

SendPoint Branch Capture Quick Start Installation Guide

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The Sendpoint Branch Capture solution is a stand-alone product provided by FIS which allows documents to be quickly and easily scanned into the system using a compact, stand-alone, check-and-item digital imaging system.

This application is designed to enhance workflow by electronically capturing items at the Branch and transmitting data to the central processing center, allowing the items to be truncated at the Branch. The client application can be incorporated with any application that requires transaction-based data and image capture.

All examples used in this guide are based on a Windows 7 64-bit system.

Assumptions

This manual assumes the user knows how to work in the Microsoft Windows operating environment and how to use a web browser, like Internet Explorer. In particular, the user must know how to work with drop-down lists, dialog boxes, list boxes, and so on.

For complete instructions and information about Microsoft Windows and the keyboard equivalents for mouse actions, see the Microsoft Windows documentation.

How to Use This Manual

This manual contains three kinds of information:

- ◆ **Overview** chapters explain what the product does as a whole. Such chapters cover critical concepts that are a prerequisite to information in the rest of the manual.
- ◆ **Procedural** chapters give step-by-step instructions for performing specific tasks with the product.

About This Manual

Special Symbols



The caution symbol to the left of a paragraph indicates that the contained information must be carefully read and followed in the paragraph to prevent serious errors or data loss.



The note pad symbol to the left of a paragraph highlights a helpful tip or technique.



This arrow is used to show a series of selections from a menu. For example, Select File -> Run *means the user must expand the File menu and select Run.*

Text Conventions

This manual uses fonts and typefaces to connect what is in this guide to what is on the screen. In particular:

- ◆ A sans serif font is used for text that is displayed on:
 - Viewports, windows, or dialog boxes that appear within the text of paragraphs. For Example: the Close and OK buttons, the File menu.
 - File names that appear within the text of paragraphs. For example: /Etc/Hosts, C:\Windows\Win.ini.
- ◆ An *italic sans serif font* is used to identify viewports, windows, or dialog boxes. For example: ...the *Installation* window appears.....
- ◆ A `monospaced font` is used for listing the contents of files and certain programming terms.
- ◆ A **bold monospaced font** identifies actual characters the user must type. For example: ... type **exit** at the DOS prompt ...
- ◆ Italic and enclosed with <> identifies a variable that must be replaced with the actual text or value appropriate for the system. For example: ... the file <D:>\<Directory>\<File_Name> ... means *D:*, *Directory*, and *Filename* must be replaced with the actual drive and full pathname of the file in question.

Technical Support

FIS offers a product maintenance plan that includes use of a toll-free hotline and a technical support e-mail address.

- ◆ Call 1-888-41-Touch (86824)
Customer support representatives are available at this number, Monday through Friday, 7:00 AM to 8:00 PM, Central Time, excluding holidays observed by FIS. For emergency, system-down support, call any time.
- ◆ FIS Client Portal: <https://my.fisglobal.com>
Allows direct access to FIS support and product information in a secure, easy to access environment.

If a company does not have a current maintenance contract, they are billed at an hourly rate for use of these services.

Pre-Installation

- ◆ **Introduction**
- ◆ **Hardware Requirements**
- ◆ **System Requirements**
- ◆ **Installing Orbograph**
- ◆ **Installing .Net 4.7**
- ◆ **Installing SQL Express 2014**

Introduction

The Branch Client and Capture Engine have specific requirements that must be completed prior to installation. Review this chapter to ensure all requirements are met.

Minimum Hardware Requirements

The following requirements refer to the free hard drive space available on the computer prior to installation:

- ◆ Pentium 4 3.0 GHz processor or Core 2 Duo 2.33 GHz processor



NOTE

AMD processors can cause up to 10% performance reduction in Orbograph.

- ◆ 2 GB RAM
- ◆ 1024 X 768 video resolution
- ◆ 40 GB hard drive
- ◆ Network Card
- ◆ USB 2.0

System Requirements

The following software requirements are required for installation:

- ◆ Supported Operating Systems:
 - Windows 7 (32-bit or 64-bit)
 - Windows 8 (32-bit or 64-bit)
 - Windows 8.1 (32-bit or 64-bit)
 - Windows 10 (32-bit or 64-bit)
 - Windows Server 2008 R2 SP1
 - Windows Server 2012
 - Windows Server 2012 R2
 - Windows Server 2016
- ◆ Microsoft .NET 4.7



NOTE

*To install .NET 4.7, refer to the **Installing .Net 4.7** section of this guide.*

- ◆ Microsoft SQL Server Standard, Enterprise, and Express:
 - SQL Server 2008 SP4 (32-bit or 64-bit)
 - SQL Server 2008 R2 SP3 (64-bit)
 - SQL Server 2012 SP2 (32-bit or 64-bit)
 - SQL Server 2014
 - SQL Server 2016SQL Management Studio
- ◆ Visual C++ 2005 Redistributable Package may be required.
- ◆ Visual C++ 2008 Redistributable Package may be required.

Additional Requirements

The following are additional requirements:

- ◆ Orbograph Branch - Orbograph is not required but may be installed with the Branch Client or Capture Engine if desired. For CAR to be performed the Accura XV 2.1.0.37 engine is supported.

Accura XV is included as part of the Sendpoint Branch Capture install package as an option. Refer to the **Installing** and **Upgrading** sections of this guide.

- ◆ Scanner - A check scanner must be connected to the Client PC.

Installing .Net 4.7

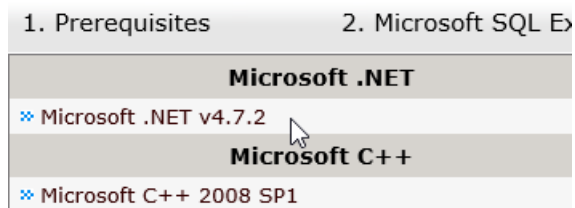
This section covers the installation of .Net 4.7 which is required for both the Capture Engine and Branch Client.



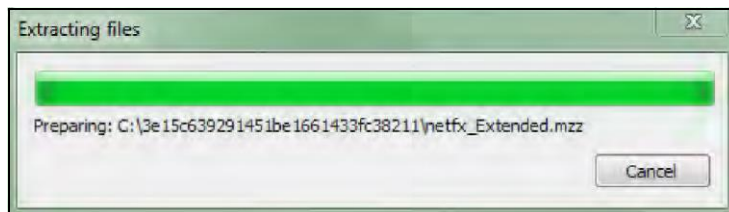
NOTE

*This application may already be installed. Check Add/Remove Programs before installing this component. If already installed, please skip and begin the **Installing SQL Express 2014** installation.*

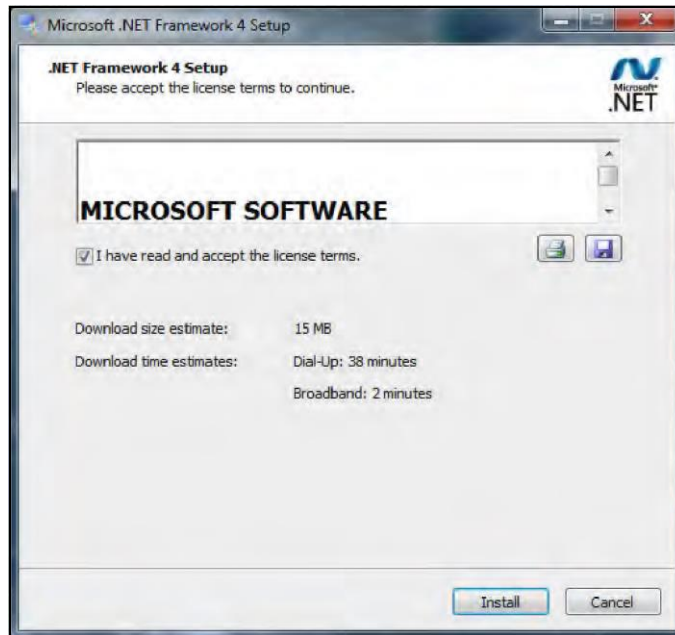
1. Download .Net 4.7 from the Branch Landing Page under the **1. Prerequisites** menu.



2. Execute NDP471-KB4033342-x86-x64-AllOS-ENU.exe. An Extracting Files window displays.



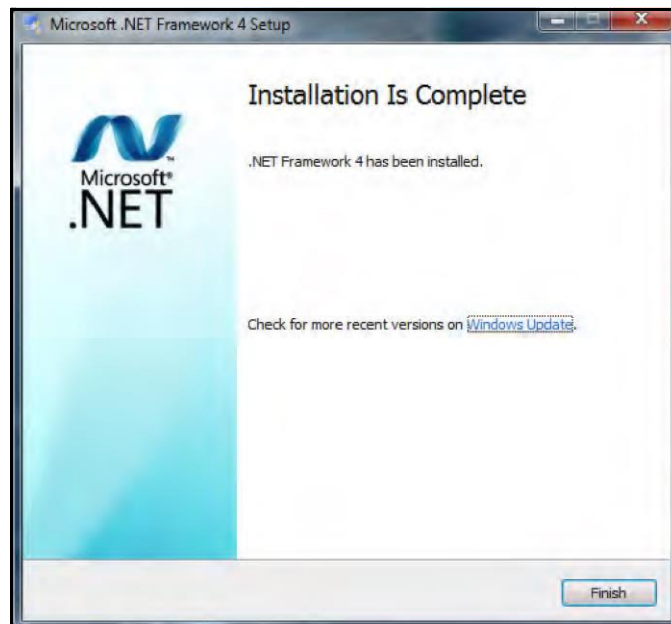
3. The *Microsoft .NET Framework 4.7 Setup* window displays.



Installing .Net 4.7

4. To accept the *End-User License Agreement* select the checkbox next to I have read accept the license terms.
5. Click Install.
6. The *Installation Progress* window displays. This process can take several minutes to complete.

7. The *Installation Complete* window displays.



8. Select Finish.
9. In order to complete the installation of .NET 4.7, the computer must be restarted.

Installing SQL Express 2014

This section discusses the new installation Microsoft SQL Server 2014 Express Edition, as well as the SQL Server Management Studio Express. If upgrading from a prior version, please select the upgrade option and the process upgrade is similar to the instructions below.

Management Studio Express is used by administrators to view and manage data within the Capture Engine database on the local workstation. The only users with access to SQL by default are Local Administrators. The service identity used by the Capture Engine is granted necessary access to the Capture Engine database by the Capture Engine installer.

The installer used during this installation is the SQL Server 2014 Express Edition and it contains both the required and optional components.

SQL Server 2014 Express Edition and Management Studio Express need to be downloaded and installed separately. This would be useful if downloading the installers over a slow network connection as the Advanced installer is a very large file.



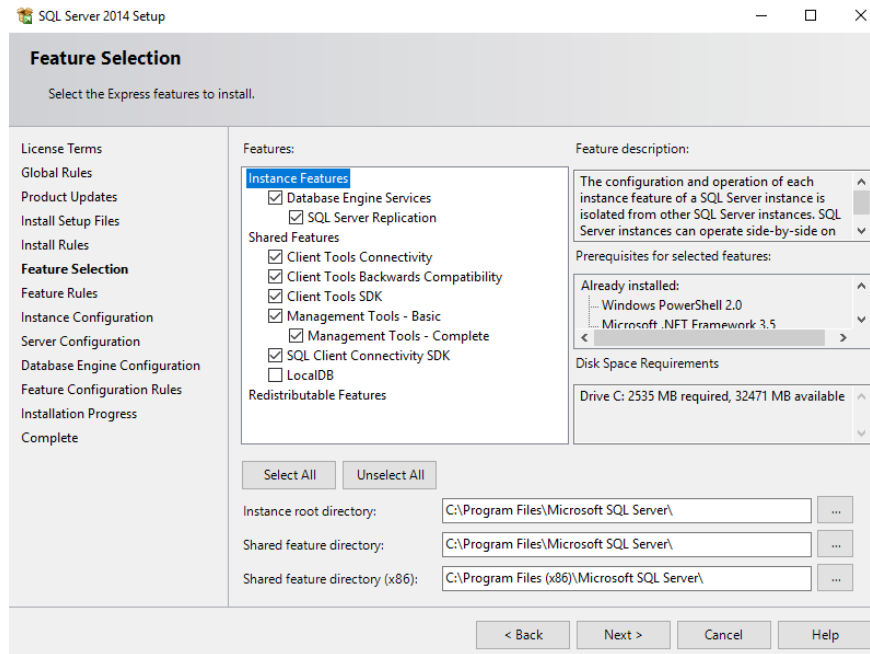
NOTE

To download any of the installers for SQL Express 2014, download from the [SendPoint Branch Landing Page](#)

SQL 2014 requires .Net 3.5. If this is disabled:

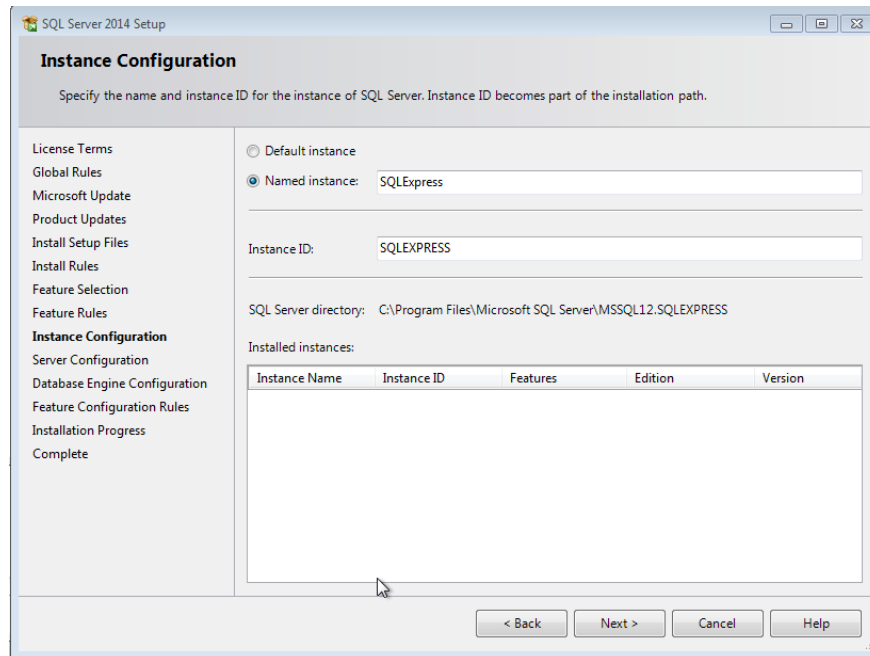
- For Windows 7 you will need to download and install the latest .Net 3.5 package from Microsoft.
 - For Windows 8 thru Windows 10 we have included a batch file that will validate .Net 3.5 and enable if required. Run the file named *Win8-10_EnableNetFx3.5_forSQL2014.bat* located in the *_Win8-10_EnableNetFx3.5_forSQL2014* folder of the *SendPointBranchCapture.zip* file. See Chapter 2 for more information on downloading this file.
1. Execute the SQL Installer. The *Extracting Files* window displays.
 2. The *SQL Server Installation Center* window displays. Select the New SQL Server stand-alone installation or add features to an existing installation option.
 3. The *Setup Support Rules* window displays. When this process is complete, select the OK button.
 4. The *License Terms* window displays.
 5. After reading the license agreement, select the check box next to I accept the licensing terms and conditions and select Next.
 6. The *Product Updates* window displays. When this process is complete, select the Next button.
 7. The *Install Setup Files* window displays. Select the Install button.
 8. An activity bar shows the SQL Server components as they install. Select Next.
 9. The *Setup Support Rules* window displays. When this process is complete, select the Next button.

10. The *Feature Selection* window displays. Database Engine Services and Management Tools - Complete is required. Select the Next button.

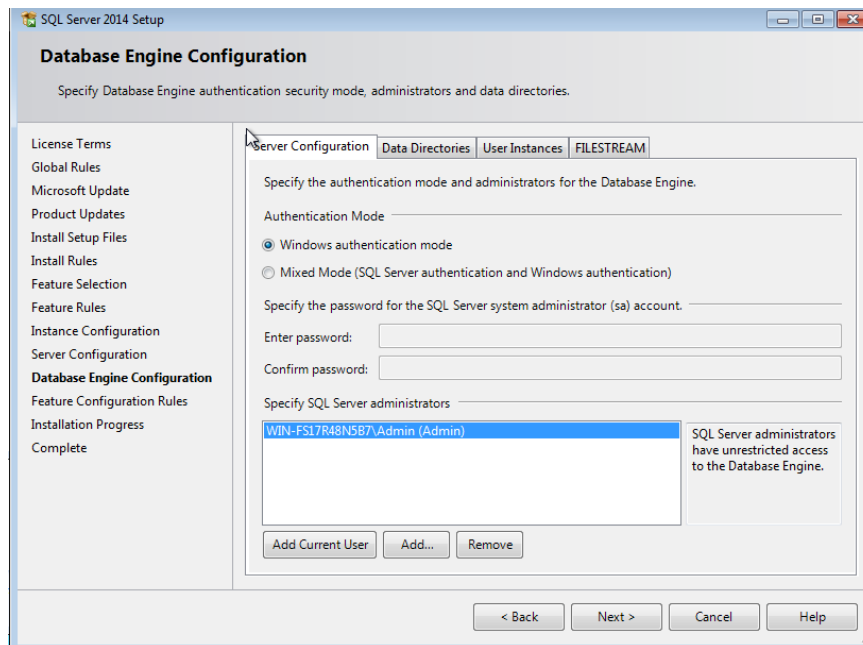


The *Instance Configuration* window displays. Select the Named instance option and ensure that the Instance ID is SQLEXPRESS

- 11.



12. Select the Next button.
13. The *Server Configuration* window displays. Select the Next button.
14. The *Database Engine Configuration* window displays. Ensure the Windows Authentication Mode option is selected and click the Next button.



If using Windows Authentication Mode, you may set a local or domain group to be a SQL Server administrator. The only default SQL Server Administrator created, is the user performing the installation.

15. The *Error Reporting* window displays. Select the Next button.
16. The *Installation Progress* window displays. An activity bar shows the SQL Server components as they install. Select Next.
17. The *Complete* window displays. Select the Close button.

Installation

- ◆ **Installation**
- ◆ **Upgrade**
- ◆ **Scanner Drivers**
- ◆ **Anti-Virus Exceptions**

Installation Components

The SendPoint Branch Installer is designed to install the components with minimal required configuration to create a working system. The products selected determine which components are installed. The components are installed as follows:

- ◆ **Capture Engine Upload Service** - The Capture Engine Upload Service is a Windows Service that Branch Capture clients use to communicate with the Capture Engine and the Capture Engine uses to communicate with the Aggregator.
- ◆ **Capture Engine Database** - The Capture Engine Database is a SQL Database that contains the system, transaction, and configuration data for a branch.
- ◆ **Branch Client** - The Branch Client installs the Branch Capture Client. These components include:
 - Client Upload Service - The Client Upload Service is a Windows Service that communicates with the Capture Engine Service to submit Health Check messages and transmits runs captured while offline.
 - Branch Capture Client application.



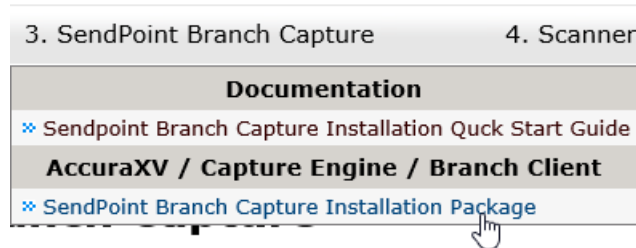
NOTE

For more information on the Branch Client, refer to the Sendpoint Branch User Guide.

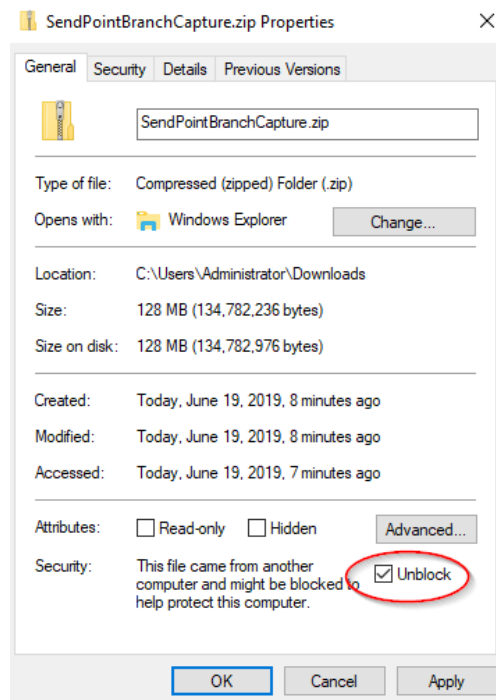
New Installation

This section provides steps to the installation process for a first time install on a PC. The options selected depends on the installation scenario. To install the Capture Engine and Branch Client, perform the following steps:

1. Download *SendPointBranchCapture.zip* from the Branch Landing page

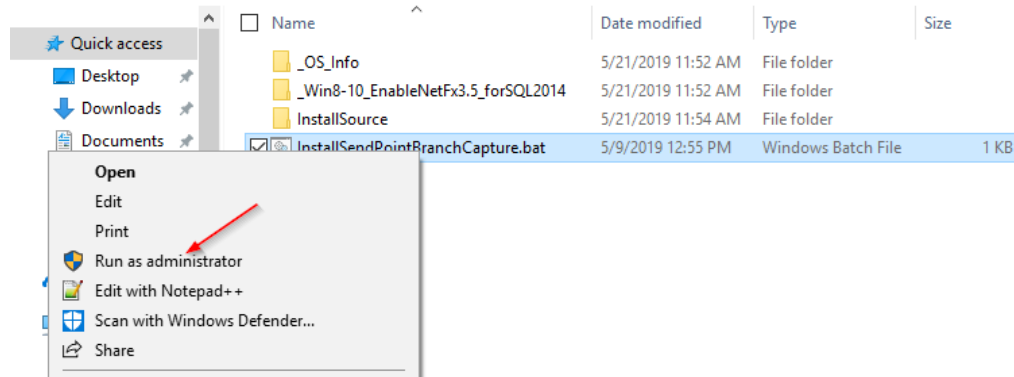


2. Check to see if the zip file has been blocked. Right click on *InstallSendPointBranchCapture.bat* and select "Properties". At the bottom of the General tab, check for a Security message saying, "This file came from another computer and might be blocked to help protect this computer". If this displayed, check the **Unblock** check box to avoid future security warnings.

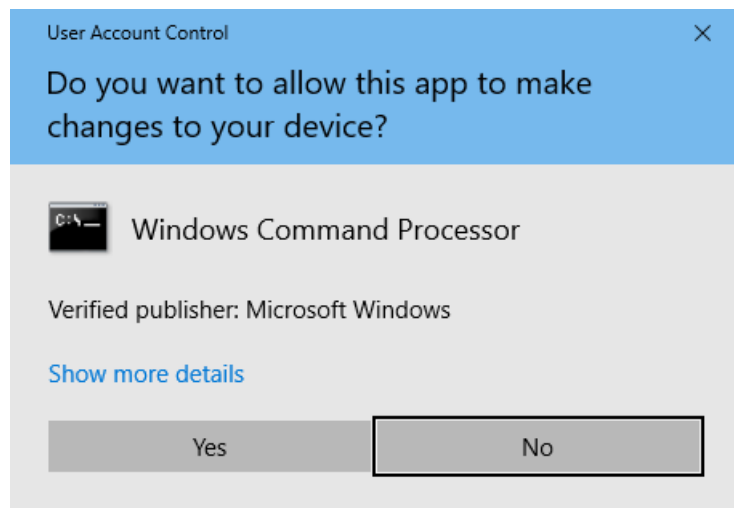


Click the OK button.

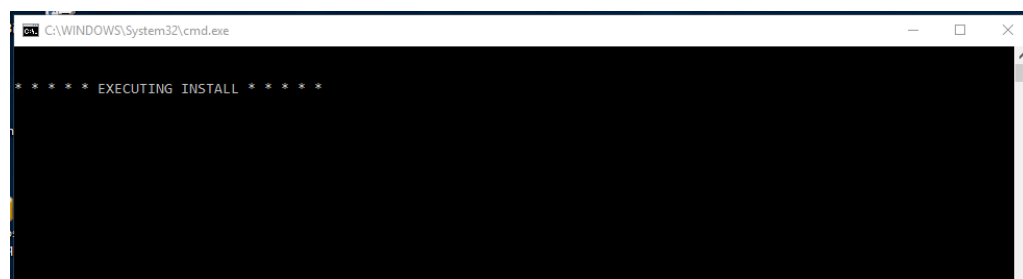
3. Extract the zip file to a destination of your choice.
4. From the folder that the files were extracted to, right click on *InstallSendPointBranchCapture.bat* and select “Run as administrator”



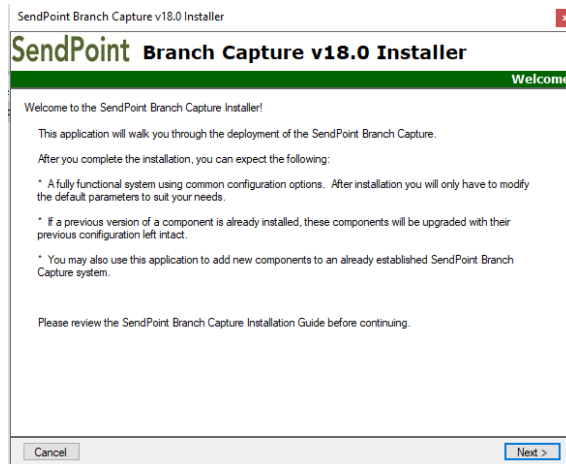
5. If UAC prompts you to allow this app to make changes, select Yes.



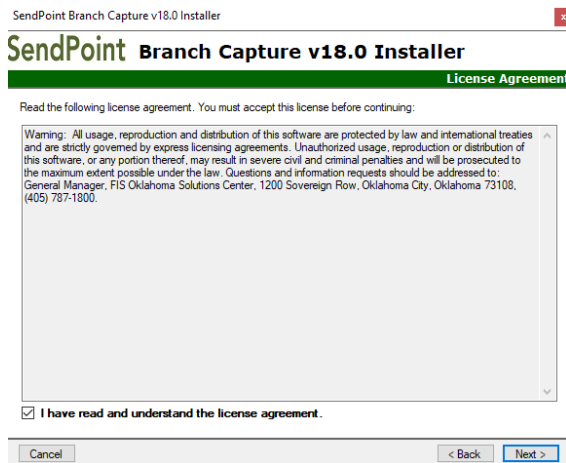
6. A command Window will display “Executing Install”



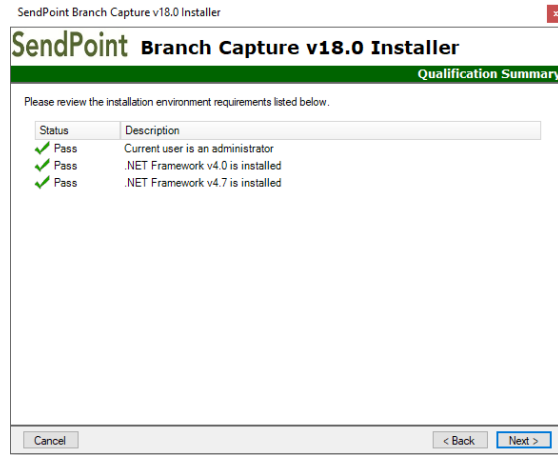
7. The Welcome Screen is displayed. Click the Next button.



8. License Agreement is displayed, review and accept the agreement to continue. Click the Next button.



9. The qualification Summary widow will validate if all the prerequisites are in place to complete the install. If needed address any failed requirements. Click the Next button.



10. Select the tiers you desire to install on this workstation.

- ◆ Orbograph Tier will install Accura XV 2.1.0.37

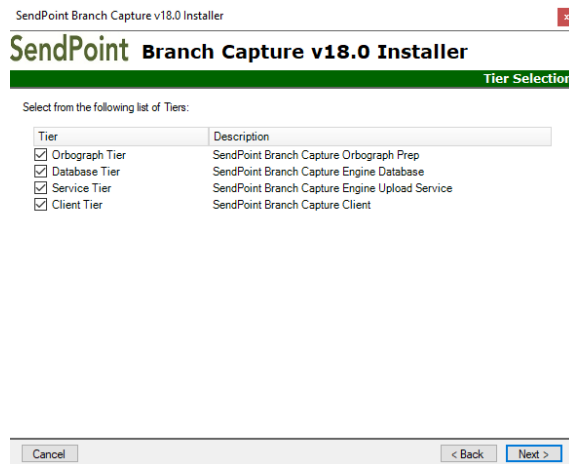


NOTE

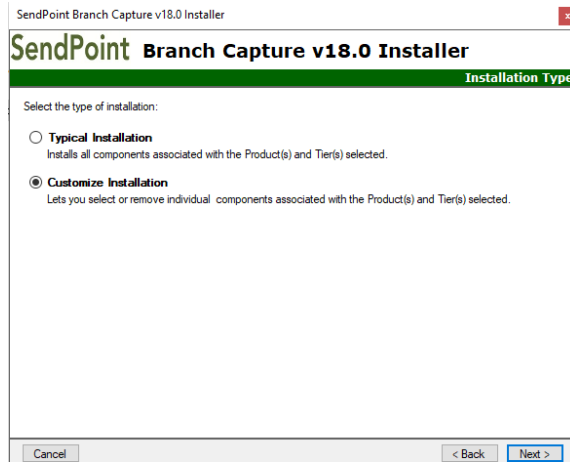
This is optional, but should be selected if using branch balancing.

- ◆ Database Tier, MS SQL must be installed on the workstation for this option to be installed
- ◆ Service Tier will the Capture Upload service that transmits deposits form the local database to FIS.
- ◆ Client Tier installs the SendPoint Branch Client user interface.

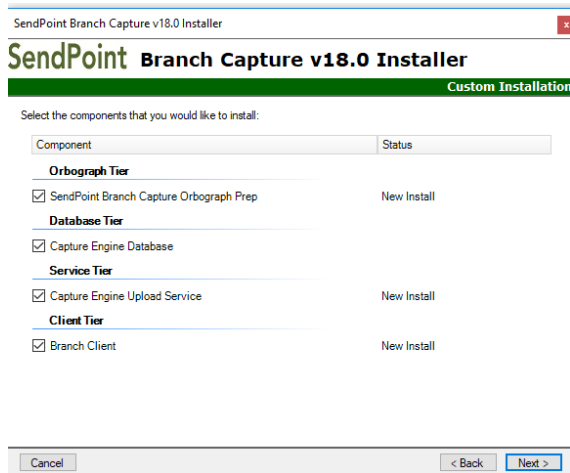
Click the Next button.



11. From the Installation Type window choose Customize Installation and click the Next button



12. Details about the install will be shown. This will give an option to unselect any item if you choose.



This Screen is not displayed if Typical Installation was selected in the previous step

13. Provide the new install configuration options. Click the Next Button.

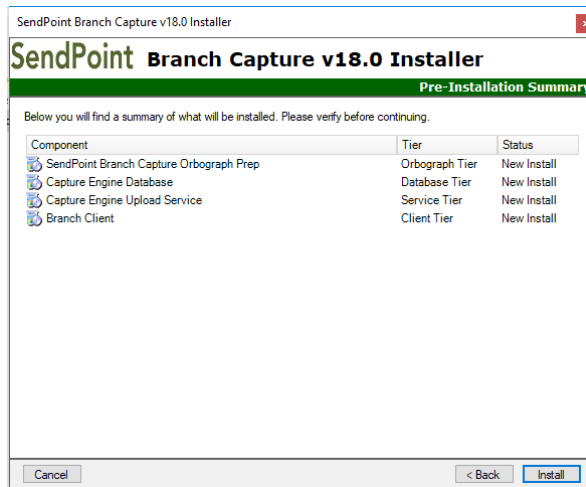
- ◆ Branch Service User – Enter the branch service user name
- ◆ Branch Service Password—Enter the service user password
- ◆ Application Server—Enter the destination URL that Capture Engine will use to connect to FIS.



Do Not enter HTTP:// or HTTPS in the Application Server field. Only enter the <server>.<domain>.<com> Example: Direct.Imagedepositgateway.com

Click the next button.

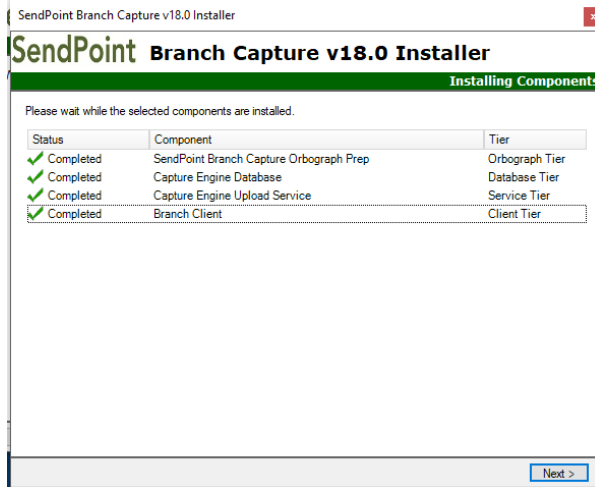
14. Review the Pre-Installation Summary and click the Install button



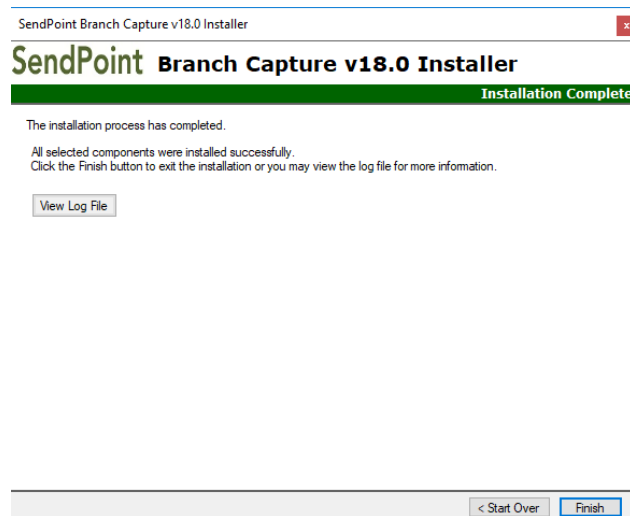
NOTE

During this stage, command windows will open and close. Please to not close any of them, allow them to fully complete and close on their own. If the Orbograph tier was selected a self test will be displayed, click on the OK window when displayed and the install will continue.

15. After all the components have completed installing click the Next button.



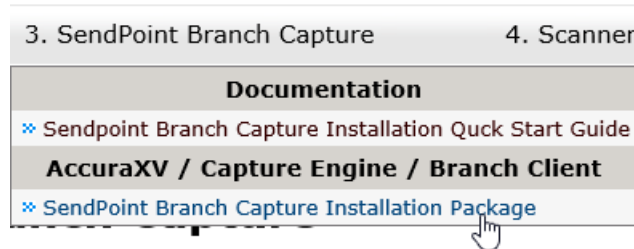
16. The final screen will provide an option to view the log file of the install. If an error accrued the log file is helpful in troubleshooting.



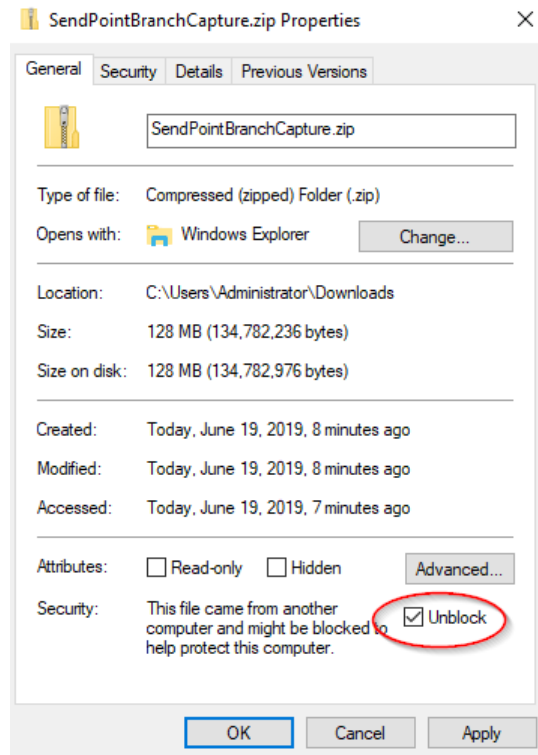
Upgrade

If Branch Capture components are already installed, they are automatically selected for upgrade. The Data Tier is not auto-detected for upgrade. It must be explicitly selected.

1. Download *SendPointBranchCapture.zip* from the Branch Landing page

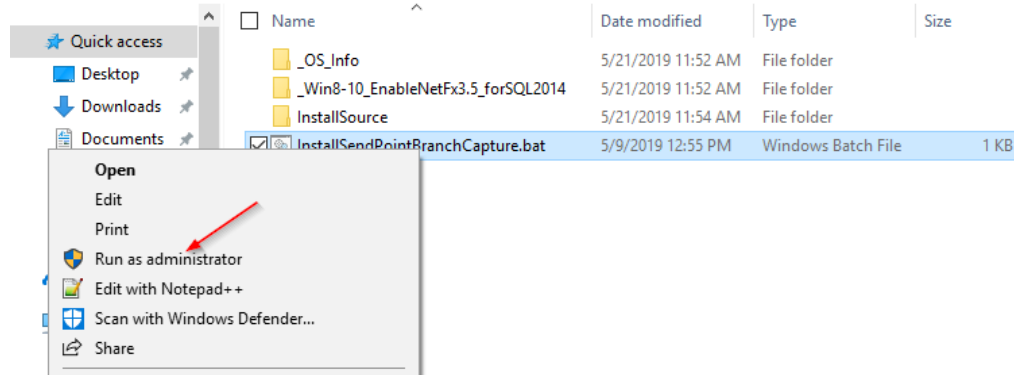


2. Check to see if the zip file has been blocked. Right click on *InstallSendPointBranchCapture.bat* and select "Properties". At the bottom of the General tab, check for a Security message saying, "This file came from another computer and might be blocked to help protect this computer". If this displayed, check the **Unblock** check box to avoid future security warnings.

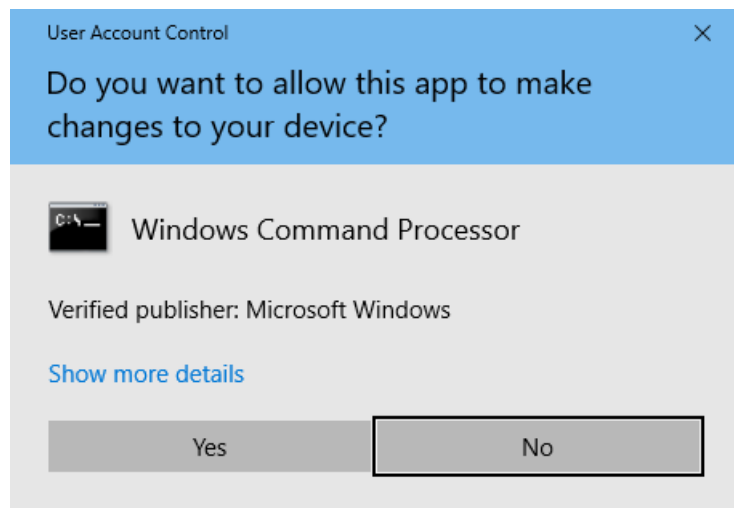


Click the OK button.

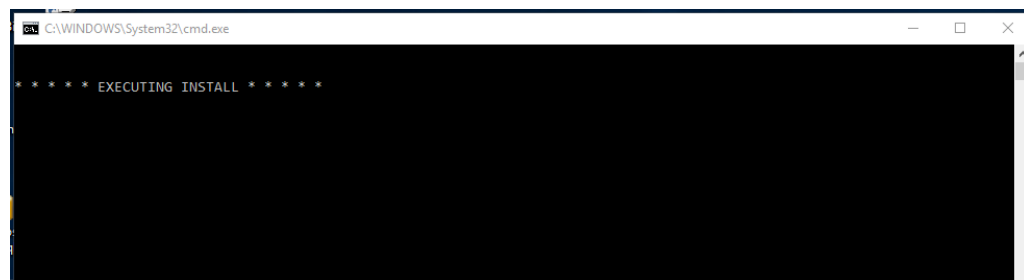
3. Extract the zip file to a destination of your choice.
4. From the folder that the files were extracted to, right click on *InstallSendPointBranchCapture.bat* and select “Run as administrator”



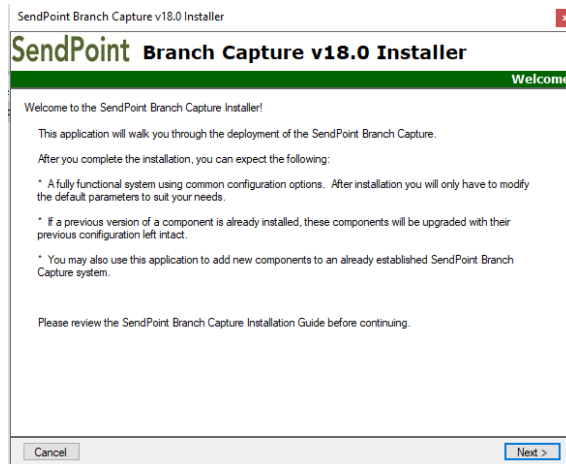
5. If UAC prompts you to allow this app to make changes, select Yes.



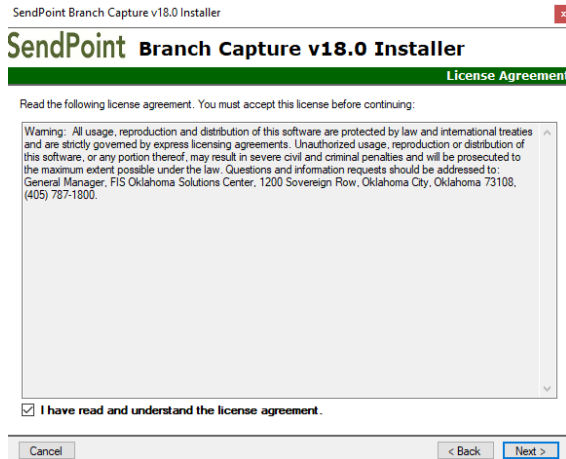
6. A command Window will display “Executing Install”



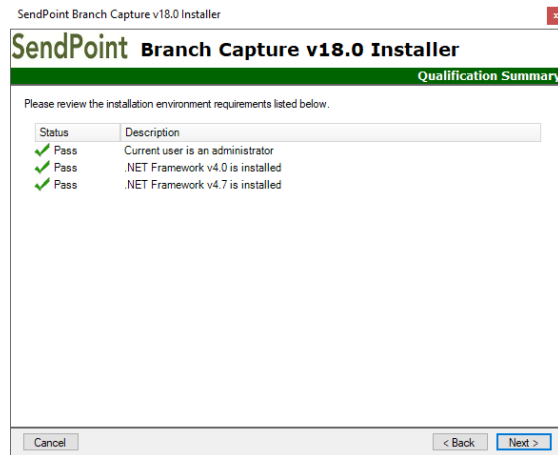
7. The Welcome Screen is displayed. Click the Next button.



8. License Agreement is displayed, review and accept the agreement to continue. Click the Next button.



- The qualification Summary widow will validate if all the prerequisites are in place to complete the install. If needed address any failed requirements. Click the Next button.

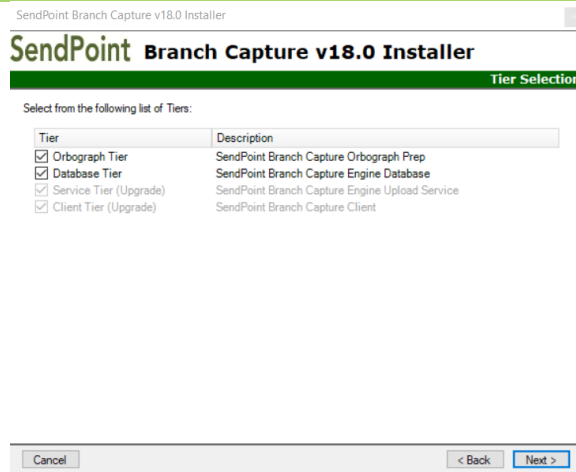


- Installed items will be autodetected and will be greyed out and selected to be upgraded. Select the tiers you desire to added on this workstation.
 - ◆ Orbograph Tier will install Accura XV 2.1.0.37
 - ◆ Database Tier, MS SQL must be installed on the workstation for this option to be installed
 - ◆ Service Tier will the Capture Upload service that transmits deposits form the local database to FIS.
 - ◆ Client Tier installs the SendPoint Branch Client user interface.
 Click the Next button.

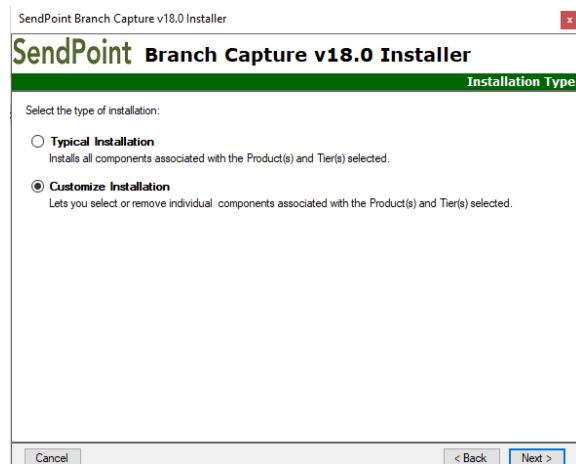


NOTE

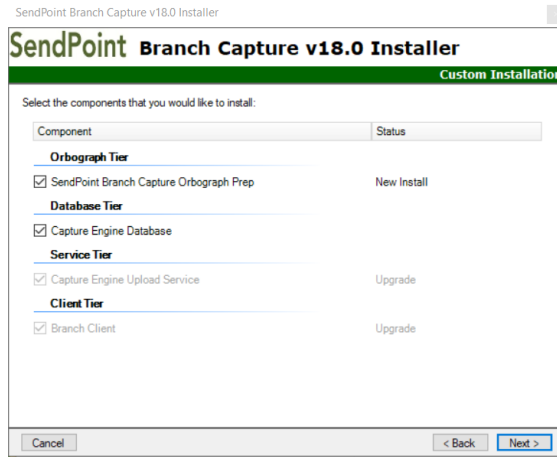
Database tier must be selected when upgrading. If using branch balancing, you should select the Orbograph Tier.



11. From the Installation Type window choose Customize Installation and click the Next button



- Details about the install will be shown. This will give an option to unselect and item that is not being upgraded.



NOTE

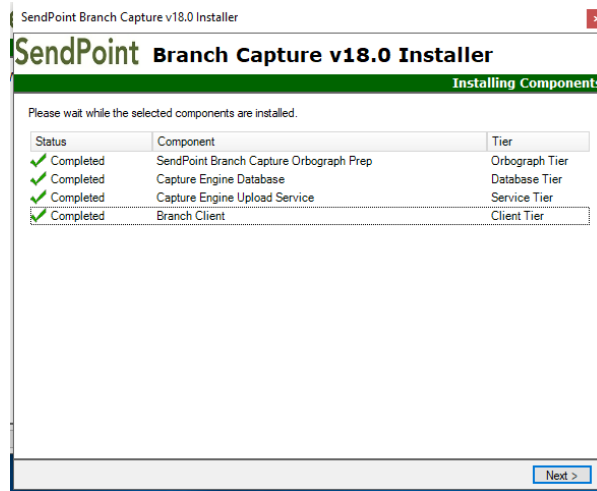
This Screen is not displayed if Typical Installation was selected in the previous step. If a component is being upgraded, you may not unselect it.

13. The upgrade will begin. After all the components have completed installing click the Next button.

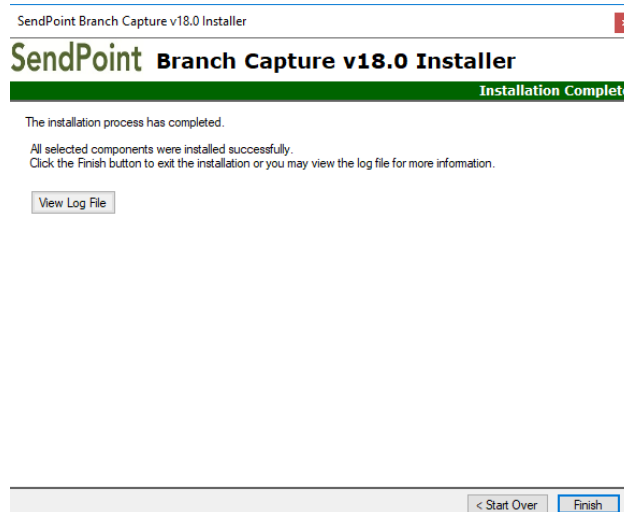


NOTE

During this stage, command windows will open and close. Please to not close any of them, allow them to fully complete and close on their own. If the Orbograph tier was selected a self test will be displayed, click on the OK window when displayed and the install will continue




14. The final screen will provide and option to view of log file of the install. If an error accrued the is a helpful in trouble shooting.



Scanner Drivers

SendPoint Branch Capture scanner driver can be downloaded from the Branch Landing page. They are in the 4. Scanner Driver menu.



SendPoint Branch Capture

Home 1. Prerequisites 2. Microsoft SQL Express 3. SendPoint Branch Capture **4. Scanner Drivers**

Branch Capture

Welcome to
SendPoint Branch Capture

This solution is a stand-alone product which allows documents to be quickly and easily scanned into the system using a compact, stand-alone, check-and-item digital imaging system.

Follow these steps to complete the setup.

1. Download and Install the required Prerequisites.
2. Download and Install the appropriate SQL Express 2014 SP3.
3. Download, UnZip and Install SendPoint Branch Capture.
4. Download and Install the appropriate Scanner Driver.

New install



CAUTION

Do not plug the scanner in before installing the driver.

1. From the landing page open the Scanner Drivers menu and select the appropriate driver for your scanner and download.
2. Extract the zip file to a folder of your choice.
3. Run the install from the folder that was selected in the previous step and accept the default values for the installed

Upgrade Scanner Driver

1. From the landing page open the Scanner Drivers menu and select the appropriate driver for your scanner and download.
2. Unplug the current scanner from the USB port.
3. From Add/Remove programs, remove your current scanner driver.
4. Extract the zip file to a folder of your choice.
5. Run the install from the folder that was selected in the previous step and accept the default values for the installed
6. Reconnect the Scanner to the USB port.

Anti-Virus Exceptions

Capture Engine

To avoid heavy performance issues, the following default folders within the Capture Engine folder structure need to be exempt from active virus scans. The list is as follows:

- ◆ <Drive_Letter>:\%Program Files%\Advanced Financial Solutions\Direct Capture Server
- ◆ <Drive_Letter>:\ProgramData\Advanced Financial Solutions\Direct
- ◆ <Drive_Letter>:\Orbograph

Branch Client

To avoid heavy performance issues, the following folders within the Branch Client folder structure need to be exempt from active virus scans. The list is as follows:

- ◆ <Drive_Letter>:\%Program Files%\Advanced Financial Solutions\Afs Branch Capture
- ◆ <Drive_Letter>:\ProgramData\Advanced Financial Solutions\Direct
- ◆ <Drive_Letter>:\Direct
- ◆ <Drive_Letter>:\SmartSource (Unisys SourceNDP, WebSource, and SmartSource only)