the *Network* tab.
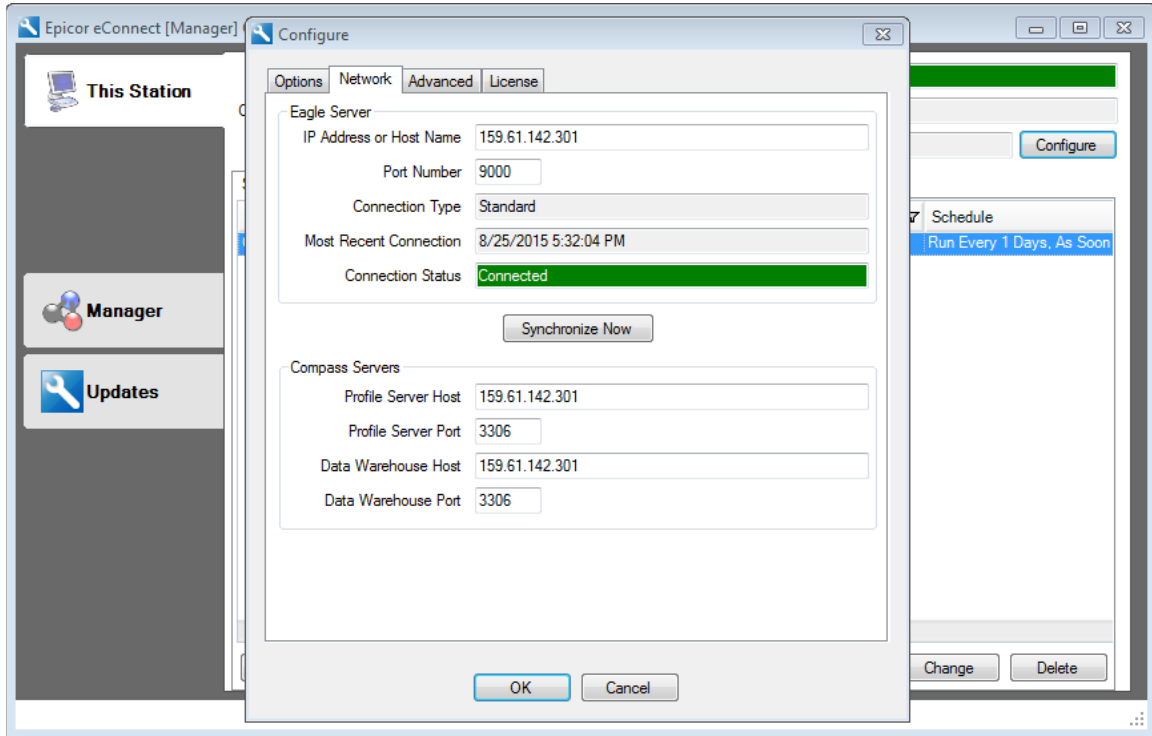
5. Verify that the correct IP address for your Eagle server is listed, and that the connection status is green and says "Connected."
6. For Compass Updates, fill in the Compass Server information, typically it is the Eagle Server IP address.

    Note: This is required for Compass to complete the update process.

7. From the *Advanced* tab, click *Make This Station the Manager Station.*
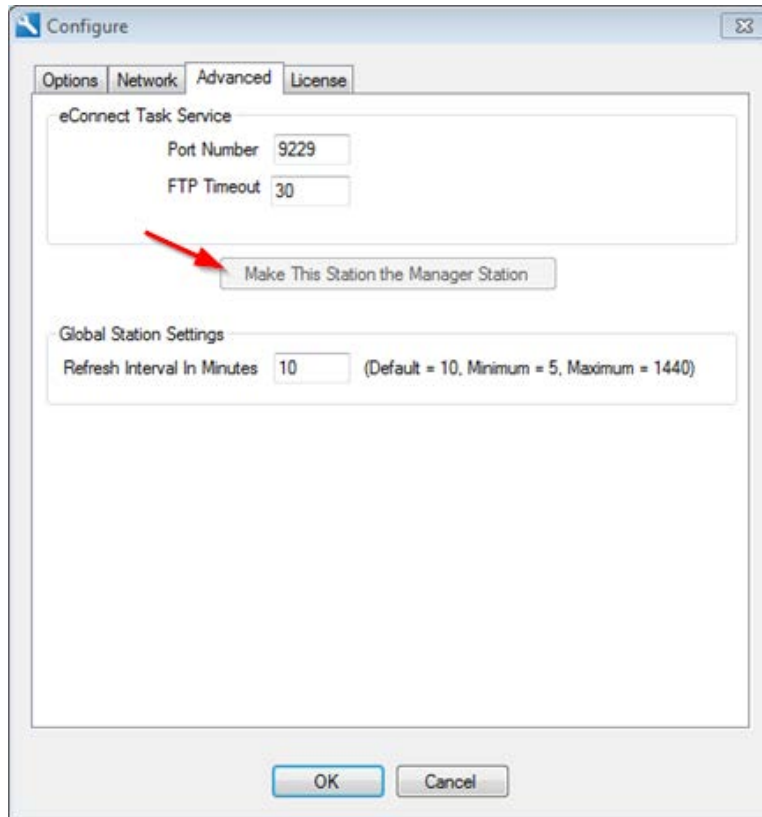
8. From the *License* tab, enter your customer number and contact information, and then click *Connect Now.*

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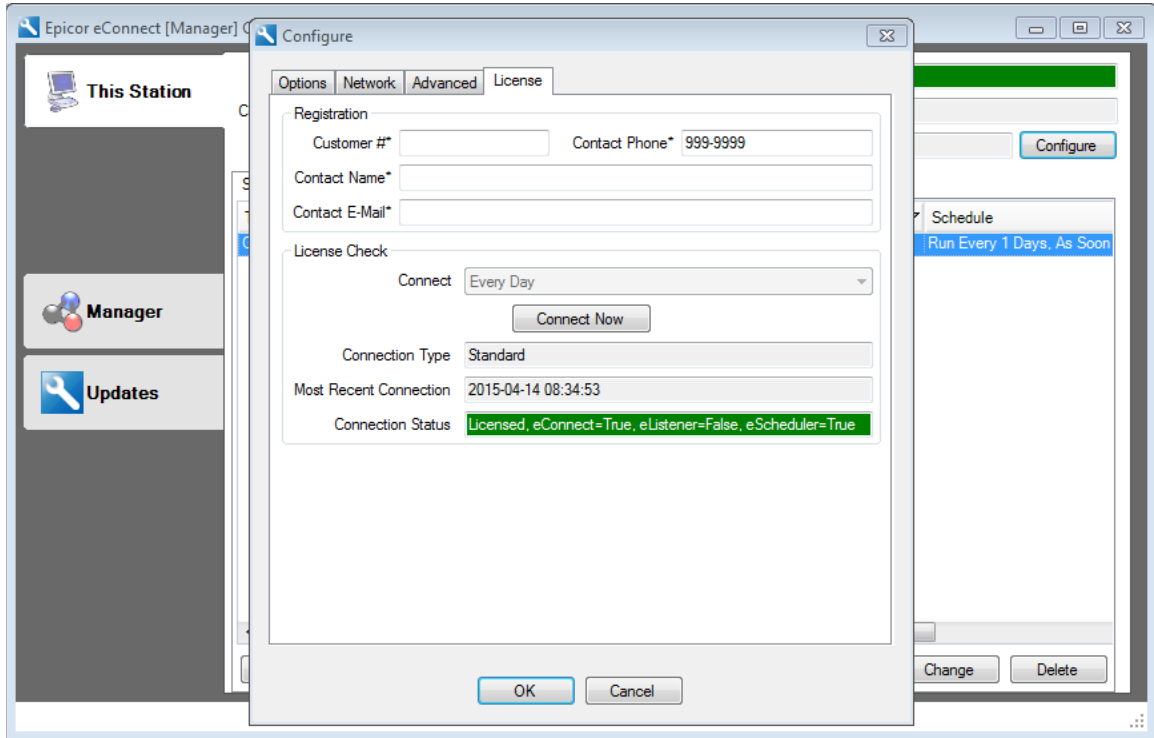
Within a few minutes, the Status indicator should become green to indicate valid license and Eagle connectivity.
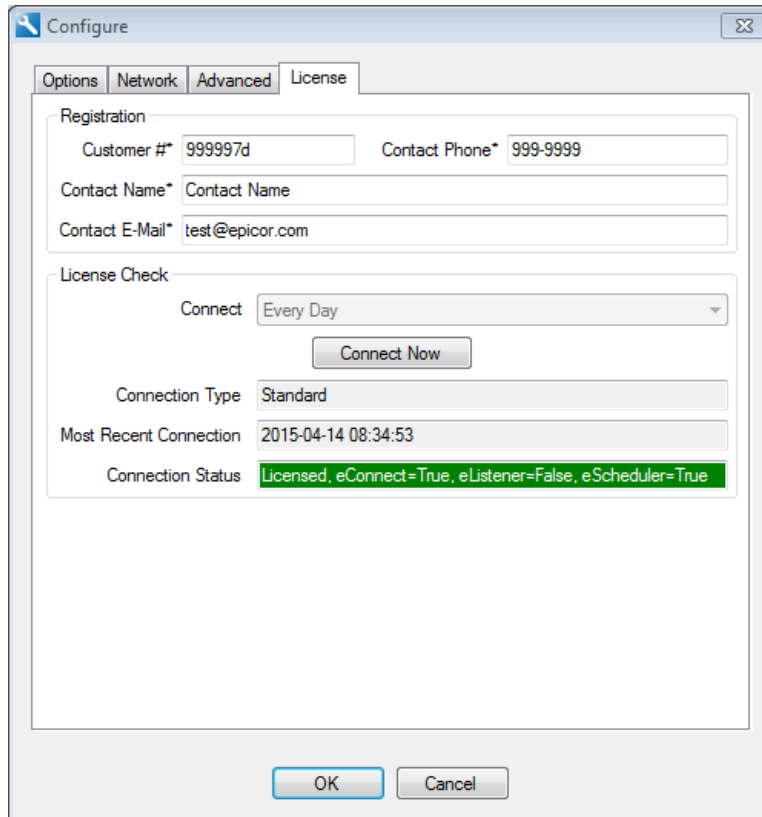
Updating eConnect

1. Copy the MSI file to the C:\Temp\ directory on your eConnect Manager Console.
2. Go to Updates/eConnect and do the following:
   - Click Load New Update, then click Accept at the License Agreement. The update takes several minutes to load and display in the list.
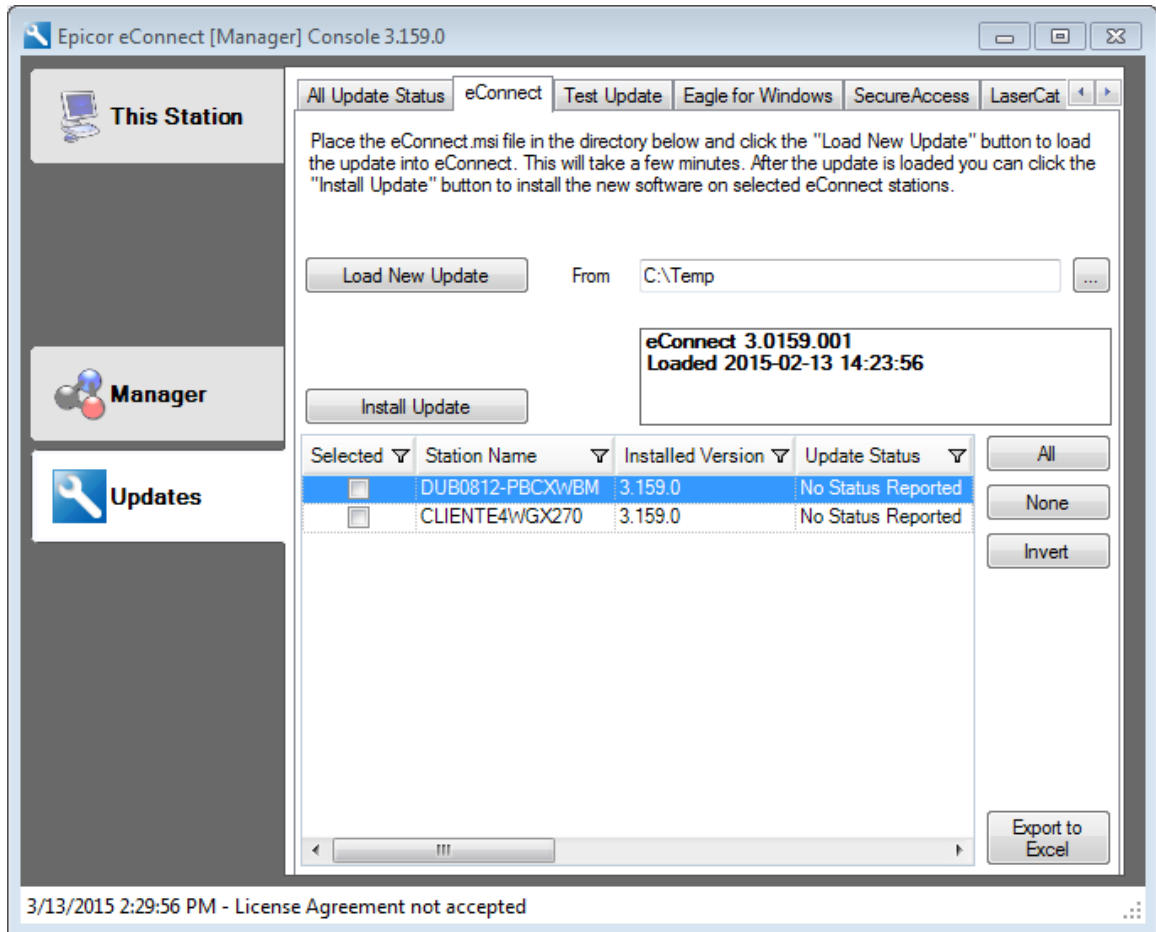
- Click the ALL button on the right or select the desired stations to update.
- Click Install Update, select your desired Schedule, and then click OK.
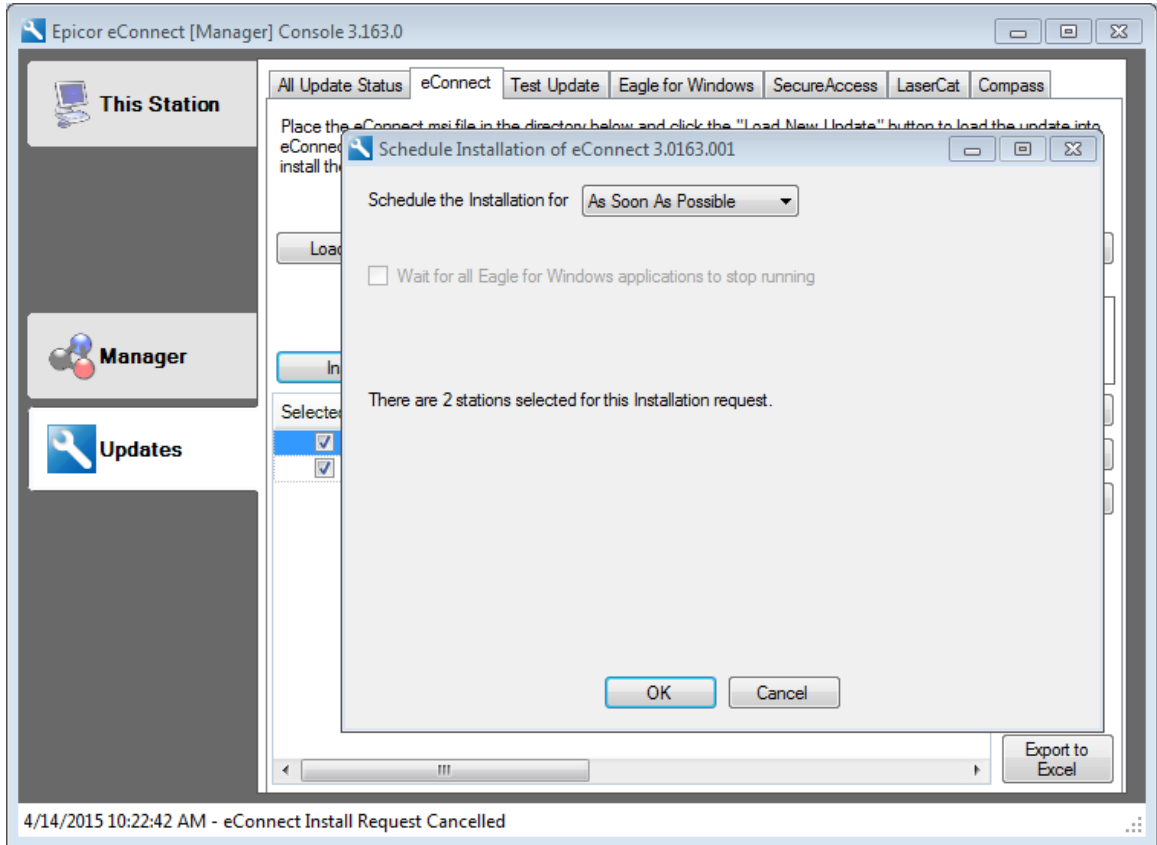
Within 20-30 minutes of the scheduled run time, the Stations list should indicate that all stations have updated.

Epicor eConnect [Manager] Console 3.163.0

All Update Status | eConnect | Test Update | Eagle for Windows | SecureAccess | LaserCat | Compass

This Station

Place the eConnect.msi file in the directory below and click the "Load New Update" button to load the update into eConnect. This will take a few minutes. After the update is loaded you can click the "Install Update" button to install the new software on selected eConnect stations.

Load New Update   From   C:\Temp

Manager

eConnect 3.0163.001
Loaded 2015-03-26 13:35:24
Install Started 2015-03-26 13:40:42

Install Update

Updates

Selected	Station Name	Installed Version	Update Status	Update Status Last Changed	St
☑	DUB0812-PBCXwBM	3.163.0	Install Complete	2015-03-27 08:29:17	20
☐	CLIENTE4WGX270	3.159.0	No Status Reported	Never	20

All
None
Invert

Export to Excel

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The eConnect Tabs

This section describes in detail the various tabs in eConnect.

The Manager tab

The Manager tab self-populates with useful information about each of your eConnect stations. If desired, you can export information from the Manager tab to Excel. Most information is self-explanatory, but the red time stamp means that a station has not checked in since that time stamp. A station name in bold blue text designates the current Manager Console.

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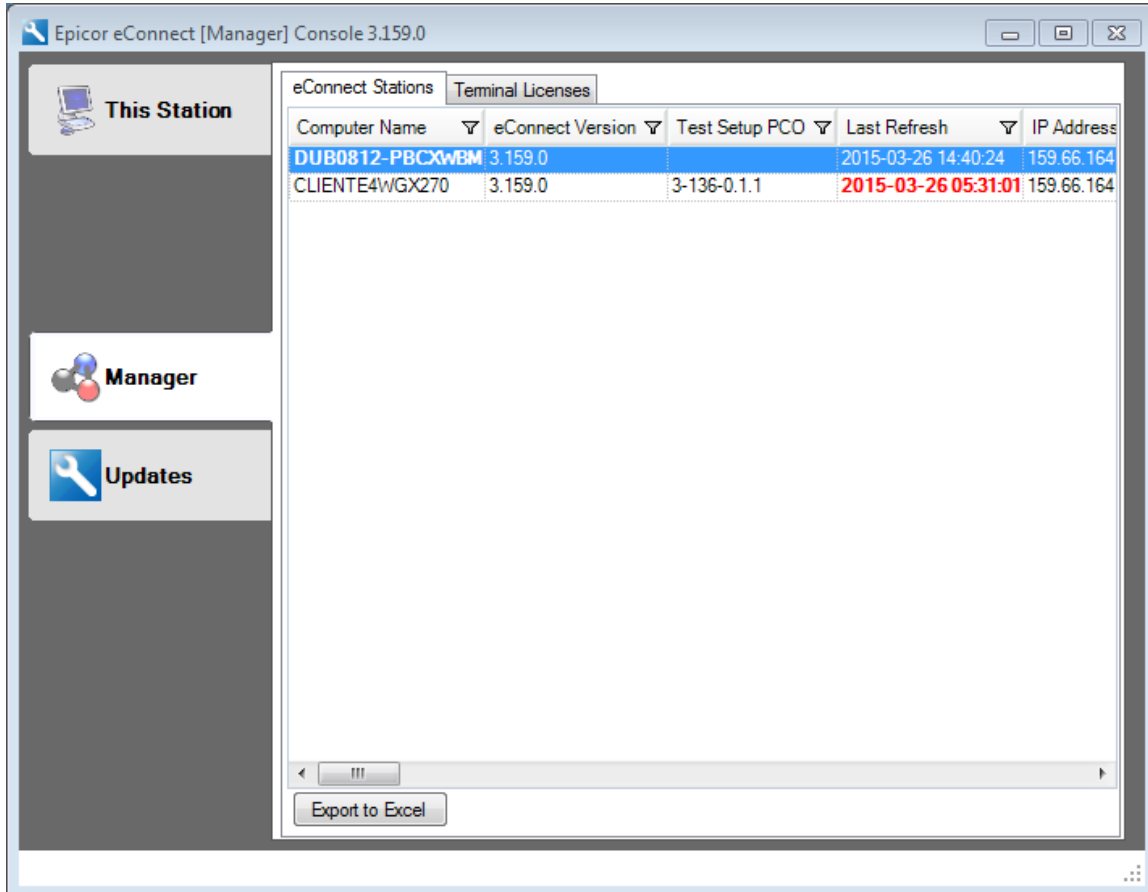
This Station Tab – eConnect Tasks

This tab logs everything done by this eConnect station. On the eConnect Manager Console, you can see what was broadcast to be done for the other stations. This can be handy in confirming the scheduling of specific tasks.
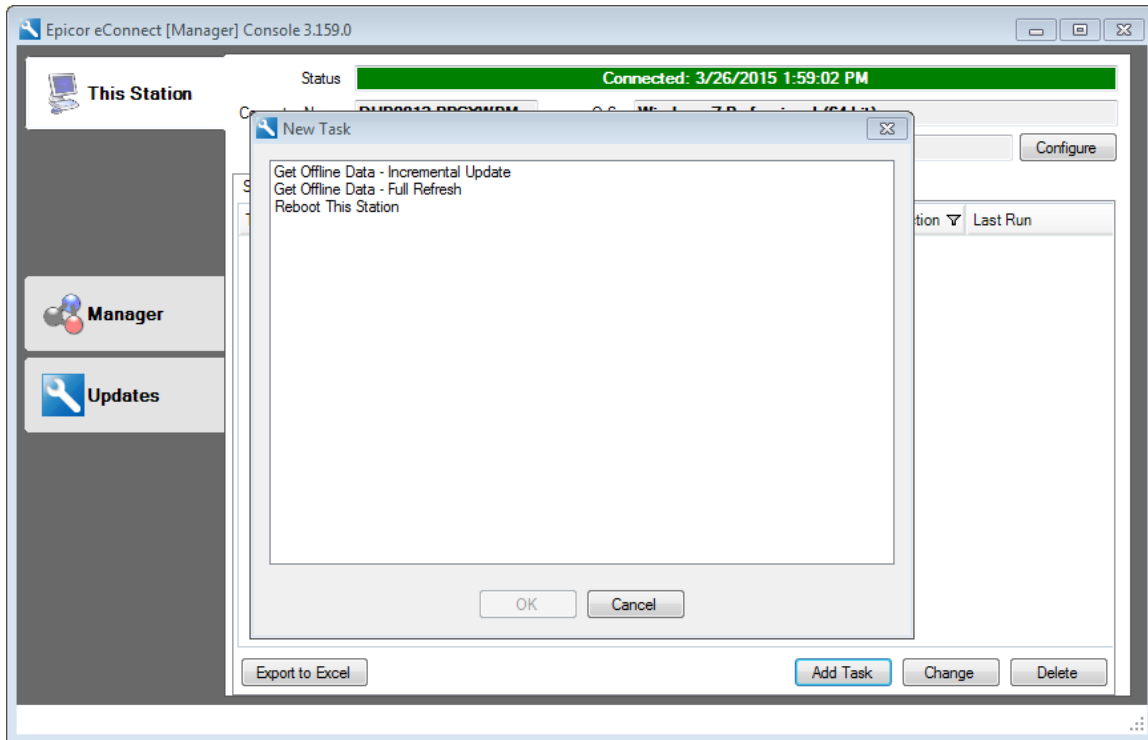

eScheduler – The Scheduled Tasks tab

eScheduler does not require a user to be logged onto the Windows machine, and currently supports the Offline refresh (download) for Offline POS data files only. If POS stations are not left powered on at night, Epicor suggests using the Offline Master / Client model using at least one Master per location which is left on at night to process the files for the local Clients. See the Eagle for Windows online help topic entitled "Standards for Master/Client Setup" to configure this model, which also lowers the nightly bandwidth requirements of each remote location.

To Add, Change, or Delete eSchedules:

1. From This Station, on the Scheduled Tasks tab, select the desired action (add, change, or delete).

2. Select your Offline Refresh choice and click *OK* to display the schedule screen.
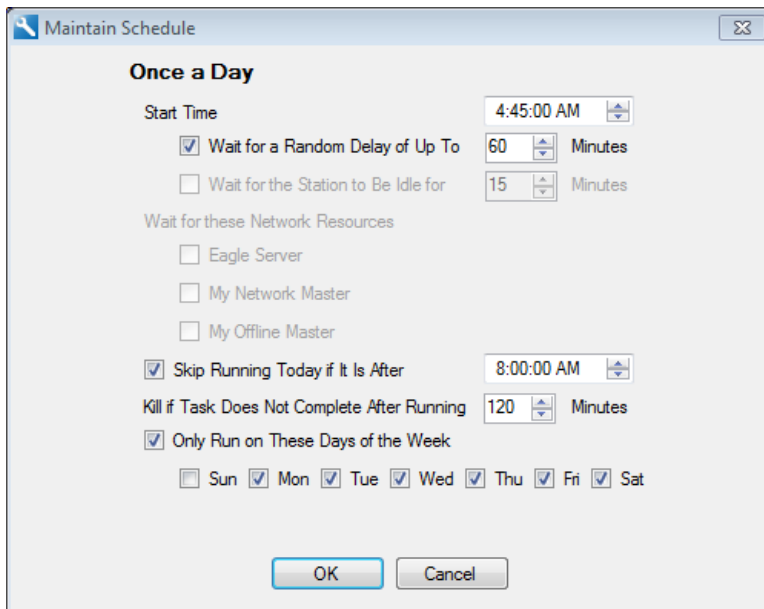
Once you have made your scheduling choice and clicked OK, within a few minutes your schedule displays in the Scheduled Tasks.
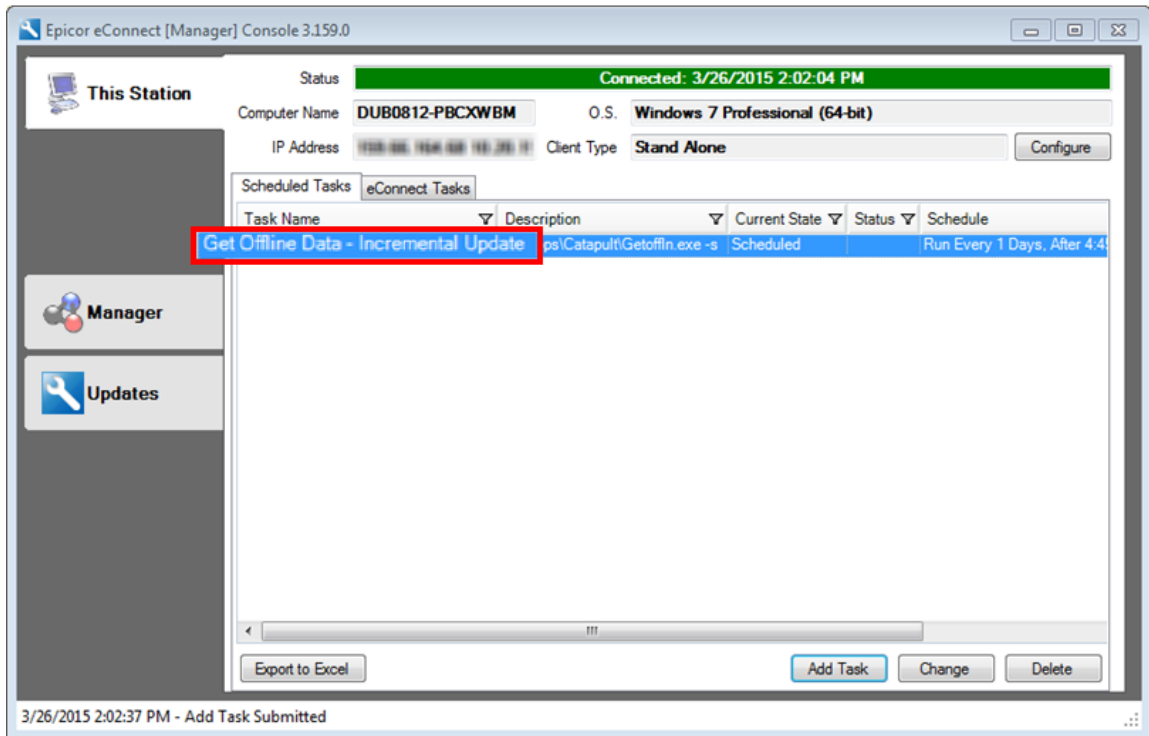
Updating Eagle for Windows

Running a Test Setup

If this is your first time using eConnect, run a test setup, as described below. Otherwise, you can skip this section and proceed to "Updating Eagle for Windows."

1. From the eConnect Manager Console, go to Updates/Test Update.
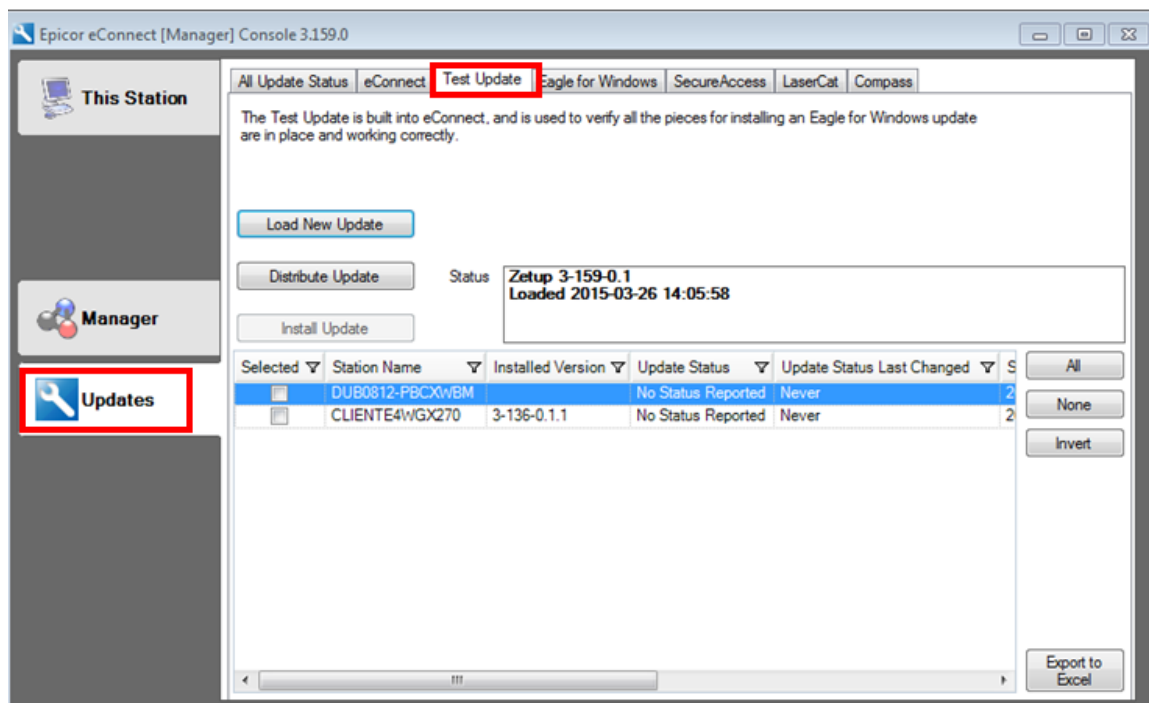
2. Click Load New Update. The Status will say "Loading..."

3. After several minutes, when the Status changes to "Loaded <date> <time>," select the desired stations using the boxes on the left or the buttons on the right
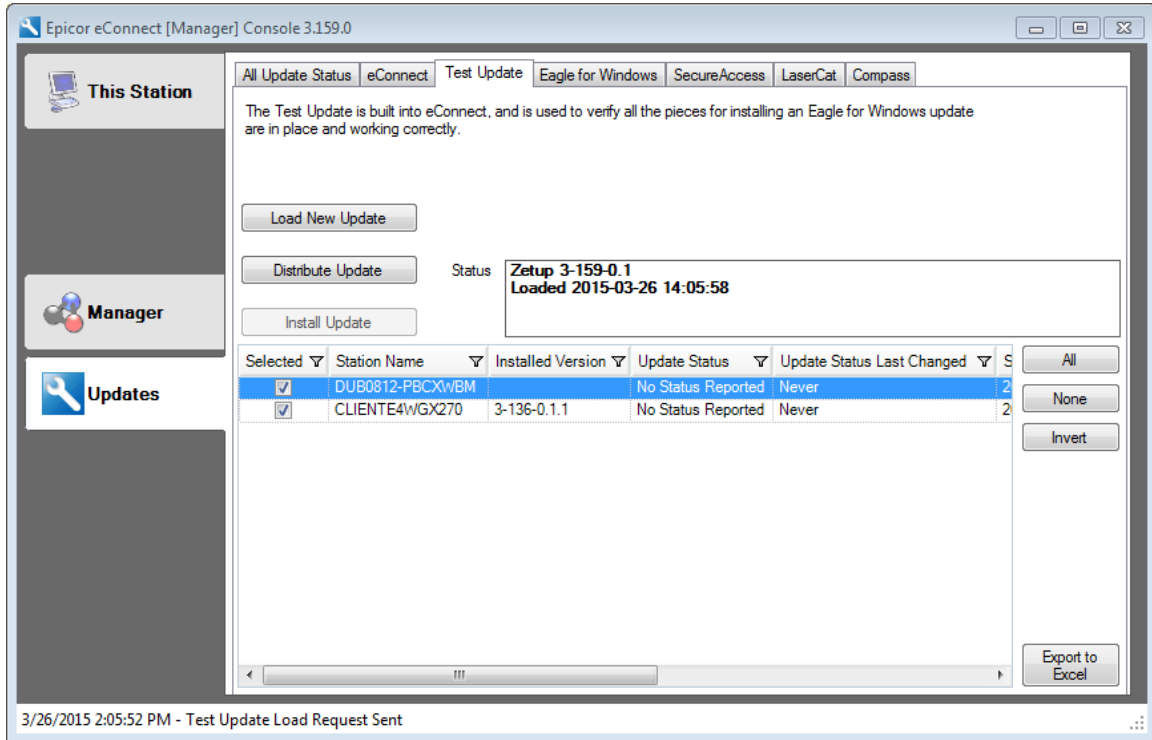
4. Click Distribute Update and select the desired schedule for these stations.
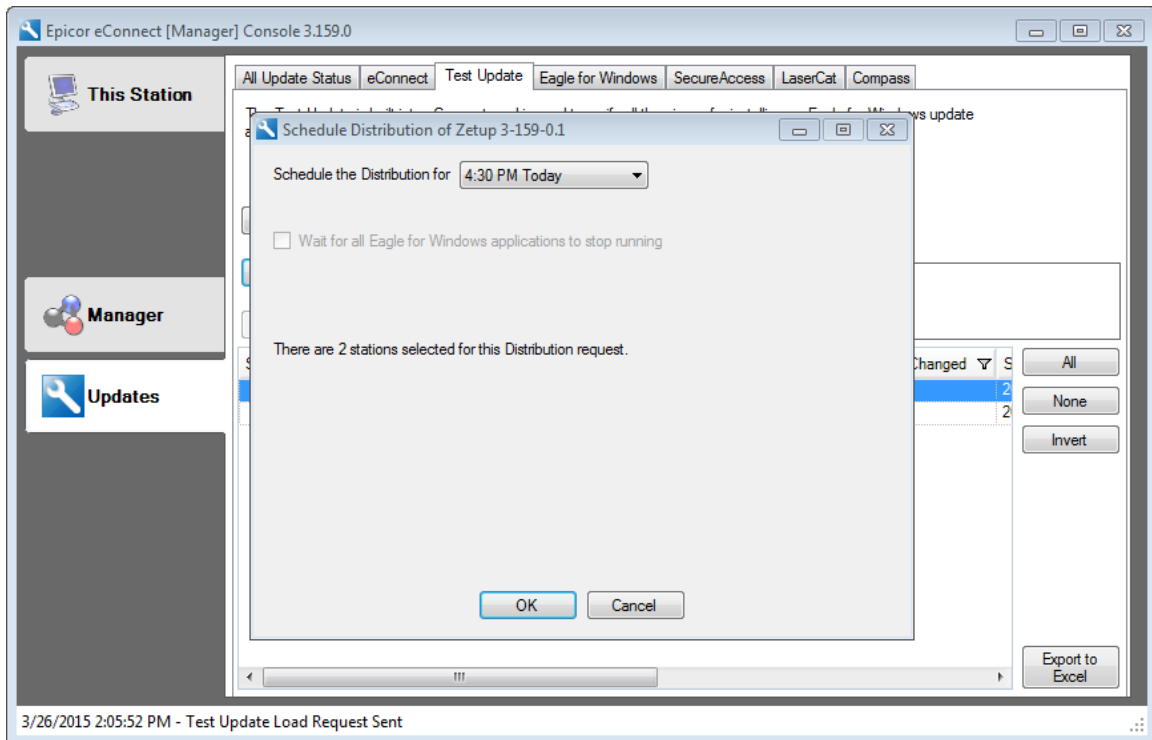
5. The Status will add "Distributing…" and then the Status will change to "Distribute Started <date> <time>." Wait at least 10 minutes from the <date> <time> status.

6. Select the desired stations using the boxes on the left or the buttons on the right.

7. Click Install Update and select the desired scheduling.
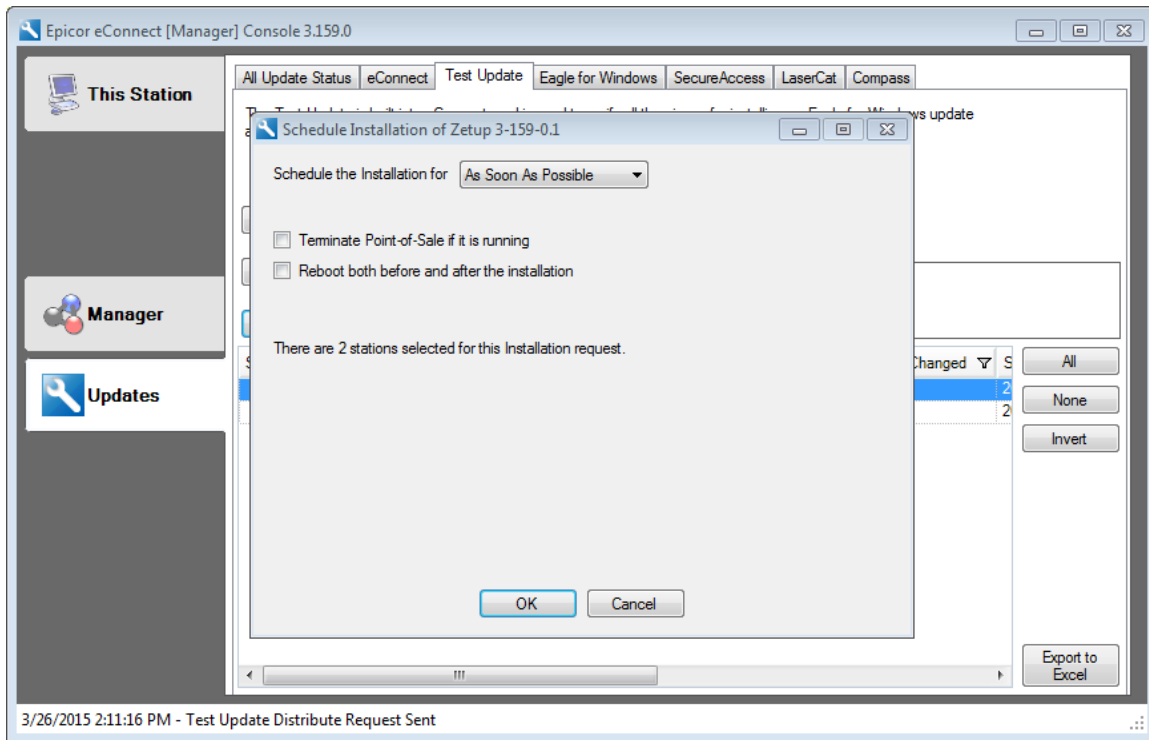
The Status will add "Installing…"and then will change to "Install Started <date> <time>."

The Stations will now reflect the Test Setup PCO on each station and show that they all updated.

Updating Eagle for Windows

1. Copy the entire Eagle for Windows CD onto your eConnect Manager Console, or place it into its CD drive.

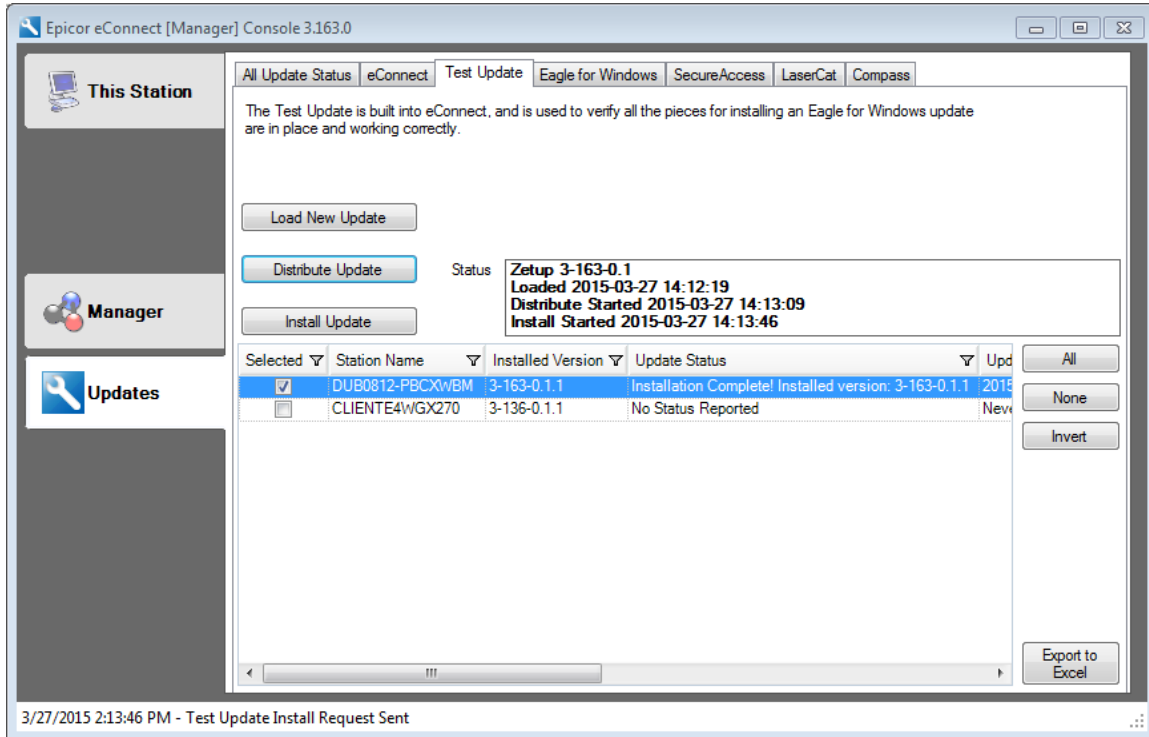2. From the eConnect Manager console, on the Updates/Eagle for Windows tab, enter the path to the Eagle for Windows software in the *From* field.

3. Press *Load New Update* and *accept* the Software License Agreement.
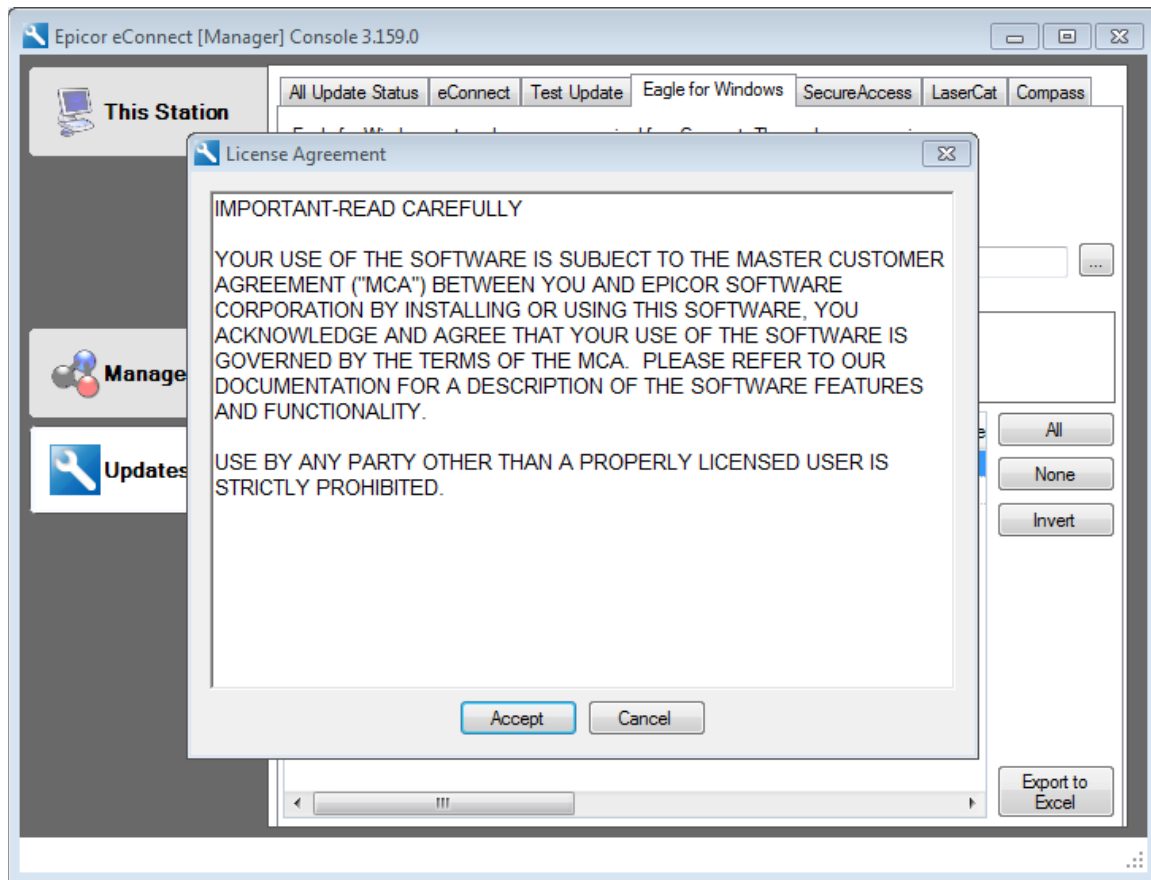
The update takes about 20 minutes to load.

4. The *Distribute Update* button becomes enabled.

5. Click the *ALL* Button on the right or select the desired stations to which to distribute the first schedule. Keep in mind that each Stand alone and Net Master Eagle for Windows station will be downloading a 700MB file, so select appropriately for your network bandwidth.

6. Click *Distribute Update* to display the scheduling window.

Schedule Distribution of Eagle for Windows 25.0130.001

Schedule the Distribution for [10:00 PM Today ▼]

☐ Allow re-install of same version

☐ Wait for all Eagle for Windows applications to stop running

There are 2 stations selected for this Distribution request.

[OK] [Cancel]

7. Select the desired schedule and then click OK.

   Note – you can schedule the distribution process multiple times and it can span several evenings if necessary.

Epicor eConnect [Manager] Console 3.163.0

This Station
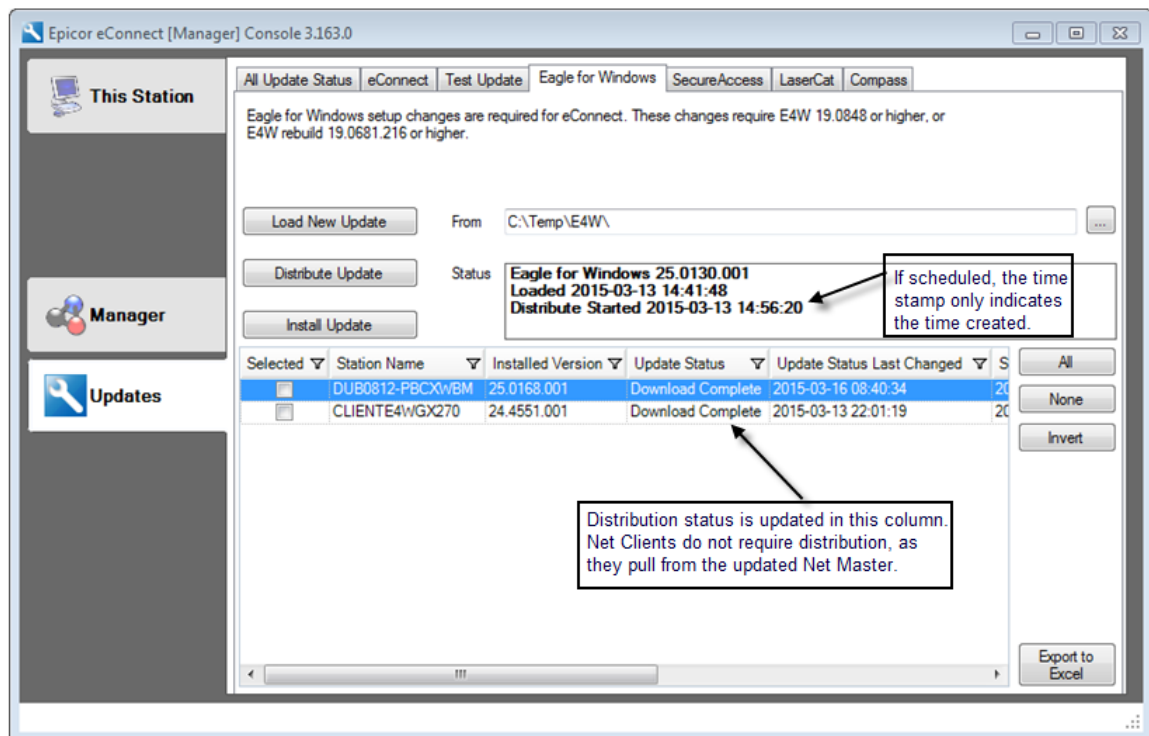
All Update Status | eConnect | Test Update | Eagle for Windows | SecureAccess | LaserCat | Compass

Eagle for Windows setup changes are required for eConnect. These changes require E4W 19.0848 or higher, or E4W rebuild 19.0681.216 or higher.

[Load New Update]   From   C:\Temp\E4W\   [...]

[Distribute Update]   Status   Eagle for Windows 25.0130.001   If scheduled, the time
                                 Loaded 2015-03-13 14:41:48   stamp only indicates
[Install Update]   Distribute Started 2015-03-13 14:56:20   the time created.

Manager

Updates

Selected ▼	Station Name ▼	Installed Version ▼	Update Status ▼	Update Status Last Changed ▼	S
☐	DUB0812-PBCXWBM	25.0168.001	Download Complete	2015-03-16 08:40:34	20
☐	CLIENTE4WGX270	24.4551.001	Download Complete	2015-03-13 22:01:19	20

[All]
[None]
[Invert]

Distribution status is updated in this column.
Net Clients do not require distribution, as
they pull from the updated Net Master.

[Export to Excel]

! Important ━━━━━━━━━━━━

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Do NOT distribute updates to stations during business hours because this process dramatically slows down the network. If necessary, you can distribute updates to stations over several nights.

8. Check the "Update Status" column to verify the download for all terminals was "Completed" or "Skipped."

9. Install the new server software on the Eagle Server. You must do this BEFORE proceeding with the Eagle for Windows install.

10. Once the Eagle server has been updated with new software, return to the eConnect Manager Console and initiate the install for all clients using the "As Soon As Possible" schedule option.

# Updating Compass

Updating Compass

Copy the Compass Installation file onto your eConnect Manager Console, or place it into its CD drive.

Note: Make sure to have the Compass Servers info filled in the configure section before starting an update. See Section "Installing eConnect for first time".

1. From the eConnect Manager console, on the Updates/Compass tab, enter the path and installation setup name to the Compass software in the *From* field or click on the browse icon
[...] beside the *From* field and select the file name to load.
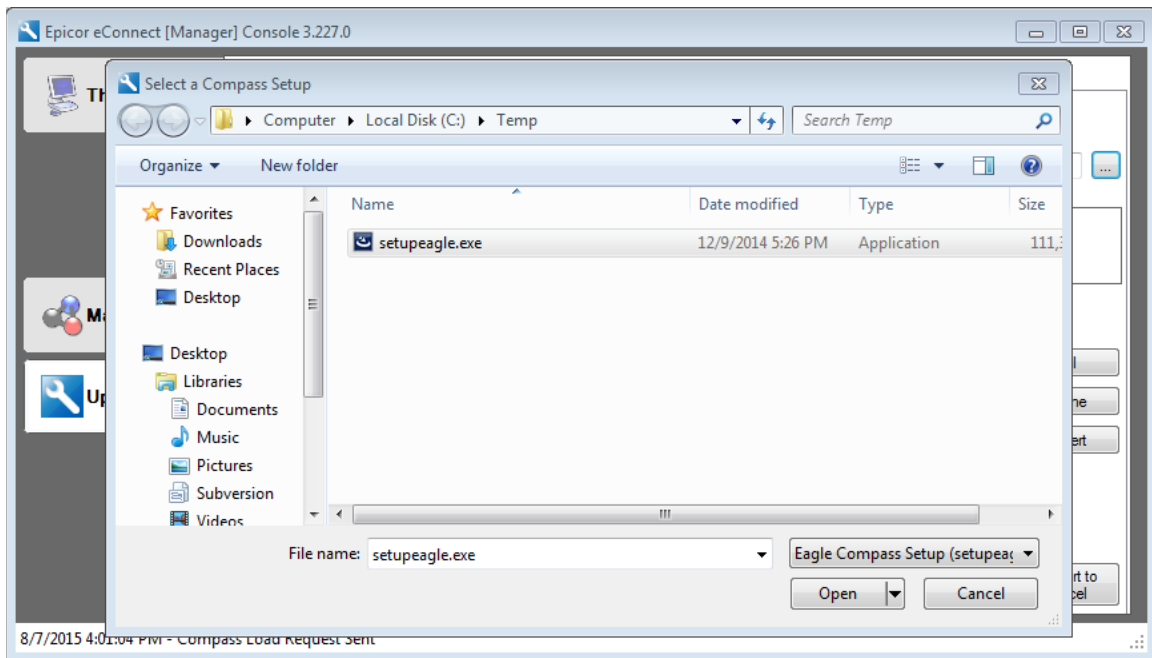
2. Click on Open to complete the file selection process.

3. Press *Load New Update* and *accept* the Software License Agreement.
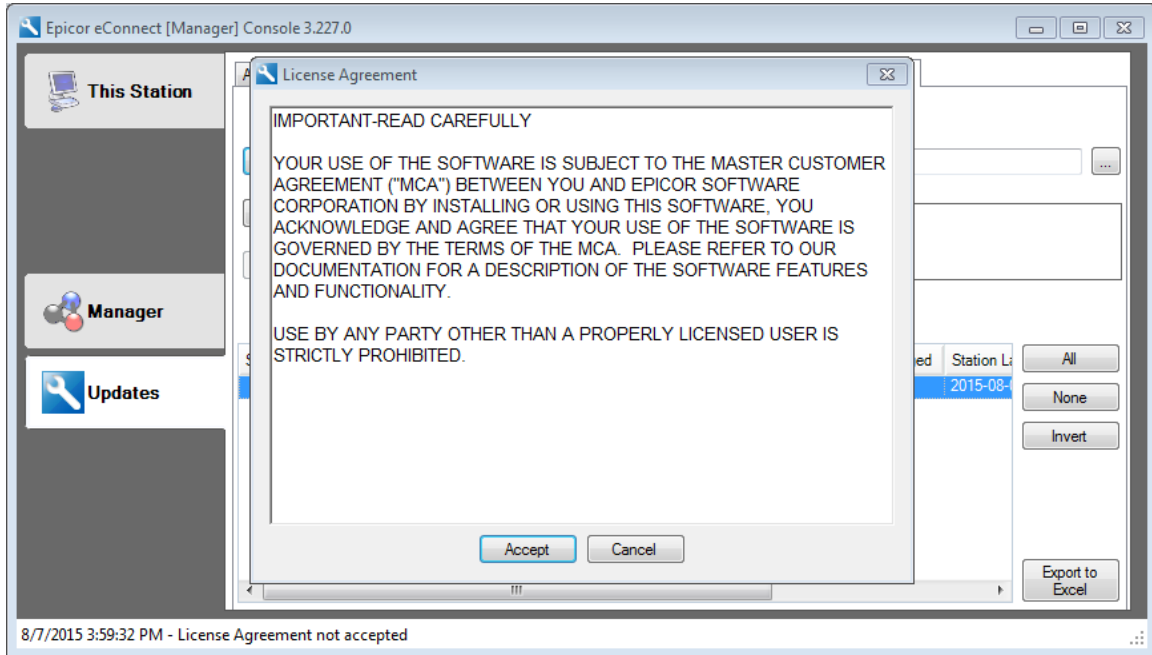
The update takes about 10 minutes to load.

4. The *Distribute Update* button becomes enabled.

5. Click the *ALL* Button on the right or select the desired stations to which to distribute the first schedule.

6. Click *Distribute Update* to display the scheduling window.
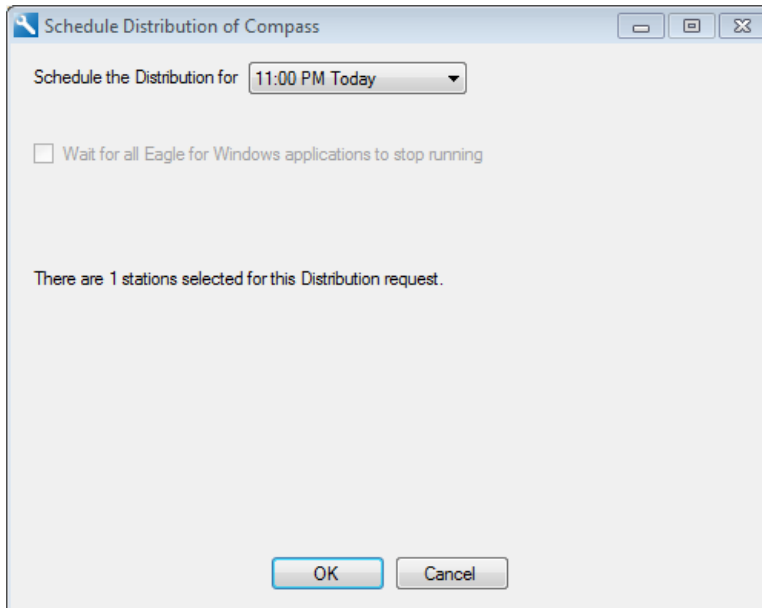
7. Select the desired schedule and then click OK.

Note – you can schedule the distribution process multiple times and it can span several evenings if necessary.

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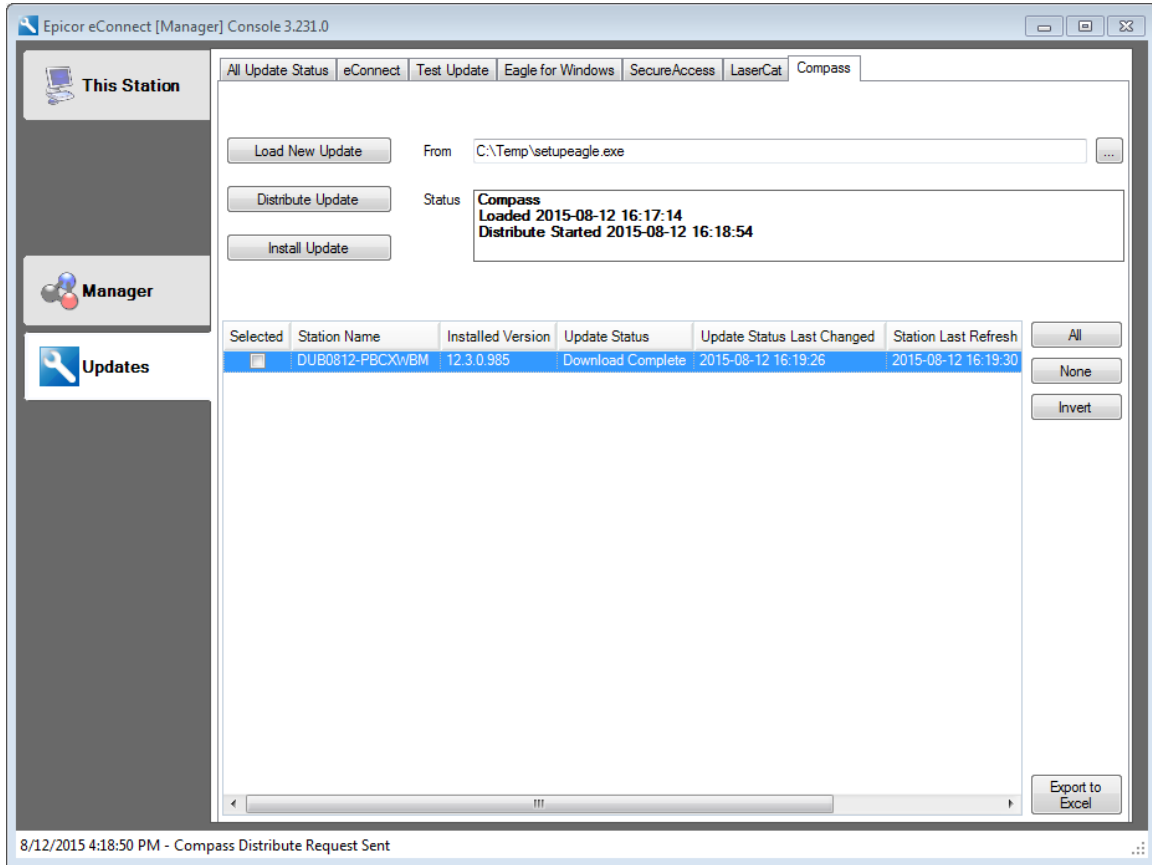
! Important ━━━━━━━━━━━━━━━

Do NOT distribute updates to stations during business hours because this process dramatically slows down the network. If necessary, you can distribute updates to stations over several nights.

8. Check the "Update Status" column to verify the download for selected clients was "Completed" or "Skipped."

9. Once the Distribution is completed distributing the new software, return to the eConnect Manager Console and initiate the install for all clients using the desired schedule – usually after hours as this will cause a system reboot.

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Appendix A-Troubleshooting Client Install Issues

If you ever need to hand-install a software package that was successfully distributed, do the following:
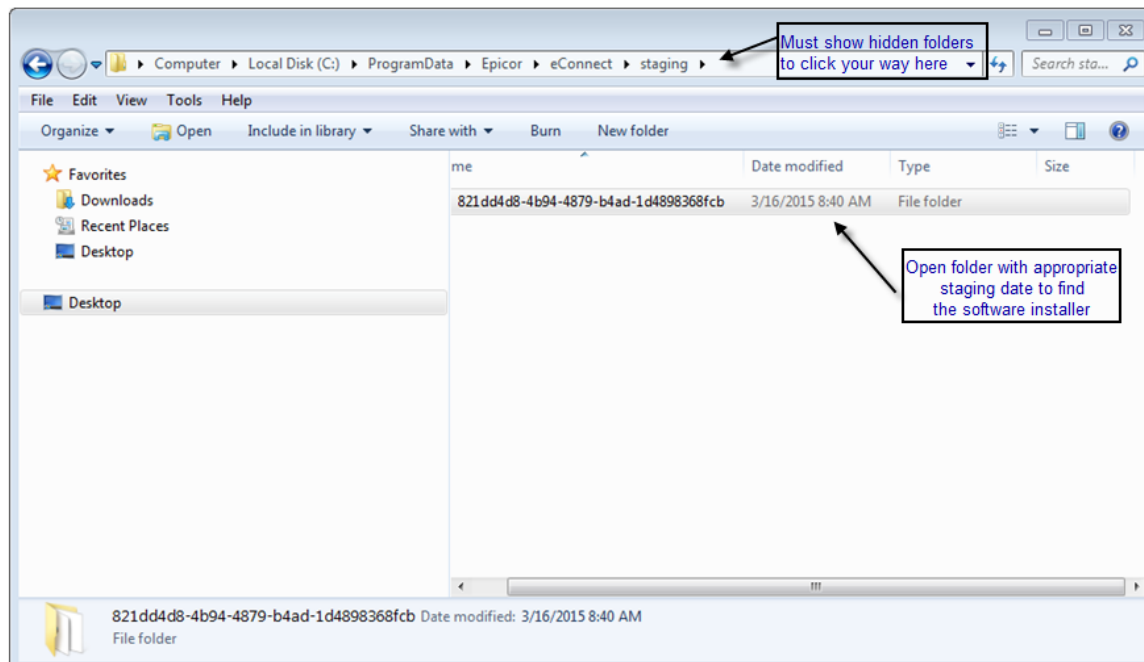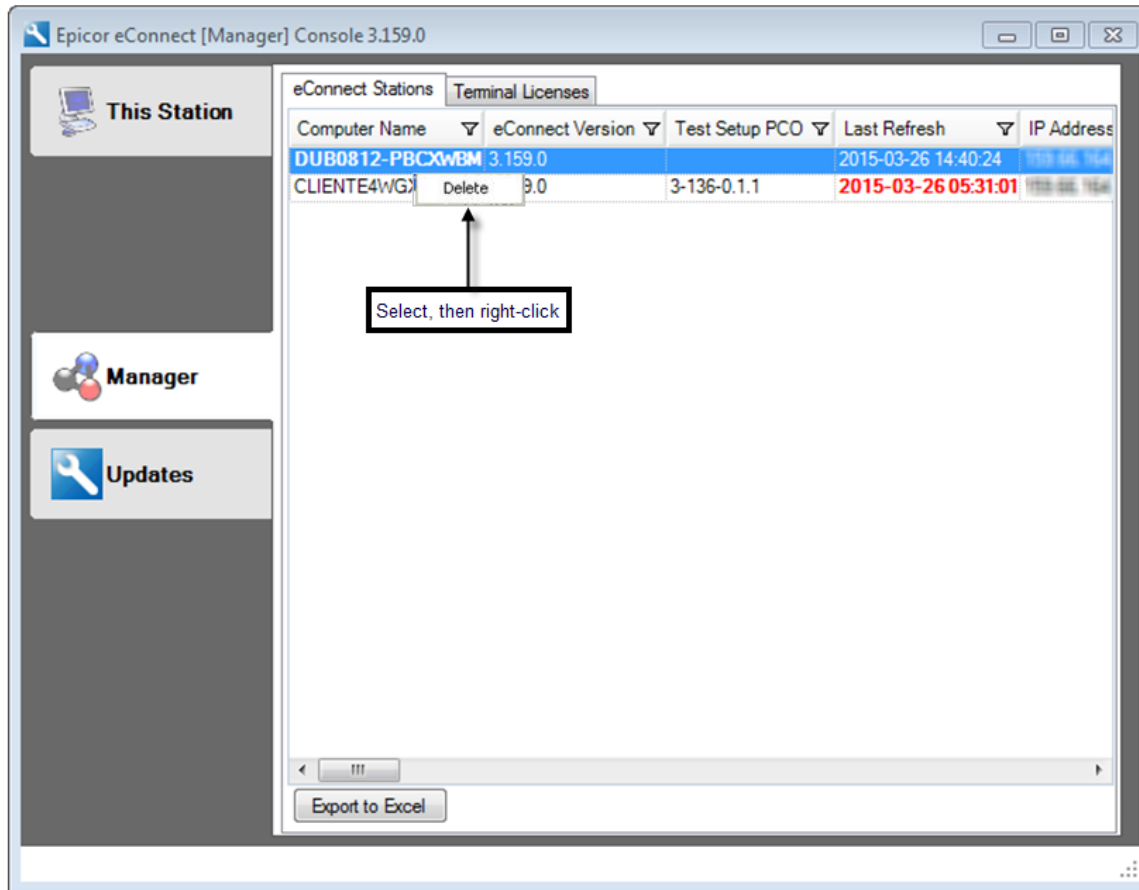

Find the distributed package that you need to troubleshoot or re-install under the following folder:
C:\Documents and Settings\All Users\Application Data\Activant\eConnect\staging
You may need to open the sub-directories to find your setup files, then manually run the install by double-clicking setup.exe and following the prompts.

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Appendix B- Removing Old/ Dead stations

Appendix C- Cloning PC's

Step 1. Stop the Epicor eConnect service
Step 2. Delete the above ComputerId.txt file listed in the location below.
Step 3. Create their image.

When the newly imaged systems start up and the eConnect service starts for the first time, it will create a unique ID for that system.

If the cloning has already happened, stop the service, delete the file, restart the service on each clone.

On Windows 7 it should be in this location:
C:\ProgramData\Epicor\eConnect\Data\ComputerId.txt

The XP location is:

C:\Documents and Settings\All Users\Application Data\Epicor\eConnect\Data\ComputerID.txt

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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