



# ReSource Software Installation Guide

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This document is intended to assist our customers to install ReSource software on systems they already own, or obtained from a third-party. Software installation and configuration is an included benefit of purchasing hardware from ReSource. Customers who obtained new hardware from us do not need to perform these steps.

You will need to perform many of the tasks described in this guide. This Guide is organized by the role of the machine you are configuring; Server, Client, etc.

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## ReSource Installation Overview

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**LOCAL TECHNICAL SUPPORT:** Depending on your comfort level, you may wish to retain a local technician to perform these tasks for you. If you do so, this Installation Guide should be given to them.

**SETUP ASSISTANCE:** This guide is your support tool. ReSource Customer Service is happy to answer specific questions from this Installation Guide along the way. However, we schedule installation appointments only for equipment purchased from us. Please use the steps in this guide. Plan carefully as you implement your new hardware.

**RESOURCE ACCOUNT NUMBER:** You will need your ReSource account number during the installation process. If you do not know this, please contact ReSource Customer Service at (800)537-3621.

**DATA TRANSFER:** Included with this Installation Guide is a section on data restoration. You or your technician must first install blank, updated, copies of ReSource and UPS Worldship<sup>®</sup>, install and test all hardware, setup and test Internet access, and setup and configure network (if applicable) per the guidelines shown in this document.

When these steps are completed, use the section on Data Transfer to move your data from old machine to new. **YOU WILL WANT TO MAKE THIS THE LAST STEP prior to using your new system!**

**HARDWARE REQUIREMENTS:** If you are installing our software on hardware that you already own, or obtained from another vendor, you will need to gather some hardware information before installing. Make sure your hardware and Windows Operating System (OS) meets the “**ReSource System Hardware Requirements**” shown at the end of this document before proceeding. If it does not, please contact your local technician to make the necessary changes or additions to your system. Unfortunately, we cannot support software installed on hardware or OS that does not meet these requirements. Note that the requirements shown are minimum requirements; you will want to obtain hardware with capabilities far beyond our minimum requirements in order to enjoy optimum system performance.

**CARRIER SOFTWARE:** Some carriers supply their own software packages to assist in shipping with them. Other than the software shown in this guide, you should consult with ReSource Customer Service before installing any other shipping software on your system.

**INSTALLATION ON EXISTING RESOURCE SYSTEMS:** If you are attempting to reinstall on a machine that already has ReSource installed, please be aware that running the installation file will overwrite your databases with blank new databases, resulting in data loss. If this applies to you please contact ReSource Customer Service prior to installing.

## Overview

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### **SERVER INSTALL TASKS:**

The installation of the ReSource system needs to be performed in the following order:

- Install ReSource
- Setup, connect, and configure all hardware. This includes connecting, installing, and testing your printers in Windows with successful Windows test pages.
- If you have a network you should connect and configure Windows networking per the guidelines shown in this document.
- Install the UPS Worldship<sup>®</sup> application, if you ship UPS packages.
- If upgrading hardware (i.e. transferring data from an old machine to a new), perform the data transfer steps shown in this guide.

### **CLIENT INSTALL TASKS:**

In the case of adding client machines on a network you will need to also:

- Install ReSource
- Share the C: drive on your Server with full access permissions
- Map network drives to the Server share, as described in this document.
- Install UPS Worldship<sup>®</sup> Remote Workstation version, if you ship UPS packages.
- Configure file sharing so that the client works on the Server data files in common.

This document takes you through each of these tasks in order. Please be sure to follow these steps in detail. Doing so will assure a smooth installation experience

## Glossary

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- The term **Server** can mean a stand-alone system or in the case of a multiple machine system, will refer to the main machine in a network. It is the machine where all of the ReSource and UPS data files reside
- The term **Client** means any subsidiary or back-room machines in the store that read their data across a network from the Server.

## Configure Windows Settings

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This section is designed to help you prepare your computer systems prior to beginning installation. These steps are applicable to both Server/Stand-Alone machines, as well as Client machines.

**MINIMUM REQUIREMENTS:** Make sure your hardware and Windows Operating System (OS) meets the minimum hardware requirements shown at the end of this document.

**OPERATING SYSTEM:** ReSource is a Windows application supported only on the following operating systems – Windows XP, Windows 7 Pro or higher – 32 or 64-Bit

**USER LOGINS:** The ReSource system is currently not designed to support systems with multiple user logins in Windows. ReSource must run under a single user login with full administrative rights. Please create one user login for your store. Install and use the software under one administrative user login.

**INSTALLATION LOCATION:** Installation of the ReSource system is only supported on the C: drive.

**DISPLAY RESOLUTION:** ReSource is configured to fill the screen edge to edge at 800 x 600 screen resolution. Running at this resolution will display the POS at full screen. You may run a higher resolution if you wish, but the screens will not fill completely.

**DISPLAY FONTS:** ReSource will only display properly under Normal fonts

**FIREWALL:** Make sure that ReSourcepos.exe and ProcessWebRequests.exe are given full in and outbound access permissions in your Windows and other firewalls. Make sure that a current anti-Virus software package is installed, updated, and configured on each machine in your store.

**USER ACCOUNT CONTROLS:** Please disable User Account Controls in Windows Vista and Windows 7

## ***Install ReSource***

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You must run an installer file to install ReSource. This installer file can be obtained via a downloadable file.

You will need your ReSource Account Number as part of this install process. Please contact us if you do not know your account number.

## ***Install ReSource – Download Installation File***

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We have created a downloadable version of the Installation CD.

Please download the following files (type this address exactly as it appears):

<http://downloads.resourcesoftware.com/cd/downloads/installmaster.exe>

### **Download/Install Instructions**

- When prompted click SAVE
- Choose a Save location that you can easily find, such as your Desktop
- Click SAVE
- Allow the download to complete.
- When the download completes, you should see installmaster.exe at the location you selected in the steps above.
- Double click and run the installmaster.exe file. Follow the on-screen prompts, entering your ReSource account number when prompted.
- Other components will run in addition to ReSource installer. Allow these to download and run. Follow the on-screen prompts.
- You will now have a blank version of the ReSource program installed on your system.
- Open ReSource and allow any automatic updates to load.

## ReSource Installed – What's Next?

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You now have a blank copy of the ReSource program loaded on your system. Run the Copy Utility NOW to make a backup set of clean files.

*If you do not have data to bring over from an older machine, you will need to configure the blank software prior to use in your store. Please click [HELP | About](#) from within ReSource to access our online help system*

You have many configuration and data transfer tasks to complete. You are now ready to begin configuring your new machine. Be sure to follow any remaining configuration steps outlined in ReSource Online Help. You can view help topics by clicking [HELP | ReSource Help](#), then use keyword INSTALL

## Install Printers & Other Devices

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**INTERNET ACCESS:** Reliable broadband Internet access is required for package processing, as well as for many ReSource functions.

**REPORT PRINTER:** For multiple computer systems, you need a report printer for the Server machine only. Install the printer per the documentation that comes with the printer using the install CD included with the printer. When installation is finished, make sure the printer is the Windows default printer and that it prints a Windows Test page.

**RECEIPT PRINTER:** A receipt printer is needed for each machine in your store. The most common supported models are the Citizen CTS-2000, CTS-310, and CBM-1000. ReSource can provide you with driver software for these models. Any other model is untested for use with ReSource, but may work. You will need to work with manufacturers to obtain driver software. Install and test to determine if they meet your needs. In all cases, you must obtain a successful Windows Test Page prior to configuring for use with ReSource. Graphic receipt printing is only supported on CTS-2000 and CTS-310.

**LABEL PRINTER:** A label printer is needed for each machine in your store. The following models are tested and supported – UPS 2442, UPS 2844, Zebra 2442 or 2844, Eltron 2442 or 2844, Zebra ZP-450. Other models may print a successful windows test page, but will probably not produce a correct bar code. Driver software for these models will probably install automatically when plugged into your new system. Alternatively, UPS printer drivers can be used if you have already installed UPS processing software.

**DYMO USPS LABEL PRINTER:** Install the Dymo printer on USB per manufacturer's directions.

**SCALE:** USB, or connected on COM1 COM2 with serial connection, or COM4 only when using a Serial to USB converter. Supported scales are Toledo 6L or PS60. Other models *may* work if emulating these models, otherwise weight will have to be entered manually.



**TOUCH SCREEN:** Install and calibrate using manufacturer's software and instructions. ReSource system then needs to be told to recognize the fact you are using a touch screen by going to FILE | Program Setup|Store Information, General. Check Use Touch Screen.

**BAR CODE SCANNER:** Scanner needs to be installed and recognized by Windows. ReSource currently supports the scanner format used by the Welch Allyn/Hand Held Products 3800. You will either need to obtain a WA3800 or work with your scanner manufacturer to emulate a WA3800.

**KEYBOARD/WEDGE:** The ReSource POS supports a specific input format for credit card swipes. To determine whether your device is capable of conforming to this standard, please contact ReSource Customer Service for more information.



**Drivers for ReSource-tested hardware can be downloaded from**  
<http://www.resourcesoftware.com/cd/downloads/resourcedrivers.zip>

## Transferring Data

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### **IMPORTANT: Data Transfer only applies to Server machines. Skip these steps if you are setting up a client machine**

If you are installing ReSource on a new machine, you may have ReSource data from another machine that you have been using. The steps are designed to walk you or your local computer technician through the data restoration process once you have completed the software installations steps. Please note the following

#### **Data Transfer Procedure - Comments**

- You must complete all installation steps shown in our **Installation Guide** prior to proceeding with the steps in this document. You will not be ready to do the data transfer to a new machine until you have completed these tasks.
- **When you restore data, you should be ready to begin using the new machine at this time.** If you transfer data to the new machine and keep using the old machine, transactions run on the old machine must be re-entered individually into the new machine or the whole transfer process repeated. Therefore you will want to put off the data transfer until the last moment. Because each data transfer experience is unique, there are situations not covered by these steps. These general steps will serve as a guide for you or your technician
- You and your technician should first determine what method will be used to move ReSource data from the old to new machine. Make sure that you know what files need to be recovered from your old system prior to beginning work.
- There are a number of ways the data can be moved. If you are moving compressed data, typical file sizes are 80-120MB in size; you should expect that non-compressed data will exceed 500MB in size. Compressed data can be moved on portable media using anything convenient such as USB drives, external HD, or networks.

#### **Data Transfer Steps - Via A Portable Device Or USB Drive**

1. Plug your USB drive into a USB port on your old server
2. On the old server, browse to C:\ReSource\ReSourcePOS (**Important: Data on Pre-2010 systems will likely be in C:\Program Files\Winpos**)
3. Click EDIT | Select All
4. **\*\*IMPORTANT - Hold down CNTRL and DESELECT all of the sub directories (Archive, Transmit, etc) and the following files – ParcomIni.mdb, ProcessWebRequests.exe, and ProcessWebRequests.exe.config**
5. Right click on any one of the remaining highlighted files, then left click on COPY
6. Browse to your USB drive
7. Right click and paste the copied files to your USB drive.
8. Unplug your USB drive. Plug it into a port on your new computer
9. Browse to the USB drive.



10. Click ORGANIZE | Select All
11. Click ORGANIZE | Copy
12. **CONFIRM THAT THE RESOURCE POS PROGRAM IS NOT RUNNING. Be sure other programs such as Process Web Requests is also closed via the taskbar icon!**
13. Right click on C:\ReSource\ReSourcePOS directory, left click on Paste. Click OK to the File Replace and Directory Merge messages that appear.
14. Once the transfer has taken place, open ReSource.
15. Click Database | Customer and you should see your customers
16. Click Utility | Receipt lookup and you should see your receipts.
17. Click on FILE | Printer setup. Select the printers you configured earlier
18. Click FILE | Program Setup | Shipping Setup, Printers tab. Select the printers shown there as well.

## ***Install UPS Worldship***

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If you are a UPS shipper (an ASO), you will need to install the UPS Worldship product as well. Please use the installation CD provided by UPS, along with their instructions, to install the UPS processing software.

### **SERVER MACHINE:**

- Install UPS Worldship using their installation CD on a server machine
- Installation is only supported in the default directory – C:\UPS
- Install as an **Administrative Workstation**
- Set the Shared Data Directory to C:\UPSDATA. If this directory does not exist, please create one prior to installing

### **CLIENT MACHINE:**

- Installation of UPS Remote Workstations is conducted **without a CD.**
- Installation files are run across the network.
- Data directory is M:\UPSDATA, if network and UPS install configured per these directions.
- **Suggested instructions to perform an UPS Remote Workstation install are included in the end of this install guide.**

For UPS software installation questions, please contact UPS technical Support (888)553-1118

## ***Install UPS Worldship – Account Validation***

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UPS validates your account prior to allowing UPS Worldship to be registered. You will need a copy of your recent UPS bills to do so. For more information about account validation/registration, and to assist you entering the correct information on the validation screens, contact UPS technical support.

## ***Install FedEx Processing Components***

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Components to process FedEx packages are automatically installed as the ReSource software is installed. There is no need to install a separate FedEx processing software package (i.e. Ship Manager). Older systems are utilizing a legacy form of FedEx processing.

## ***Install Endicia DAZzle and Printable Postage***

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You will need to install and configure Endicia DAZzle and Printable Postage on each machine from which you want to print out USPS labels. Consult their installation documents for more information, or view the Endicia topics on the ReSource Help System

## ***Install IC Verify Credit Card Processing Software***

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ReSource integrates to the IC Verify software product for credit card approval integration.

You will need to work with IC Verify support to install and configure IC Verify so that it is able to process and get an approval of test transactions when running by itself. Contact ReSource Customer Service when this is completed for help integrating their software for use with the ReSource program.

## ***Client Machine - Configuring A Network For ReSource Software***

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This section outlines the basic steps needed to configure a network to support multiple machines running ReSource in your store.

This section is intended as a convenience for our more advanced users to give them a quick guide to get their networks running. The tasks outlined in this section can be technically challenging for many users. ReSource Customer Service is happy to assist you with your ReSource installation questions but does not conduct network support. This document also assumes that you have hooked up all network cables, properly hooked the cables to a network router if applicable, installed the correct network cards and software drivers, etc.

If you do not understand the tasks outlined in this section, or if you follow these steps and your network still does not function properly, please contact a local technician to properly configure your network prior to proceeding.

Once you have successfully completed sharing directories and setting the drive mapping, you are ready to proceed with the Client installation steps. The installation cannot proceed unless the network is fully configured.

**TERMINOLOGY:** The Server is the main machine in your store. It contains the ReSource program, as well as your customer, inventory, configuration, and other data files. A Client is a subsidiary computer. These each have the ReSource and UPS programs installed, but are mapped back to the data files on the Server. Each machine shares data files in common so changes made on one computer are reflected on all computers.

**WORKGROUPS:** All machines should be on the same Workgroup. Our standard workgroup name is RSI. Domains are an untested manner of network organization for ReSource integration.

**NETWORK MACHINE IDENTIFICATION:** Our standard configuration is as follows. We suggest you follow this model for your own network:

- The Workgroup should be RSI.
- The Server system should be identified as SERVER.
- The first Client system should be identified as CLIENT1 (CLIENT2, and so on)

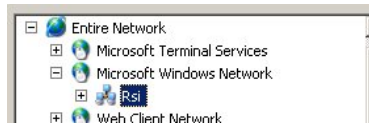
**USERS:** The ReSource system is currently not designed to support network systems with multiple user logins. Please create one user login for your store and install the software under that login on each machine. This login must have Administrative privileges.

**NETWORK SHARES:** Establishing a share of the Server C root with full permissions is a requirement for ReSource to operate properly. A properly configured network should allow Full Read-Write Access (*Allow Network Users To Change My Files...*) permissions to the Server's shared directories. SERVERC as share description is suggested.

**STATIC IP ADDRESSES:** It is not required that you statically assign each machine's IP address, unless your network mapping is conducted via an IP address for non-ReSource related reasons, such as when sharing a copier.

**NETWORKED PRINTERS:** The standard network printer configuration is one shared report printer that is physically connected to the Server. This printer may be shared between all computers in your store. Each POS system will need its own receipt and thermal label printer.

**NETWORK SHARE MAPPING:** Map the C: drive on your Server machine as **M**. Mapping one drive letter to the root C: \ directory is required for successful network processing. It also makes additional mapped letters for other directories, such as the UPS directory unnecessary.



*(XP machine shown)*

- Once connected, you should see the RSI workgroup name under Microsoft Windows Network from your client machine.
- If not, double click on Microsoft Windows Network and you should then see RSI.
- Double click RSI and you should see SERVER. Double click on SERVER and below that you should see SERVERC.
- If you are unfamiliar with steps needed to share and map a network drive letter, please consult your local computer support technician.

If you are unable to complete the steps above, reboot both the Server and then the Client. Try to map drives again. If you still cannot see the Server machine, please contact a local technician to resolve the issue and have them complete the drive mapping steps before proceeding with client machine setup tasks.

## Client Machine – Configuring To Share ReSource Data

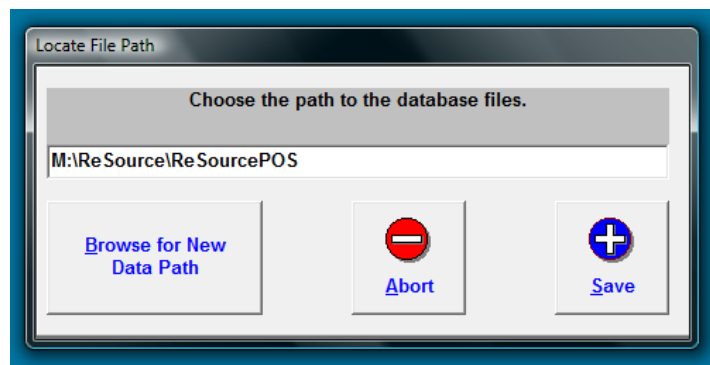
This section is to help you and your technician configure the ReSource software for your networked systems.

A client machine is a subsidiary machine; it shares its data with the Server machine. It must be configured to read and write data to a common database, stored on the Server.

First, connect your client machine to your store network. Next, perform the steps below to share the data.

### Setting Data Path To Share Information With Server Machine

Now that ReSource is installed, you will next need to set the Client machine to share its data in common with the Server. When finished with installation and networking tasks, you will then need to set it up to share data with the Server machine. Use the steps below to complete the setup of your client machine.



1. Open the ReSource Startup Screen
2. Hit F2
3. Click Open Utilities Panel
4. Click Set Node. Change the Node to 2 (or a unique node for this machine if you have more than one client machine. 3, 4 and so on).
5. Click OK.
6. Click on Set Path.
7. Click on Browse For Data Path. Find your M drive, click on it once
8. Double on the ReSource folder
9. Double click on the ReSourcePOS folder
10. Click OK, then click Save.
11. Click Exit.
12. Open ReSource. Click HELP | About to verify that the node and data path are now correct. Click Done.

You are ready to proceed with configuration and testing. To verify that this machine is now sharing data with the Server, click on Database | Customers and you should see your customer list from the Server machine. If you have followed the steps above, you are now ready to begin configuring your Client machine for use. You will need to setup printers within ReSource on this machine, and perform final system testing. Be sure to follow the tasks outlined in ReSource Online Help. You can view help topics by clicking HELP | ReSource Help.

## **Client Machine – Configuring To Share ReSource Data – Windows 8 Clients**

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These additional steps are required on a Windows 8 client.

Click Start, type **regedit** in the Start Programs and files box, and then press enter. (If the windows 8 machine does not have classic shell or a similar modification made to utilize the Start menu, then try "windows key+R" on your keyboard to get to the Start Programs and files" box.

Locate the following registry key:

**HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System**

Right click on it. Left click on "New", and then click "DWORD Value"

Type in the field "EnableLinkedConnections" (without quotations) and then press ENTER

Right-click EnableLinkedConnections, and then click Modify.

In the Value Data box, type 1, and then click OK.

Exit the Registry Editor. Save if prompted.

Restart the computer.

After that, you should be able to configure RS to the map drive.

**IMPORTANT OS NOTE:** Resource will install and run on Windows 8. But the third party products to which we integrate have not all announced support for Windows 8. This is aside from the fact that many printer drivers have not yet been provided for Win8.

Windows 8 is biased towards a tablet environment, not a retail POS environment. For this reason, it is our strong recommendation that new systems load Windows 7 professional, not Windows 8

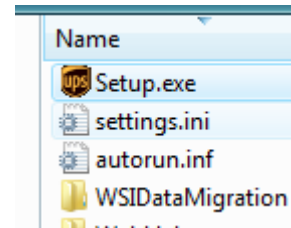
## Client Machine - Install UPS Worldship – Remote Workstation

Customers installing on a Client (remote workstations) are asked for the location of the Shared Data Directory as part of the Remote Workstation upgrade installation. Some customers have reported difficulty determining the location of the Shared Directory. Shown below are the steps to find the file in the most common location.

NOTE: If you are reading this prior to upgrading your server machine; the location of the shared data directory will be shown during the server upgrade. Write it down so you can use it when you upgrade your clients..

***While there can be other locations,*** the steps below should work in the majority of cases.

1. Close ReSource and UPS on all machines in your store.
2. On your client machine, double click on My Computer
3. Double click on your **M** drive (probably labeled **C on Serverc (M )** or a similar name).
4. Double click on **UPSDATA**
5. Double click on **UPS**
6. Double click on **WSTD**
7. Double click on **Remote**
8. Double click on **Install**
9. In the list that appears, you should see a file call **SETUP** or **SETUP.EXE** (Look for a file with a UPS logo with that name).
10. Double click on **the Setup.exe** file.
11. Click **Run** and **Yes**
12. This should reboot your client then automatically start the remote upgrade process. Follow the onscreen prompts from there.
13. The upgrade program will run for several moments and then possibly reboot the second machine.
14. UPS should open up automatically after the reboot and draw some final updates from the Server machine.



The UPS Remote Workstation installation can be accomplished across the network or via a CD. Note that this procedure above **does not** use the UPS CD.

**IMPORTANT: If the Setup.exe file shown in step 9 does not appear, or the folders in steps 4-8 do not exist, you will need to continue to work with UPS technical support to find the alternative location of the shared directory and the setup file. Their number is 888-553-1118.**



## ReSource Minimum Hardware Requirements

### THESE ARE THE MINIMUMS WE REQUIRE FOR A SUCCESSFUL SOFTWARE ENVIRONMENT.

The higher the processor speed and RAM the better program performance you will experience. Please call Resource Sales at 800-818-0492 for the current configuration we are providing at this time.

2 GHz processor (both 32/64 bit supported)		
2 Gb. RAM (minimum)	40 GB HD min	1 Gigabit NIC/Router
Monitor	Keyboard	Mouse
CD or DVD Drive	Report Printer	Internet Access *

- Receipt Printer on each system for POS functions
- Scale and Thermal Address Label on each system for shipping functions

*\*Internet Access Required*

### Supported Operating Systems

Windows 7 Home Premium or Professional, Vista, Windows XP Home and Pro. **User Account Controls must be disabled.**

<i>Device Name</i>	<i>Port</i>
• Report Printer	USB
• Receipt Printer	USB or LPT
• Thermal Label Printer	USB or LPT
• Scale (Toledo PS60 or 6L only)	USB or COM1/2
• Touch Screen	USB

Printers must be connected and able to print a Windows test page. Other devices must test successfully outside of ReSource

### Network Configuration

#### Server

- The Server system machine name should be identified as SERVER or similar. Workgroup should be same for all POS systems.
- Server's C drive should be shared as SERVERC.
- Shared directories should be set with full access permissions and no password. The shared report printer should be installed on all machines.

#### Client

- The first client system should be identified, as CLIENT1. Workgroup should be RSI.
- Clients should connect to the Server's C drive (SERVERC) using the mapped drive letter M
- Each client must have its own receipt and thermal printer.