



ACCORD ImageView

Installation and Upgrade Guide

Release Level v8.5.x (Generic)

Base Version: January 29, 2021



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**32605 West Twelve Mile Road, Suite 275
Farmington Hills, MI 48334**

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Contact Information

Correspondence regarding this publication should be forwarded to:

- Mail: Product Support, Yojna, Inc., 32605 W. Twelve Mile Rd., Suite 275, Farmington Hills, Michigan 48334.
- Telephone: 248-489-9650
- E-mail: support@yojna.com
- Web: www.yojna.com

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1 Preface

1.1 Purpose

The purpose of this guide is to provide information about installing and uninstalling the ACCORD ImageView application.

The user will be able to perform the following tasks with this guide:

- Identify supported hardware configurations.
- Identify supported operating systems.
- Define user rights and permissions for network operating systems.
- Define the desired application configuration.
- Install the application.
- Uninstall the application.
- Perform upgrades from an earlier version of ImageView.

1.2 Description

The *ACCORD ImageView v8.5.x Installation and Upgrade Guide* is part of a library of guides for the ACCORD family of products that provide micro-to-micro integration across LANs/WANs and the Internet.

An ACCORD network can include computers running Windows Server 2019, Windows Server 2016, Windows Server 2012 R2, Windows 10 (business editions), and/or Windows 8.1 (business editions).

ACCORD products are modular and scaleable, and may be used independently or in combination.

1.3 Architecture

The following illustration depicts ImageView v8.5.x installed in distributed mode.

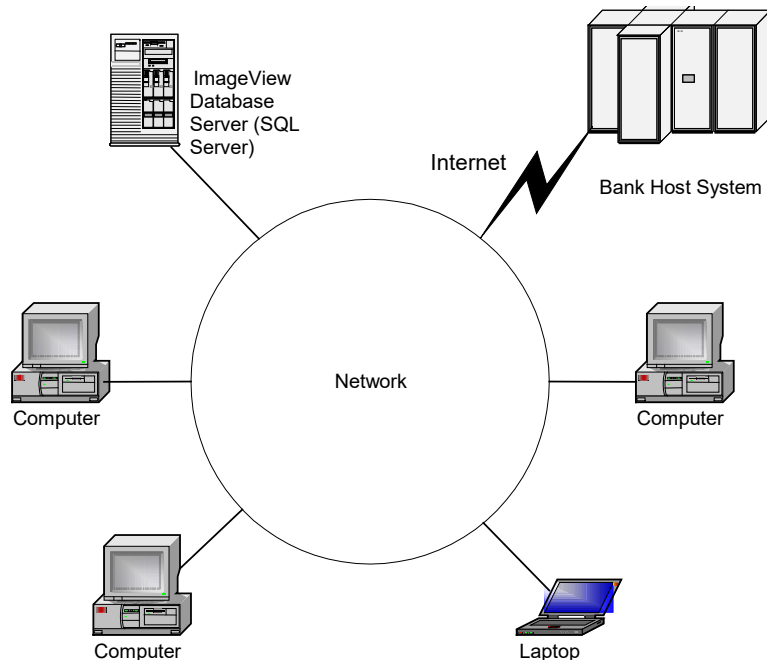


Figure 1: ACCORD ImageView architecture (distributed mode) with Connect to Bank support

1.4 System Requirements

A working knowledge of the following is required:

- Windows Server 2019, Windows Server 2016, Windows Server 2012 R2, Windows 10, or Windows 8.1 operating systems.
- Installation procedures for software.

The minimum and recommended hardware to use the ACCORD ImageView suite of programs includes the following:

Minimum	Recommended
Intel Pentium IV or AMD 1.8 GHz or higher CPU (32-bit or 64-bit)	Intel Xeon, Intel Core i5 or AMD 2.4 GHz or higher CPU (32-bit or 64-bit)
2 GB RAM or higher Note: If large volumes of data are being registered, the minimum should be 2 GB RAM or higher.	4 GB RAM or higher Note: users who intend to perform high-volume exports should use at least 8 GB of RAM
Graphics memory of 256 MB, DirectX 9 graphics device with WDDM 1.0 or higher driver	Graphics memory of 512 MB, DirectX 9 graphics device with WDDM 1.0 or higher driver
40 GB or higher of free disk space *	80 GB or higher of free disk space *
CD/DVD-ROM drive**	CD/DVD-ROM drive**
Internet Explorer 11.0 ***	Internet Explorer 11.0 or higher ***

Note: Intel Itanium hardware (e.g. IA-64 architecture) is not supported.

* The ImageView Standard v8 application allows for copying check image CDs to hard disk (**Note:** this is an optional feature). The maximum number of index records supported is 8 million (exact volume may vary, depending on the license agreement with Yojna Inc.). The actual size of the hard disk(s) required will depend on the volume of data to be stored to disk.

**The CD/DVD-ROM drive is required for CD/DVD viewing support.

*** Internet Explorer v11 is *required* for remote access (Connect to Bank) support.

Screen resolution: the ImageView v8.5.x application is best viewed with a screen resolution of 1024 x 768 or higher.

1.5 Related Material

In addition to this user guide, please also refer to the following documents:

- *ImageView Standard v8.5.x Administrator's Guide*
- *ImageView Standard v8.5.x Viewer User Guide*
- *ImageView Standard v8.5.x Connect to Bank Guide*

1.6 Conventions

The following conventions are used in this guide:

- The first letter of a keyboard key name is a capital. For example: E for Enter.
- When two keys are used together for an operation, they are joined with a (+) sign. This means that while holding down one key, press the other. For example: Alt+D.
- Commands that are to be typed and that appear on the screen are shown in bold. For example: **ADMIN**
- “Click” refers to pressing and releasing the mouse button.
- “Choose” refers to clicking a mouse or using a key combination to select an option that begins an action.
- “Select” refers to highlighting an option; it does not in itself initiate an action.
- “Operating system”, “workstation”, and “PC” are used generically for products marketed under proprietary names.
- “Installing software” refers to copying the software from the release CD-ROM or diskette(s) to the hard disk using a setup or install program.
- ImageView is the standard product name for the Yojna check image viewer, which may be rolled out under a trademarked or service marked name by the Financial Institution to its customer base.
- Items contained within angle brackets (“<” and “>”) indicate path placeholders. For example: <app install path> indicates the logical drive and folder to which ImageView has been installed.

1.7 Technical Support

If you obtained this software from a financial institution:

- You should first contact this institution to obtain technical assistance. If the FI is unable to resolve your issue, they will in turn contact Yojna, Inc. for further assistance.

If you obtained this software directly from Yojna, Inc:

- Contact Yojna Inc. to obtain technical assistance.

When reporting an issue, please provide the following information to technical support:

- The operating system version, including service packs, if any.
- The exact System Version number of the application. This can be verified by clicking Help | About on the menu bar of the application.
- The exact error message or sequence of error messages you received. Also describe the steps you took that resulted in the error message(s). This will help in attempting to reproduce the issue.
- Send screen prints of error messages as supporting documentation. To take a screen print, press the Print Screen button (captures the entire display) or Alt+Print Screen buttons (captures the active window). Open a Word document and Paste the screen capture, then save the document.
- Send the application log files.
- Open an AccordCare incident and include the above-mentioned diagnostic material. Refer to the AccordCare Policy and Procedures Manual to learn how an incident is opened.

1.8 Capacity

The total number of documents the ImageView application can support is negotiated with the Financial Institution at the time the viewer is licensed and is defined in the Statement of Work (SOW) document.

- ImageView Standard v8.5.x is capable of registering up to 8 million documents.

Note: a document is defined as the record set consisting of one index record and its associated images.

Typically, a check image CD-ROM volume can hold 20,000 documents (a document is defined as one check and its associated images and index information). However, the "cleaner" the check image is, the smaller the file size. For a "busy" check, the capacity may be 18,000 images. For a clean check, it may be closer to 30,000.

- ImageView Standard v8.5.x can support copying CD volumes to hard disk (**Note:** this functionality is an optional feature). Additional increments of storage can be purchased from Yojna, Inc., and a revised license file will be sent to you after placing the order. Please contact Yojna's Marketing Department if you need to increase the storage capacity for your installation of ImageView. **Note:** for storing over 8 million records, it is recommended that you use Yojna's ImageView Corporate v8.x product, which can store up to 25 million records using SQL Server 2014 (Standard or Enterprise editions) as the database.

A warning message will be displayed in the Data Manager component when the total number of registered documents approaches this limit, and you will not be able to register additional volume sets if doing so would exceed the licensed limit.

1.9 Audience

The primary audience for this guide are system and/or network administrators, and the IT team responsible for providing software installation and support services.

1.10 Summary of Changes

Base Version	<p>Base content brought forward from <i>ImageView v8.4.x Installation and Upgrade Guide Revision E</i></p> <ul style="list-style-type: none"> • Introduced support for Windows Server 2019 • ImageView Standard v8.5 uses SQL Server 2014 Express SP3 and supports TLS 1.2 <ul style="list-style-type: none"> • Note: if upgrading from ImageView Standard v8.4.x, the existing SQL Server 2012 Express instance is retained and used • ImageView Standard v8.5 can be installed on FIPS-compliant computers • Updated section 1.4: System Requirements • Updated section 2.1: Supported Platforms • Updated section 2.1.1: Unsupported Platforms • Added section 5: Upgrading from ImageView v8.4.x • Added section 6: Migrating from ImageView v8.3.x.x
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	<ul style="list-style-type: none">• Added section 6.5: Copying the Import Data Image Path Folder• Added Appendix D: Upgrading to SQL Server 2014 Express SP3
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2 Installation and Configuration

This section describes the procedure for installing the ImageView Standard v8.5.x application. It also describes the two primary modes of configuration: Local Mode and Distributed Mode.

2.1 Supported Platforms

ACCORD ImageView Standard v8.5.x is supported only on the following Microsoft operating systems:

- Windows 8.1 Professional and Enterprise (with Upgrade 1)
- Windows 10 Pro or Enterprise
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019

For the above platforms, both 32-bit and 64-bit versions are supported. **Note:** Server 2012/Server 2012 R2, Server 2016, and Server 2019 are only available in 64-bit versions.

ACCORD ImageView Standard v8.5.x is supported in the following virtual machine environment, using the above supported guest operating systems:

- Microsoft Hyper-V

VMWare: Yojna has not qualified ImageView Standard v8.5.x on virtual machine instances of Windows running on VMWare products. ImageView Standard v8.5.x should run fine provided the guest instance of Windows is installed and operating correctly on a VMWare host.

FIPS: ImageView Standard v8.5.x can be installed on FIPS-compliant computers.

2.1.1 Unsupported Platforms

The following platforms are not supported:

- * Windows 8.1 Basic (consumer) edition.
- * Windows 10 Home
- Retired versions of Windows, such as Windows 7, Windows Vista, Windows 8, Windows XP, Windows 9x, Windows ME, Windows NT 4, Windows 2000 (Server or Professional), Windows Server 2003, or Windows Server 2008/2008R2.

* Supported versions of Windows must have the ability to be joined to a Windows Server domain with Active Directory services.

2.2 Software Pre-requisites

ImageView Standard v8.5.x requires that the following software be installed on your computer:

- Microsoft .NET Framework v4.8.
 - **Note:** .NET Framework v4.8 may already be installed on your computer, either by Windows Update or by another application.
- Microsoft Visual C++ 2017 Redistributable Package.
- Microsoft SQL Server 2014 Express SP3
 - **Note:** SP3 is used in order to support TLS 1.2.

- To read reports saved to CD/DVD in the PDF file format, Adobe Reader, v11 or higher, also needs to be installed.

ImageView Standard v8.5.x setup will install these components on your computer if they are not already installed. **Note:** the Adobe Reader is not included in the setup packaging, and users will need to download it from www.adobe.com.

Alternatively, you can install these components separately, but note that these components must be installed prior to running ImageView v8.5.x setup. **Note:** Microsoft .NET Framework v4.0 or higher must be installed before installing SQL Server 2014 Express SP3.

2.3 Rights and Permissions

This section describes operating system user account rights and permissions required to install and operate ACCORD ImageView.

2.3.1 Installation

To install or upgrade to ACCORD ImageView v8.5.x on computers running Windows 8.1, Windows 10, or Windows Server 2012/2016/2019, you must use an account with local Administrator rights.

Important: an account with administrator rights is required to install SQL Server 2014 Express SP3, as per Microsoft documentation.

Note: when installing ImageView in distributed mode, the installation should be performed by a network administrator, or a user with a corresponding level of permissions. This user should also have local administrator rights on the computer(s) where ImageView v8.5.x is being installed.

2.3.1.1 WMI Registry Settings

To successfully install SQL Server 2014 Express SP3, ensure that the Administrators group has 'Full Control' permissions to the following registry key:

- HKey_Local_Machine\System\CurrentControlSet\Control\WMI\Security

2.3.1.2 Rights Needed to Install SQL Server 2014 Express SP3

Important: an account with administrator rights is required to install SQL Server 2014 Express SP3 as per Microsoft documentation.

To successfully install SQL Server 2014 Express SP3, ensure that the Administrators group has been assigned the following rights, as per Microsoft support article KB2000257 - <https://support.microsoft.com/en-us/help/2000257/sql-server-installation-fail-if-setup-account-not-have-some-user-right>:

- Backup files and directories (SeBackupPrivilege)
- Debug programs (SeDebugPrivilege)
- Manage auditing and security log (SeSecurityPrivilege)

To verify/change these permissions, do one of the following

- Open Control Panel | Administrative Tools | Local Security Policy. Now expand the Security Settings | Local Policies | User Rights Assignment node.

- Go to Start | Run, type gpedit.msc, and press Enter. When the Local Group Policy Editor console opens, expand the Computer Configuration | Windows Settings | Security Settings | Local Policies | User Rights Assignment node.

Note: setup will check for these rights, and abort if there are missing rights.

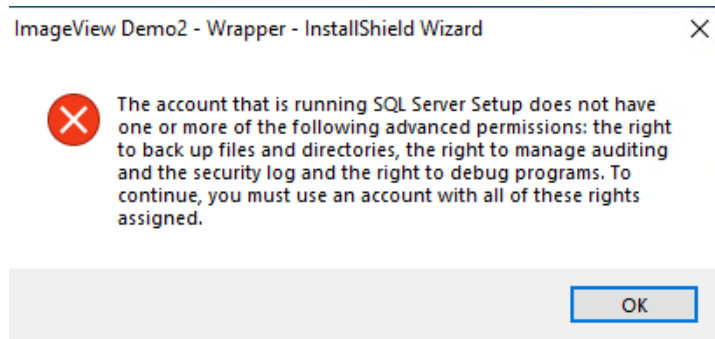


Figure 2a: Insufficient/missing permissions messages

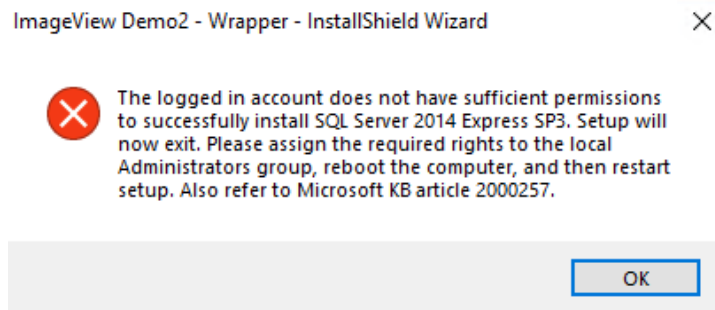


Figure 2b: Setup exit message, due to insufficient permissions

2.3.1.3 Troubleshooting

For permissions-related installation issues, try the following:

- On Windows 10, Windows 8.1, and Server 2012/2016/2019, you may need to install the third-party components and ImageView using the Run as Administrator option, even if the account you are using belongs to the local administrators group of the computer.
- If your environment allows it, temporarily disable User Account Control.
- If your environment allows it, temporarily disable anti-virus scanners and spyware detectors. Be sure to re-enable them after installation of ImageView has completed.

To identify the logged on user, what domain(s) the user belongs to, the user's security privileges, and similar information, use the tool WHOAMI.EXE. WHOAMI.EXE is included with Windows Vista, Windows 7, and Server 2008.

For more information on using WHOAMI.EXE, refer to this link: <https://docs.microsoft.com/en-us/windows-server/administration/windows-commands/whoami>

To check the list of privileges that are currently associated for the account used for setup, you can use the ACCESSCHK.EXE tool that can be downloaded from the following location: <http://technet.microsoft.com/en-us/sysinternals/bb664922.aspx>

2.3.1.3.1 System Restore

Note: the System Restore option is not available on Windows Server 20xx platforms. You will need to enable the Windows Backup feature, or install a third-party backup application.

ImageView Standard v8.5.x setup creates two restore points:

1. Immediately before installing SQL Server 2014 Express SP3.
2. After completing the installation of ImageView v8.4.x.

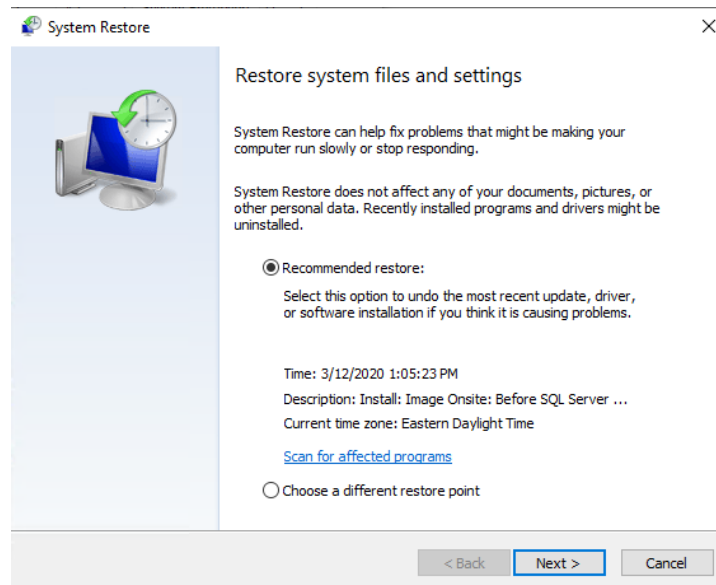


Figure 3: System Restore screen (Windows 10)

Note: for system restoration to work, the System Protection option on your computer needs to be enabled.

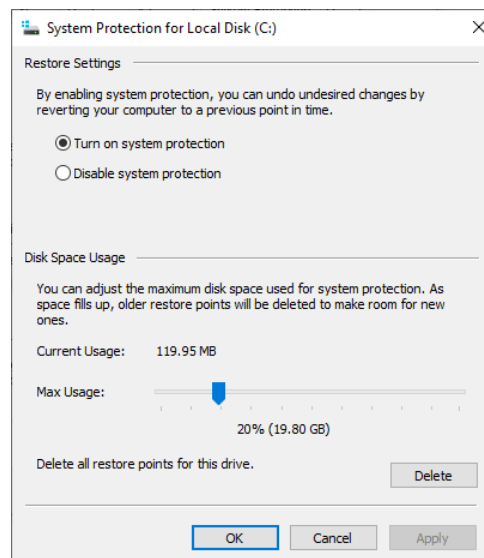


Figure 4: System Protection settings screen (Windows 10)

2.3.2 Operation

For all installations of ImageView, permissions should be defined at the parent ImageView folder and propagated downward to subfolders and files. The following folder and file permissions are required for ImageView.

2.3.2.1 Local mode

If you are using NTFS partitions, user accounts require the following minimum permissions assigned to all application folders/subfolders and files:

- *Read/Execute, List Folder Contents, Read, and Write* (**Note:** to prevent specific users from deleting application folders/files, do not assign the Modify permission)

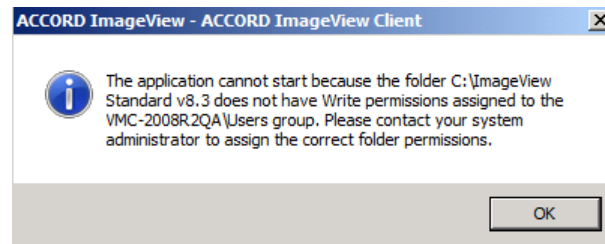


Figure 5: Warning message indicating that Write permissions have not been assigned

2.3.2.2 Distributed mode

If you are using NTFS partitions, user accounts require the following minimum permissions assigned to all application folders/subfolders and files. These permissions are also required on any application folders and files stored on network drives. (**Note:** this is of particular importance when ACCORD ImageView is installed in distributed mode.)

- Folder level: *Read/Execute, List Folder Contents, Read, and Write* (**Note:** to prevent users from deleting application folders/files, do not assign the Modify permission)
- Share level: *Change*.

Note: Ensure that permissions are assigned correctly at both the folder level and the share level for a distributed mode installation.

2.4 Configuration

ACCORD ImageView supports two standard modes of configuration, which must be decided on prior to installation of the application, as you will be prompted to define the configuration during installation. The two modes are:

- **Local Mode:** in this mode, the application and all folders and files are installed to a single PC. Multiple users, if desired, may share this computer.
- **Distributed Mode:** in this mode, the SQL Server 2014 Express SP3 database is typically installed to a server *, and ImageView is installed on PCs connected together on a network, with connectivity to the SQL Server database server. **Note:** users will still need to load CD volumes as necessary to retrieve document images if the source volume was registered from a CD-ROM drive.

* For distributed mode installations, the SQL Server 2014 Express SP3 database instance can also be installed to a workstation platform such as Windows 10, if desired e.g. if the size of your organization does not warrant a dedicated server.

2.5 Upgrading an Earlier Release

ImageView Standard v8.5.x supports upgrades from the following previous releases of ImageView Standard:

- ImageView Standard v8.4.x: upgrade is performed in-place.
- ImageView Standard v8.3.2.x: a data migration is performed using the IV 8x Data Upgrade Utility
- ImageView Standard v8.3.0.x: a data migration is performed using the IV 8x Data Upgrade Utility

Note: upgrades from any ImageView version prior to v8.3.0.0 are not supported. For older versions, users will first need to upgrade to v8.3.x.x or v8.4.x, and then migrate to v8.5.x. V8.5.x setup will check for the presence of ImageView Standard versions prior to v8.3.0.0, and will exit if obsolete/unsupported versions are detected on the computer.

2.6 Installing ACCORD ImageView

The following sections describe the installation procedures for the ACCORD ImageView v8.5.x application. For best results, close all open applications before commencing setup.

Before you begin, it is recommended that you first backup the computer and the registry. Also review Appendix A.

For both Local Mode and Distributed Mode installations, setup for ImageView v8.5.x is a 2-part process:

- Part 1: required third-party components are installed as necessary. Setup will check for these components and install them if they are not present on your computer.
 - Microsoft .NET Framework v4.8
 - Microsoft Visual C++ 2017 Redistributable Package.
 - Microsoft SQL Server 2014 Express SP3
- Part 2: the ImageView application will be installed.

To install ACCORD ImageView:

- Physical media: insert the installation CD/DVD into your CD/DVD drive. Depending on how the CD/DVD was created, the setup program may begin automatically or you may need to specify the path to the setup files. Refer to the supporting documentation provided with the CD/DVD by your financial institution as necessary.
- Downloaded file: browse to the folder where you downloaded the ImageView setup file.

Execute SETUP.EXE to begin the installation. **Note:** in v8.5.x, setup first launches the ImageView Wrapper setup instance, which examines your computer for the presence of .NET Framework v4.8 and Visual C++ 2017 and installs them as necessary.

The User Account Control dialog box will appear.

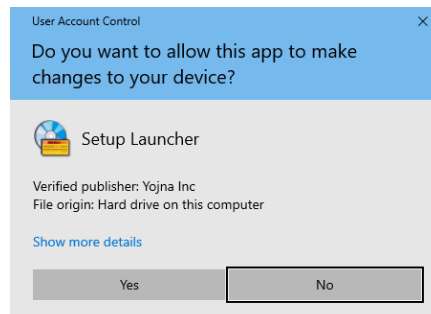


Figure 6a: User Account Control dialog box (Windows 10)

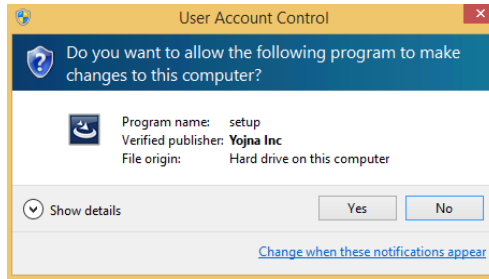


Figure 6b: User Account Control dialog box (Windows 8.1)

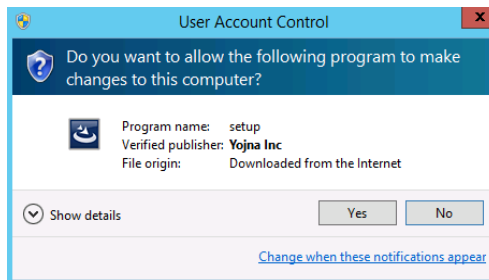


Figure 6c: User Account Control dialog box (Server 2012)

Select the Yes/ option to continue. The InstallShield Wizard will initialize, and then display a screen indicating pre-requisite software components, if any, that need to be installed.

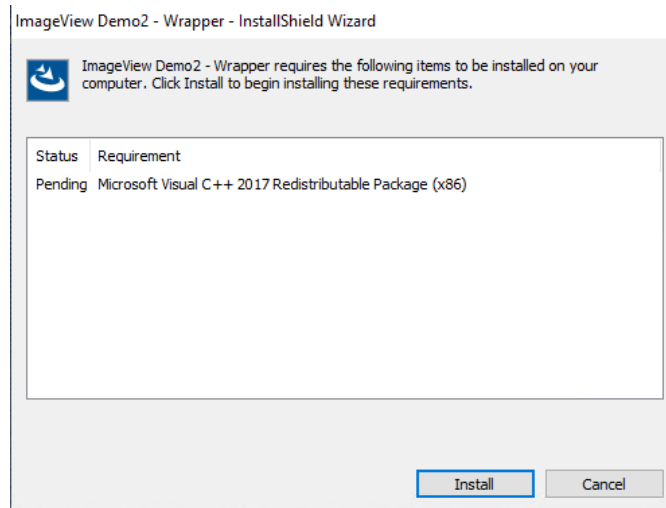


Figure 7a: Pending component screen (Windows 10)

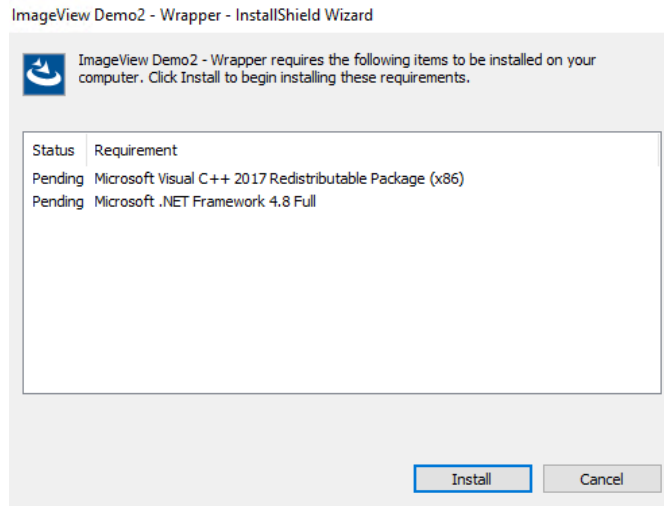


Figure 7b: Pending component screen (Server 2019)

Click the Install button to continue.

2.6.1 Installing Prerequisite Components

Note: *the procedures described in this section are sufficient to be able to install the third-party components used by ImageView v8.5.x. These procedures should not be construed as a replacement for the official installation documentation provided by the third-party vendor. In addition, any advanced configuration of these third-party products lies outside the scope of this manual.*

2.6.1.1 Microsoft Visual C++ 2017 Redistributable Package

Setup installs Visual C++ 2017 in silent mode. A reboot of your computer is not required.

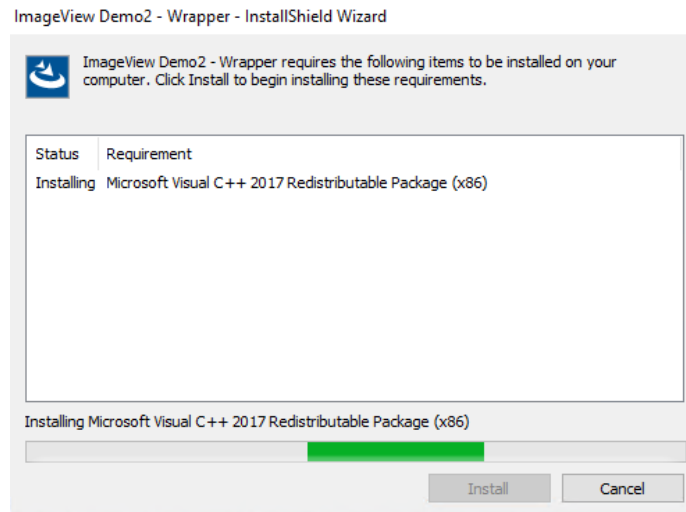


Figure 8a: Installing Visual C++ 2017 (Windows 10)

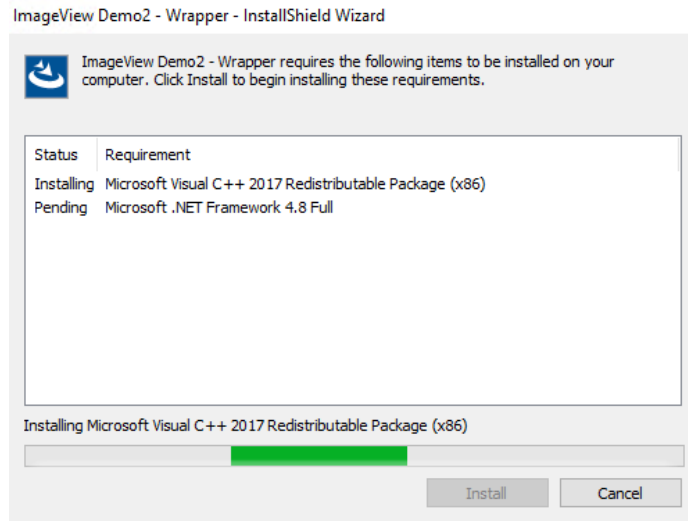


Figure 8b: Installing Visual C++ 2017 (Server 2019)

After installing Visual C++ 2017, checks your computer for .NET Framework v4.8.

2.6.1.2 Microsoft .NET Framework v4.8

Setup will install Microsoft .NET Framework v4.8, in silent mode, if it is not installed on your computer.

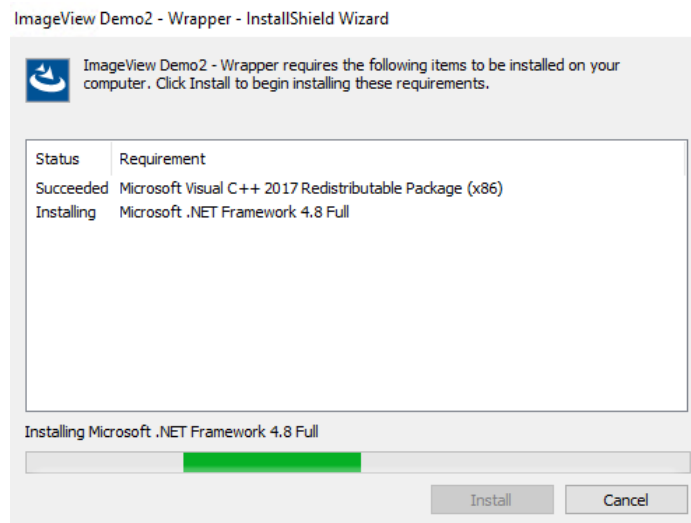


Figure 9: Installing .NET Framework 4.8 screen

After .NET Framework v4.8 has been installed, you may be prompted to reboot your computer. Reboot as prompted, do not postpone to later.

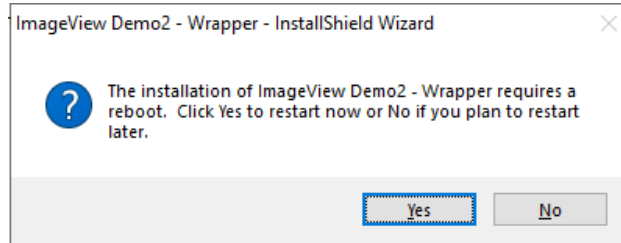


Figure 10: Reboot prompt

2.6.1.3 Registry Backup and Restore Point

Setup will resume the installation, after first taking a registry backup and then creating a restore point.

Notes:

- System Restore needs to be enabled on workstation computers in order to create a restore point.
- Setup will first check for the advanced permissions required to install SQL Server 2014 Express SP3 (refer to section 2.3.1.2). If any of those advanced permissions are missing, setup will exit without taking a registry backup or creating a restore point.
- The System Restore option is not available on Windows Server 20xx platforms. You will need to enable the Windows Backup feature, or install a third-party backup application.

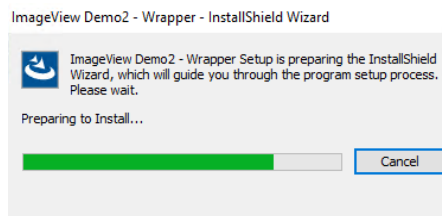


Figure 11: Preparing to Install screen

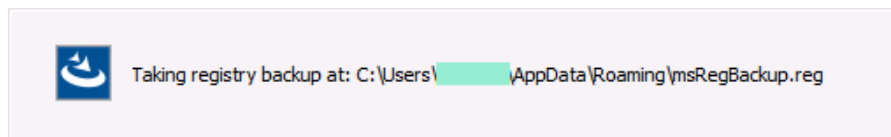


Figure 12: Registry backup message

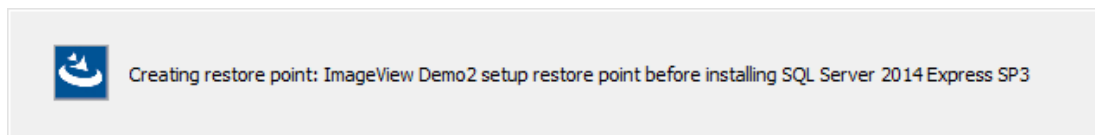


Figure 13: Creating restore point message

Setup will now prompt you for the destination folder for the ImageView database files stored in SQL Server 2014 Express SP3.

2.6.1.4 Microsoft SQL Server 2014 Express SP3 Setup

IMPORTANT: Review sections 2.3.1, 2.3.1.1, 2.3.1.2 and Appendix A before installing SQL Server 2014 Express SP3.

Setup will prompt you to specify the installation folder for the ImageView database files used by SQL Server 2014 Express SP3. You can accept the default folder (C:\Program Files\Microsoft SQL Server), or specify a different folder on local hard disk(s).

Note: as per Microsoft recommendations, setup will not allow you to install SQL Server 2014 Express SP3 instances on remote (network) drives or mapped drives, compressed drives, or read-only drives. It is not recommended to install SQL Server 2014 Express SP3 into a folder or drive that is configured to use the Encrypted File System (EFS).

Important: the path that you are specifying here is only for the SQL Server database files used by the ImageView application. Setup will create a corresponding SQL Server 2014 Express SP3 folder structure for the ImageView database instance (<IMAGEVIEWER85>) from the path you specify. The core SQL Server 2014 Express SP3 files however, will be installed to the following location (unless SQL Server 2014 Express SP3 has previously been installed):

- C:\Program Files\Microsoft SQL Server.

Warning: some organizations may receive copies of ImageView Standard v8.x from more than one financial institution, and install each copy on the same computer. To account for this possibility, it is strongly recommended that you do not change the default installation folder for SQL Server 2014 Express SP3 without first consulting Yojna technical support.

Do not change the installation folder for SQL Server 2014 Express SP3 such that the ImageView database instance is stored into the same folder where ImageView Standard v8.5.x will be installed.

Setup will initialize, and then display the SQL Server 2014 Express installation path dialog box.

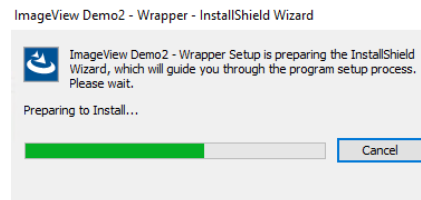


Figure 14: : InstallShield Wizard – Preparing to Install screen

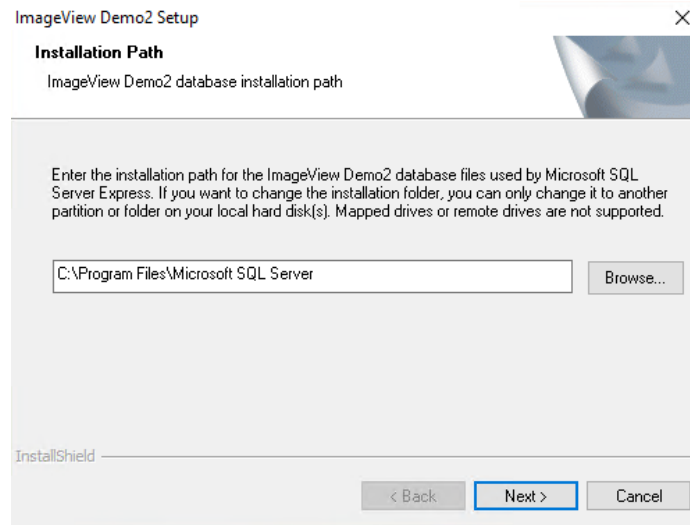


Figure 15: SQL Server 2014 Express SP3 Installation Path dialog box

Click Next to continue. Setup will save the specified folder for SQL Server 2014 Express SP3, and then display a list of pre-requisite components that will be installed.

Note: the installation of SQL Server 2014 Express SP3 will take several minutes to complete.

Note: if SQL Server 2008 R2 Express has been previously installed on a given computer, but ImageView Standard v8.3.x.x has not been installed (or has been completely uninstalled) on this same computer, ImageView Standard v8.5 setup will install the SQL Server 2014 Express SP3 instance. It will not attempt to upgrade SQL Server 2008 R2 Express.

Before installing SQL Server 2014 Express SP3 the following component must be installed:

- Microsoft .NET Framework v4.0 or higher.

In ImageView v8.5.x, setup installs a named instance (<IMAGEVIEWER84>) of SQL Server 2014 Express SP3.

- If SQL Server 2014 Express SP3 is already installed on the computer, setup will add the named instance (<IMAGEVIEWER84>) to the existing configuration.

In ImageView v8.5.x, SQL Server 2014 Express SP3 is installed in silent mode. The setup process will install SQL Server 2014 Express SP3 and execute a script to configure the ImageView v8.5.x database. No user intervention is required, other than specifying the destination folder for the ImageView database files and corresponding SQL Server folder structure as described in section 2.6.1.3.

Important: Setup will create a corresponding SQL Server 2014 Express SP3 folder structure for the ImageView database instance (<IMAGEVIEWER84>) from the path you specify (refer to section 2.6.1.3). The core SQL Server 2014 Express SP3 files however, will be installed to the following location (unless SQL Server 2014 Express has previously been installed):

- C:\Program Files\Microsoft SQL Server.

Warning: some organizations may receive copies of ImageView Standard v8.5.x from more than one financial institution, and install each copy on the same computer. To account for this possibility, it is strongly recommended that you do not change the default installation folder for SQL Server 2014 Express SP3 without first consulting Yojna technical support. **Do not change the installation folder for SQL**

Server 2014 Express SP3 such that the **ImageView** database instance is stored into the same folder where **ImageView Standard v8.5.x** will be installed.

Setup will resume the installation: click the **Install** button to continue.

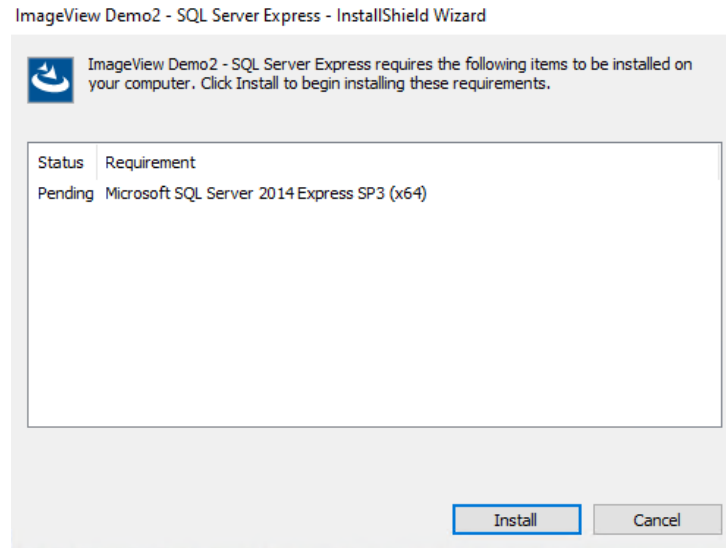


Figure 16: SQL Server 2014 Express SP3 setup

The SQL Server 2014 Express SP3 files will be extracted to a temporary folder in preparation for installation.

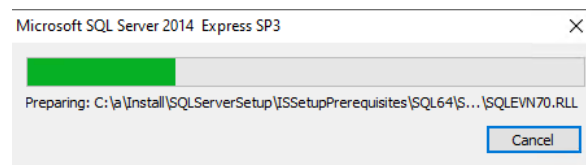


Figure 17: Extracting SQL Server 2014 Express SP3 setup files

Also note: if SQL Server 2014 Express SP3 fails, ImageView setup will exit without installing the viewer.

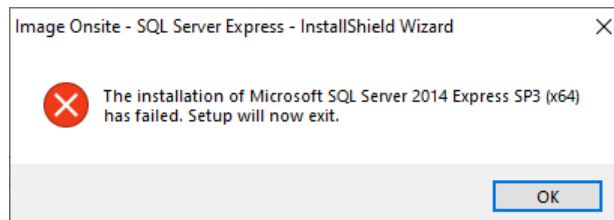


Figure 18: SQL Server 2014 Express SP3 setup failure message

SQL Server 2014 setup will periodically display the following message (**Note:** several screens are displayed, user intervention is not required – a configuration file is processed to give SQL Server 2014 setup the information needed to install the software):

SQL Server 2014

Please wait while Microsoft SQL Server 2014 Setup processes the current operation.

Figure 19: Setup processing message

The Install Setup Files screen, followed by the Installation Progress screen, will be displayed.

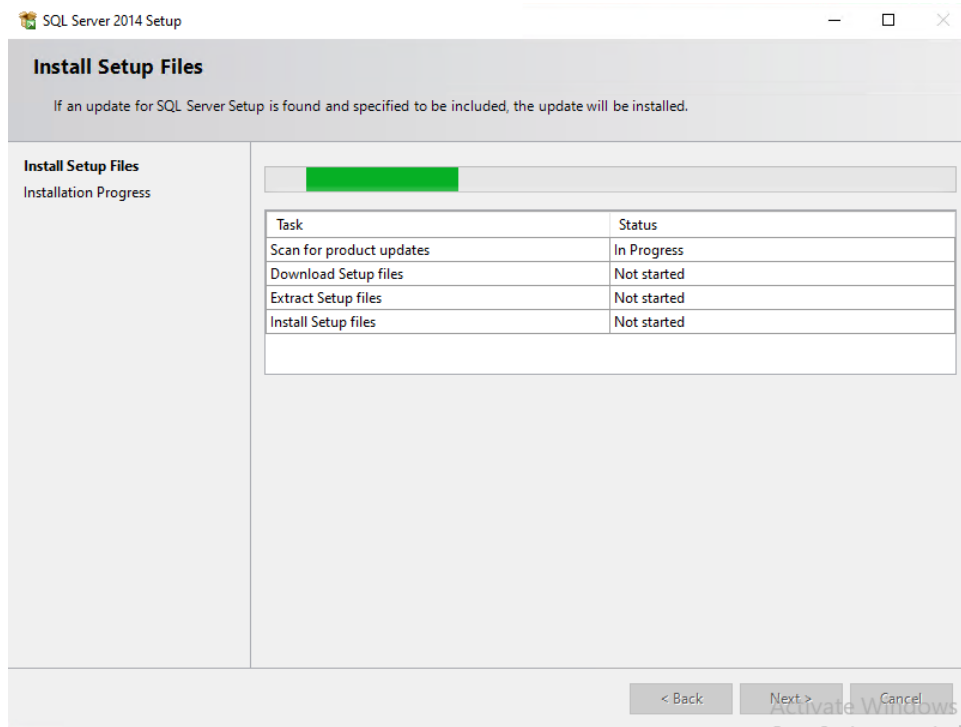


Figure 20: SQL Server 2014 Install Setup Files screen

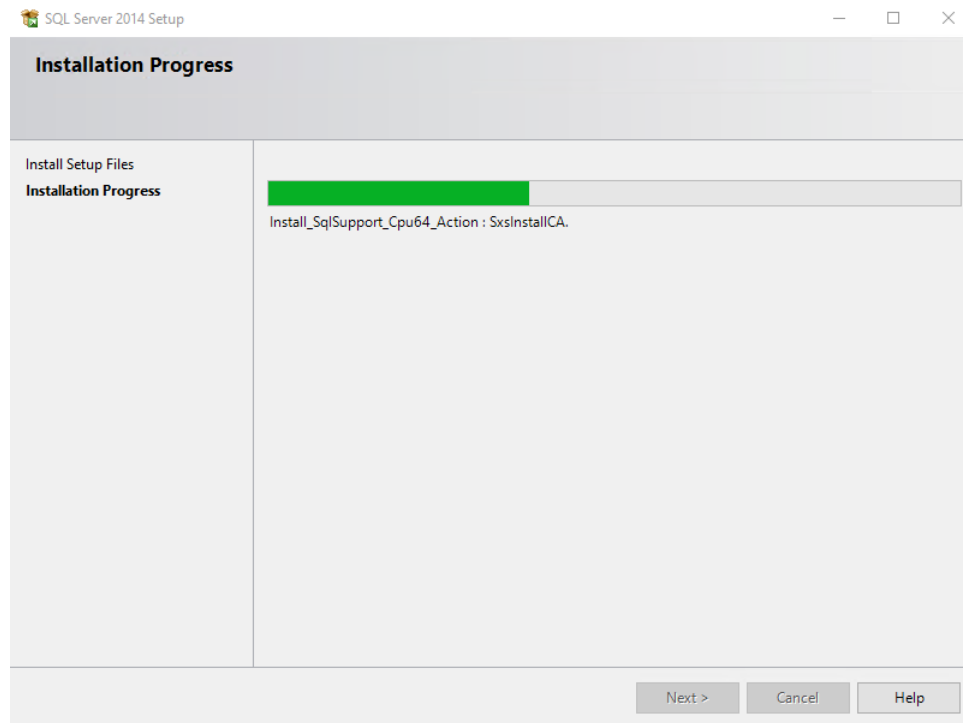


Figure 21: SQL Server 2014 Installation Progress screen

After successfully installing SQL Server 2014 Express SP3, setup will begin installing ImageView v8.5.x.

2.6.2 Installing ImageView v8.5.x in Local Mode

This section describes the procedure for installing ImageView Standard v8.5.x in Local Mode. After completing the installation of third-party components, the ImageView InstallShield Wizard will initialize.

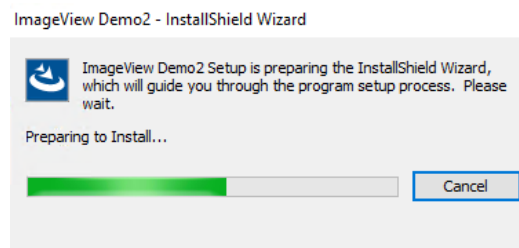


Figure 22: InstallShield Wizard – Preparing to Install screen

The Choose Destination Location screen will be displayed. Accept the default folder, or click the Browse button and change as desired. The default folders are:

- x86 systems: C:\Program Files\<ImageView v8.5>
- x64 systems: C:\Program Files (x86)\<ImageView v8.5>

Click Next to continue.

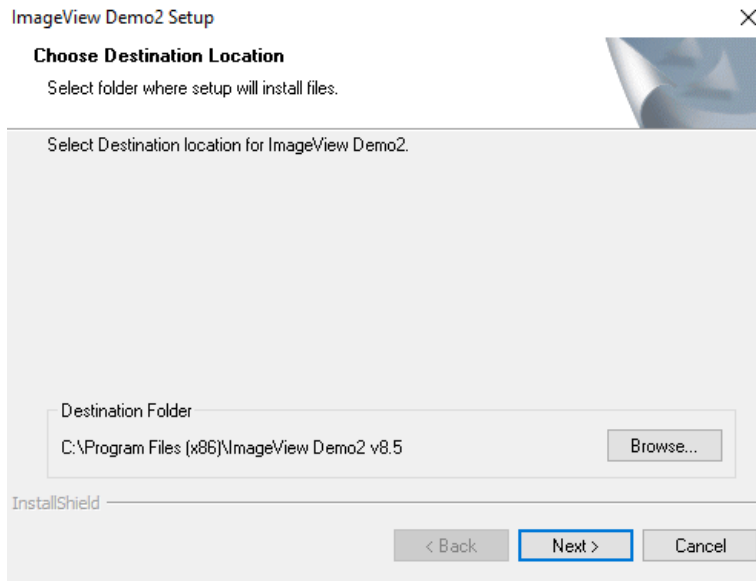


Figure 23: ImageView - Choose Destination Location screen

You will now be asked to specify the folder where the SQL Server database files (.MDF and .LDF files) used by ImageView Standard v8.5 will be stored. Accept the default folder and click Next.

- The default folder is C:\ProgramData\<bank name>\<ImageView 8.5>\<Product GUID>

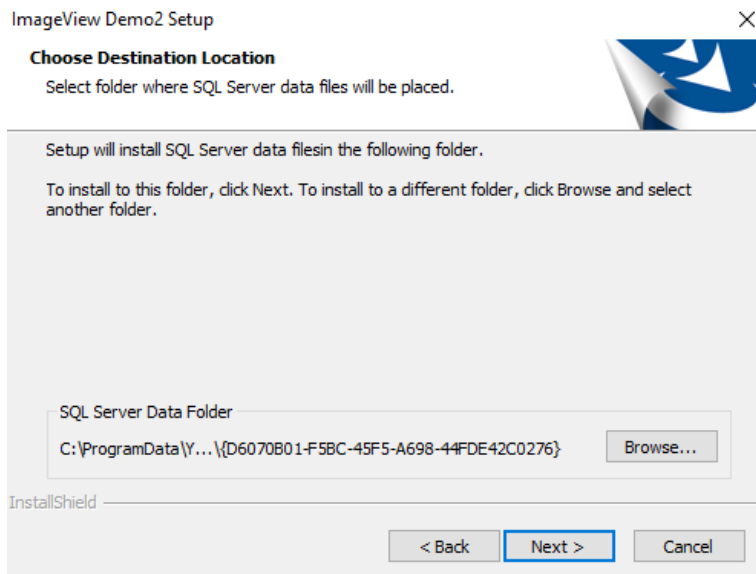


Figure 24: Choose Destination Location screen (database files)

The Installation Mode screen will be displayed. Select 'Local Mode' and click Next to continue.

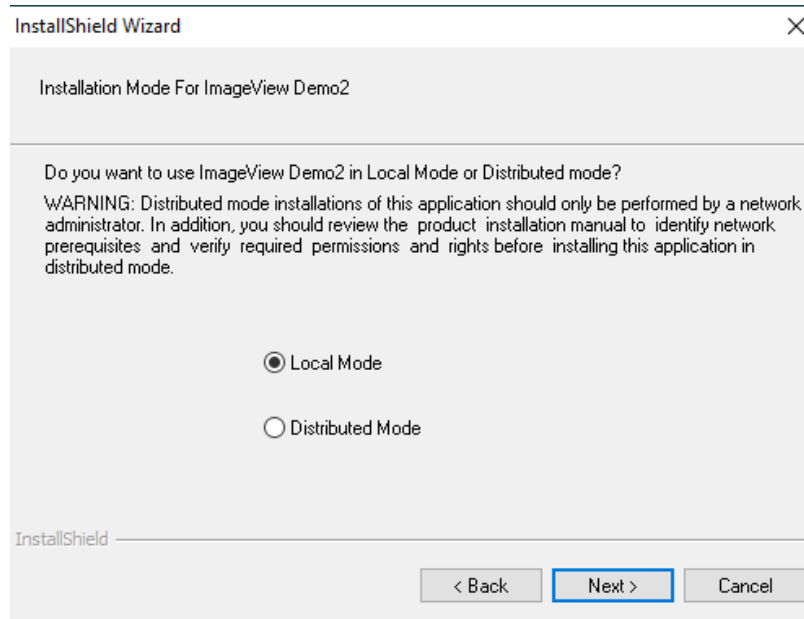


Figure 25: Installation Mode page

The Log Path Selection screen will now be displayed. Accept the default, or click the Browse button and enter the folder where ImageView will store its log files. Click Next to continue.

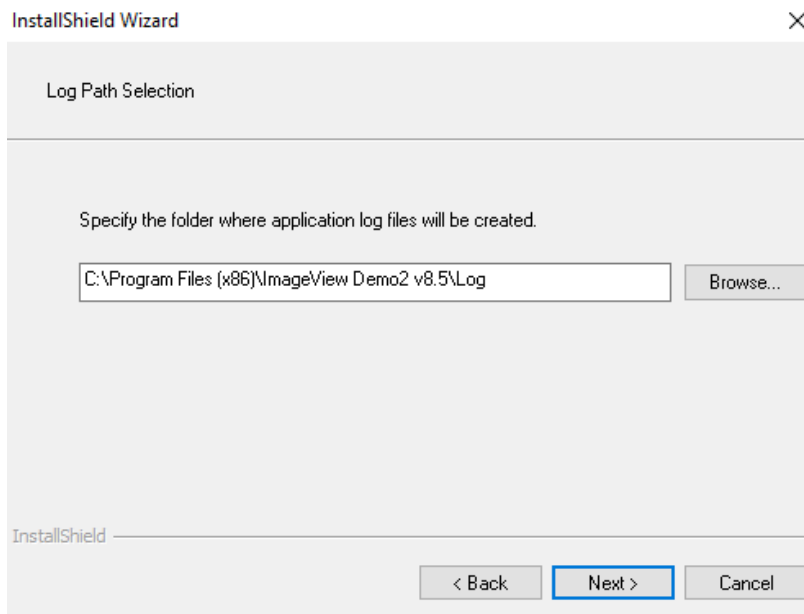


Figure 26: Log Path Selection dialog box

The Select Program Folder screen will be displayed. Accept the default, or change as desired. Click Next to continue.

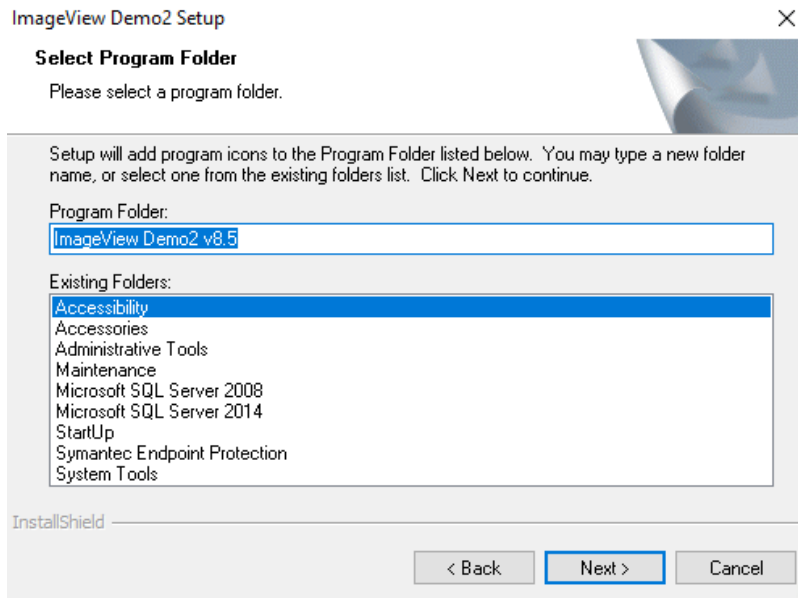


Figure 27: Select Program Folder dialog box

The Start Copying Files screen will be displayed. Review your settings that are displayed on this page: click the Back button if you want to make any changes, otherwise, click Next to continue.

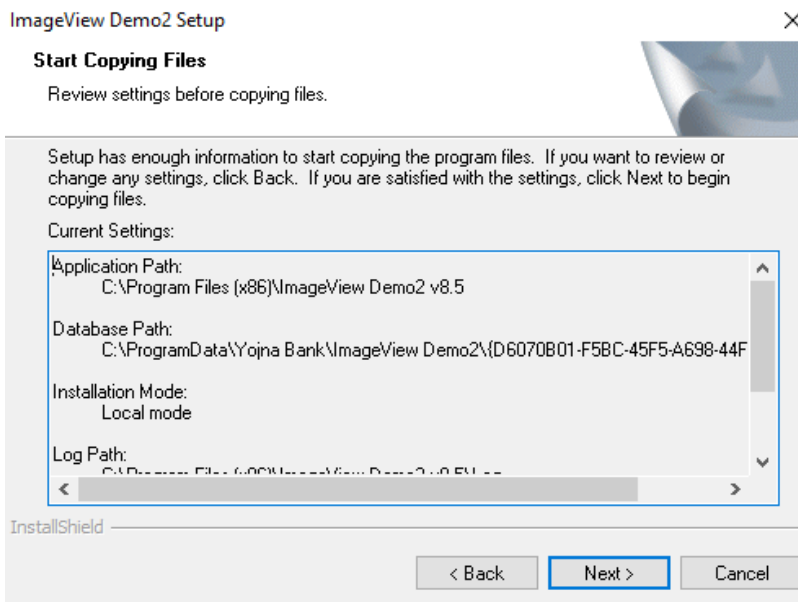


Figure 28: Start Copying Files dialog box

Setup will now begin installing the application files.

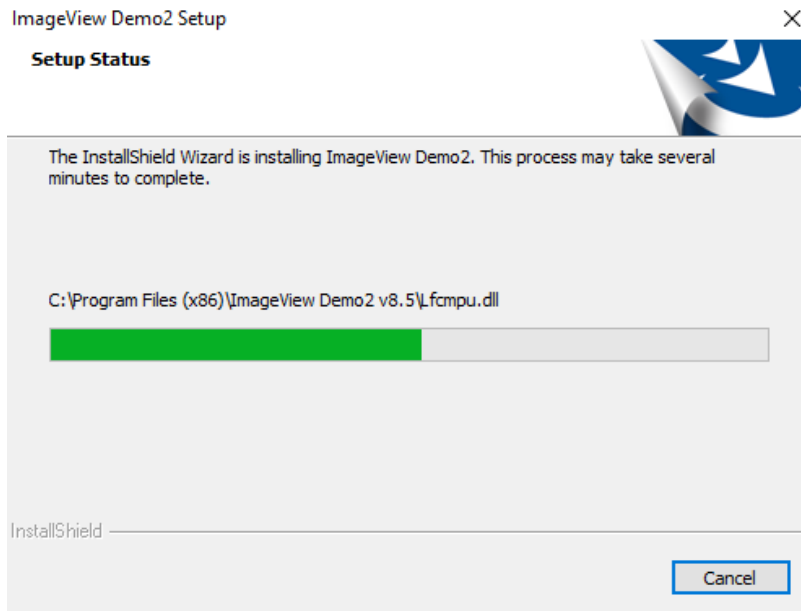


Figure 29: Setup Status screen

Setup will run a script to automatically configure ImageView to access SQL Server 2014 Express SP3. You do not need to manually do any configuration on the database.

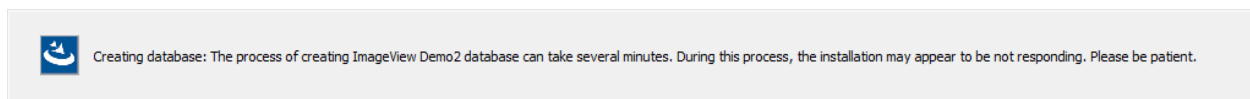


Figure 30: Creating database message

After the script has completed, setup will display a message indicating that the ImageView database has been successfully created. Click OK to close this message.

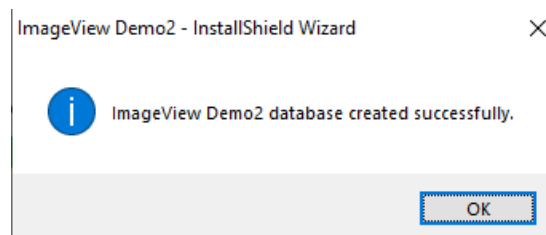


Figure 31: Database script confirmation message

A confirmation message will be displayed when setup has completed. Click Finish to exit this phase of setup.

Note: the confirmation message may prompt you to reboot your computer. If this message is displayed, select 'Yes, I want to restart my computer now' and click Finish to exit setup.

Refer to section 3 for configuration information.

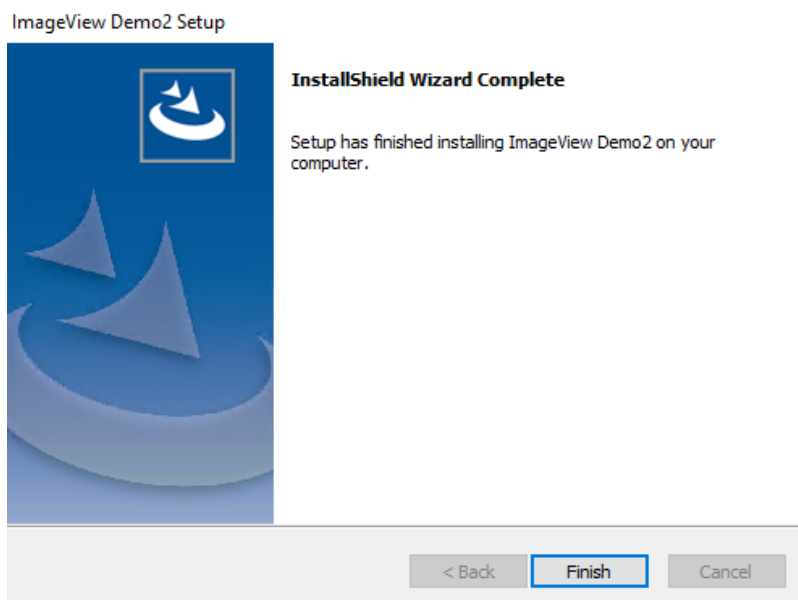


Figure 32: InstallShield Wizard Complete screen

2.6.3 Installing ImageView v8.5.x in Distributed Mode

The following sections describe the procedures for installing ImageView Standard v8.5.x in distributed mode. The basic procedure consists of:

- Installing the ImageView server-side components, including SQL Server 2014 Express SP3. The server-side components can be installed on a dedicated server running Windows Server 2019/Server 2016/Server 2012, or to a workstation running Windows 10 or Windows 8.1.
- Configuring SQL Server 2014 Express SP3 for remote access
- Configuring Windows Firewall, if it is running on the computer hosting the server-side components.
- Installing the ImageView clients.

Warning: for distributed mode installations, setup should be performed by either a network administrator, or a user with the corresponding level of permissions. Yojna does not recommend that distributed mode installations be performed by users who do not have network administrator rights, or who are not familiar or experienced with networking concepts such as shares or rights/permissions.

SQL Server: note that in order to install SQL Server 2014 Express SP3, the person performing the installation will need access to the server on which SQL Server 2014 Express SP3 is to be installed. This may require physical access to the server if a tool such as Remote Desktop is not being used, in addition to having the necessary rights and permissions to install applications on a server.

Note: When installing ACCORD ImageView clients, the ImageView application should be shut down on all other workstations until setup is complete.

2.6.3.1 Installing the Server-side Components

Run SETUP.EXE from the installation media and install the third-party components as described in section 2.6.1. After completing the installation of third-party components, the ImageView InstallShield Wizard will initialize.

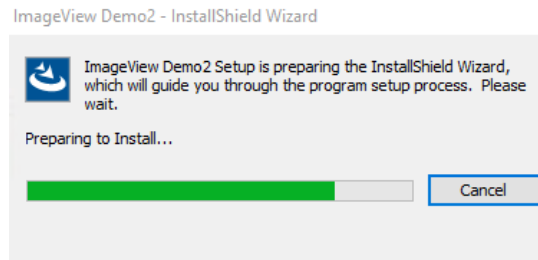


Figure 33: InstallShield Wizard screen

The Choose Destination Location screen will be displayed. Accept the default folder, or click the Browse button and change as desired. The default folders are:

- x86 systems: C:\Program Files\<Imageview v8.5>
- x64 systems: C:\Program Files (x86)\<Imageview v8.5>

Click Next to continue.

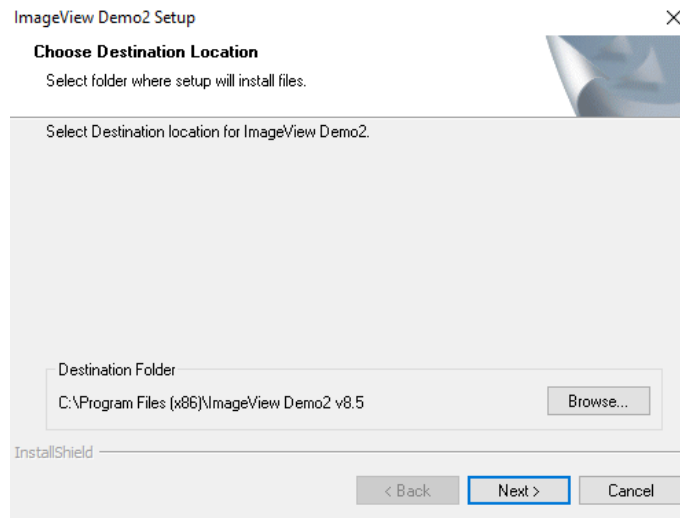


Figure 34: Choose Destination Location screen

You will now be asked to specify the folder where the SQL Server data files (.MDF and .LDF files) used by ImageView Standard v8.5 will be stored. Accept the default folder and click Next.

- The default folder is C:\ProgramData\<bank name>\ImageView 8.5\<Product GUID>

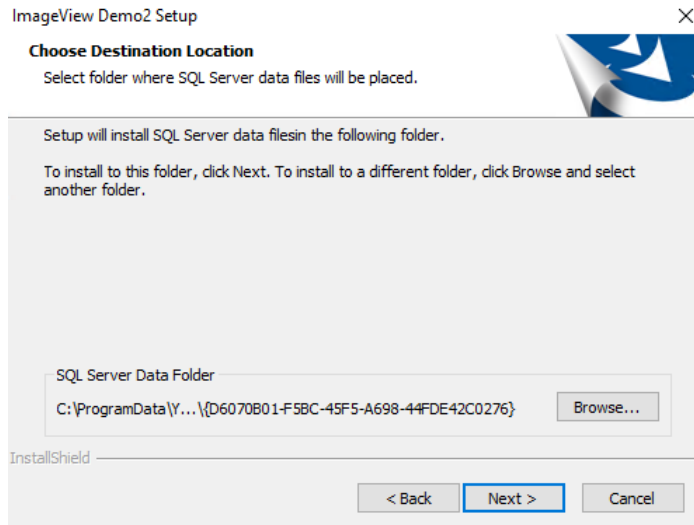


Figure 35: Choose Destination Location screen (database files)

The Installation Mode screen will be displayed. Select 'Distributed Mode' and click Next to continue.

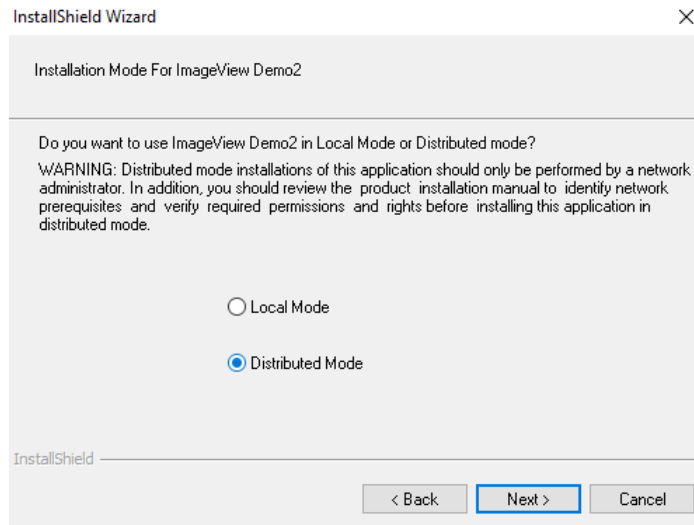


Figure 36: Installation Mode screen

The Path Selection dialog box will be displayed. Enter the path from where distributed clients can install the application: this is the path containing the setup files that ImageView clients will connect to in order to install the application in distributed mode. The default path is C:\Program Files (x86)\<ImageView v8.5.x>\ClientInstallation.

- You can install the distributed mode client setup files to a different computer. If you do so, ensure that the folder is shared (refer to figure 46) and has the default folder permissions as specified in section 2.3.2.2 after completing setup of the server-side components. **Note:** During the initial installation/creation of this folder, it may be necessary to assign Full Control permissions if you encounter any difficulty completing setup. Permissions can then be tightened as appropriate after completing setup.

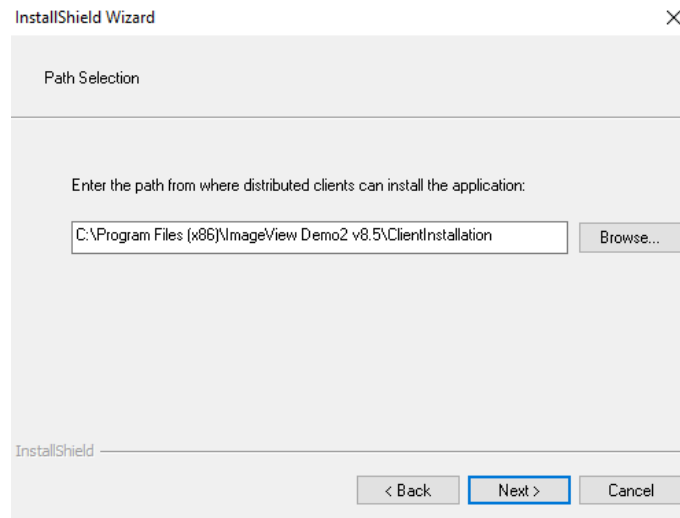


Figure 37: Path Selection dialog box

A prompt will be displayed indicating that you must share the folder where the client installation files will be copied. Setup will not proceed until this folder has been shared. Open Windows Explorer and browse to the folder where the client setup files will be stored (e.g. C:\Image v8.5\ClientInstallation). Create a share, then click OK to close the setup prompt (Figure 38) and proceed. **Note:** refer to section 2.3.2.2 for the minimum required permissions.

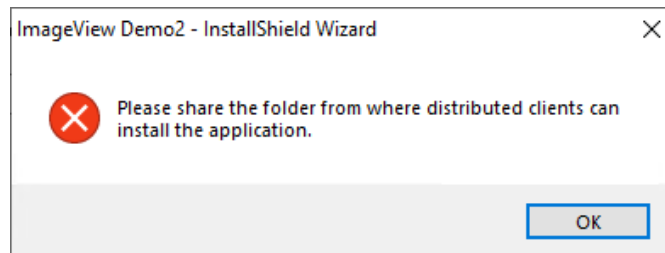


Figure 38: Prompt to share a folder

The Log Path Selection screen will now be displayed. Accept the default, or click the Browse button and enter the folder where ImageView will store its log files. Click Next to continue.

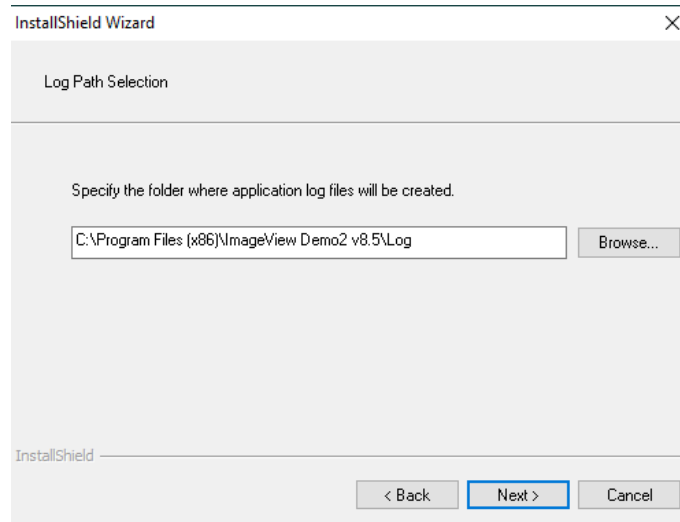


Figure 39: Log Path Selection dialog box

The Select Program Folder screen will be displayed. Accept the default, or change as desired. Click Next to continue.

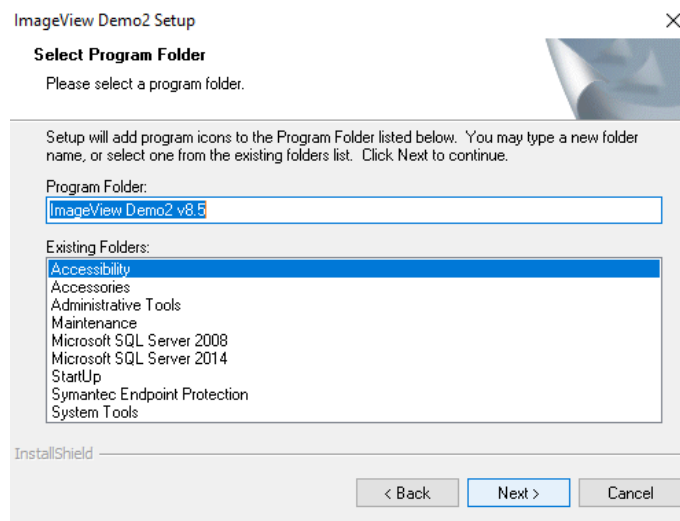


Figure 40: Select Program Folder screen

The Start Copying Files screen will be displayed. Review your selections and then click Next to continue. Click the Back button if you want to make any changes.

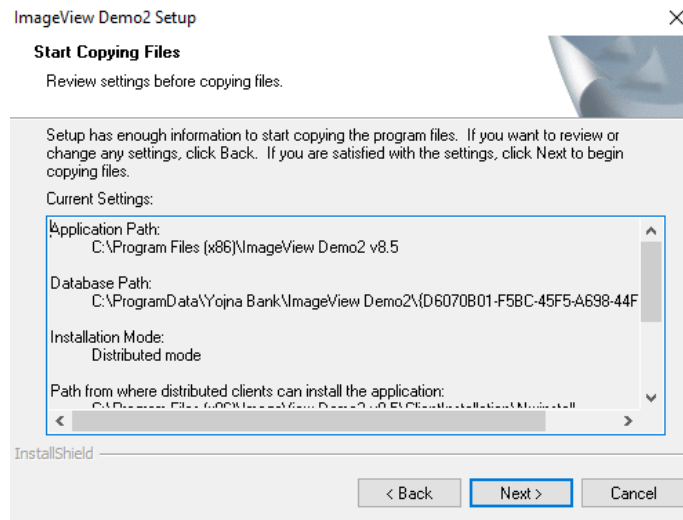


Figure 41: Start Copying Files screen

Setup will now begin installing the application files. **Note:** ImageView installation will take several minutes to complete while the database schema is created and default data loaded.

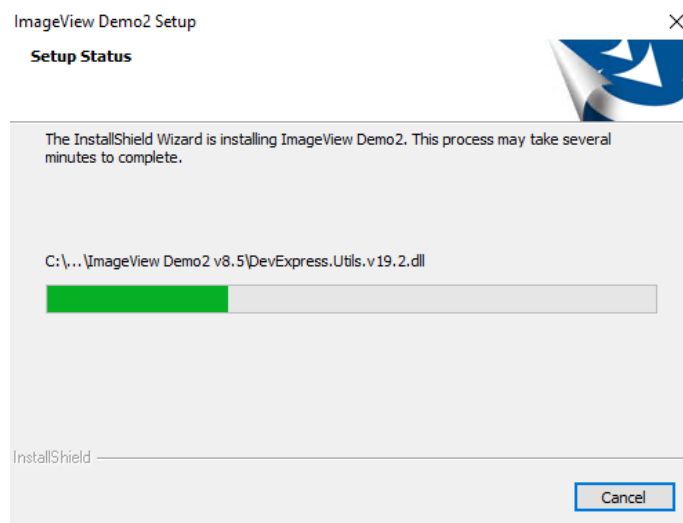


Figure 42: Setup Status screen

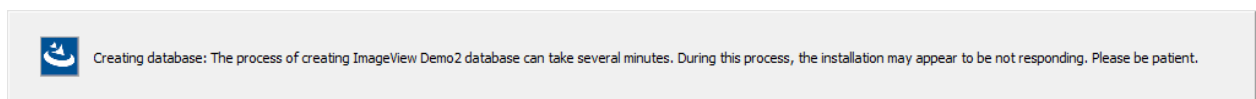


Figure 43: Creating database message

Setup will run a script to automatically configure ImageView to access SQL Server 2014 Express SP3. You do not need to manually do any configuration on the database at this point. After the script has completed, setup will display a message indicating that the ImageView database has been successfully created. Click OK to close this message.

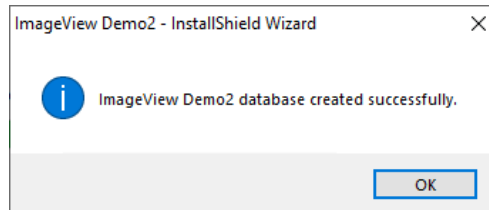


Figure 44: Database creation confirmation message

A message will be displayed to indicate that the client setup files are being copied to the path specified for the NWINSTALL folder.

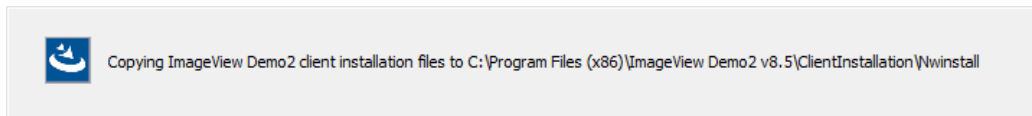


Figure 45: Copying client setup files

A confirmation message will be displayed when setup has completed. Click Finish to exit this phase of setup.

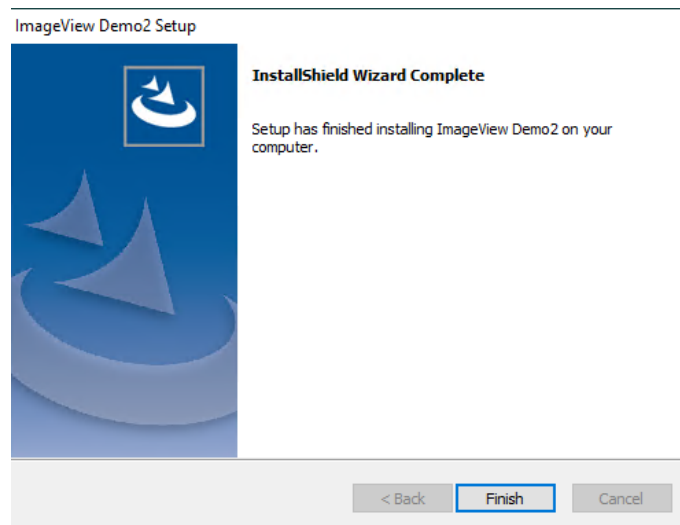


Figure 46: Setup Complete screen

A message will be displayed reminding you to share the ImageView folder. Click OK to close this message, and ensure that the folder where ImageView has been installed is shared.

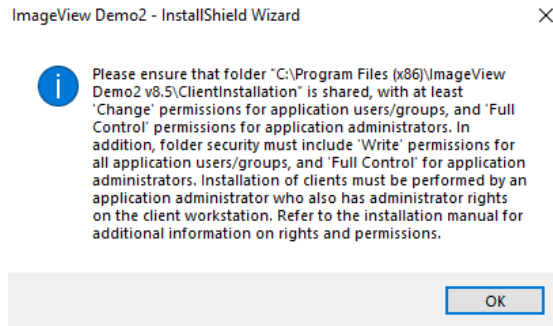


Figure 47: Share ClientInstallation folder reminder message

Note: Ensure that the application folder and subfolders have at least Change permissions at the share level, and Read, List, Read & Execute, Write, and Modify permissions at the folder (security) level for the assigned groups/users. ImageView folder permissions should be set at the parent level (i.e. ImageView installation folder) and propagated down to the subfolders.

Note: if the ClientInstallation folder was installed to another location (e.g. folder, drive, computer) outside of the ImageView folder, share the folder and set folder permissions accordingly.

After server-side setup has been completed, a message will be displayed indicating that firewall rules may need to be configured/edited to allow SQL Server network traffic from the distributed mode clients. Configure SQL Server and Windows Firewall as described below before proceeding with the installation of any clients.

- **Warning:** distributed mode clients typically return error message "Database operation failed" when trying to launch ImageView Standard v8.x if SQL Server traffic is blocked by a firewall on the computer hosting the ImageView Standard v8.x database.

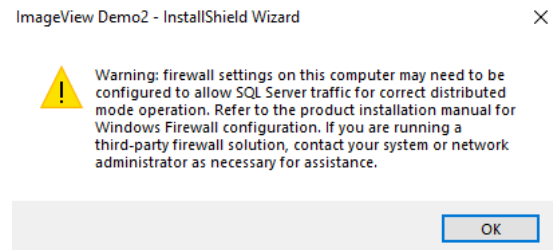


Figure 48: Firewall configuration warning message

Click OK. Server-side setup is now complete.

2.6.3.1.1 SQL Server Configuration

The following configuration needs to be verified on SQL Server 2014 Express SP3 before installing any ImageView clients.

- Open the Start button and select Microsoft SQL Server 2014 | SQL Server Configuration Manager.

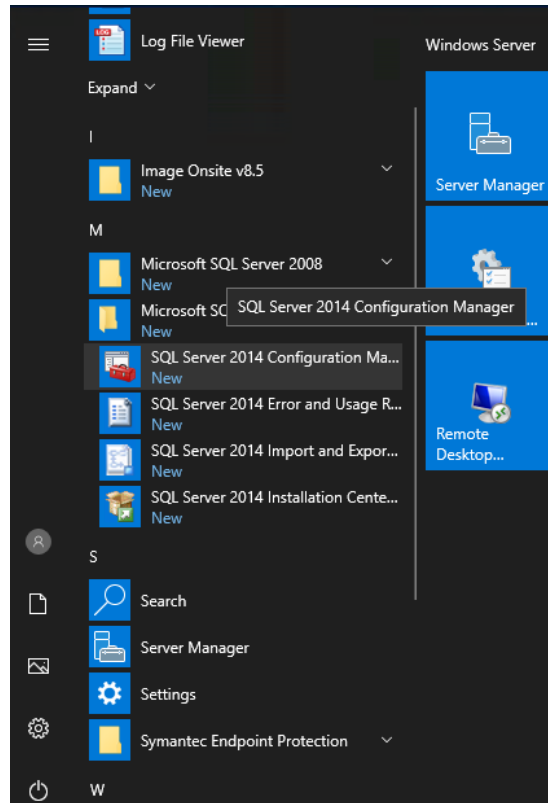


Figure 49: SQL Server 2014 program folder (Server 2019 Start button)

- b) The SQL Server Configuration Manager main page will be displayed. Click the SQL Service Services node. The SQL Server Browser and SQL Server (<IMAGEVIEWER84> or YOJNAINSTANCE) services should be running, with the Start Mode as “Automatic”. If you need to make any changes, right-click a service and select Properties from the popup menu.
- For new installations of ImageView Standard v8.5.x, the SQL Server service name is “<IMAGEVIEWER84>”.
 - For upgrades from ImageView Standard v8.4.x, the SQL Server service name is “<IMAGEVIEWER84>”.
 - For upgrades from ImageView Standard v8.3.x.x, the SQL Server service name is “YOJNAINSTANCE”.

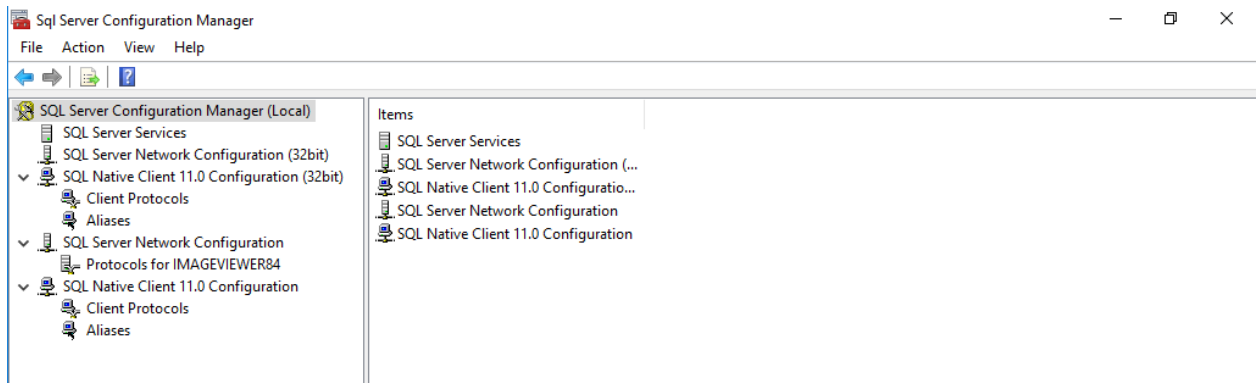


Figure 50: SQL Server Configuration Manager page

- c) Expand the SQL Server Network Configuration node and select 'Protocols for <IMAGEVIEWER84>' (or 'Protocols for YOJNAINSTANCE', if you have upgraded from v8.3.x.x). The TCP/IP protocol should be enabled. Right-click the protocol to display the popup menu in order to enable/disable the service.

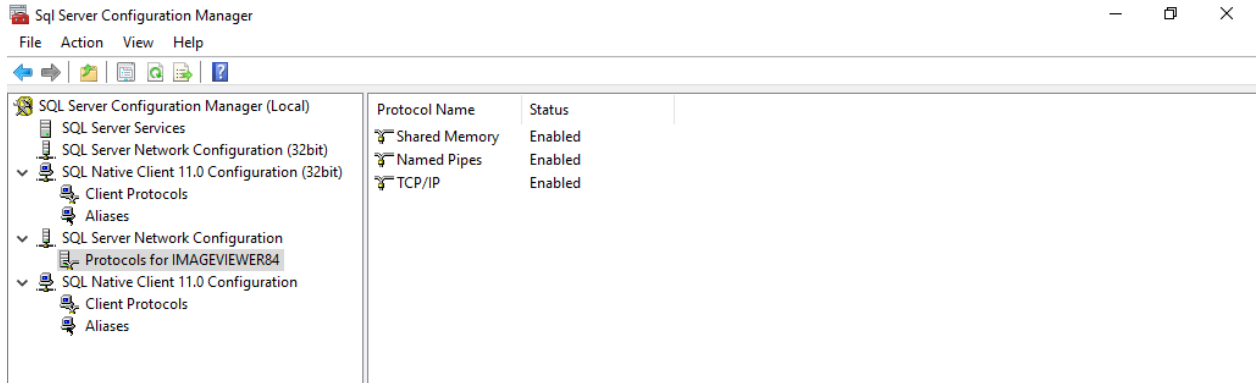


Figure 51: SQL Server Network Configuration page

- d) After making any changes, you may receive a message indicating that you need to restart the service: both the SQL Server Browser and SQL Server (<IMAGEVIEWER84>) services will need to be restarted. **Note:** restart the SQL Server (YOJNAINSTANCE) service, if you have upgraded from v8.3.x.x.

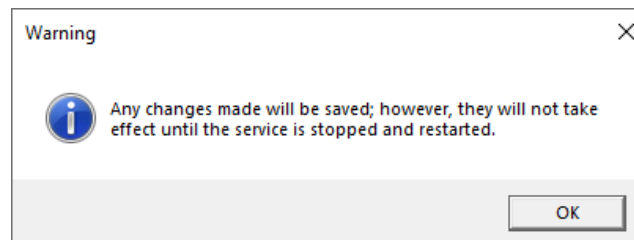


Figure 52: Restart services message

To restart the services:

1. Select the SQL Server Services node (refer to figures 50 or 51)
2. In the right pane, select the service and right-click it.
3. Click the Restart option from the popup menu.

2.6.3.1.2 Windows Firewall Configuration

This section describes the configuration procedure for Windows Firewall running on Windows 8.1, Windows 10, Server 2012/2012 R2, Server 2016, or Server 2019.

- **Warning:** distributed mode clients typically return error message "Database operation failed" when trying to launch ImageView Standard v8.x if SQL Server traffic is blocked by a firewall on the computer hosting the ImageView Standard v8.x database.

- a) Open Control Panel | Windows Firewall

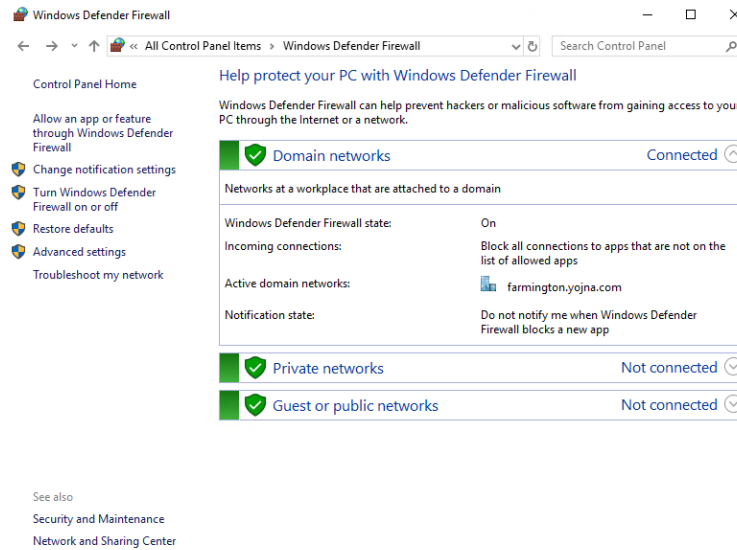


Figure 53: Windows Firewall configuration main page (Server 2019)

- b) In the left pane, click the option 'Allow an app or feature through Windows Firewall'. The 'Allow programs to communicate through Windows Firewall'/'Allow apps to communicate through Windows Firewall' page will be displayed.

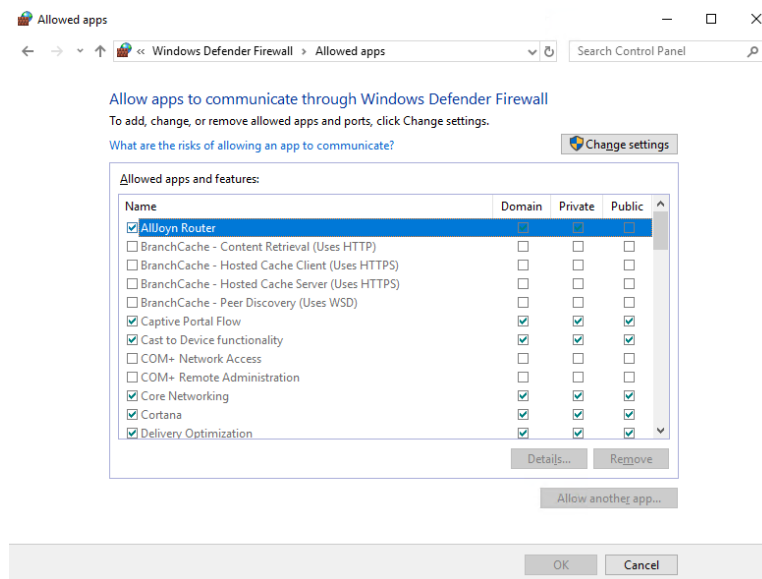


Figure 54: Allowed Programs page (Server 2019)

- c) Click the 'Allow another program...'/'Allow another app...' button. The Add a Program/Add an App dialog box will be displayed. **Note:** you may first need to click the 'Change settings' button, to enable the 'Allow another program'/'Allow another app...' button.

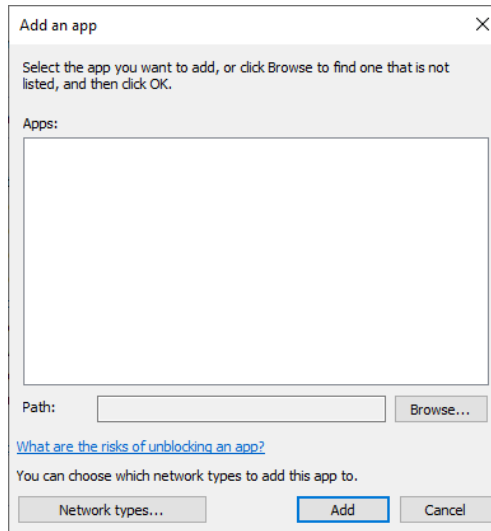


Figure 55: Add an app dialog box (Server 2019)

- d) Click the Browse button and navigate to the SQL Server installation folder, and locate SQLSERVER.EXE. For SQL Server 2014, the default folder is
 - C:\Program Files\Microsoft SQL Server\MSSQL12.IMAGEVIEWER84\MSSQL\Binn.

After selecting the file, click Open on the Browse dialog box.
- e) Click the Add button on the Add a Program/Add an app dialog box: the screen will refresh to show the added program – “SQL Server Windows NT”. Do not skip this step.
- f) Using the Add a Program/Add an app dialog box, now locate SQLBROWSER.EXE. The default folder is:
 - x86 systems: C:\Program Files\Microsoft SQL Server\90\Shared
 - x64 systems: C:\Program Files (x86)\Microsoft SQL Server\90\Shared

After selecting the file, click Open on the Browse dialog box.
- g) Click the Add button on the Add a Program/Add an app dialog box: the screen will refresh to show the added program – “SQL Browser Service EXE”. Do not skip this step.

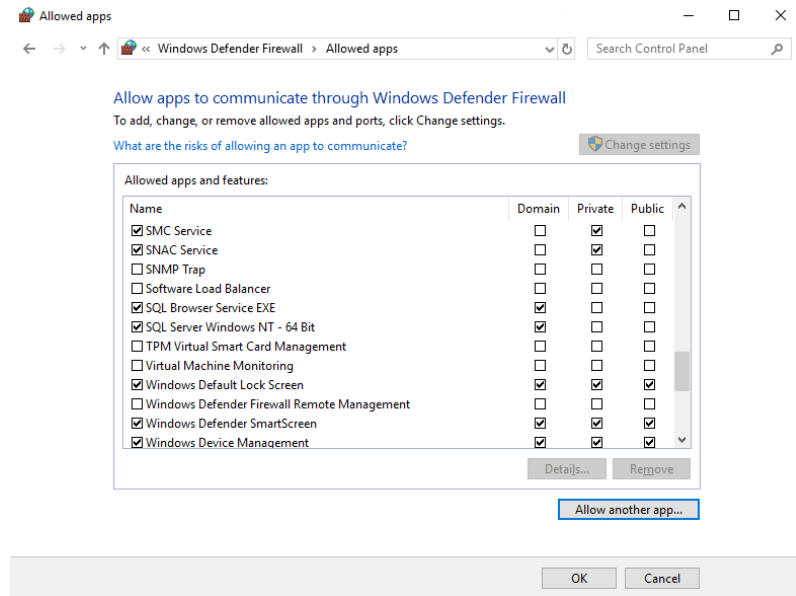


Figure 56: Windows Firewall Allowed Apps page, with added apps (Server 2019)

- h) Click OK to close the 'Allow programs to communicate through Windows Firewall' page, then exit from the Windows Firewall configuration applet.

2.6.3.2 Installing ImageView Clients

Note: ImageView clients using the internet download setup package will download the required third-party components from the internet and install them in silent mode.

To install ImageView clients, do the following:

- a) From a client computer, browse to the computer containing the ImageView server-side components. Locate the folder defined for Path Selection | 'Enter the path from where distributed clients can install the application' as described in section 2.6.3.1. By default, this will be a subfolder named ClientInstallation\Nwinstall found under the <ImageView v8.5.x> installation folder.

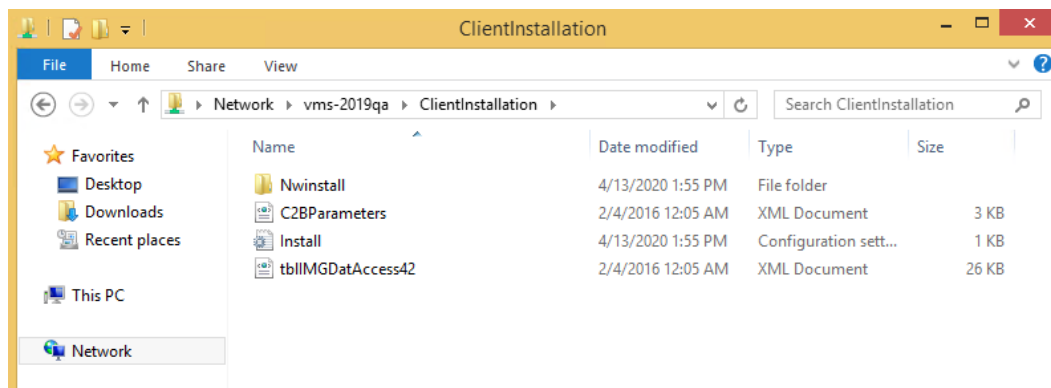


Figure 57: ClientInstallation\Nwinstall subfolder (Windows 8.1)

- b) In the NWINSTALL subfolder, execute SETUP.EXE.

- c) A User Access Control message box may be displayed: click Yes/Allow to continue.
- d) On client computers, the following components will first be installed if they are not already loaded onto the computer:
- Microsoft .NET Framework v4.8
 - Microsoft Visual C++ 2017 Redistributable Package.
- Click Install to continue. Refer to section 2.6.1 for more information on installing these third-party components. **Note:** Adobe Reader also needs to be installed in order to view reports saved in the .PDF file format.

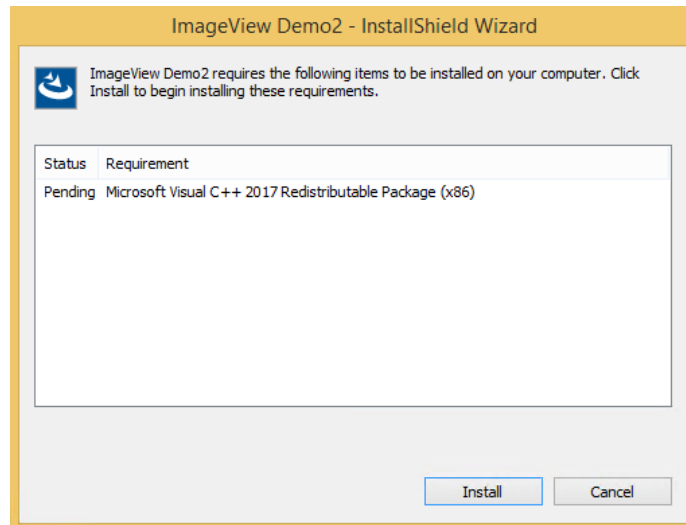


Figure 58: Pre-requisite components screen (Windows 8.1)

- e) The Visual C++ .2017 component is installed in silent mode. No user intervention is required for these components. Also refer to sections 2.6.1.4 and 2.6.1.5 as necessary.

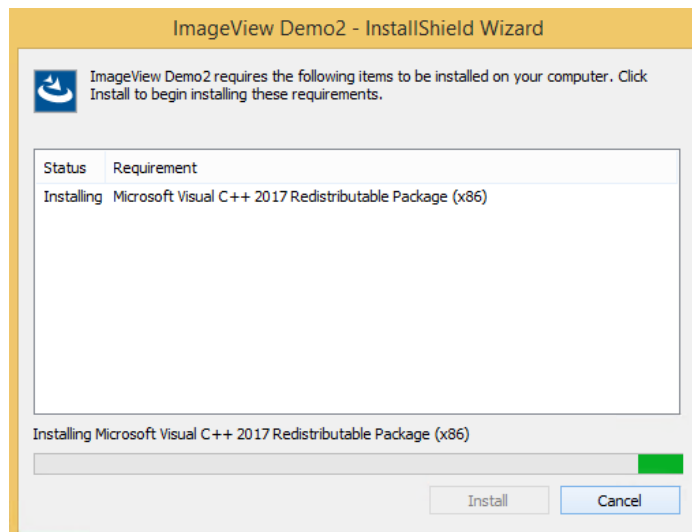


Figure 59: Installing Visual C++ 2017 screen

- f) After installing the Visual C++ 2017 Redistributable Package, ImageView client setup will begin. The InstallShield Wizard will initialize and then display the Choose Destination Location screen.
- **Note:** after installing Visual C++ 2017, you may be prompted to reboot. Reboot as prompted. Setup will automatically resume after rebooting.

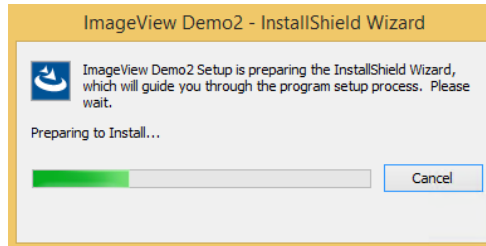


Figure 60: InstallShield Wizard initializing

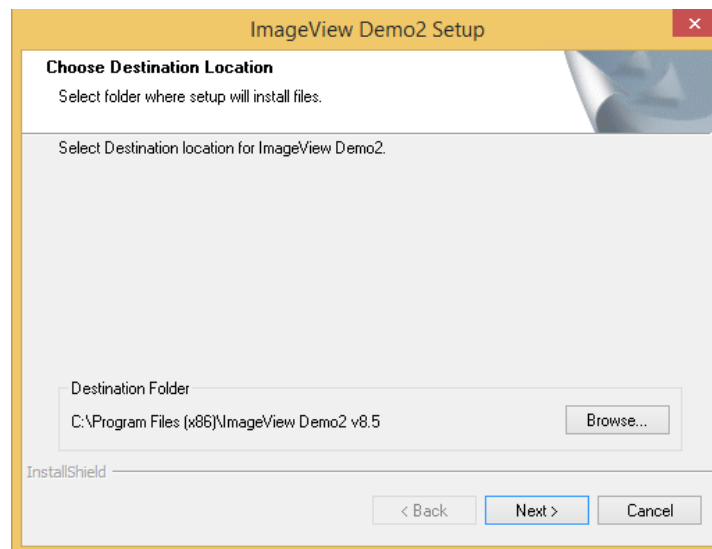


Figure 61: Choose Destination Location screen

- g) Accept the default folder, or click the Browse button and change as desired. The default folders are:
- x86 systems: C:\Program Files\<Imageview v8.5>
 - x64 systems: C:\Program Files (x86)\<Imageview v8.5>
- Click Next to continue.
- h) The Log Path Selection screen will now be displayed. Accept the default, or click the Browse button and enter the folder where the ImageView client will store its log files. Click Next to continue.

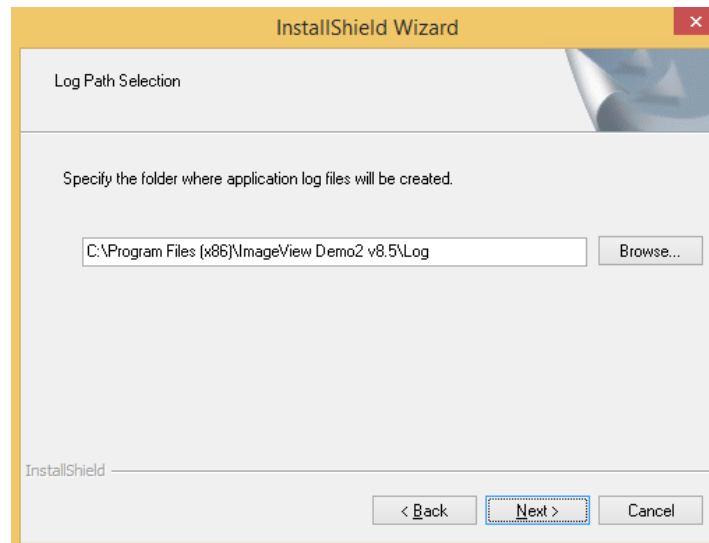


Figure 62: Log Path Selection screen

- i) The Select Program Folder screen will be displayed. Accept the default, or change as desired. Click Next to continue.

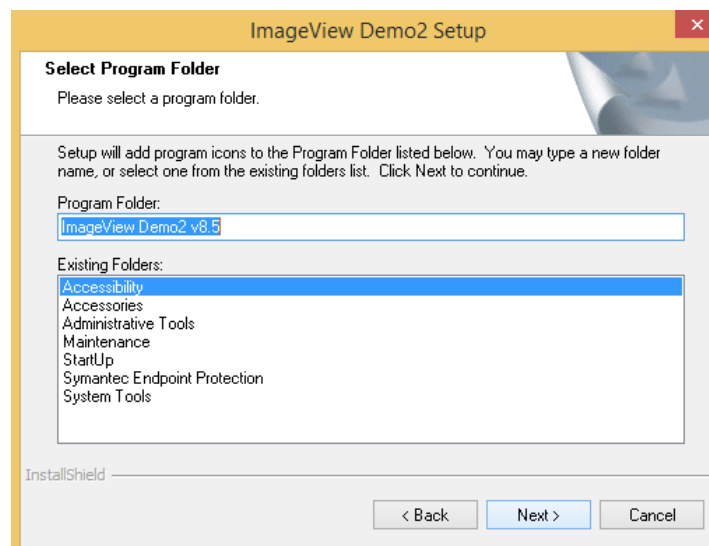


Figure 63: Select Program Folder screen

- j) The Start Copying Files screen will be displayed. Review your settings that are displayed on this page: click the Back button if you want to make any changes, otherwise, click Next to continue.

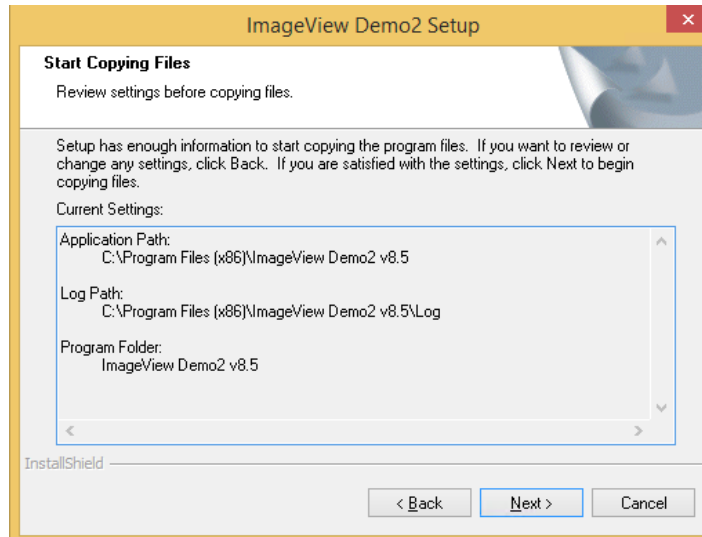


Figure 64: Start Copying Files screen

- k) Setup will now begin installing the application files.

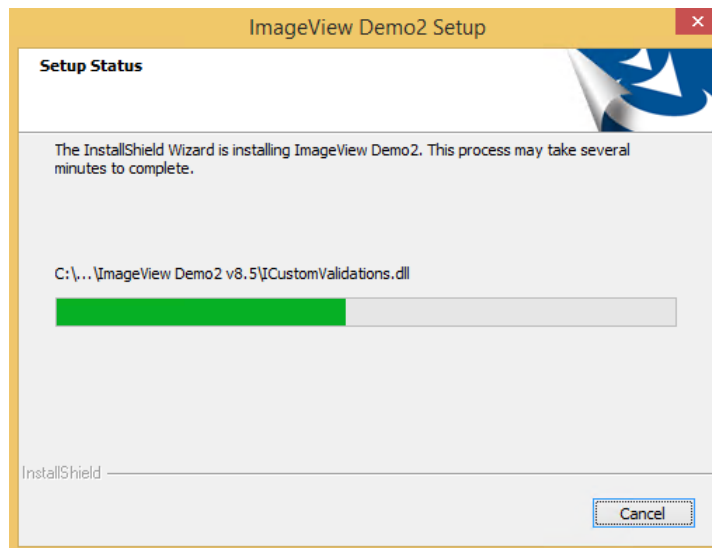


Figure 65: Setup Status screen

- l) A confirmation message will be displayed when setup has completed. Click Finish to exit setup.

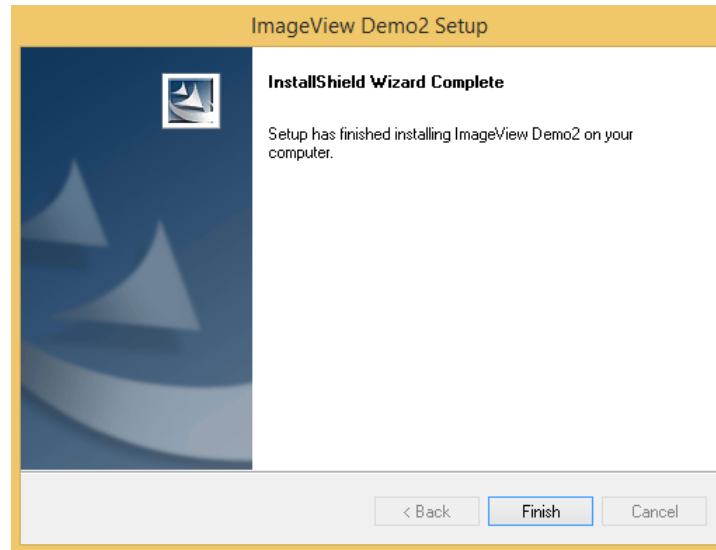


Figure 66: InstallShield Wizard Complete screen

m) Install additional clients as necessary.

2.6.4 ImageView Database File Location

In ImageView v8.5.x, the application database files are stored to the following default folder:

- C:\ProgramData\<bank name>\ImageView 8.5>\<Product GUID>.

If a different folder was defined for the installation of the ImageView database files (refer to section 2.6.1.4), the database files will be stored in that folder tree. **Note:** core SQL Server 2014 Express SP3 files will still be installed to the folder selected for the SQL Server installation .

Warning: some organizations may receive copies of ImageView Standard v8.x from more than one financial institution, and install each copy on the same computer. To account for this possibility, it is strongly recommended that you do not change the default installation folder for SQL Server 2014 Express SP3 without first consulting Yojna technical support. **Do not change the installation folder for SQL Server 2014 Express SP3 such that the ImageView database instance is stored into the same folder where ImageView Standard v8.5.x will be installed.**

2.6.5 Internet Download Installation

An optional installation package includes internet download of the third-party components. This package decreases the overall size of the ImageView Standard v8.5.x installation package. Setup will check for the following components, download them automatically from the internet as needed, and install them in silent mode:

- .NET Framework v4.8.
- Visual C++ 2017.
- SQL Server 2014 Express SP3

Important: to install the internet download setup package, your computer **must** have an active connection to the internet, and be configured to allow file downloads.

To begin the internet download setup, execute SETUP.EXE. A User Account Control message may be displayed: click Yes (or Allow) to continue.

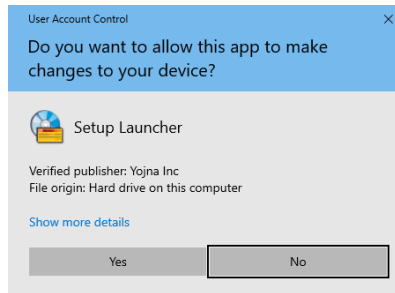


Figure 67: User Account Control message

Setup will display the initial pending component screen. Click Install to continue.

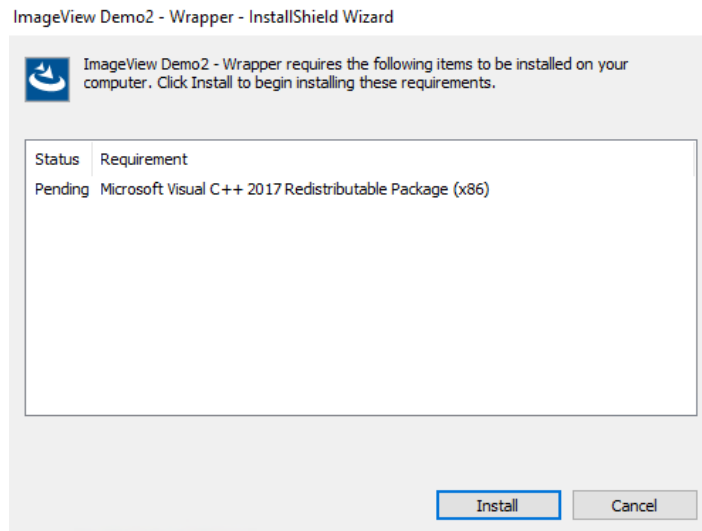


Figure 68: Pending component screen (Windows 10)

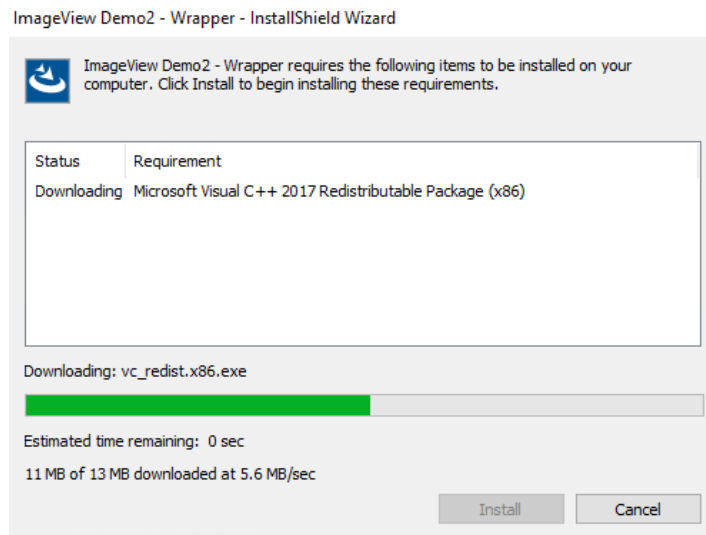


Figure 69: Downloading Visual C++ 2008 SP1 (Windows 10)

Setup will begin downloading Visual C++ 2017. After completing the download, setup will automatically begin installing Visual C++ 2017 in silent mode.

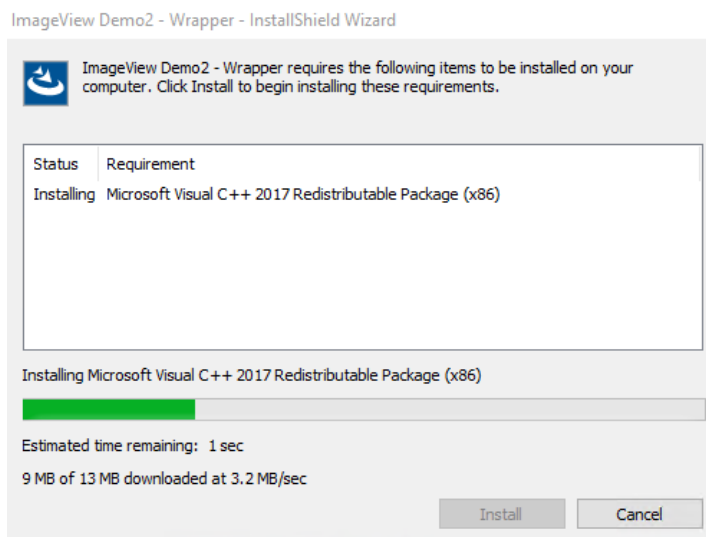


Figure 70: Installing Visual C++ 2008 SP1 screen

After completing the Visual C++ 2017 installation, setup will download .NET Framework v4.8. **Note:** this will occur only if .NET Framework v4.8 has not been previously installed.

After installing .NET Framework v4.8 and rebooting if prompted to do so, the InstallShield Wizard re-initializes.

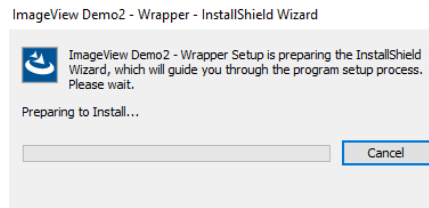


Figure 71: Preparing to Install message

Setup will now take a registry backup

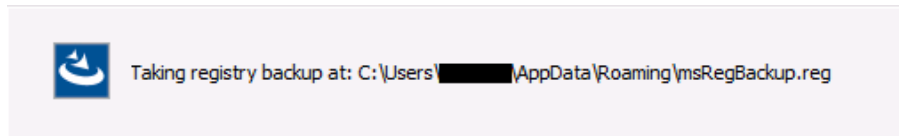


Figure 72: Registry backup message

Next, it will create a system restore point, and then display the SQL Server installation folder dialog box. **Note:** the System Restore option is not available on Windows Server 20xx platforms. You will need to enable the Windows Backup feature, or install a third-party backup application.

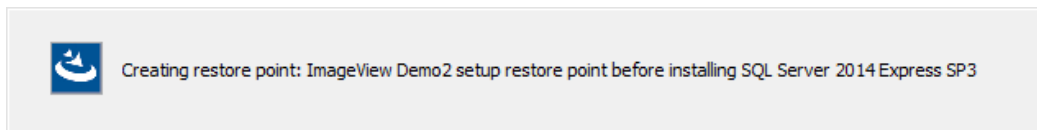


Figure 73: Creating restore point message

Important: to review the SQL Server 2014 Express SP4 installation process, refer to section 2.6.1.4 before proceeding.

Click Next to continue.

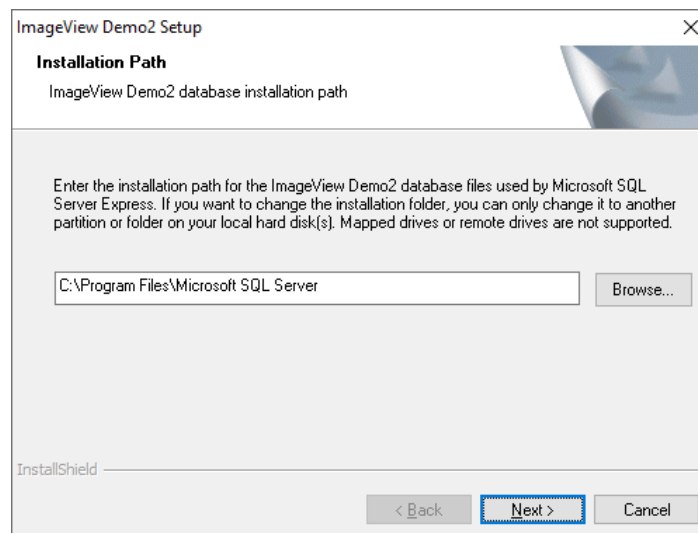


Figure 74: SQL Server 2014 Express SP3 Installation Path dialog box

The pending component screen will be displayed. Click the Install button to continue with the SQL Server 2014 Express SP3 download.

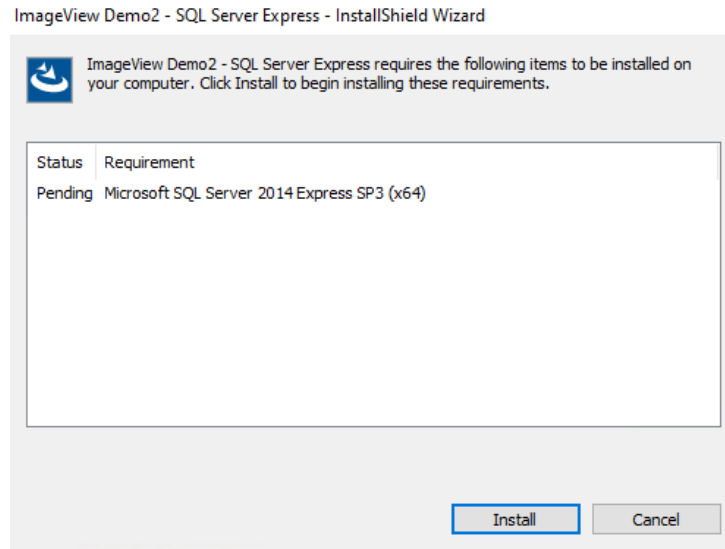


Figure 75: Pending component screen

Setup will download SQL Server 2014 Express SP3.

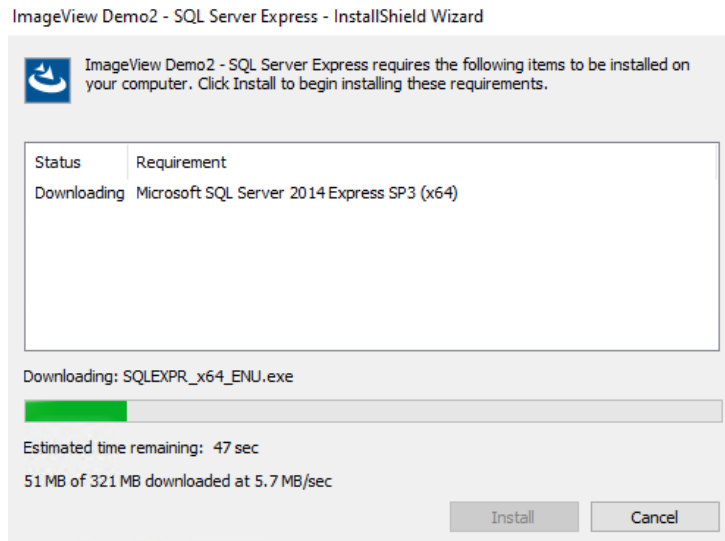


Figure 76: Downloading SQL Server 2014 Express SP3 screen

After the download has completed, SQL Server 2014 Express SP3 begins. SQL Server is installed in silent mode. A series of screens will be displayed while SQL Server is installed; these screens do not require user intervention. Refer to section 2.6.1.4 as needed.

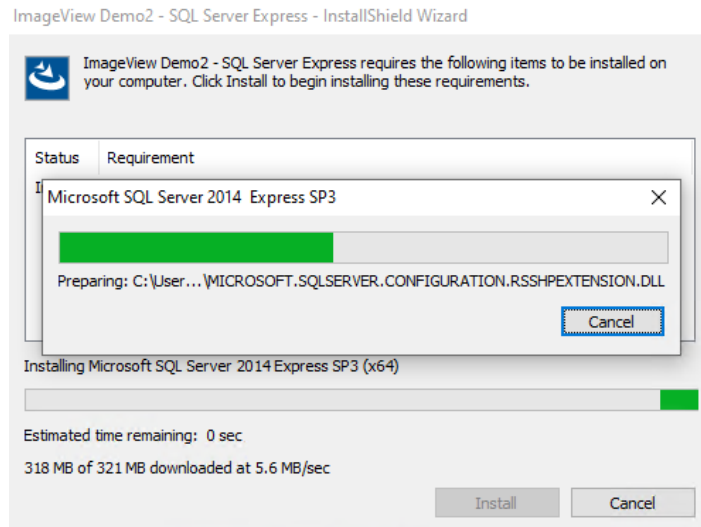


Figure 77: Extracting SQL Server setup files screen

After the installation of SQL Server has completed, you will be prompted to install ImageView Standard v8.5.x; go to section 2.6.2 and follow the instructions for installing ImageView Standard v8.5 in local mode.

2.6.5.1 Distributed Mode

For distributed mode installations, the internet download procedure is similar as described above. Setup will download the required third-party components and install them as necessary.

When ImageView Standard v8.5 clients are added, the setup process will download any required third-party components except for SQL Server 2014 Express SP3.

Refer to section 2.6.3 for full instructions on performing a distributed mode installation.

2.6.6 Setup Log File

Setup creates a log file, IVSETUP.LOG, in folder C:\Users\<username>\AppData\Roaming\Log.

This file may be needed for troubleshooting installation issues.

3 Configuration

This section describes configuration procedures that should be verified after installing ImageView v8.5.x.

3.1 Services

The SQL Server service should be configured to start automatically.

- For new installations of ImageView Standard v8.5.x, the SQL Server service name is "<IMAGEVIEWER84>" i.e "SQL Server (<IMAGEVIEWER84>)".
- For upgrades from ImageView Standard v8.4.x, the SQL Server service name is "<IMAGEVIEWER84>".
- For migrations from ImageView Standard v8.3.x.x, the SQL Server service name is "IMGONSITE".
- For upgrades from ImageView Standard v8.4.x that included an in-place upgrade from ImageView Standard v8.3.x.x, the SQL Server service name is "YOJNAINSTANCE".
- For upgrades from ImageView Standard v8.3.x.x, the SQL Server service name is "YOJNAINSTANCE".

Note: the SQL Server 2014 Express SP3 service properties are automatically configured during SQL Server setup. For new installations of v8.5.x, the Logon account is set to Local System by setup.

Note: for distributed mode installations, also refer to section 2.6.3.1.1 (SQL Server Configuration).

3.2 Log File Viewer

The Log File Viewer is used to view the ImageView log files. The log files are stored in folder <ImageView 8.5>\Log, and can also be viewed with a text editor such as Notepad.

- Select Date: choose the log file date from the calendar control.
- List of Log Files: a dropdown list of available log files for the selected date.

The degree of detail recorded in the log files is controlled by the Log Level setting in the Viewer User Configuration module. Refer to the *ImageView Standard v8.5.x Viewer User Guide* for additional information on User Configuration.

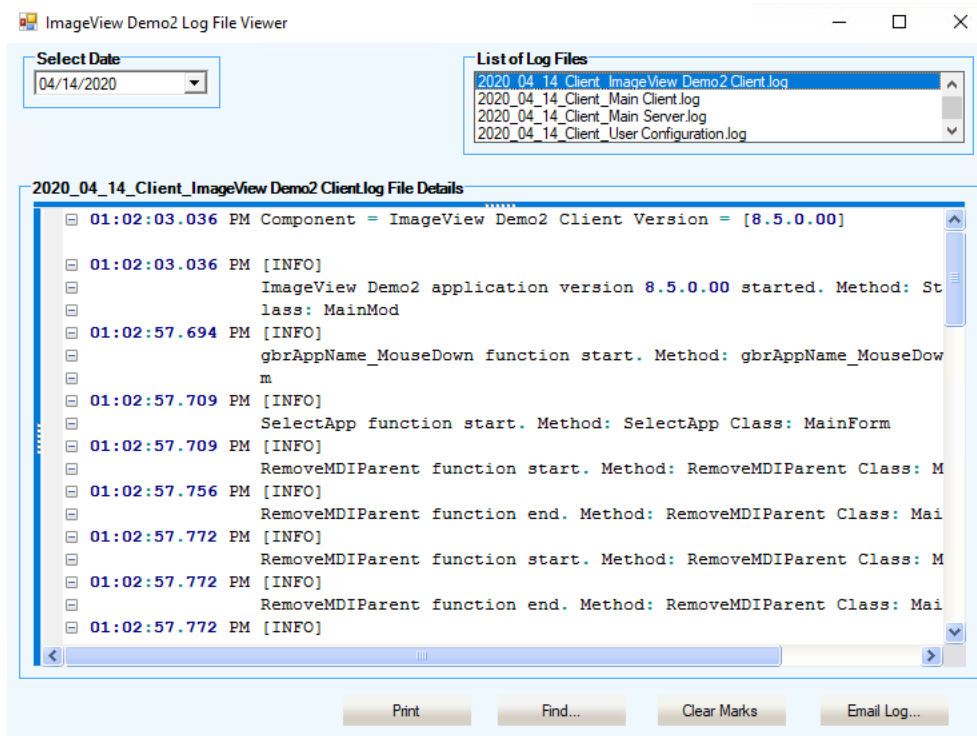


Figure 78: Log File Viewer screen

Log files can be emailed to technical support by clicking the Email Log... button. ImageView will automatically zip the log file and attach it to a new email message. Edit the 'To' field and enter the email address of the support group for the financial institution from whom you obtained the ImageView software. You can also email the logs directly to Yojna, if:

- You have been instructed to do so by the financial institution's support group.
- You obtained the ImageView software directly from Yojna Inc, not from a financial institution.

Please note that if you obtained ImageView from a financial institution, that entity provides first-level technical support for the application. They will contact Yojna as necessary if further assistance is required in troubleshooting an issue.

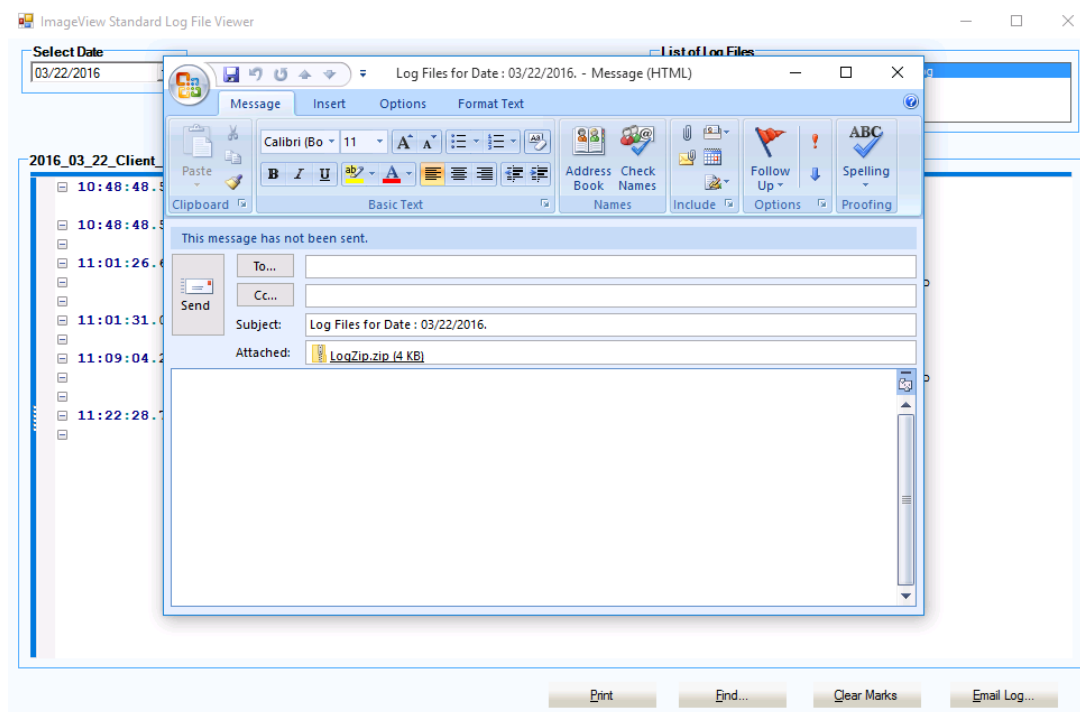


Figure 79: Sample new email message with logs attached (zipped)

The email functionality works with the following email applications:

- Microsoft Outlook.

4 Maintenance Setup

If you run setup after successfully installing ImageView v8.5.x, setup will open into maintenance mode. The options available are:

- Modify – not applicable to ImageView v8.5.x.
- Repair – select this option to repair/reinstall application program files. This option should be used in the event of application program file corruption, missing files, or similar circumstances. The repair setup procedure is described below.
- Remove – removes the application from the computer. Refer to Section 9 for instructions on uninstalling the ImageView software.

4.1 Local Mode

Before running setup, ensure that the application is shut down. Setup will find a running instance of the application and will exit. If you encounter this condition, shut down ImageView and then restart setup.

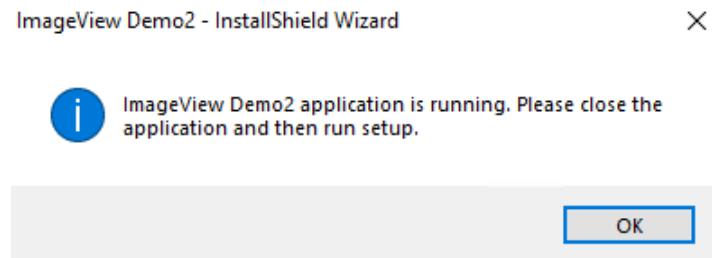


Figure 80: Application running message

To run setup in Repair mode, run setup from the installation media. The InstallShield Wizard will initialize.

The Setup Status screen will be displayed, and will display a progress meter while the application is updated.

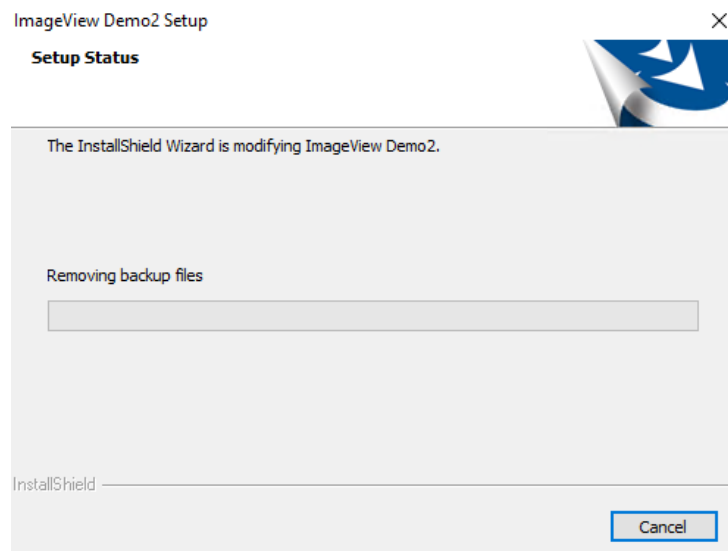


Figure 81: Setup Status screen

Setup will display a confirmation message after the maintenance setup completes. Click OK to close this message.

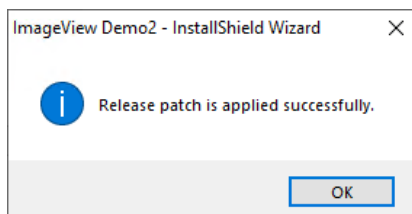


Figure 82: Confirmation message

Setup will then display the Maintenance Complete screen: click Finish to exit setup.

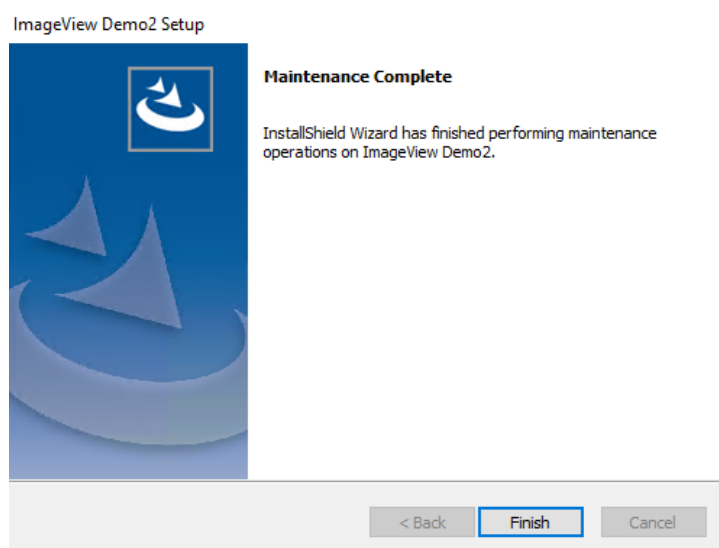


Figure 83: Maintenance Complete screen

4.2 Distributed Mode

Before running setup, ensure that the application is shut down on the ImageView server and on all ImageView clients. Setup will find any running instances of the application and will exit. If you encounter this condition, shut down all running instances of ImageView and then restart setup. To assist you in this process, the setup message will display a list of all computers with running instances of ImageView.

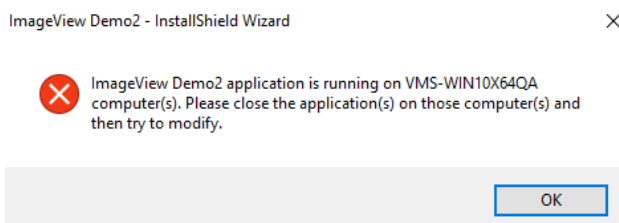


Figure 84: Application running on specified computer(s) message

To run a Repair mode setup on a client, connect to the NWINSTALL folder and run setup.exe. Proceed as described in section 4.1. It is only necessary to run a repair setup on the affected computer; you do not need to run repair on all ImageView clients.

To run a Repair mode setup on the ImageView server, run setup from the installation media and proceed as described in section 4.1.

5 Upgrading from ImageView v8.4.x

ImageView Standard v8.5.x supports in-place upgrades from ImageView Standard v8.4.x, provided that the upgrade occurs on a computer running a version of Windows that is supported for v8.5.x (refer to section 2.1 for the list of supported platforms).

Note: to upgrade a copy of v8.4.x that is installed on Windows 7 or Server 2008, you will need to install v8.5.x on a supported version of Windows (e.g. Windows 10, Server 2016) and then perform a data migration using the IV 8x Data Upgrade Utility.

SQL Server 2012 Express:

- ImageView Standard versions 8.4.0.0 – 8.4.0.39 installed SQL Server 2012 Express SP2.
- ImageView Standard versions 8.4.0.40 and higher installed SQL Server 2012 Express SP4 (for TLS 1.2 support)

Important: When upgrading to ImageView Standard v8.5.x, the SQL Server 2012 Express instance used by ImageView versions 8.4.x is not upgraded to SQL Server 2014 Express SP3. End users/organizations may subsequently upgrade to SQL Server 2014 Express SP3 as required/needed: when doing so, ensure that SQL Server 2012 Express is fully backed up first.

- SQL Server 2012 Express (all service packs) has an end-of-life date of July 12, 2022. Organizations/users should manually upgrade to SQL Server 2014 SP3 by this date.

Note: if SQL Server 2012 Express has been previously installed on a given computer, but ImageView Standard v8.4.x has not been installed (or has been completely uninstalled) on this same computer, ImageView Standard v8.5 setup will install the SQL Server 2014 Express SP3 instance. It will not attempt to upgrade SQL Server 2012 Express.

5.1 Before You Begin

1. Before proceeding with the upgrade, ensure that you have backed up your existing installation of ImageView v8.4.x, including the SQL Server 2012 Express folder(s).
2. Refer to Appendix D for instructions on how to manually upgrade to SQL Server 2014 Express

5.2 Local Mode Upgrade

Note: when upgrading from a previous version, a viewer license key is not required.

Shut down ImageView if it is running, then execute setup.exe for v8.5. The InstallShield Wizard will initialize.

A UAC message may be displayed; click Yes to continue.

Setup will check for any pre-requisite software, and install it as needed. Click Install to continue.

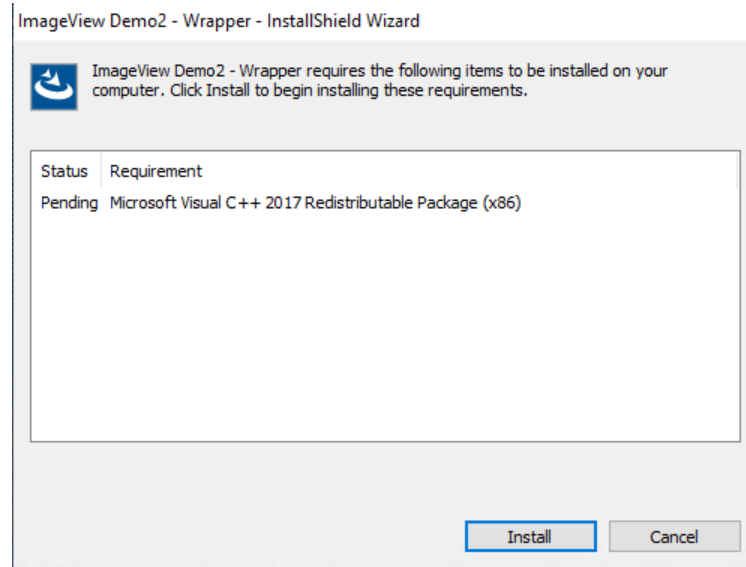


Figure 85: Pending component screen

After installing Visual C++ 2017, you may be prompted to reboot the computer. Reboot as indicated, do not skip this step.

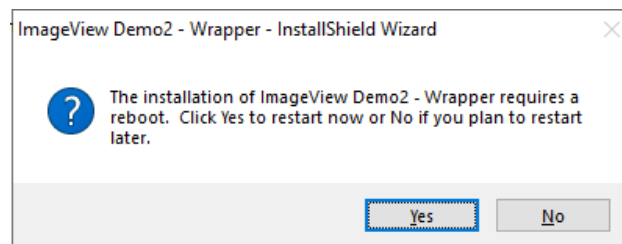


Figure 86: Reboot prompt

After rebooting and signing back on to Windows, setup will automatically resume (if it should not start, execute setup.exe again). After installing any pre-requisite components, the ImageView Wrapper setup re-initializes.

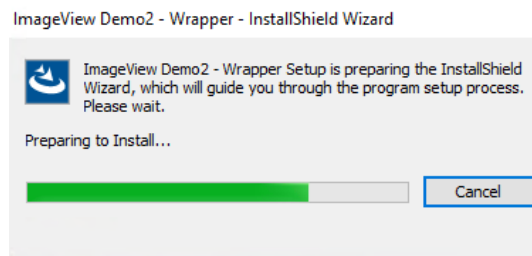


Figure 87: Preparing to Install screen

Next, a prompt will be displayed asking you to confirm the upgrade. Click Yes to continue.

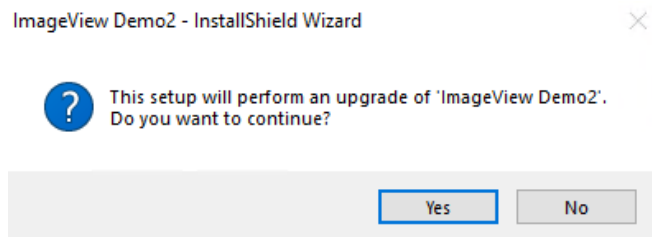


Figure 88: Upgrade confirmation message 1

A second instance of the InstallShield Wizard will initialize.

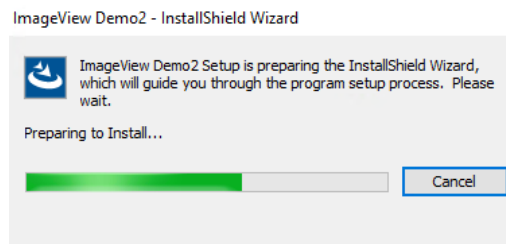


Figure 89: Preparing to Install screen

A second prompt will be displayed asking you to confirm the upgrade. Click Yes to continue.

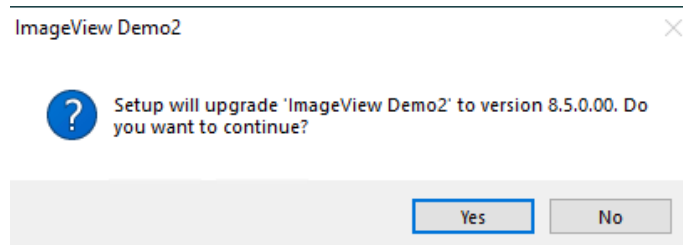


Figure 90: Upgrade confirmation message 2

The Resuming the InstallShield Wizard screen will now be displayed. Click Next to continue.

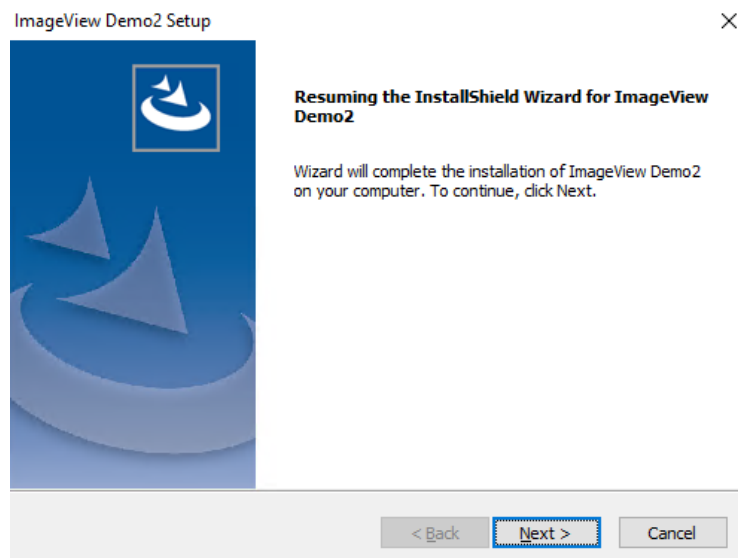


Figure 91: Resuming Wizard screen

Setup will begin the upgrade.

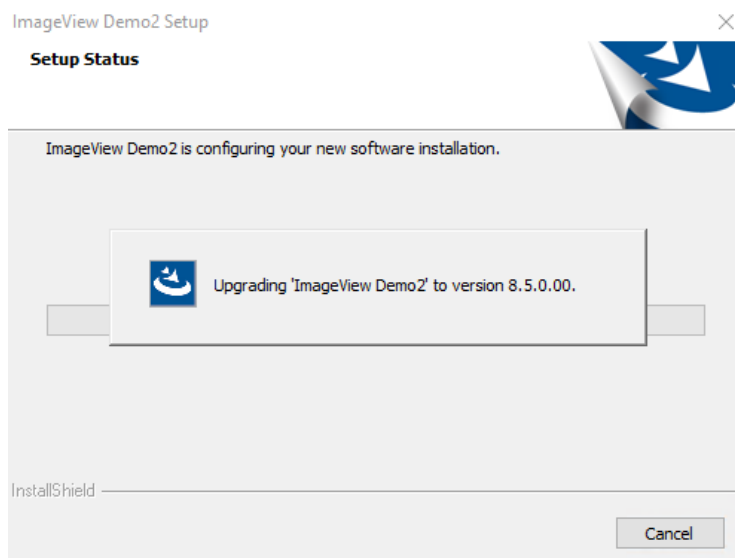


Figure 92: Upgrade message

Setup will then install the v8.4.x files and perform the upgrade

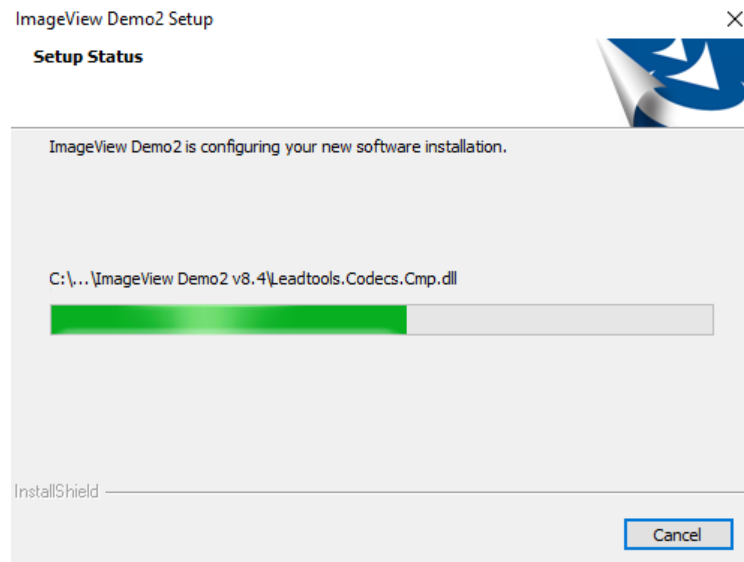


Figure 93: Setup Status screen

After installing the v8.5 files, the database will be upgraded. The screen in Figure 91 will be redisplayed. When finished, the Wizard Complete screen will be displayed. Click the Finish button to exit setup.

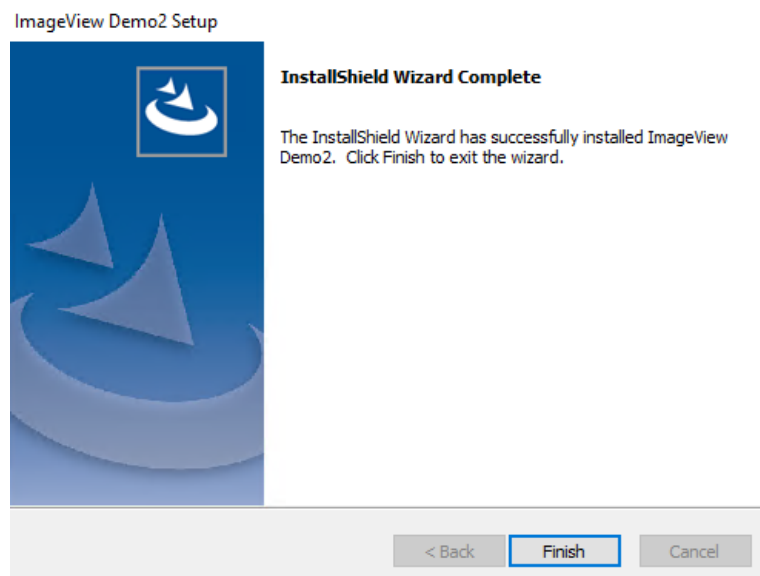


Figure 94: InstallShield Wizard Complete screen

5.3 Distributed Mode Upgrade

This section describes the procedures for upgrading a distributed mode installation of ImageView Standard v8.4.x. **Note:** when upgrading from a previous version, a viewer license key is not required.

Distributed mode upgrades should be performed in the following order:

1. Upgrade the ImageView server. The ImageView server is the computer on which the initial setup of v8.4.x was performed, and on which the ImageView database hosted in SQL Server 2012 Express resides.

Notes:

- Refer to the beginning of section 5 for additional information regarding upgrading SQL Server 2012 Express instances. ImageView Standard v8.5.x does not upgrade SQL Server 2012 Express to SQL Server 2014 Express. SQL Server will need to be manually upgraded.
- The presence of the ImageView database on a computer can be confirmed by opening the Services console and locating service “SQL Server (<IMAGEVIEWER84)”.

2. Upgrade the ImageView clients.

Setup will display a message indicating that the upgrade is being initiated on the wrong computer if the upgrade is initiated on an ImageView client, and exit.

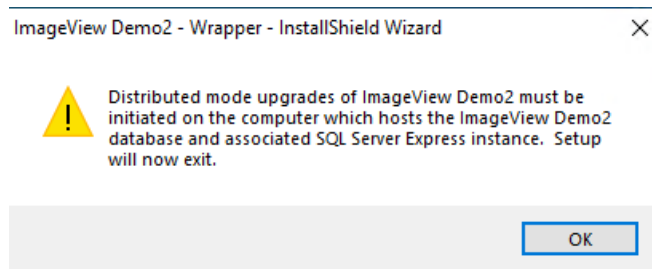


Figure 95: Incorrect computer message

Before running setup, ensure that the application is shut down on the ImageView server and on all ImageView clients. Setup will find any running instances of the application and will exit. If you encounter this condition, shut down all running instances of ImageView and then restart setup. To assist you in this process, the setup message will display a list of all computers with running instances of ImageView.

5.3.1 Server-side Components

First, sign on to the computer where ImageView Standard v8.4.x was initially installed. This computer will also have SQL Server 2012 Express SP2 or SP4 installed on it.

Shut down ImageView if it is running, then execute setup.exe for v8.5. The InstallShield Wizard will initialize.

- If a User Account Control message is displayed, click Yes.

Setup will check for third-party components, and install as needed. Click Install to continue.

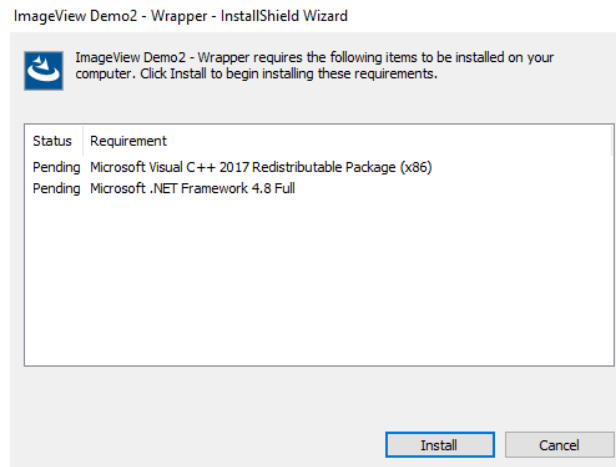


Figure 96: Pending component screen

After installing third-party components, you may be prompted to reboot; reboot as prompted, and sign back on to Windows. Setup will automatically resume after signing back on.

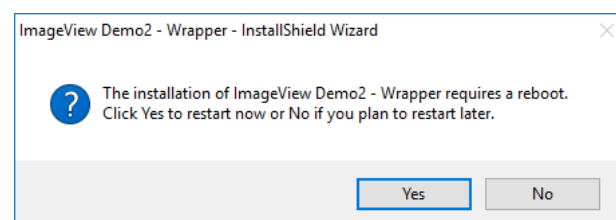


Figure 97: Reboot prompt

After installing any pre-requisite components, the ImageView Wrapper setup re-initializes.

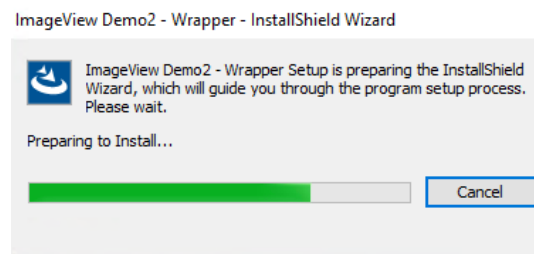


Figure 98: Preparing to Install screen

Next, a prompt will be displayed asking you to confirm the upgrade. Click Yes to continue.

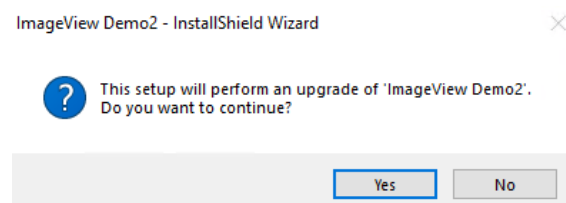


Figure 99: Upgrade confirmation message 1

A second instance of the InstallShield Wizard will initialize.

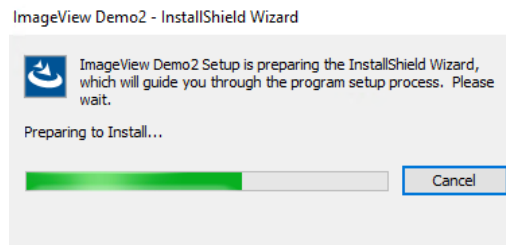


Figure 100: Preparing to Install screen

A second prompt will be displayed asking you to confirm the upgrade. Click Yes to continue.

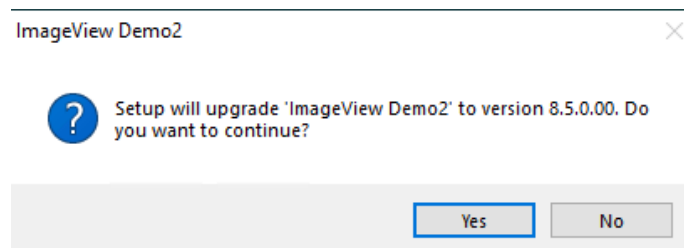


Figure 101: Upgrade confirmation message 2

The Resuming the InstallShield Wizard screen will now be displayed. Click Next to continue.

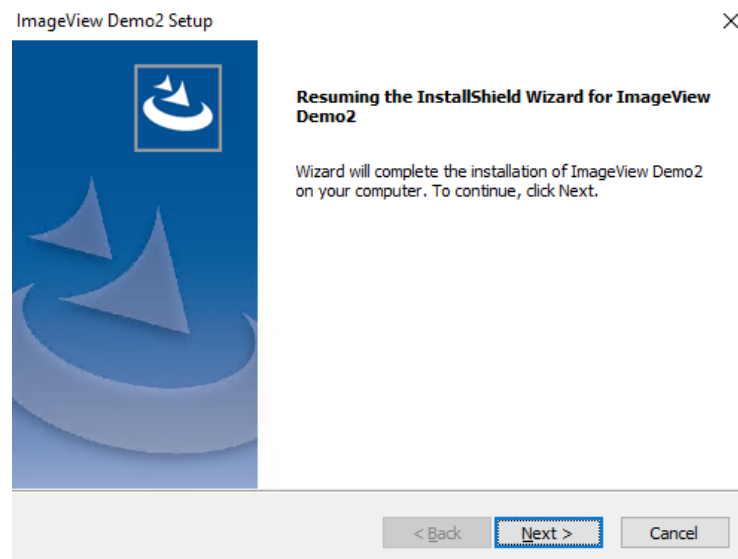


Figure 102: Resuming InstallShield Wizard screen

Setup will begin the upgrade, after first backing up the existing files.

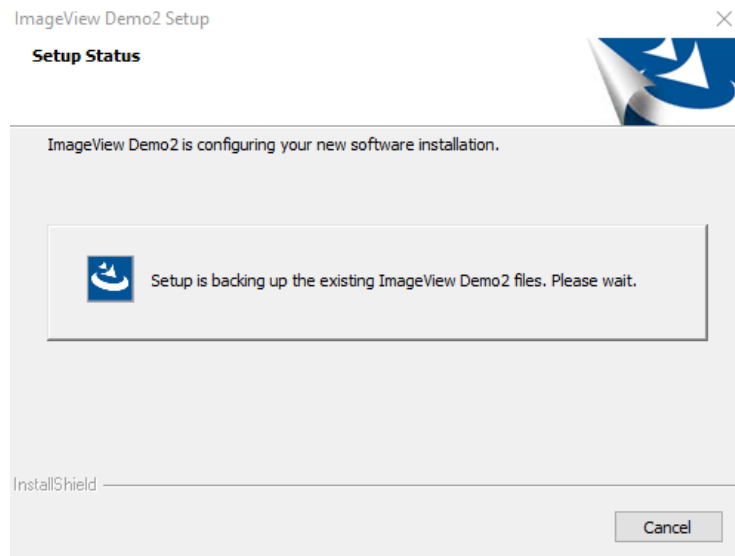


Figure 103a: Backing up files message

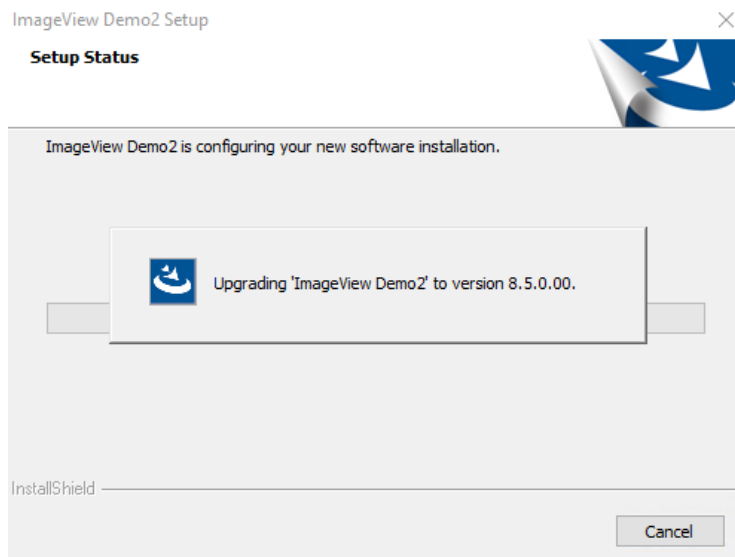


Figure 103b: Upgrade message

Next, setup will update the contents of the ClientInstallation folder.

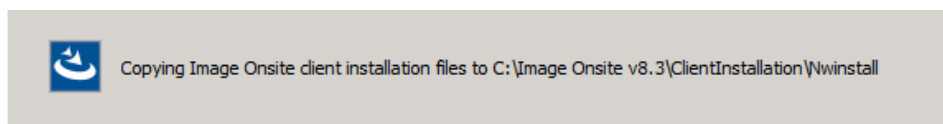


Figure 104: Upgrading client setup files

Setup will then begin copying the new files.

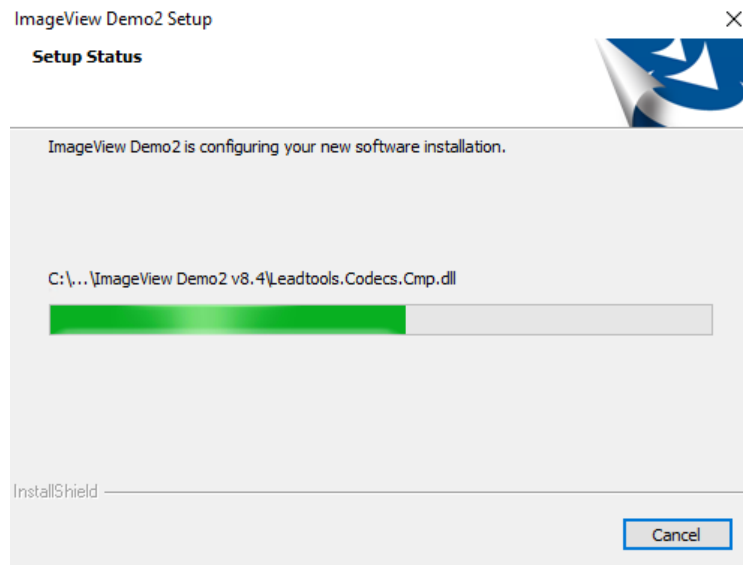


Figure 105: Setup Status screen

After installing the v8.5 files, the database will be upgraded. The screen in Figure 100b will be redisplayed. When finished, a message will be displayed reminding you to upgrade existing clients.

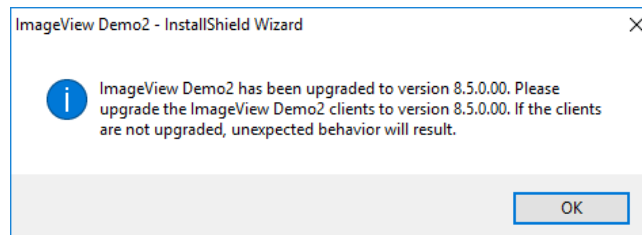


Figure 106: Upgrade clients reminder message

Click OK to close this message. The Wizard Complete screen will now be displayed. Click the Finish button to exit setup.

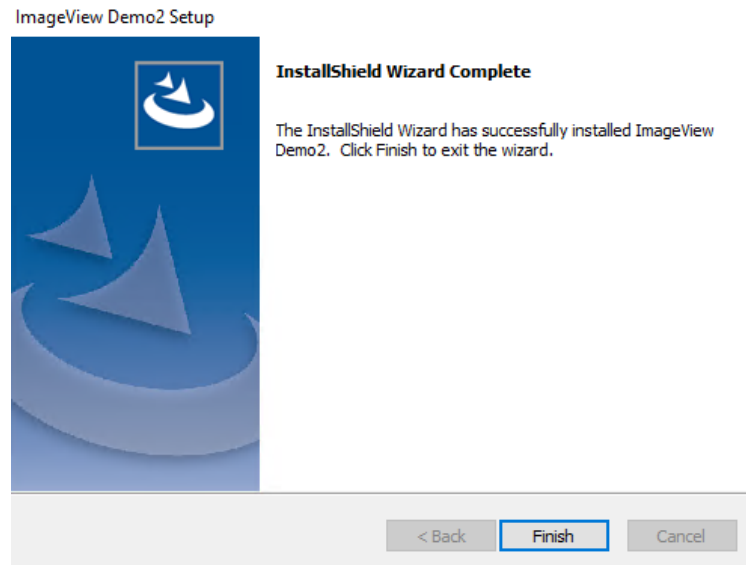


Figure 107: InstallShield Wizard Complete screen

5.3.2 Upgrading the Clients

Note: an upgrade to v8.5 will use the existing installation folder for v8.4.x:

- If v8.4.x was installed as a new installation, an upgrade to v8.5 will continue using the existing v8.4.x folder.
- If v8.4.x was installed as an upgrade to v8.3.x.x, the default installation folder was outside of the C:\Program Files (x86) or C:\Program Files folders. If you want to install v8.5 into the C:\Program Files (x86) folder (x64 systems) or C:\Program Files folder (x86 systems) in order to meet your organization's software installation requirements, you will need to uninstall the existing client and then install v8.5 as if it was a brand new client install. Doing this will not affect the ImageView data, as the data does not reside on the client computer(s).
- ImageView Standard versions prior to v8.4.x did not allow installation into the C:\Program Files (x86) or C:\Program Files folders. This limitation was resolved in v8.4.x.

To upgrade the v8.4.x ImageView clients, on the client computer(s) browse to the <ImageView v8.5>\ClientInstallation\Nwinstall folder on the ImageView server that has just been upgraded, and execute SETUP.EXE.

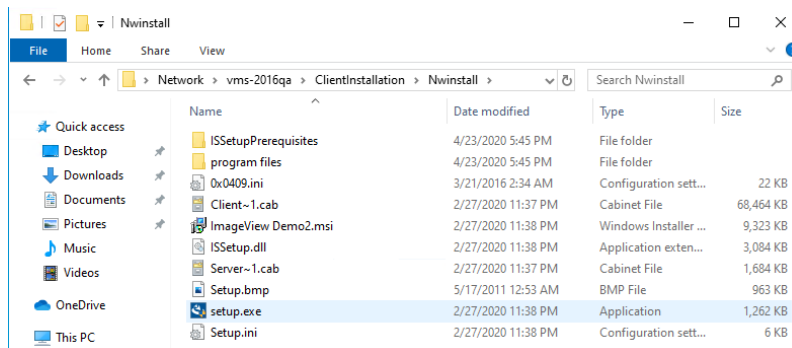


Figure 108: <ImageView server>\ClientInstallation\Nwinstall folder

- If a User Account Control message is displayed, click Yes/Allow to continue.

V8.5 client upgrade setup will first examine your computer for required third-party software components (e.g. .NET Framework v4.8), and install them as necessary: click the Install button to continue.

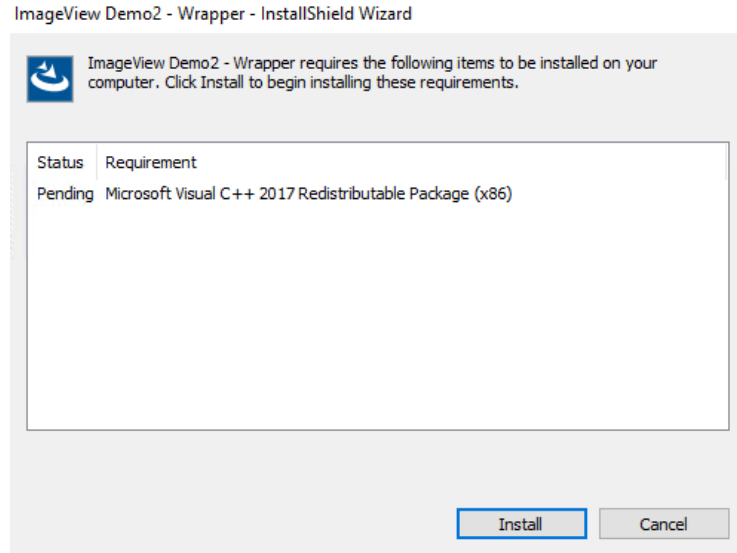


Figure 109: Pending component screen

Reboot if prompted to do so. Do not skip this step if you are prompted to reboot.

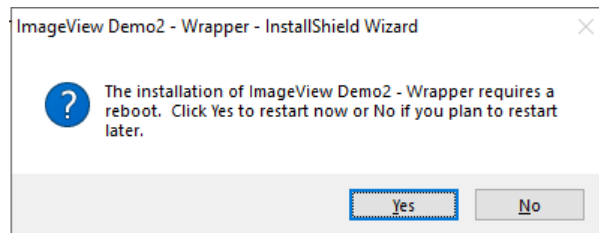


Figure 110: Reboot prompt

After rebooting, log on to Windows, and setup should resume automatically. Restart setup.exe if it does not.

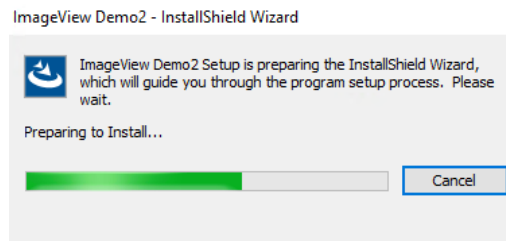


Figure 111: Preparing to Install screen

A prompt will be displayed asking you to confirm the upgrade. Click Yes to continue.

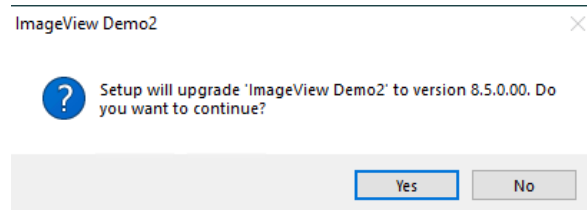


Figure 112: Upgrade confirmation message

The Resuming the InstallShield Wizard screen will be displayed. Click Next to continue.

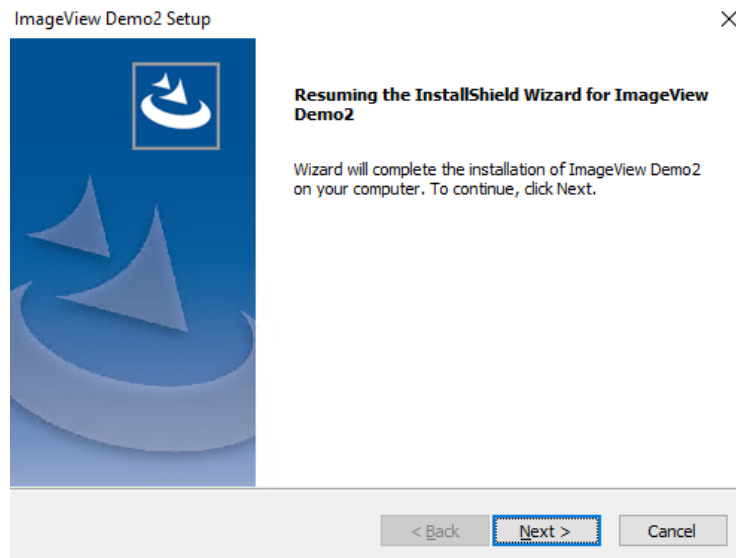


Figure 113: Resuming the InstallShield Wizard screen

Setup will now copy the new files.

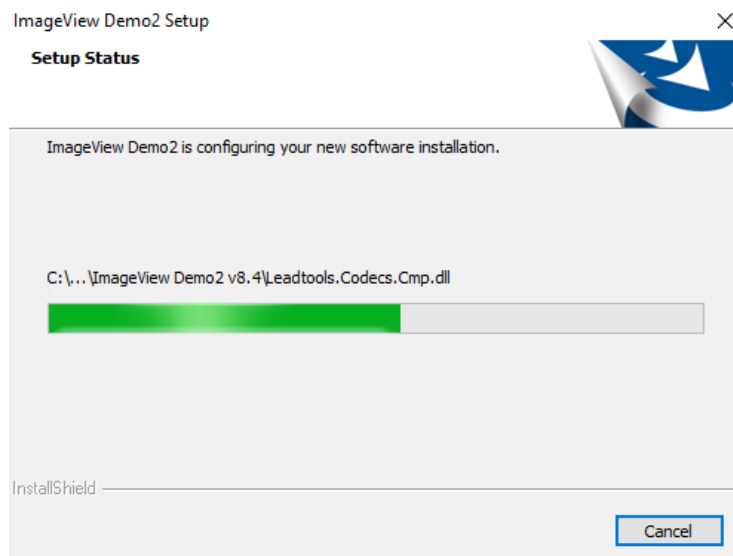


Figure 114: Setup Status screen

When finished, the Wizard Complete screen will be displayed. Click the Finish button to exit setup.

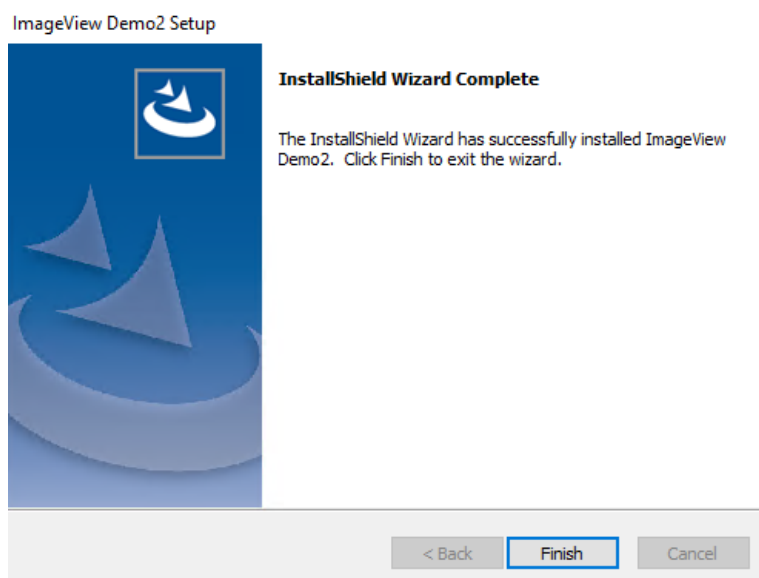


Figure 115: InstallShield Wizard Complete screen

Ensure that all existing v8.4.x clients are upgraded before using v8.5.

6 Migrating from ImageView v8.3.2.x/v8.3.0.x

This section describes the procedure for migrating from the following versions of ImageView Standard:

- v.8.3.2.x
- v.8.3.0.x

The migration procedure for v8.3.2.x/v8.3.0.x consists of the following steps:

1. Perform a clean installation of ImageView Standard v8.5.x on a supported version of Windows. Refer to section 2.1 for the list of supported versions of Windows.
 - Performing a clean installation will allow you to install v8.5 into the default C:\Program Files (x86) or C:\Program Files folder. Versions 8.3.2.x/8.3.0.x could not be installed into either of these folders.
2. Run the IV 8 Data Upgrade Utility to import data from v8.3.2.x/v8.3.0.x into v8.5.x.
3. Copying any folders created to store data for v8.3.x.x to the computer running v8.5.x. **Note:** this only needs to be done if an Import Data Image Path has been configured in System Configuration for v8.3.x.x.

Notes:

- To run the upgrade utility, the computer running ImageView Standard v8.3.x.x must be powered on and connected to the network.
- Versions 8.3.2.x/8.3.0.x used SQL Server 2008 R2 Express as the application database. SQL Server 2008 (all editions) reached end-of-life in July 2019. Performing a clean installation of v8.5.x on another computer and then running a data migration will ensure that data is stored into SQL Server 2014 Express.

SQL Server 2008 R2 Express:

- ImageView Standard versions 8.3.0.x installed the initial RTM release of SQL Server 2008 R2 Express.
- ImageView Standard versions 8.3.2.x installed SQL Server 2008 R2 Express SP2.

Important: if you should upgrade to ImageView Standard v8.5.x in place, the SQL Server 2008 R2 Express instance used by ImageView versions 8.3.x.x **is not** upgraded to SQL Server 2014 Express SP3.

Note: if SQL Server 2008 R2 Express has been previously installed on a given computer, but ImageView Standard v8.3.x.x has not been installed (or has been completely uninstalled) on this same computer, ImageView Standard v8.5 setup will install the SQL Server 2014 Express SP3 instance. It will not attempt to upgrade SQL Server 2008 R2 Express.

6.1 Before You Begin

Before proceeding with the upgrade:

- Ensure that you have backed up your existing installation of ImageView v8.3.x.x, including the SQL Server 2008 R2 Express folder(s).
- Folder security: the account being used to run the IV 8x Data Upgrade utility from v8.5 needs Write permissions to the ImageView v8.3.x.x installation folder.
- Share the ImageView v8.3.x.x installation folder. Change permissions are required. If Change permissions are not assigned to the ImageView v8.3.x.x installation folder, a message will be displayed (figure 116).

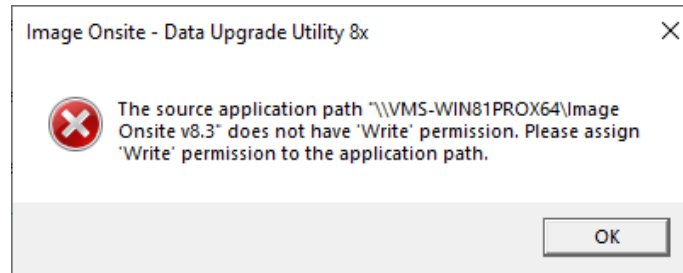


Figure 116: Incorrect permissions message

6.2 Local Mode Upgrade

Shut down ImageView if it is running, then execute setup.exe for v8.5. The InstallShield Wizard will initialize.

1. Install ImageView Standard v8.5 in local mode. Refer to sections 2.6.1 – 2.6.2 as necessary for detailed instructions.
2. After the installation has completed, start the IV 8x Data Upgrade utility.

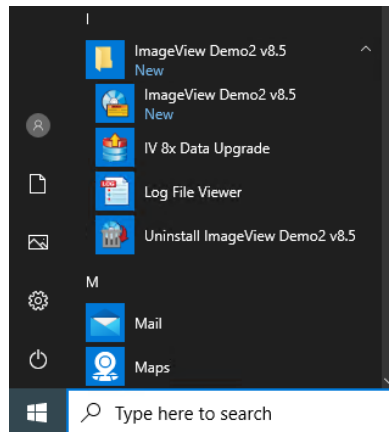


Figure 117: Windows 10 Start menu

3. The IV 8x Data Upgrade utility opens, displaying the main dialog box.

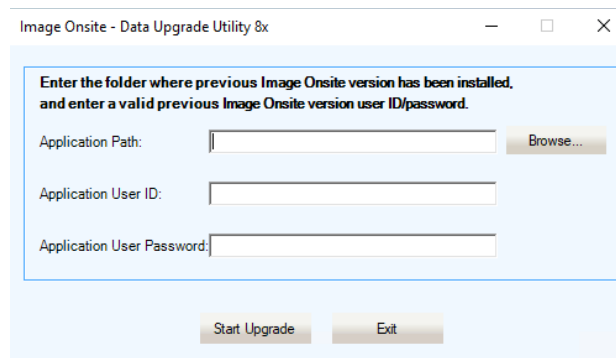


Figure 118: IV 8x Data Upgrade utility dialog box

Enter the following values:

- Application Path: click the Browse button, or type in the computer name and v8.3.x.x shared folder name. Typed names must be in UNC format e.g. \\<computer A>\<v8.3.x.x share>. When accessing the v8.3.x.x folder, select the parent level, not any subfolders.

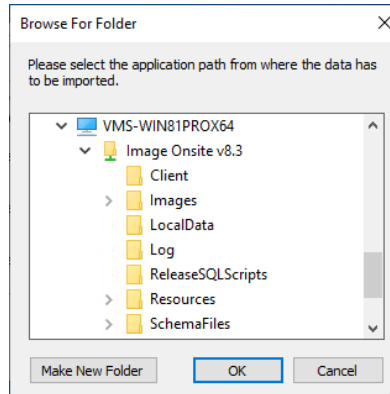


Figure 119: Browse for Folder dialog box

- Application User ID: enter a valid user ID for v8.3.x.x
 - Application User Password: enter the corresponding user password.
4. Click the Start Upgrade button. The utility will locate the v8.3.x.x computer and authenticate with v8.3.x.x. Upon successful authentication, the utility will begin importing the v8.3.x.x data.

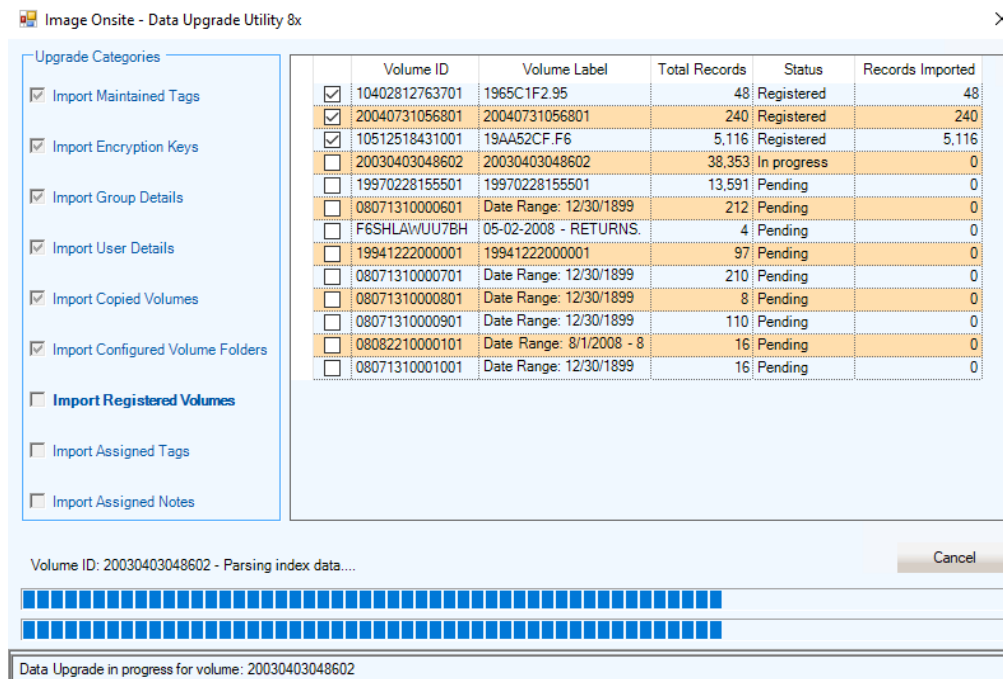


Figure 120: Data Upgrade processing screen

5. Upon completion and successful processing, a confirmation message will be displayed. Click OK to close this message.
6. Click the Close button to exit the IV 8x Data Upgrade utility.

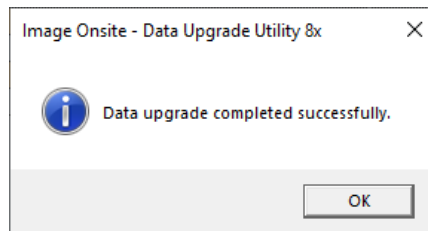


Figure 121: Confirmation message

7. Sign on to ImageView Standard v8.5 and verify that data was imported correctly.

6.3 Distributed Mode

This section describes the procedures for upgrading a distributed mode installation of ImageView Standard v8.3.x.x.

Before running setup, ensure that the application is shut down on the ImageView server and on all ImageView clients. Setup will find any running instances of the application and will exit. If you encounter this condition, shut down all running instances of ImageView and then restart setup. To assist you in this process, the setup message will display a list of all computers with running instances of ImageView.

Distributed mode upgrades should be performed in the following order:

1. Install ImageView Standard v8.5 in distributed mode. Refer to sections 2.6.1 and 2.6.3 as necessary.
2. Execute the IV 8x Data Upgrade utility, as described in section 6.2.
3. Sign on to a client instance of v8.5 and verify that the data was migrated successfully into v8.5.

6.4 Data Upgrade Log File

The IV 8x Data Upgrade Utility creates a log file in the ImageView v8.5 log folder, <ImageView 8.5>\Log. The file is named <date>_Client_DataUpgrade8x.log.

6.5 Copying the Import Data Image Path Folder

As noted in section 6, if you have defined an Import Data Image Path folder in v8.3.x.x, you will need to copy that folder to the computer where you are installing v8.5.x. This procedure can be done after installing v8.5.x.

To locate the Import Data Image Path folder, sign on to v8.3.x.x with an administrator account and open the System Configuration module.

Copy this folder and contents to the v8.5.x computer, as a subfolder of the v8.5.x installation folder.

Sign on to v8.5.x and update the path as necessary. For example: if the path on v8.3.x.x is "C:\Image 83\Images" and v8.5.x is installed to "C:\Program Files (x86)\Image v85", update the Import Data Image Path to "C:\Program Files (x86)\Image v85\Images" and save the change.

Edit permissions so that ImageView v8.5.x users can write files to this location. **Note:** for distributed mode installations, you will also need to create/update share permissions – users will need Change permissions.

7 Patch Installation

Periodically, Yojna Inc. will release patches to address bug fixes and/or provide application updates. This section describes the software patch installation procedures.

Patches released by Yojna are cumulative; they contain any previous patches in addition to the latest fixes/updates.

During patch installation, the following occurs:

- ImageView Standard v8.5 application files are updated as required.
- A database script is automatically executed to apply any database updates to the database instance used by ImageView Standard v8.5.
- Log files are generated to record the installation process.

7.1 Local Mode Patch Installation

In local mode, patches will update accordingly the files and database instance used by ImageView Standard v8.5.

For local mode installations, do the following to install a patch:

1. Shut down ImageView Standard v8.5 if it is running.
2. Unzip the patch to a folder on the hard disk of the computer where ImageView Standard v8.5 is installed. You can use the <ImageView 8.5> installation folder, or another folder.
3. After unzipping, the patch will create folder “ReleasePatches”.

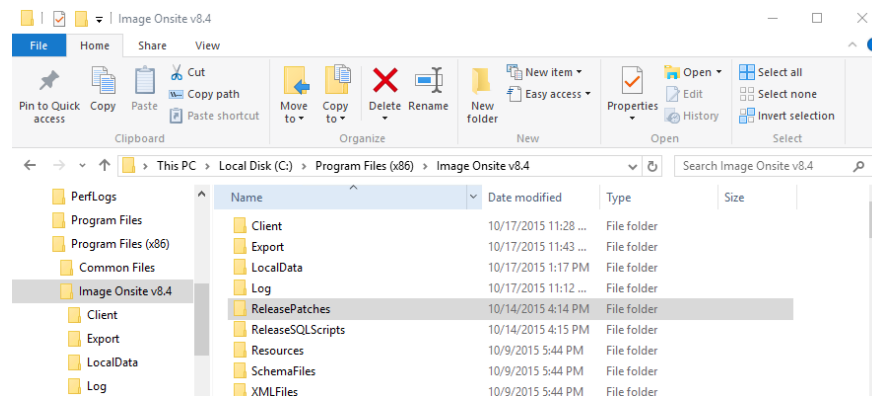


Figure 121: ReleasePatches folder

4. Open folder ReleasePatches, and execute CopyPatches.exe.

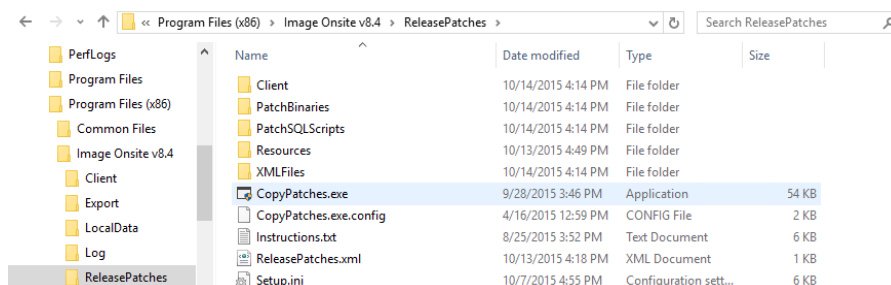


Figure 122: CopyPatches.exe location

5. If a User Account Control message is displayed, click Yes/Allow to continue. The patch will install silently: application files are updated and a database script is executed to apply any required database updates.
6. When the patch installation has completed, a confirmation message will be displayed. Click OK to close the message.

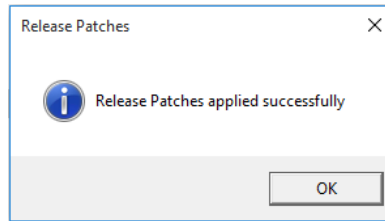


Figure 123: Patch installation confirmation message

7.2 Distributed Mode Patch Installation

In distributed mode, patches will update accordingly the files and database instance used by ImageView Standard v8.x, and will also update the contents of the “ClientInstallation” folder used to install ImageView clients.

For distributed mode installations, the patch must be installed in the following order:

1. ImageView server. The ImageView server is the first computer on which the ImageView Standard v8.x application was installed, and which also hosts the SQL Server database instance installed by ImageView. **Note:** the ImageView server should also be updated first in order to ensure that the contents of the “ClientInstallation” folder are correctly updated.
2. ImageView clients. **Note:** in distributed mode, all existing clients must be updated with the patch being applied.
 - For any new clients that are installed after applying a patch, new clients will have the patch automatically applied during installation.

7.2.1 Patching the ImageView Server

1. Shut down ImageView Standard v8.5 if it is running.
2. Unzip the patch to a folder on the hard disk of the computer where ImageView Standard v8.5 is installed. You can use the <ImageView 8.5> installation folder, or another folder.
3. After unzipping, the patch will create folder “ReleasePatches” (refer to Figure).
4. Open folder ReleasePatches, and execute CopyPatches.exe (refer to Figure).
5. If a User Account Control message is displayed, click Yes/Allow to continue. The patch will install silently: application files are updated and a database script is executed to apply any required database updates.
6. When the patch installation has completed, a confirmation message will be displayed. Click OK to close the message.

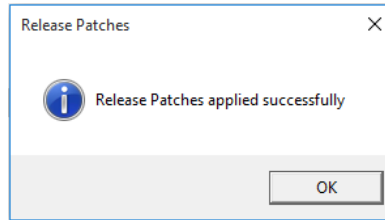


Figure 124: Patch installation confirmation message

7.2.2 Patching the Clients

On each client, do the following:

1. Open Windows Explorer/File Explorer and browse to the computer hosting the ClientInstallation\NWInstall folder.
2. Browse to folder ClientInstallation\Nwinstall\program files\ImageView 8\ReleasePatches
3. Execute CopyPatches.exe. If a User Account Control message is displayed, click Yes/Allow to continue. The patch will install silently: application files are updated on the client.
4. When the patch installation has completed, a confirmation message will be displayed. Click OK to close the message.

7.3 Log Files

Patch installation log files are stored to the configured ImageView Standard v8.5 log folder e.g. <ImageView v8.5>\Log.

The patch log files are:

- <date>_CopyPatches.log
- ExecuteSQLScript.log

8 Uninstalling ACCORD ImageView Standard v8.5.x

This section describes procedures for uninstalling the ImageView Standard v8.5.x software. These procedures do not include removal of any third-party components.

8.1 Local Mode Uninstall

To remove a local mode installation of ACCORD ImageView v8.5.x, follow the instructions below.

Note: to uninstall the ImageView Standard v8.5.x application, you must use an account with local administrator rights.

Open Control Panel and select Programs and Features.

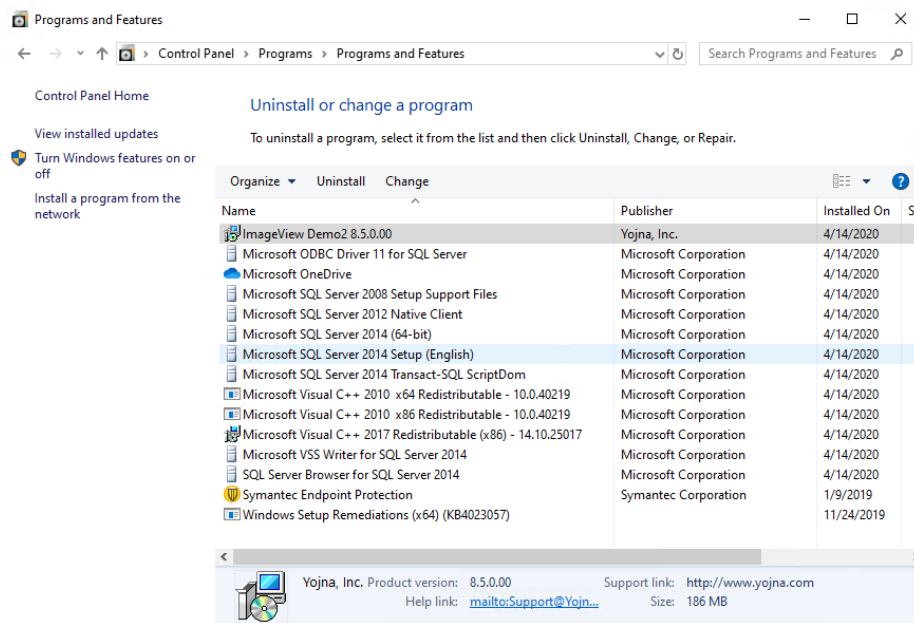


Figure 125: Programs and Features screen (Windows 10)

Select the ImageView application from the list of installed programs (note that the application name may be customized as per the financial institution's requirements): an Uninstall/Change button will now appear in the toolbar, or you can also right-click on the program entry to display the Uninstall/Change popup menu. Click Uninstall/Change.

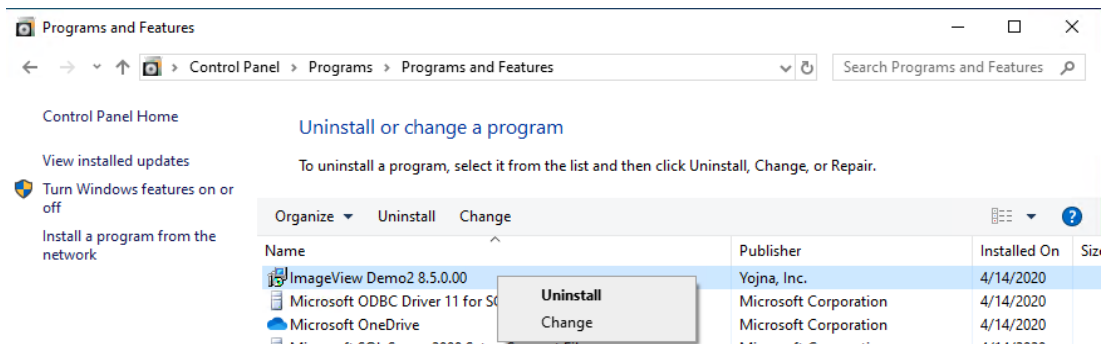


Figure 126: Uninstall options (Windows 10)

The InstallShield Wizard will initialize, and you will then be prompted to confirm the uninstallation – click Yes to continue removing the application, or No to abort the uninstall process.

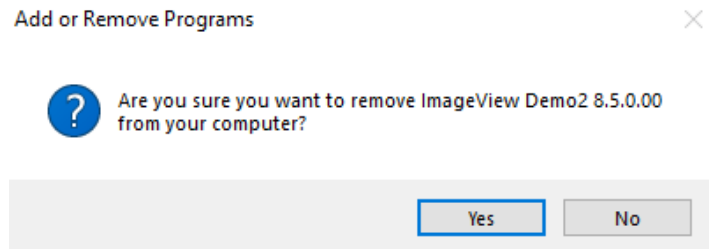


Figure 127: Confirm Uninstall message

The Setup Status screen will be displayed, showing the uninstall progress.

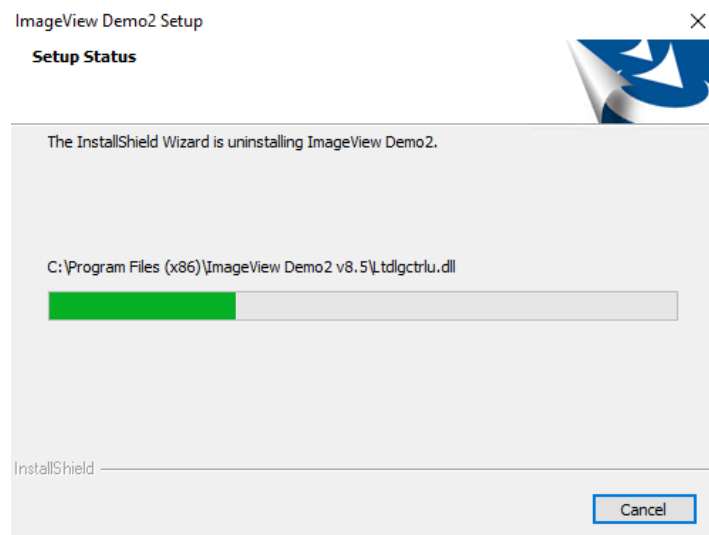


Figure 128: Setup Status screen

When setup has finished uninstalling the application, a confirmation message will be displayed. Click Finish to exit setup.

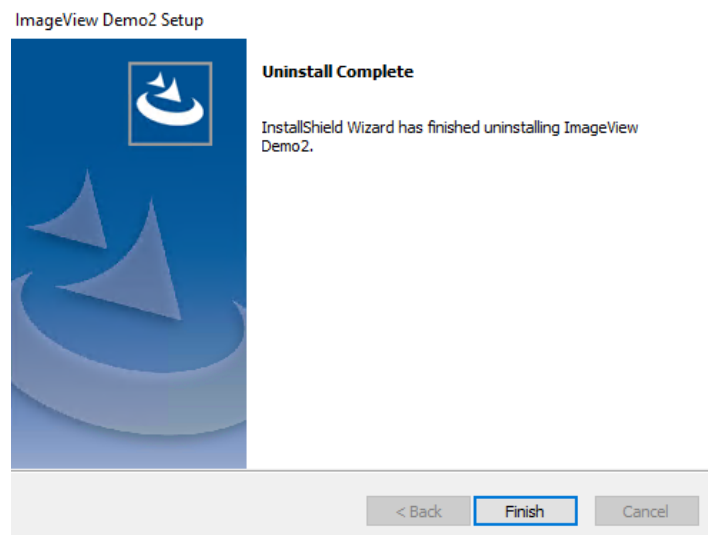


Figure 129: Uninstall Complete screen

8.2 Distributed Mode Uninstall

When uninstalling an entire distributed mode installation of ImageView, you should first remove the clients. The server installation should be the last computer uninstalled, as the ImageView server contains the ImageView database and client setup files (NWINSTALL folder).

Individual ImageView clients can be uninstalled at any time.

New clients can be installed at any time, as long as the computer containing the initial installation with the NWINSTALL folder is available and has the ImageView application installed.

Note: to uninstall the ImageView Standard v8.5.x application, you must use an account with local administrator rights.

8.2.1 Uninstalling Clients

Note: to uninstall the ImageView Standard v8.5.x application, you must use an account with local administrator rights.

Open Control Panel and select Programs and Features.

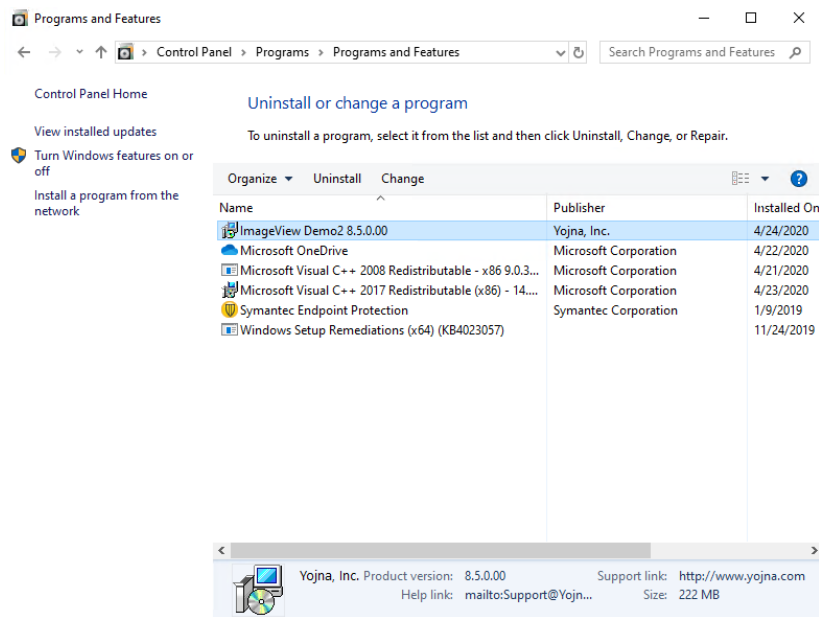


Figure 130: Programs and Features screen (Windows 10)

Select the ImageView application from the list of installed programs (note that the application name may be customized as per the financial institution's requirements): an Uninstall button will now appear in the toolbar, or you can also right-click on the program entry to display the popup menu. Click Uninstall.

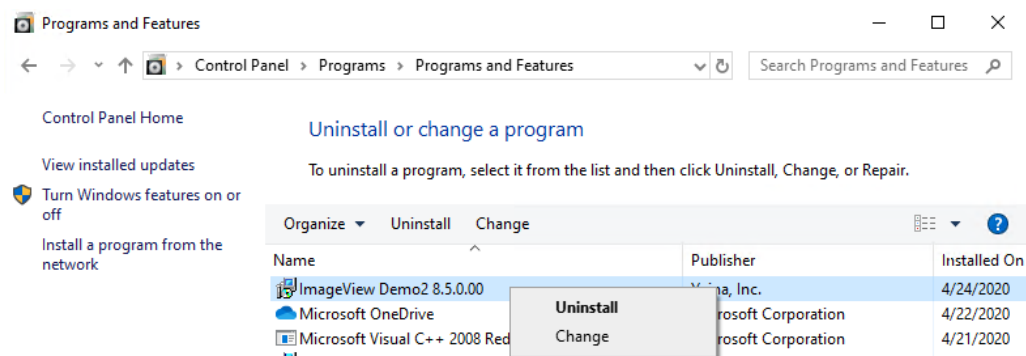


Figure 131: Uninstall options (Windows 10)

The InstallShield Wizard will initialize, and then display a confirmation message. Click the Yes button.

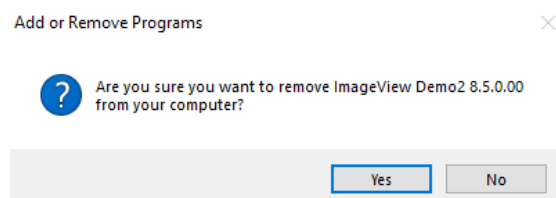


Figure 132: Add or Remove Programs confirmation message

The Setup Status screen will be displayed, showing the uninstall progress.

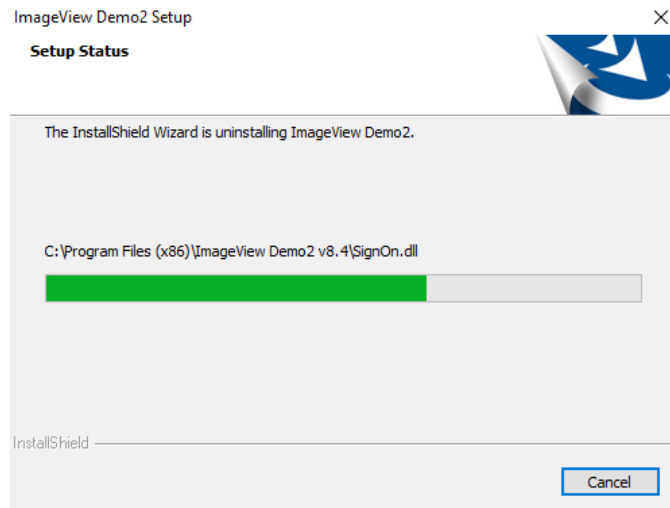


Figure 133: Setup Status screen

When uninstall is complete, click the Finish button. The Programs and Features screen will then refresh to show that the application has been removed.

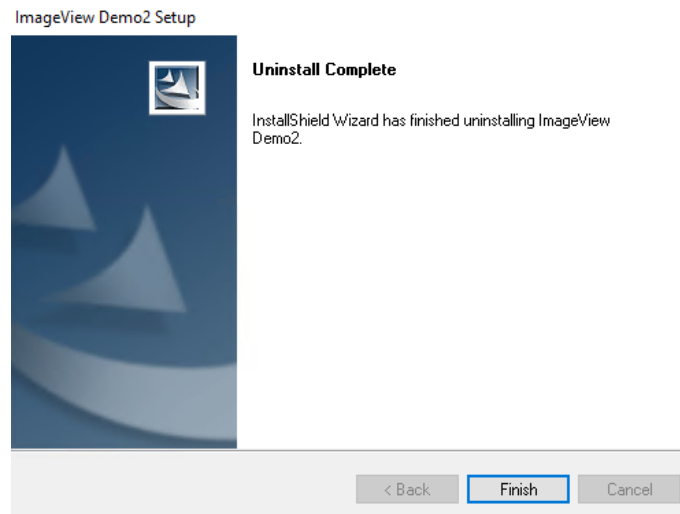


Figure 134: Uninstall Complete screen

8.2.2 Uninstalling the ImageView Server

Note: to uninstall the ImageView Standard v8.5.x application, you must use an account with local administrator rights.

Open Control Panel and select Programs and Features.

ImageView Standard v8.5.x Installation Guide

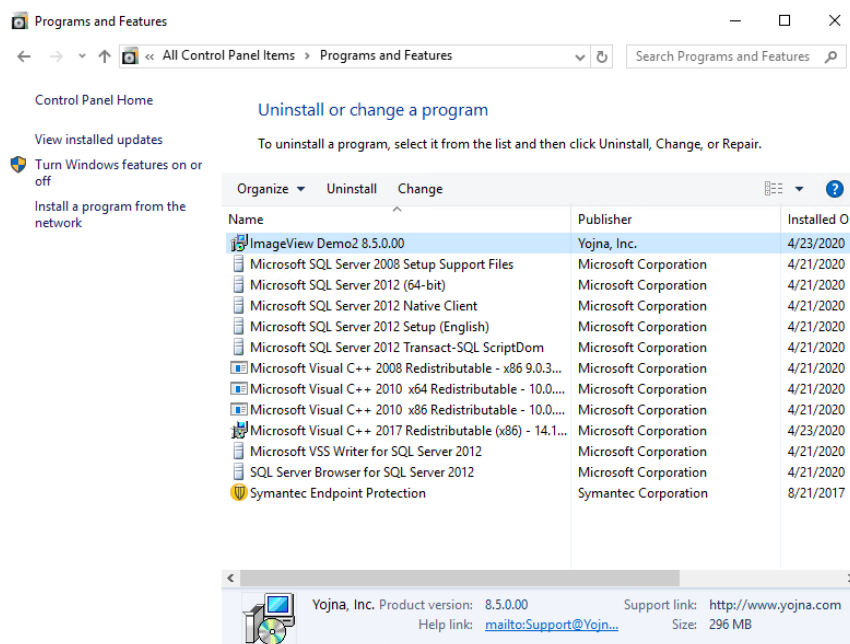


Figure 135: Programs and Features screen (Windows Server 2019)

Select the ImageView application from the list of installed programs (note that the application name may be customized as per the financial institution's requirements) and click the Uninstall button. A User Account Control dialog box may appear: click Continue to proceed.

The InstallShield Wizard will initialize, and then a confirmation message will be displayed. Click the Yes button.

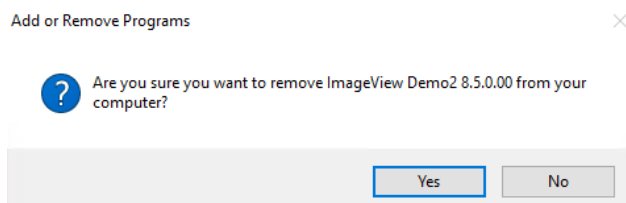


Figure 136: Add or Remove Programs confirmation message

Setup will first check to see if all ImageView clients have been uninstalled. If there are any ImageView clients remaining to be uninstalled, a message similar to the following will be displayed:

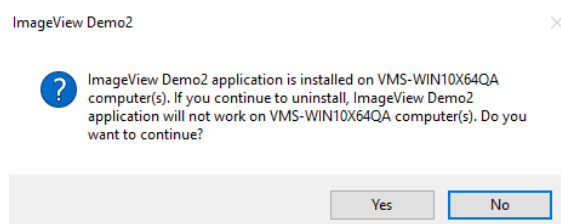


Figure 137: Instance(s) of ImageView client(s) message

If this message appears, click No to exit setup on the ImageView server. Now go to the identified client(s) and uninstall the ImageView client application. When that has been completed, you can resume the uninstallation of the ImageView server.

The Setup Status screen will be displayed, showing the uninstall progress.

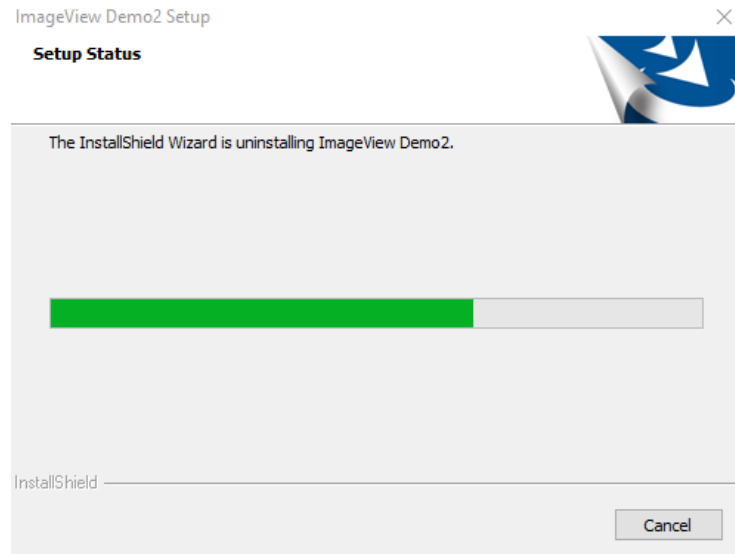


Figure 138: Setup Status screen

When uninstall is complete, click the Finish button. The Add or Remove Programs screen will then refresh to show that the application has been removed.

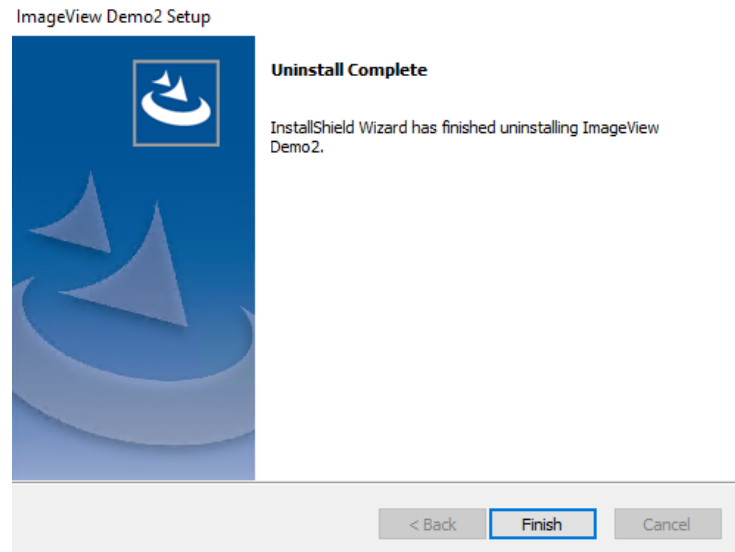


Figure 139: Uninstall Complete screen

8.3 Alternate Uninstall Method

The following describes an alternate method of uninstalling ImageView Standard v8.5.x, in the event that uninstall fails using Programs and Features as described above.

Note: local administrator rights are required to execute the alternate uninstall methods described below.

8.3.1 Windows 8.1, Windows 10, and Server 2012

On Windows 8.1, Windows 10, and Server 2012/2012 R2, the <Uninstall ImageView Standard v8.5> option may not be visible on the Apps page program lists.

To execute the alternate uninstallation method, open Windows/File Explorer to C:\ProgramData\Microsoft\Windows\Start Menu\Programs\<ImageView Standard v8.5>, and execute the <Uninstall ImageView Standard v8.5> option. **Note:** the C:\ProgramData folder may be hidden. If this is the case, click the View menu option and enable the “Hidden items” option in the Show\hide section of the ribbon bar.

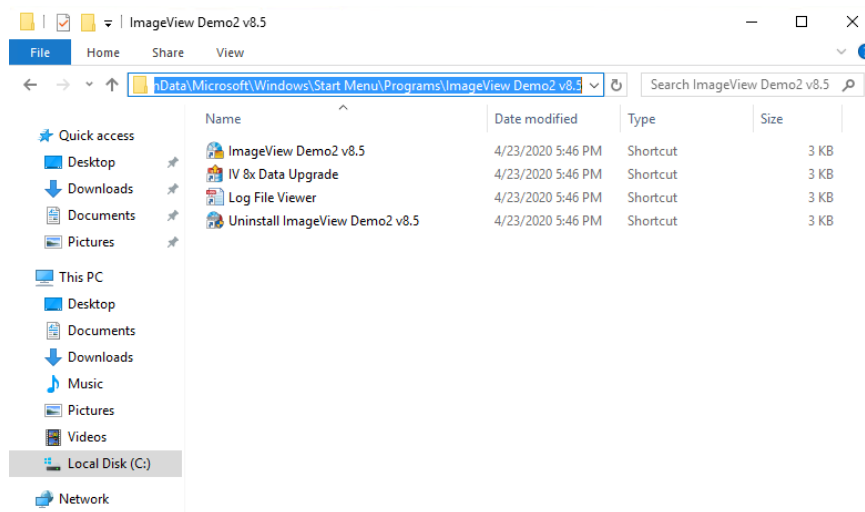


Figure 140: C:\ProgramData folder contents (Windows 10)

A User Account Control message will be displayed: click Yes to continue.

The InstallShield Wizard will initialize, and you will then be prompted to confirm the uninstallation – click Yes to continue removing the application, or No to abort the uninstall process.

- For local mode uninstallation, proceed as described in section 8.1.
- For distributed mode uninstallation, proceed as described in section 8.2.

9 Glossary

CD Report: the electronic representation of bank statements stored on a check image CD-ROM. Note that not all financial institutions choose to offer this feature.

Data Manager: the ImageView component used to register, unregister, and delete CD volumes.

Distributed mode: a configuration where ImageView is installed to several computers connected on a network segment such that the machines share a common user profile and volume set database.

Document: a record set pertaining to a specific check or document, including the index information and associated images.

Image: the electronic representation of a check or document photocopy as recorded by the financial institution and stored on a CD-ROM.

Index: a record set pertaining to a specific check or document which contains such information as the R/T Number, check number, check amount, date paid, etc.

Local Mode: a configuration where ImageView is installed to one computer and the user profile and volume set database resides solely on that computer. Refer to the *ImageView v8.5.x Installation and Upgrade Guide* for additional information.

Note: a text item that may be attached to a document. Notes are the equivalent of Post-It notes, and can be up to 8,000 characters in length. The contents of Notes cannot be used for search criteria.

Profile Manager: the ImageView component used to define users, application access rights, and account access rights.

Query: a set of criteria used to search for specific documents and retrieve the corresponding index and image information.

Register: the process of entering a CD volume set into the ImageView database. Volumes must be registered before they can be used as subjects for queries.

Security Key: a code defined by the financial institution and encoded onto the CD volume used to prevent unauthorized access to the data contained on the volume. The Security Key must be defined in Data Manager before encoded CD volumes can be registered.

System Configuration: the ImageView component used to define application-wide settings.

Tag: a marker that may be attached to a document. Tags can contain up to 50 characters, and may be used as query search criteria.

Unregister: the process of deactivating CD volumes from the ImageView database. Volumes marked as "unregistered" are skipped over when queries are executed. Once volumes are unregistered, they can subsequently be deleted.

User Configuration: the ImageView component to define settings applied to individual users.

Volume: a check image CD-ROM supplied by a financial institution. See Volume Set.

Volume Copy: the ImageView component used to copy the entire contents of an image CD volume to hard disk or to a SAN device.

Volume Folder: refers to the logical drive used as the source from which volumes are registered.

Volume ID: a label imprinted on the check image CD-ROM by the financial institution that typically indicates the date and time the volume was created. The volume ID also indicates the position of a specific volume within a multi-volume set.

Volume Label: a text label that can be applied by ImageView to a CD volume that aids in the process of identifying a volume in Data Manager.

Volume Set: a check image CD-ROM that is identified by unique characteristics such as customer name and account number(s). Volume Sets can consist of a single CD or multiple CDs. In the case of multi-volume sets, each CD volume typically has a sequential volume ID indicating its position within the volume set (also see Volume ID).

10 Appendix A (Troubleshooting SQL Server 2014 Express SP3 Setup)

Installing SQL Server 2014 Express SP3 can, in some instances, be difficult. This section addresses some common issues.

Before installing SQL Server 2014 Express SP3, the following components must be installed on your computer, as per Microsoft's documentation:

- Microsoft .NET Framework v4.0 or higher

SQL Server 2014 Express SP3 setup will exit if this component is not found. ImageView Standard v8.5.x setup installs Microsoft .NET Framework v4.8 as required if it has not previously been installed.

SQL Server 2014 Express SP3 setup requires that a user with local administrator rights to the computer installs it. In addition, the local Administrators group needs a specific registry permission as described in section 2.3.1.1, and advanced rights as described in section 2.3.1.2. Note that the ImageView Standard v8.5.x setup program will exit if these advanced rights are not set.

Note: the installation requirements for SQL Server 2014 Express SP3 are Microsoft's requirements, and these cannot be changed by Yojna Inc.

Starting with ImageView Standard v8.3.0.10, system restore points are created by setup, as described in section 2.3.1.2.1. These restore points can be used to return your computer to a working condition in the event of a failed SQL Server 2014 Express SP3 installation or upgrade.

- **Warning:** Windows Server 2012/2012 R2, Server 2016, and Server 2019 do not support restore points. It is recommended that you take a backup of Server 2012/2012 R2, Server 2016, or Server 2019 before commencing ImageView Standard v8.5.x setup.

10.1 New Installations of ImageView Standard v8.5.x

Note: this section is applicable if SQL Server 2014 Express SP3 has not been previously installed prior to running v8.4 setup. If an instance of SQL Server 2014 Express SP3 has already been installed, refer to section 9.3

If any errors occur during the installation of SQL Server 2014 Express SP3 or ImageView Standard v8.5.x, it is recommended that you do the following:

1. Examine the SQL Server 2014 Express setup logs. These logs should provide additional information on why setup failed.
 - In some cases, a message will be displayed indicating that setup failed. A review of the logs shows that setup actually passed, but requires a reboot. If this is the case, reboot the computer and restart ImageView Standard v8.5 setup. Figure A-1 shows an example of such a condition, logged in SQL Server 2014 setup log file summary.txt.

```

Summary - Notepad
File Edit Format View Help
Overall summary:
Final result: Passed but reboot required, see logs for details
Exit code (Decimal): -2067919934
Exit facility code: 1214
Exit error code: 3010
Exit message: A computer restart is required. You must restart this computer before installing SQL Server.
Start time: 2020-03-19 16:02:20
End time: 2020-03-19 16:02:36
Requested action: Install

Machine Properties:
Machine name: VMS-WIN10X64QA
Machine processor count: 1
OS version: Windows 8
OS service pack:
OS region: United States
OS language: English (United States)
OS architecture: x64
Process architecture: 64 Bit
OS clustered: No

Product features discovered:
Product Edition Instance Version Instance ID Clustered Configured Feature Language

Package properties:
Description: Microsoft SQL Server 2014
ProductName: SQL Server 2014
Type: RTM
Version: 12
Installation location: C:\a\Install\SQLServerSetup\ISetupPrerequisites\SQL64\SQLEXPRESS_x64_ENU\x64\setup\
Installation edition: Express
Slipstream: True
  
```

Figure A-1: Summary.txt

2. For other errors, perform a system restore, or restore from backup:
 - a) Restore back to the restore point created before installing ImageView v8.5.x (also refer to section 2.3.1.2.1).
 - For Windows Server versions, you will need to run a restore, as noted above.
 - b) Stop all of the SQL Server services: SQL Server (all instances), SQL Server Browser and SQL VSS Writer.
 - c) Delete the current “Microsoft SQL Server” folder. **Note:** on x64 systems, there are 2 folders, under C:\Program Files and C:\Program Files (x86).
 - d) This will restore the system to the state prior to installing SQL Server 2014 Express SP3.
 - e) Contact the Financial Institution from whom you obtained the ImageView Standard v8.5.x software: request assistance from their technical support group. The financial institution’s support team will contact Yojna as necessary to assist with the installation.

10.2 Upgrading From Version 8.3.x.x

If any errors occur during the installation of SQL Server 2012 Express SP2 or ImageView Standard v8.4.x, it is recommended that you do the following:

- a) Restore back to the restore point created before installing ImageView v8.4.x (also refer to section 2.3.1.2.1).
- b) Stop all of the SQL Server services: SQL Server (all instances), SQL Server Browser and SQL VSS Writer.
- c) Delete/rename the current “Microsoft SQL Server” folder. **Note:** on x64 systems, there are two folders, under C:\Program Files and C:\Program Files (x86).
- d) Restore the backed up “Microsoft SQL Server” folder(s)
- e) Restore the backed up ImageView 8.3.0.x database files
- f) Start the SQL Server services

- g) This will restore the system to the state prior to installing SQL Server 2012 Express SP2, and the user will be able to continue to use ImageView v8.3.0.x.
- h) Contact the Financial Institution from whom you obtained the ImageView Standard v8.4.x software: request assistance from their technical support group. The financial institution's support team will contact Yojna as necessary to assist with the installation.

10.3 Existing Instances of SQL Server 2014 Express SP3

In environments where one or more existing instances of SQL Server 2014 Express SP3 have been installed, it is recommended that you do the following before running ImageView Standard v8.5.x setup:

- Backup the computer, including the registry. If a full backup is not possible or practical, backup the <Microsoft SQL Server> folder, subfolders, and files. **Note:** on x64 systems, the <Microsoft SQL Server> folder is installed to two locations by default – C:\Program Files and C:\Program Files (x86). Both folder instances need to be backed up.
- Stop all SQL Server services
- Run ImageView Standard v8.5.x setup.

If any errors occur during the installation of SQL Server 2014 Express SP3 or ImageView Standard v8.5.x, it is recommended that you do the following:

- a) Restore back to the restore point created before installing ImageView v8.5.x (also refer to section 2.3.1.2.1).
 - For Windows Server versions, you will need to run a restore, as noted above.
- b) Stop all of the SQL Server services: SQL Server (all instances), SQL Server Browser and SQL VSS Writer.
- c) Delete/rename the current "Microsoft SQL Server" folder(s). **Note:** on x64 systems, there are 2 folders.
- d) Restore the backed up "Microsoft SQL Server" folder(s).
- e) Restart the SQL Server services.
- f) This will restore the system to the state prior to installing SQL Server 2014 Express SP3 (<IMAGEVIEWER84>).
- g) Contact the Financial Institution from whom you obtained the ImageView Standard v8.5.x software: request assistance from their technical support group. The financial institution's support team will contact Yojna as necessary to assist with the installation.

10.4 SQL Server Setup Log Files

If SQL Server 2014 Express setup continues to fail, the setup log files will be needed for troubleshooting. The following log files will typically be requested:

- Summary.txt: located in C:\Program Files\Microsoft SQL Server\120\Setup Bootstrap\Log
 - On some computers, the file will be named "summary_<machine_name>.txt"
- Detail.txt
- Detail_ComponentUpdate.txt
- Detail_GlobalRules.txt

These three files are typically located in C:\Program Files\Microsoft SQL Server\120\Setup Bootstrap\Log\<installation date_time>

11 Appendix B (Uninstalling SQL Server 2014 Express SP3)

Note: The instructions in this section are provided as a basic guide to assist you in uninstalling Microsoft SQL Server 2014 Express SP3. They are not intended to be a substitute or replacement for Microsoft documentation.

Please refer to the following Microsoft support article as necessary: <http://support.microsoft.com/kb/955499>

Before you begin:

- **Take a backup of the computer.**
 - **If you intend to reinstall ImageView Standard v8.5.x (either on the same computer or a different computer) and want to save existing data, ensure that your backup includes the ImageView database .MDF/.LDF files (refer to section 2.6.4 for the location of these files). After taking the backup, detach the ImageView database files. Then, after reinstalling ImageView Standard v8.5 and SQL Server 2014 Express SP3, detach the new .MDF/.LDF files, and then copy the saved versions in their place and attach the saved versions. Also refer to the *ImageView Standard v8.5.x Administrator's Guide* for more information on this procedure.**
- **If you have not done so, uninstall ImageView Standard v8.5.x. If you intend to reinstall on the same computer, ImageView setup will reinstall SQL Server 2014 Express SP3 and ImageView Standard v8.5, with the setup program passing the necessary configuration parameters for the database instance (IMGONSITE) used by ImageView.**
- **It is recommended that the user uninstalling SQL Server 2014 be a member of the local administrators group on the computer where SQL Server 2014 is installed.**
- **Open the Services console and stop all SQL Server services.**

To uninstall, open Control Panel | Programs and Features.

For x64 systems, select "Microsoft SQL Server 2014 (64-bit)", then click Uninstall/Change.

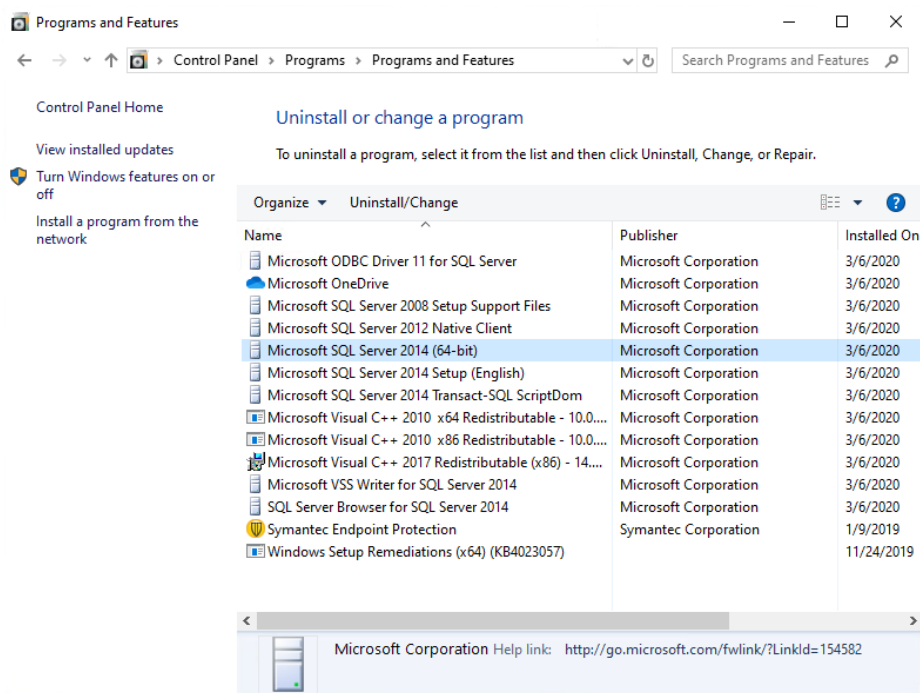


Figure B-1: Programs and Features (Windows 10 x64)

For x86 systems, select “Microsoft SQL Server 2014”, then click Uninstall/Change.

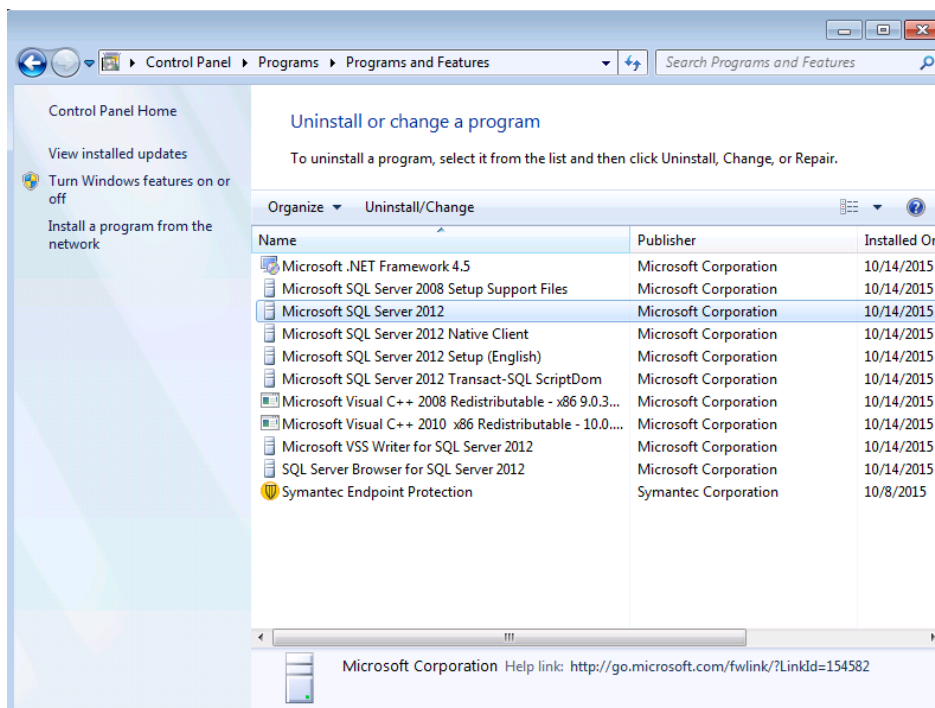


Figure B-2: Programs and Features (Windows 7 x86)

A message box will be displayed: click the Remove link.

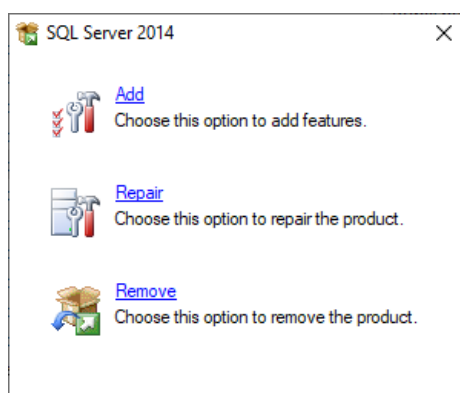


Figure B-3: SQL Server 2014 Installation Options screen

The Global Rules page will be displayed, and setup will run some checks. When finished, refer to the onscreen text: if any failures are identified, these will need to be addressed – click the ‘Show details >>’ button for further information. Click OK to proceed if there are no failures, or after correcting all identified failures.

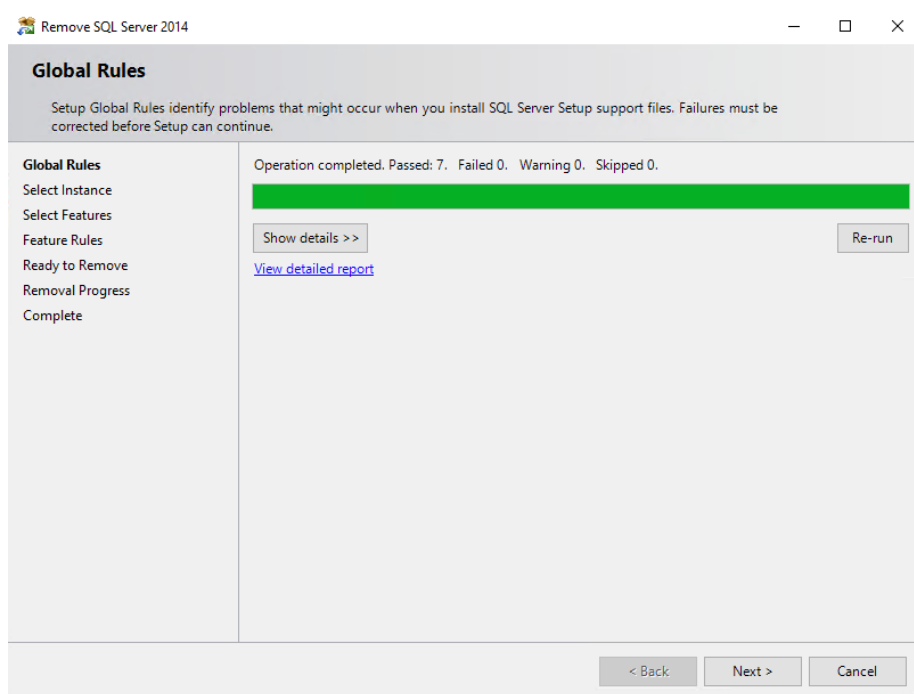


Figure B-4: Global Rules page

A message will be displayed, indicating that SQL Server 2014 Express SP3 setup is processing. When finished, refer to the onscreen text: if any failures are identified, these will need to be addressed – click the ‘Show details >>’ button for further information. Click Next to proceed if there are no failures, or after correcting all identified failures.

SQL Server 2014

Please wait while Microsoft SQL Server 2014 Setup processes the current operation.

Figure B-5: Setup processing message

The Select Instance page will then be displayed, showing a list of installed SQL Server database instances.

Select “IMGONSITE” from the ‘Instance to remove features from’ dropdown list, and then click the Next button.

Important: if additional database instances are displayed, you will only want to delete the IMGONSITE instance, do not delete any other instances.

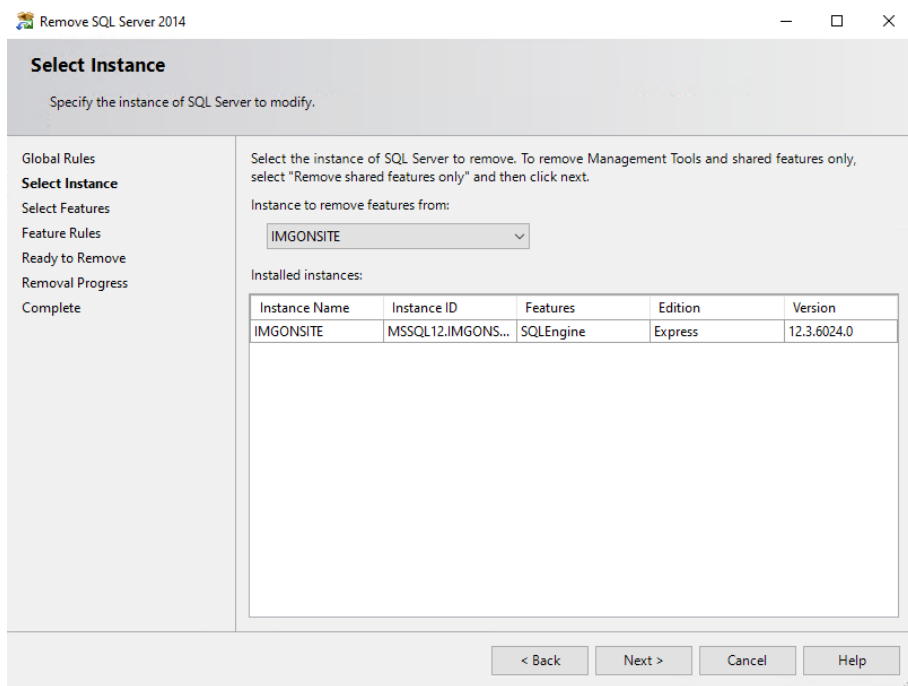


Figure B-6: Select Instance page

The Select Features page will be displayed. Select the features to be uninstalled and click the Next button to continue.

- If IMGONSITE is the only instance installed, you can delete everything.
- If, however, additional instances are found, select only IMGONSITE.

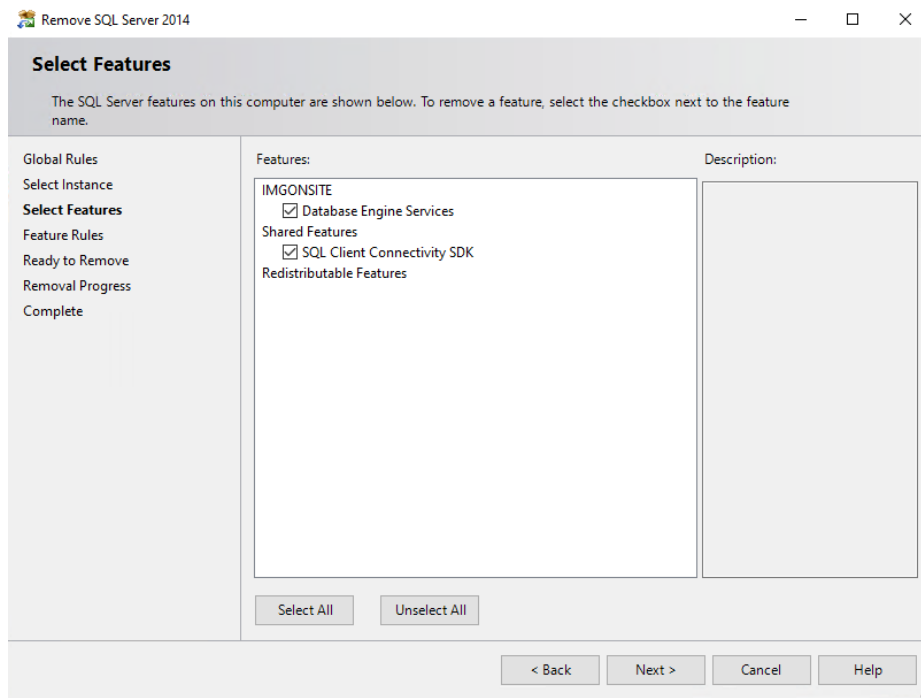


Figure B-7: Select Features page

The Ready to Remove page will be displayed. Review the information displayed on this page:

- Click the Back button to make any changes to the selections.
- Click the Remove button to proceed.

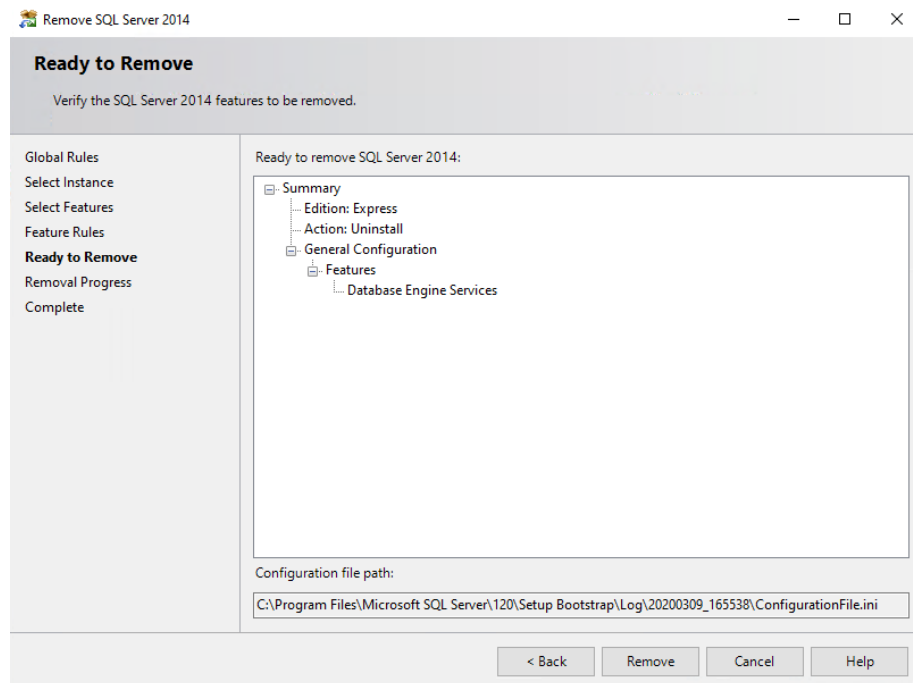


Figure B-8: Ready to Remove page

The Removal Rules page will be displayed, and setup will run some checks.

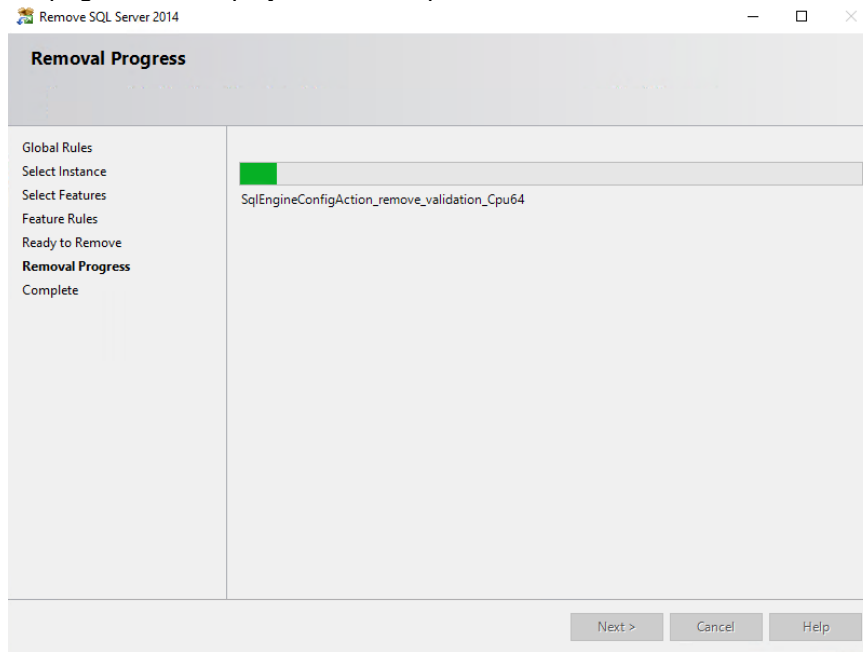


Figure B-8: Removal Progress page

SQL Server 2014 Express SP3 setup will begin the uninstallation process.

When setup has completed, the Complete page will be displayed. Review the onscreen messages and indicated log files as necessary. Click Close to continue.

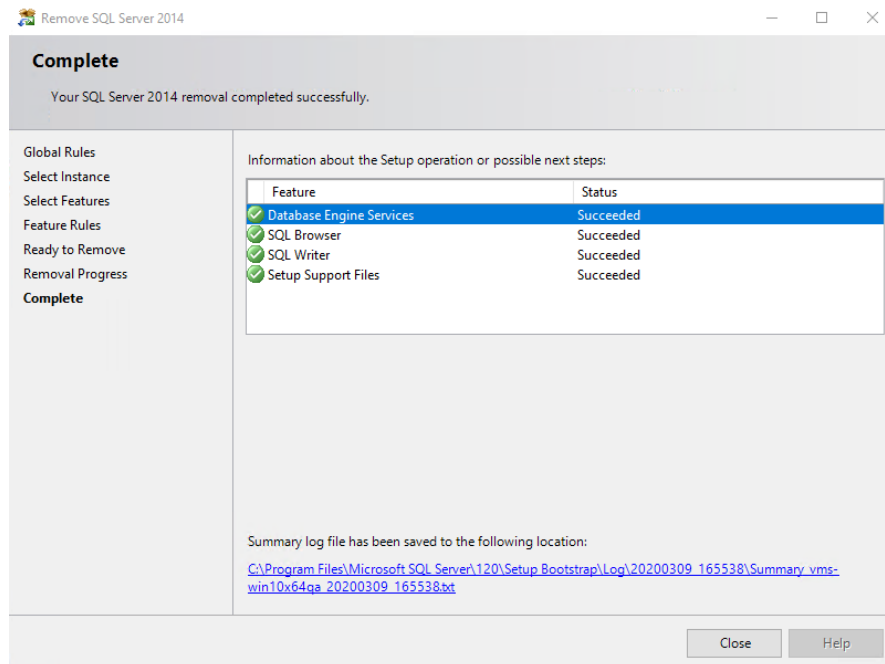


Figure B-11: Setup Complete page

The core SQL Server 2014 Express SP3 installation has now been uninstalled from the computer. Return to the Programs and Features screen, and uninstall any remaining SQL Server 2014 components:

- SQL Server 2012 Native Client
- SQL Server 2014 Setup (English)
- SQL Server 2014 Transact - SQL
- SQL Server Browser for SQL Server 2014
- Microsoft VSS Writer for SQL Server 2014

It does not matter in which order these remaining components are uninstalled. Simply confirm that you want to uninstall the component to be uninstalled, and it will be removed. **Note:** the SQL Server 2014 setup program should remove most of these components when uninstalling SQL Server 2014 as described above.

12 Appendix C (Creating a Silent Mode Setup)

The information in this section describes how to deploy ImageView Standard v8.5.x using a silent mode installation. A silent mode installation will perform the following tasks:

- Install all third-party software pre-requisites and components.
- Install ImageView Standard v8.5.x.
- Automatically run the data upgrade utility, if a previous version of ImageView Standard is detected on the computer.
- Log the results (refer to section 10.3)

To test a silent mode installation, it is recommended that you have two computers, or a virtual machine that can be restored to a clean OS image, available.

The procedure consists of the following steps:

- a) Create a setup package for the third-party components by running setup in record mode (using the /r switch). This will create an instance of file Setup.ISS
- b) Place this instance of Setup.ISS in the <ImageView 8.5.x>\Install folder.
- c) Create a setup package for ImageView Standard v8.5.x by running setup in record mode. This will create a second instance of file Setup.ISS.
- d) Place this instance of Setup.ISS in the <ImageView 8.5.x>\Install\Setup folder.
- e) Test the full setup package by running setup in silent mode, using the /s switch.

Important: for customers using the ACCORD Release Pack, ensure that you are creating a silent mode installation package using the release that you have generated, not the Release Pack itself.

Warning: some organizations may receive copies of ImageView Standard v8.x from more than one financial institution, and install each copy on the same computer. To account for this possibility, it is strongly recommended that you do not change the default installation folder for SQL Server 2014 Express SP3 without first consulting Yojna technical support. **Do not change the installation folder for SQL Server 2014 Express SP3 such that the ImageView database instance is stored into the same folder where ImageView Standard v8.5.x will be installed.**

12.1 Local Mode

This section describes the procedure for creating a local mode silent installation on x64 hardware. Refer first to the end of this section for x86 hardware.

- a) Copy the ImageView Standard v8.5.x setup package to a new folder on the hard disk. **Note:** the root of the package contains folder “Install”, and file AUTORUN.INF
- b) Open the Run dialog box. Execute <path>\Install\setup.exe /r

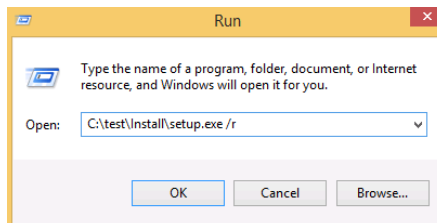


Figure C-1: Run dialog box (Windows 8.1)

- c) Follow the installation steps, reboot as prompted (e.g. for .NET Framework v4.8), enter the default folder for SQL Server 2014 Express SP3.

- d) When setup reaches the point of installing ImageView Standard v8.5, cancel setup.
- e) Browse to the OS folder (e.g. C:\Windows). Locate file Setup.ISS and move it to folder <path>\Install from step a (do not put the file in <path>\Install\Setup). This instance of Setup.ISS should have a size of 1 KB.

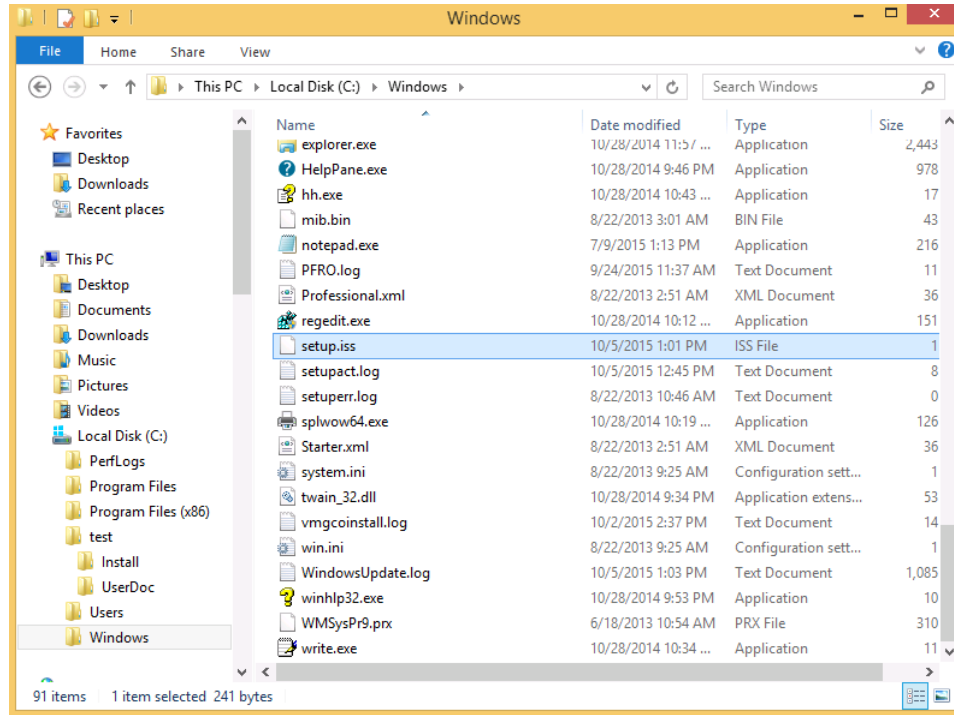


Figure C-2: First instance of SETUP.ISS

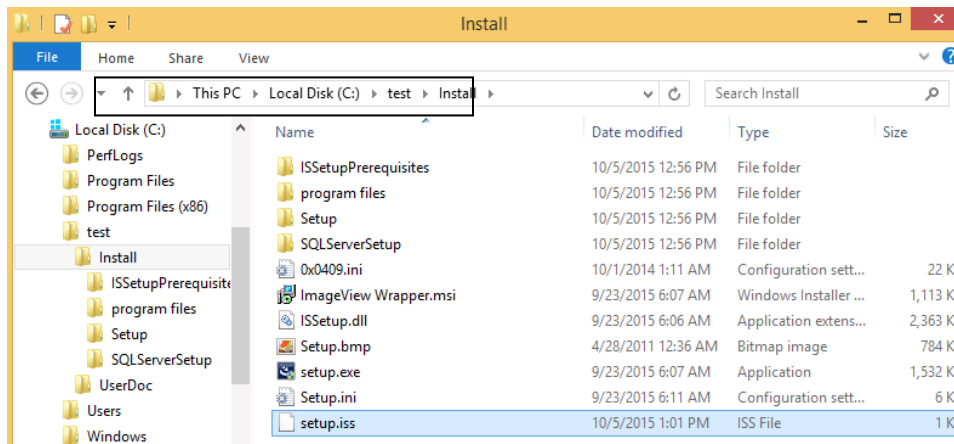


Figure C-3: Contents of the Install folder after moving SETUP.ISS instance 1

- f) Open the Run dialog box. Execute <path>\Install\Setup\setup.exe /r to install ImageView Standard v8.4. Install the viewer in local mode.

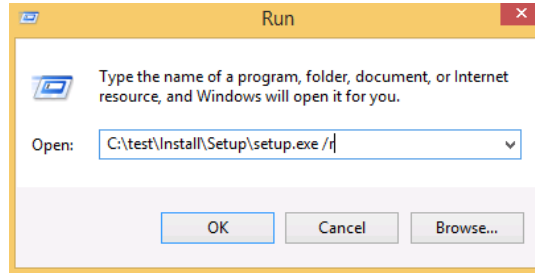


Figure C-4: Run dialog box (Windows 8.1)

- g) When setup ends, again browse to the OS folder (e.g. C:\Windows). There will now be another instance of Setup.ISS: move this copy to folder <path>\Install\Setup (do not put this copy in <path>\Install). This instance of Setup.ISS should have a size of about 2 KB

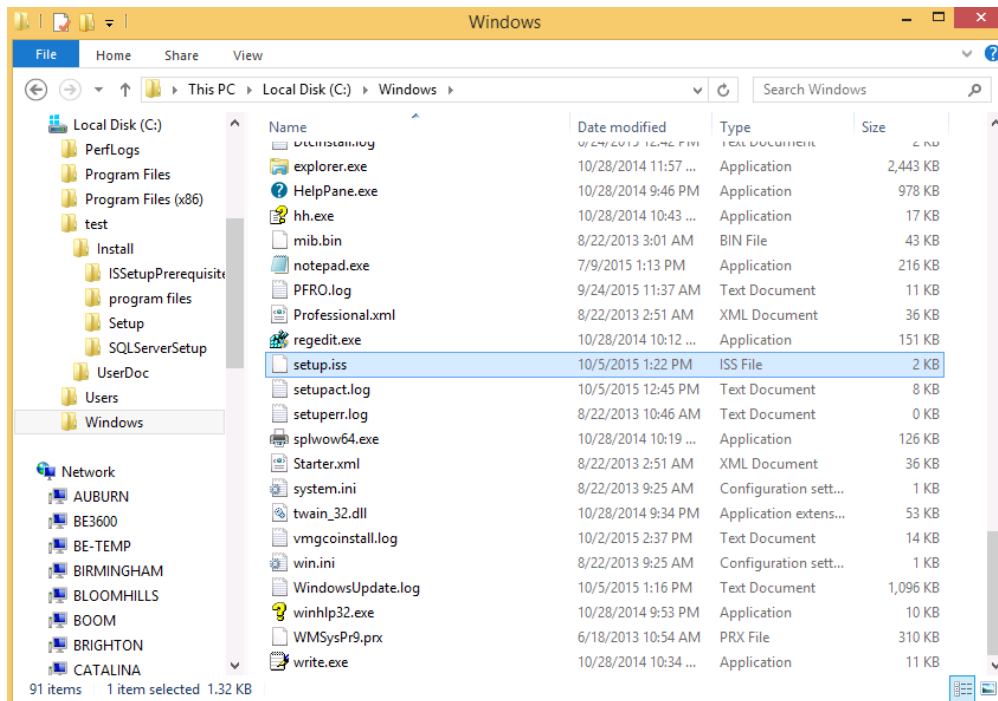


Figure C-5: Second instance of SETUP.ISS

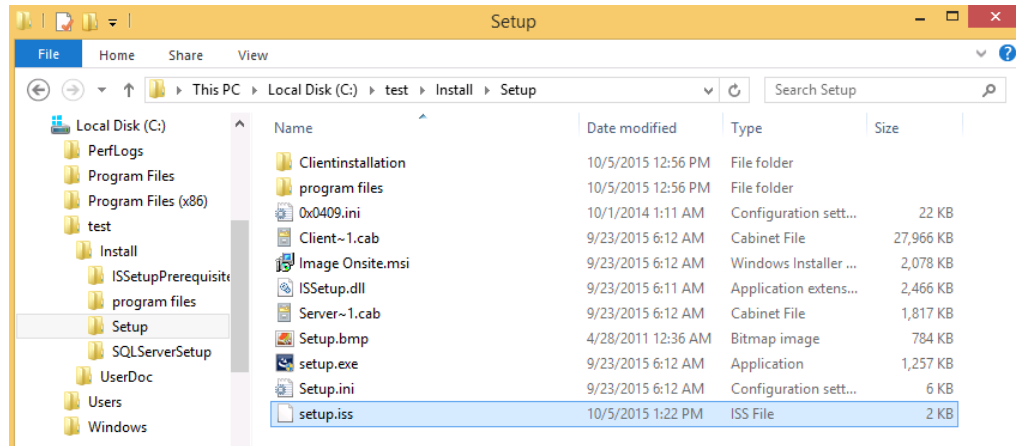


Figure C-6: Contents of the Install\Setup folder after moving SETUP.ISS instance 2

Now, on computer 2 (or a virtual machine), perform the silent mode installation that has been created above. Before doing so, step 1 below must be done on computer 2:

- Manually create the viewer installation folder (e.g. C:\Program Files\ImageView Standard v8.4). Ensure that this value matches the folder used above in step f, above.
- Copy the setup package generated in record mode above to computer 2 (place it in a separate folder from where the viewer will be installed).
- Open the Run dialog box. Execute Install\setup.exe /s. The computer will reboot as necessary to complete installation of .NET Framework v4.8 (you will still need to log on after rebooting, setup will continue silently after logging on). **Note:** SQL Server 2012 Express screens will be displayed as described in section 2.6.1.5 – user intervention is not required.
- A limitation of local silent mode is that there is no indication when setup has completed – it is suggested that you open Task Manager to the Processes tab to monitor, setup is over when no instance of setup.exe appears under Processes. In addition, an InstallShield button is displayed on the Windows Taskbar while viewer setup is running. Browse to the <Imageview v8.4> folder and ensure that it is populated.

For x86 systems, you will need to run the entire procedure above again, on an x86 computer i.e. you will need to maintain 2 sets of silent mode setups – 1 for x64 and 1 for x86. Yojna's setup program/package contains versions/files for both architectures, but setup won't know which one to install until the hardware/OS is identified.

12.2 Distributed Mode

To create a silent installation package for distributed mode installations, there are two steps to complete:

- Install ImageView Standard v8.5.x in distributed mode as described in section 2.6.3.1, and create the silent mode installation package. Refer to section 12.2.1.
- Install an ImageView Standard v8.4.x client, and create a separate silent mode installation package for clients only. Refer to section 12.2.2.

12.2.1 ImageView Server

This section describes the procedure for creating a distributed mode silent installation on x64 hardware. Refer first to the end of this section for x86 hardware.

Copy the ImageView Standard v8.5.x setup package to a new folder on the hard disk. **Note:** the root of the package contains folder “Install”, and file AUTORUN.INF

- a) Copy the ImageView Standard v8.4.x setup package to a new folder on the hard disk. **Note:** the root of the package contains folder “Install”, and file AUTORUN.INF
- b) Open the Run dialog box. Execute **<path>\Install\Setup /r** (refer to figure C-1).
- c) Follow the installation steps, reboot as prompted (e.g. for .NET Framework v4.8), enter the default folder for SQL Server 2014 Express SP3.
- d) When setup reaches the point of installing ImageView Standard v8.4, cancel setup.
- e) Browse to the OS folder (e.g. C:\Windows). Locate Setup.ISS and move it to folder <path>\Install from step a (do not put the file in <path>\Install\Setup). This instance of Setup.ISS should have a size of 1 KB (refer to figures C-2 and C-3).
- f) Open the Run dialog box. Now execute **<path>\Install\Setup\Setup.exe /r** to install ImageView Standard v8.4 (refer to figure C-4). Install the viewer in distributed mode, create a share for the ClientInstallation subfolder as prompted.
- g) When setup ends, again browse to the OS folder (e.g. C:\Windows). There will now be another instance of Setup.ISS: move this copy to folder <path>\Install\Setup (do not put this copy in <path>\Install). This instance of Setup.ISS should have a size of about 2 KB (refer to figures C-5 and C-6).

Now, on computer 2, perform the silent mode installation that has been created above. Before doing so, steps a-c below must be done on computer 2:

- a) Manually create the viewer installation folder (e.g. C:\Program Files\ImageView Standard v8.5). Ensure that this value matches the folder used above in step f, above.
- b) Under the <viewer> folder created in step a, create subfolder ClientInstallation. Also ensure that this value matches the folder used above in step f, above.
- c) Share the ClientInstallation folder. We recommend giving at least the local administrators group “Full Control” permissions.
- d) Copy the setup package from record mode above to computer 2 (place it in a separate folder from where the viewer will be installed).
- e) Open the Run dialog box. Execute **Install\setup.exe /s**. The computer will reboot as necessary to complete installation of .NET Framework v4.5 (you will still need to log on after rebooting, setup will continue silently after logging on). **Note:** SQL Server 2014 Express screens will be displayed as described in section 2.6.1.5 – user intervention is not required.
- f) Setup is done when the IVReadMe.TXT file is displayed. Browse to the <Imageview v8.5> and <Imageview v8.5>\ClientInstallation folders, and ensure that they are populated.

For x86 systems, you will need to run the entire procedure above again, on an x86 computer i.e. you will need to maintain 2 sets of silent mode setups – 1 for x86 and 1 for x64. Yojna’s setup program/package

contains versions/files for both architectures, but setup won't know which one to install until the hardware/OS is identified.

12.2.2 ImageView Clients

This section describes the procedure for creating a silent installation package for distributed mode clients on x64 hardware. Refer first to the end of this section for x86 hardware.

- **Note:** this procedure creates a silent installation setup package for the clients only. This package should be generated after first installing a distributed mode instance (including the SQL Server Express database instance) of ImageView Standard v8.5.x on the designated ImageView server.

On a client workstation, open Windows/File Explorer to the ClientInstallation folder on the ImageView Server computer, and map this folder as a network drive (e.g. Z:). **Note:** the Nwinstall folder is available in this shared folder.

- a) Open the Run dialog box. Execute **[mapped drive]:\Nwinstall\Setup.exe /r** (e.g. **Z:\Nwinstall\Setup.exe /r**) to install the ImageView Standard v8.5 client.
- b) When setup ends, browse to the OS folder (e.g. C:\Windows). There will now be an instance of Setup.ISS: move this copy to folder **[mapped drive]:\Nwinstall** (e.g. **Z:\Nwinstall**). This instance of Setup.ISS should have a size of about 2 KB.
- c) Uninstall the client setup from this client machine (we will install setup again on this machine (silently)).

Now, for all required ImageView clients, execute the silent mode installation package that has been created above.

- a) Open Windows/File Explorer to the ClientInstallation folder on the ImageView Server computer, and map this folder as a network drive (e.g. Z:). **Note:** the Nwinstall folder is available in this shared folder.
- b) Open the Run dialog box, and execute **Z:\Nwinstall\Setup.exe /s** to install the ImageView Standard v8.5 client (refer to figure C-4).

For x86 systems, you will need to run the entire procedure above again, on an x86 computer i.e. you will need to maintain 2 sets of silent mode setups – 1 for x86 and 1 for x64. Yojna's setup program/package contains versions/files for both architectures, but setup won't know which one to install until the hardware/OS is identified.

12.3 Log Files

Silent mode installations create the following log files, which can be found in the <ImageView Standard v8.5>\Log folder:

- <date>_Client_DataUpgrade.Log **Note:** this file will only be present if an upgrade from a previous version of ImageView Standard was performed.
- <date>_CopyPatches.Log
- ExecuteSQLScript.Log
- InstallStatus.Log

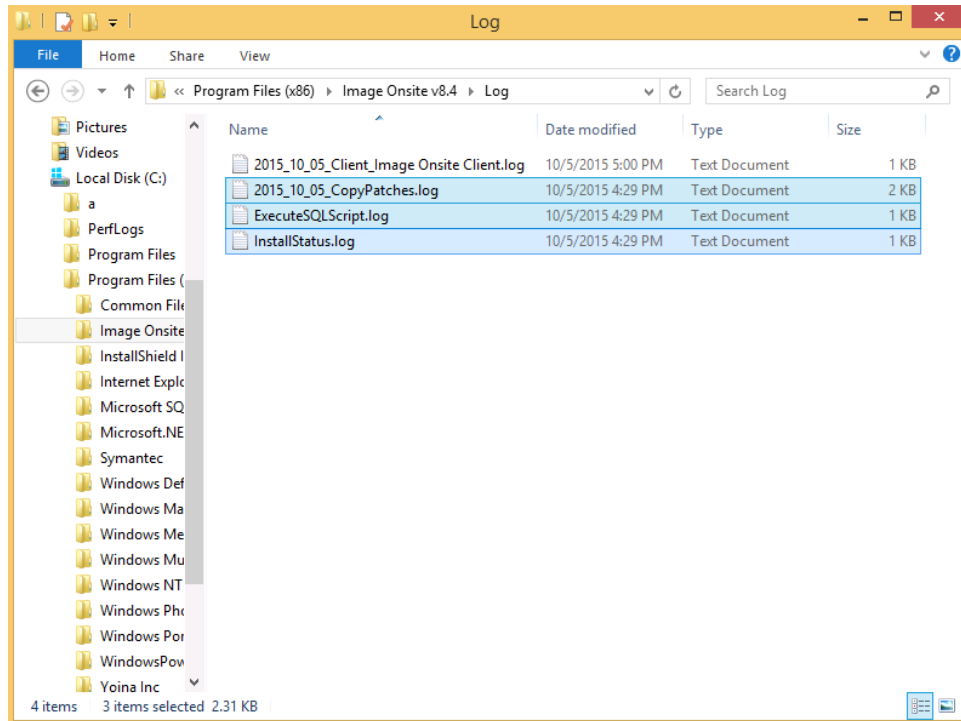


Figure C-7: Log folder contents after silent mode installation

13 Appendix D (Upgrading to SQL Server 2014 Express)

The information in this section describes the procedure for manually upgrading SQL Server 2012 Express SP2/SP4 to SQL Server 2014 Express SP3.

As noted in section 5, an in-place upgrade of ImageView Standard v8.4 to v8.5 does not upgrade the installed SQL Server version used by ImageView. SQL Server 2012 Express (all service packs) has an end-of-life date of July 12, 2022. Organizations/users should therefore manually upgrade to SQL Server 2014 SP3 by this date.

Important: SQL Server 2014 Express SP3 setup requires advanced permissions for a successful installation. Refer to section 2.3.1.2 for additional information on these advanced permissions.

Note: before proceeding with an upgrade of SQL Server, ensure that you have backed up the computer.

Perform the following steps to upgrade to SQL Server 2014 Express SP3:

1. Locate or obtain the SQL Server 2014 Express SP3 setup file –
 - If you have received the “full” version of the ImageView Standard v8.5 installation (either as physical media or a downloaded file set) from your financial institution, the SQL Server 2014 Express SP3 setup file is contained in the installation. It is stored in folder Install\SQLServerSetup\ISSetupPrerequisites
 - For x64 hardware/OS, open the SQL64 subfolder and select SQLEXPRESS_x64_ENU.exe
 - For x86 hardware/OS, open the SQL32 subfolder and select SQLEXPRESS_x32_ENU.exe
 - If you have received the “datadisk” version of the ImageView Standard v8.5 installation, you will need to download SQL Server 2014 Express SP3 from Microsoft’s web site - www.microsoft.com/en-us/download/details.aspx?id=57473
 - For x64 hardware/OS, select SQLEXPRESS_x64_ENU.exe
 - For x86 hardware/OS, select SQLEXPRESS_x32_ENU.exe
2. Execute the SQLEXPRESS_xnn_ENU.exe file. You will be asked to select a folder to where the setup files should be extracted: accept the default folder, or click the Browse button to choose a different folder.

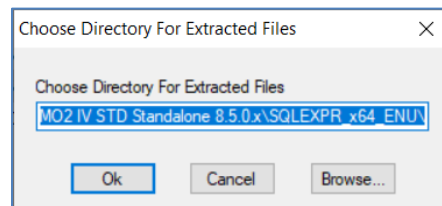


Figure D-1: Choose Directory For Extracted Files dialog box

3. After selecting the extraction folder, click OK to begin the file extraction. A progress meter will be displayed while the extraction processes the setup files.

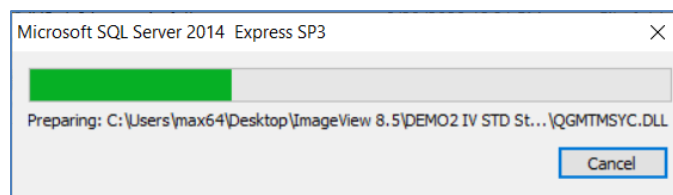


Figure D-2: Extracting SQL Server 2014 Express Files meter

4. When extraction completes, SQL Server 2014 setup begins, and displays the SQL Server Installation Center page (figure D-3).

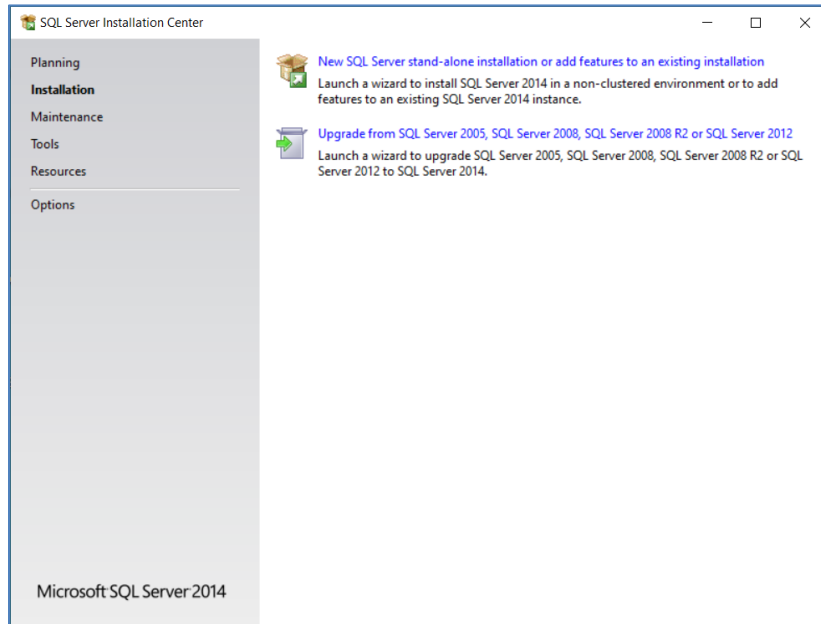


Figure D-3: SQL Server Installation Center page

5. Select the Upgrade from SQL Server 2005, SQL Server 2008, Server 2008 R2, or SQL Server 2012 option. Setup will initialize.

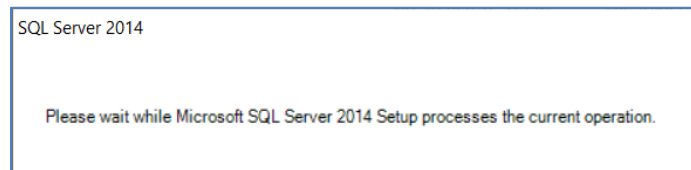


Figure D-4: Setup processing message

6. Setup will display the License Terms page.
 - Click the “I accept the license terms...” check box. **Note:** this box must be checked in order to continue.
 - The “Turn on Customer Experience...” check box is optional.
 Click the Next button to continue.

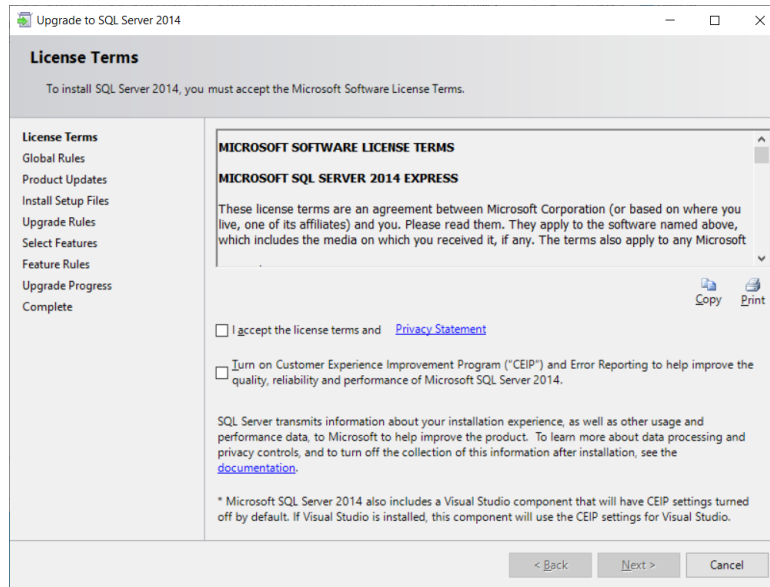


Figure D-5: License Terms page

7. Setup will now display the Global Rules page: it will run a series of checks to verify that setup pre-requisites are met. **Note:** if any items return a status of “Failed”, those items will need to be resolved before setup can continue.

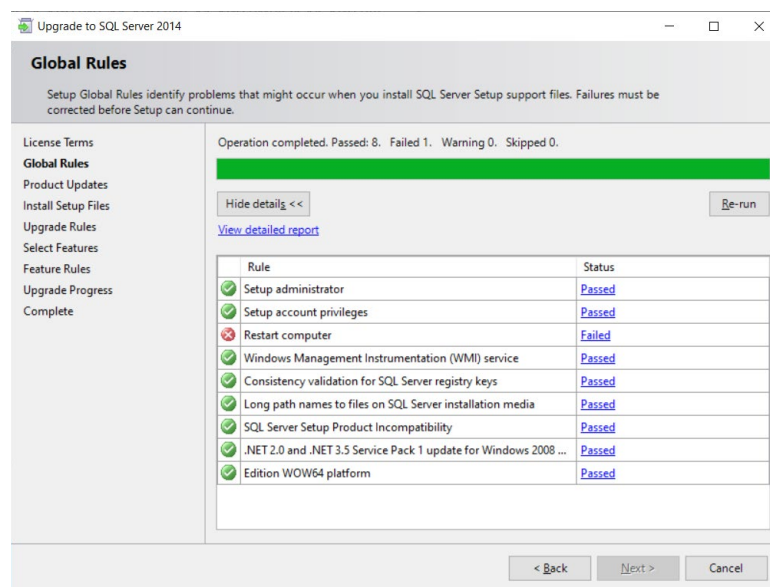


Figure D-6: Global Rules page

8. If all Global Rules items pass, the Next button will become enabled. Click the Next button to continue.
9. The Product Updates page will be displayed. Setup will check online for any needed updates, and install them. When the update check completes, click the Next button to continue.

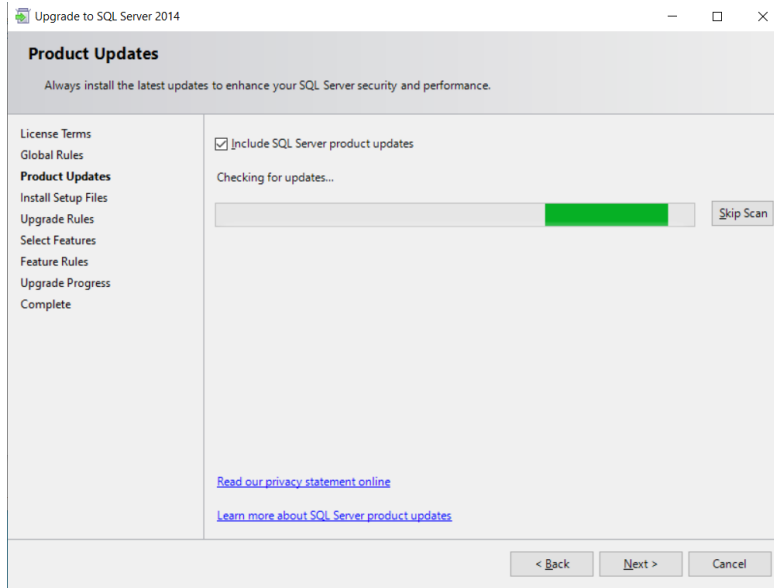


Figure D-7: Product Updates page

10. The Select Instance page will be displayed. You will need to select the database instance to be upgraded to SQL Server 2014 Express. For ImageView, the database instance name is “IMAGEVIEWER84”. After selecting the instance, click Next to continue.
 - If additional database instances are listed, verify with appropriate personnel (e.g. DBAs, system admins) to upgrade those instances.

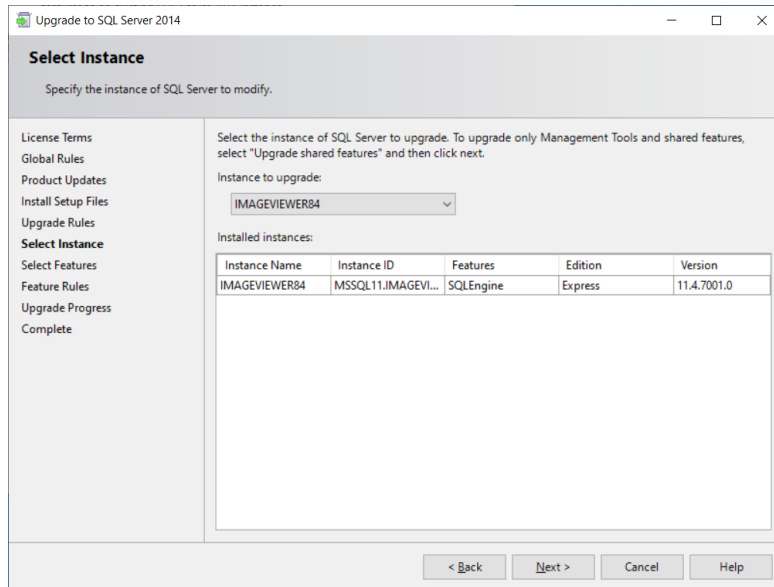


Figure D-8: Select Instance page

11. The Install Setup Files page (figure D-9) will be displayed. Setup will install installation files needed by SQL Server. Click the Next button to continue when it becomes enabled.

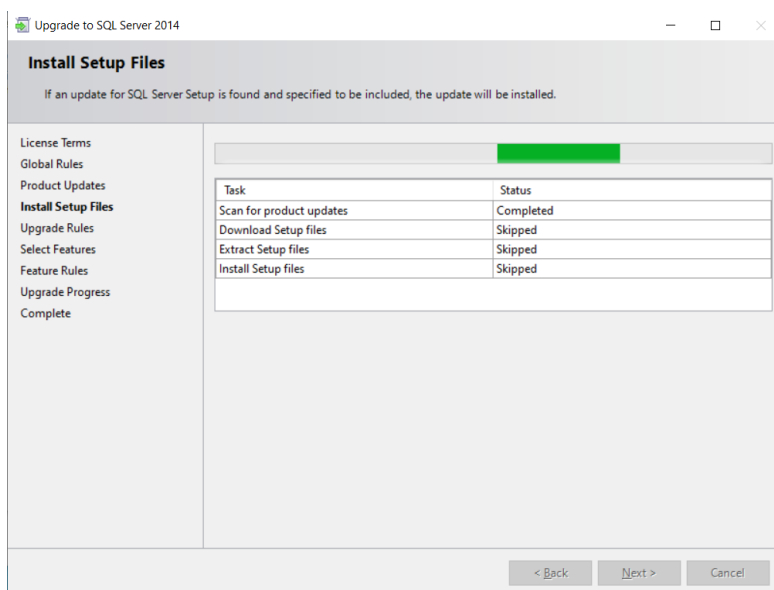


Figure D-9: Install Setup Files page

- The Upgrade Progress will now be installed: setup performs the upgrade of SQL Server. Click the Next button to continue when it becomes enabled after setup completes.

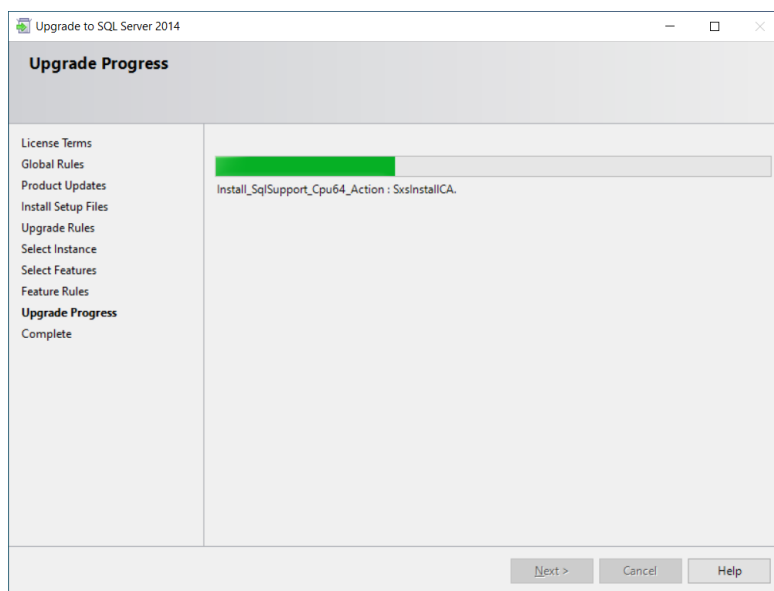


Figure D-10: Upgrade Progress page

- After the setup process has completed, you may be prompted to reboot your computer (figure D-11). Click OK on this message.

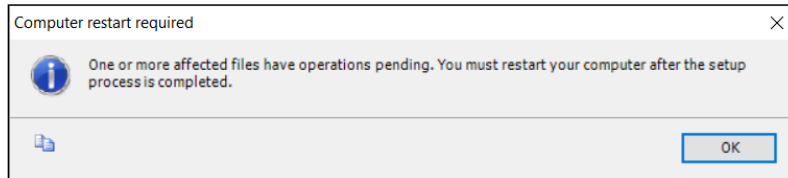


Figure D-11: Reboot prompt

14. The Complete page will be displayed, showing the status of the setup operation. SQL Server 2014 Express has been completed (Figure D12). Click the Close button to exit setup, and then reboot your computer as required.

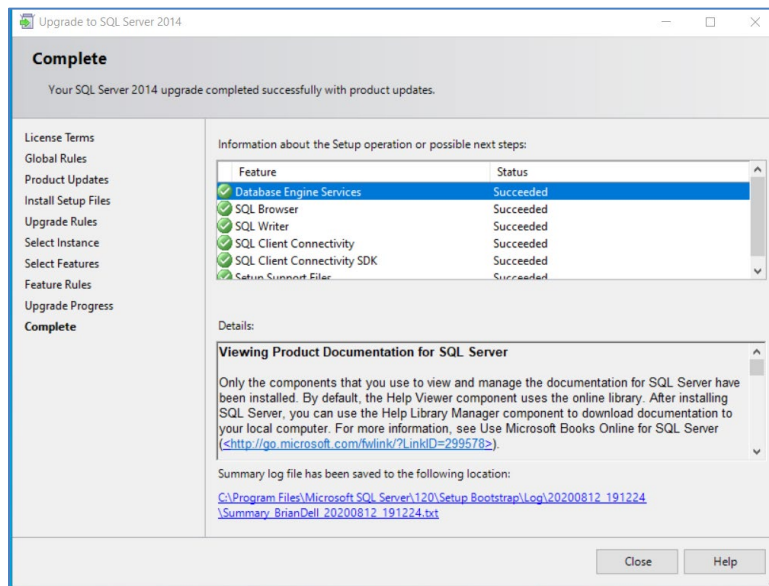


Figure D-12: Complete page

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