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PSIcapture Installation using a License Server

# **Quick Start Guide**

# **Getting Started**

## *Welcome to PSIcapture!*

his Quick Start Guide is designed to help you through the process of downloading and installing PSIcapture within a typical business network environment where it has never before been installed. Every network environment has many variables such as security policies and folder permissions can be configured in a limitless variety of ways, this guide will only provide the installation steps for a typical environment that we are likely to encounter. You will also learn to configure some basic Storage Locations. For additional information on features not covered in this guide please refer to the PSIGEN wiki at help.psigen.com. PSIGEN offers detailed hands on training with the PSIcapture software as well.

This guide covers Installation of PSIcapture 7.6.x. This guide assumes you have basic knowledge of Microsoft Windows.



## **Requirements:**

- Ensure your computer meets the min. requirements
- You have DOWNLOADED version 7.6.x of PSIcapture
- You have a current PSIcapture License Keys
  - LSxxx-xxxxxxx License Server Activation Key
  - PLxxx-xxxxxxx License Server Key
  - PSxxx-xxxxxxx Product Key

Download the Installation Package

As of the creation of this Guide, the latest version of the PSIcapture software is available at this location:

## http://downloads.psigen.com/PSIcapture.Setup.7.6.zip

The version number near the end of the above URL will change as newer versions are released.



The PSIcapture Setup file is roughly 500 MB. When using a broadband connection, you should be able to download it in around 10-15 minutes.

#### PSICAPTURE INSTALLATION QUICK START GUIDE

## Extract the Setup File

When your download has completed, open the folder where you downloaded the file.

The PSIcapture Setup is a compressed (zipped) folder that you will need to unzip before you can install the software. Right-click on the file and select **Extract All...** 

Enter the Destination path as:

) 👍 Extract Compressed (Zipped) Folders	X
Select a Destination and Extract Files	
Files will be extracted to this folder:	
C:\PSIGEN\Software\PSICapture.Setup.6.0	Browse
⊻ snow extracted fues when complete	
	Extract Cancel

C:\PSIGEN\Software\PSICapture.Setup.7.0

The files will be copied out of the compressed folder to the Destination location.



Select the PSIcapture Setup executable from the new location.

Name	Date modified	Туре	Size
PSICapture.Setup.6.0.0.6	3/30/2016 3:45 PM	Application	486,452 KB

Right-click on the install file and click Properties.

\*

Name	Date modified		Rename	
			Properties	
PSICapture.Setup.6.0.0.6	3/30/2016 3:45 PM <sup>L</sup>	А	ppication	Select

#### PSICAPTURE INSTALLATION QUICK START GUIDE

At the bottom of the Properties windows, if there is either a button or a checkbox to **Unblock** the file, please click it. If you do not see any option to Unblock or if it is grayed out, the file is already unblocked, and no action is necessary. Click **OK**.

	Security:	This file came from another computer and might be blocked to help protect this computer.	Select
		OK Cancel Apply	
۲	Select		

## Running the Installation Package

Right-click on the installation package you just extracted from the compressed (zipped) file and choose **Run as administrator**.

Name	Date modified	Туре	Size
9 PSICapture.Setup.6.0.0.6	Select	pplication	486.452 KB
		Open	
		🗧 🕄 Run as	administrator

## Prerequisites Wizard

The setup wizard will automatically determine whether any of the prerequisites needed to run PSIcapture are missing.



Nama	Varaian	Action
	Persion Descired 8.0.50727 et histor	Action
Visual C + + 2005 (X86)	Required: 8.0.50727 of higher	Skip
Visual C + + 2003 SP1 (X66)	Required: 8.0.39193 of higher	Skip
	Required: 9.0.21022 of higher	Skip
Visual C++ 2000 SP1 (x86)	Required: 9.0.30729 or higher	SKIP
Visual C++ 2010 SP1 (X86)	Required: 10.0.30319 or higher	5кір Таара!!
Visual C++ 2012 (X86)	Required: 11.0.81030.0 or high	Install
Microsoft SQL Server 2012 Expres	Required: 11.0.2318.0 or higher. Fo	ound: 11.0.2318.0
Press the Next button to install the p	Select Next	

Note: All missing prerequisites will automatically be selected for you. If they are unselected, then requirements are already met.

## PSIcapture Setup

The Setup Wizard will install PSIcapture on your computer.



Review, then Accept the terms in the License Agreement.



Select the License Server option and select it to be installed, and click Next.



## **PSIcapture**

This is the core installation for the PSIcapture product. This is the only feature that you need to install to create capture profiles and process batches.

### **PSIcapture Administration**

This will **only** install the Administration module. When running the Admin Tool, you will be able to create, modify, and review capture profile configurations and run reports, but you <u>will not</u> be able to capture images or process batches through any workflow. Running the PSIcapture Admin Tool does not consume a license.

#### License Server

This will install the License Server service and management tools. This is used to manage the concurrent licenses, and track usage of the pooled annual page counts. If you are running the software in standalone mode, as opposed to in a multi-machine production environment, then the License Server feature is unnecessary.

To install to the default folder, click **Next** again.



If you will be installing the License Server separate from the main Capture Server and/or have Network Workstations, you will want to make sure

you are running the same

build on all installations.

☆ Note:



The Setup Wizard is now ready to begin the PSIcapture installation.

Wait for the files to be extracted from the installer. The extracted files will then be copied to the install location.



When installation is complete, click Finish.

When installation is complete, you may be prompted to reboot, select Yes.



☆ Note: If you will be installing PSIcapture for the first time on this machine it will require a reboot after the installation is complete. Configure the Service Manager

We will now setup the Service Manager to run PSIcapture as a Capture Server.

For Windows 7 - Click on the Start Menu >> PSIGEN >> Service Manager For Windows 8/8.1/10 and Server 2012 R2/2016/2019 – Click on the Windows icon. Then type Service Manager, in the results select,

Select Capture Server, then click Save

	🧟 Service Manager	-		×
	Station mode Service status Bindings Databases			
	Modes		_	
	Stand-alone station			
	This station will use a local batch manager, logging, configuration and licensing services. The security module will be disabled.			
	Network station			
Select	This station will use a remote Capture Server for batch manager, logging, configuration, security and licensing services.			
	Capture server			
	This station will provide batch manager, logging, configuration, security and licensing services for other network stations.			
	Capture server			
	Capture server name or IPv4 address: WIN-V8I7LOLDON1			
	Save		Cance	

## Configure the License Server

We will now configure the PSIcapture License Server. We will start by activating the License Server itself using the PSIcapture License Server Activation Key. Once this has been accomplished, we can either choose to load PSIcapture Product Keys individually, or load a PSIcapture Server Key, which contains multiple Product Keys.

- PSIcapture Keys
  - LSxxx-xxxxxxx License Server Activation Key
  - PSxxx-xxxxxxx Product Key
  - PLxxx-xxxxxxx License Server Key
- For Windows 7 Click on the Start Menu >> PSIGEN >> License Server
- For Windows 8/8.1/10 and Server 2012 R2/2016/2019 Click on the Windows icon.

Then type License Server, in the results select,



We will now activate the PSIGEN License Server.

If you have an internet connection, we will retrieve and install the licenses over that connection.



Type in the PSIcapture License Server Activation Key. This will be the key that begins with "LS"

Activate License Sen	ver ×
License Keys:	LS
Cancel	Select Next Previous Next

Complete the following registration form (**bold** fields are required).

Activate License Server		×
Complete the following regi and support services, and v	stration form. This information will be used internally to improve license management all not be shared with any third party.	
	View our privacy policy	
General information		
Name (required):	Matt Cason	
Company (required):	PSIGEN	
Reseller:		
Phone:		
Email (required):	matt.cason@psigen.com	
Website:		
Address		
Address line 1:		
Address line 2:		
City:		
State or province:		
Zip or postal code:	Select Next	
Country:		
Cancel	Previous	

When the server activation is complete you will see the indications below.

	PSIGEN License Server	Refresh Server Server Server	rvice lager
	✓ 🚰 127.0.0.1:47232 III Counters	License: Server is now e	enabled
	> 🗄 Logs		Server key filter: All L
Red Icon is now			Licenses
Green indicating		Application	Product Key Eval NFR
activated			

With the License Server activated and enabled we are now ready to load the Product Key(s) or Server Key.

PSIGEN License Server		
Connect Activate License Server License Server Setup	C     Enable Server     Image: Configure       Refresh     X     Remove Server       Server     X     Service Manager       Server     Configure	
<b>127.0.0.1:47232</b>	Licenses - 127.0.0.1:47232	
Counters	License Management	
E Logs	Server key filter: All Licenses	Add
	Licenses	Remove
	Application Product Key Eval	Update
	Select Add	Update All
		Reserve
		Revoke

Using the Internet, we will retrieve and install the licenses, Click Next.



Type in the Product or Server Key, Click **Next.** If you have purchased only one license, you will not have a Server Key. If you have multiple licenses, you will likely have been provided with a Server Key. Entering the Server Key will effectively load all your purchased Product Keys at once.

### ☆ Note:

If you have issues with the license server not being reachable from the Network Stations, it is most likely due to a firewall or antivirus installation. We use port 47232 to connection stations to the capture server and port 47233 to distribute batches. If running into this issue create new rules that allow both Capture Services.exe and TCP 47232-47233 to be allowed on Public, Domain, and Private Connections. Please complete the registration form that you see next (bold fields are required). Click **Next.** 

Once the activation is complete, you will see the list of available keys listed:



Configuring PSIcapture to use the License Server

The License Server is now installed, configured and activated. We will now point PSIcapture to the License Server to review the available license. Open PSIcapture from the icon on the desktop or from the Start Menu.



Since we are configuring PSIcapture on the same machine where we just installed the License Server, we will point PSIcapture to *localhost* for retrieving the license.



#### 🖈 Note:

When installing PSIcapture on any other machines on the network, you will point PSIcapture to the License Server machine by entering the name of the license server or its IP address.

This will reach out to the license to see if there is an available valid license. You should see three green-checks and the PSIcapture product will open.





Now you will create two Storage Locations.

One of them will be called **Batch Storage**. This folder will store the image files for temporary internal use within the program. The other will be the **Migrations** folder, which will be the Windows Network Folder destination for files exported by PSIcapture.

Click the **Configuration** icon and then click the **Storage** tab. Then click the **Add** button.



1. Select Configuration

Name the location **Batch Storage**. For **Storage Directory**, type "C:\PSIGEN\[Batch Storage]", set storage type to **Batch Storage**. Then click **Save**.

🦻 Storage L	ocation Definition		×
Name:	Batch Storage		
Directory:	C:\PSIGEN Training\[Batch Storage]		Browse
	◯ Shared	I	
		Save	Cancel

Because this folder does not yet exist on your hard drive, you will be prompted to create it.

Directory	Not Found		×
8	Directory does not exist. Would you like to create it?		
	Select <b>Yes</b>		_
		Yes No	

Now Add a second Storage Location to be used for your Migrations.

Storage Location Definition				
Name:	Migration			
Directory:	C:\PSIGEN\[Migration]	Browse		
	⊖Shared ⊖Batch Storage ●Migration			
		Save Cancel		

Note: If you have a main Capture and License Server and have Network Workstations, you will want to make sure your storage locations on the server have the proper share permissions and you use the full UNC path for the directory. Now that your two Storage Locations are defined, we want to set them as the defaults and click **Save.** 

Configuration					×
Capture Profiles	Storage Locations				
Storage	Name	Directory	Storage Type	Default	Add
Classification	A	A C:\PSIGEN Training\/Batch Storag	A		Edit
Regular Expressions	Migration	C:\PSIGEN Training\[Migration]\	Migration		Delete
Global Lists					
Shared Counters					
Retrieval					
Viewer					
Automation					
Batch Manager					
Capture Server					
			Select Save		
					Check Usage
				Apply Save	Cancel

CONGRATULATIONS!! You've just installed PSIcapture and a License Server and defined two Storage Locations.