Oracle® Hospitality e7 Point-of-Sale
Installation Guide

Release 4.4

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Oracle Hospitality e7 Point-of-Sale Installation Guide, Release 4.4

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Contents

Preface

Oracle Hospitality e7 Point-of-Sale is a Point-of-Sale (POS) solution that provides business management capabilities for smaller enterprises with simple configuration and maintenance.

Purpose

This installation guide provides information and instructions for upgrading or installing Oracle Hospitality e7 in your store.

Audience

This Installation Guide is for the following audiences:

- System administrators and operations personnel
- Database administrators
- System analysts and programmers
- Integrators and implementation staff personnel

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com/en/industries/hospitality/.

Revision History

Table 1   Revision History

Date	Description of Change
May 2018	Initial Publication

Table 1   (Cont.) Revision History

Date	Description of Change
March 2019	• Revised *Installing the Remote Transfer Agent for Reporting and Analytics* • Added *Configuring the Embedded Transfer Agent for Reporting and Analytics*
August 2019	Revised *Configuring the Embedded Transfer Agent for Reporting and Analytics*

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Installation

Follow the instructions for your installation environment:

- Installing e7 on a PC Server
- Installing e7 on Workstations using a CAL Server
- Installing e7 on Standalone Microsoft Windows Compact Edition Workstations

Installing e7 on a PC Server

1. See the *Oracle Hospitality e7 Release Notes* and verify that your server meets the hardware and prerequisite requirements.

2. If you are performing an upgrade:

   a. Upgrade contains information and instructions for preparing the system.

   b. Close all checks and settle all batches.

3. Download `e7_pc_build_version.exe`.

4. Double-click `e7_pc_build_version.exe`, select the location to which you want to extract the installer files, click **Unzip**, and then click **Close**.

5. Double-click `e7PCSetup.exe` and follow the instructions provided by the installation wizard.

6. After completing installation, double-click the e7 icon on the desktop to start e7.

7. Select **Network Location ID** and enter the ID for use by each client and PC on the network. The ID is case sensitive.

8. Log into the Configurator. If you upgraded from an earlier version, the Configurator requires that you change your password.

9. Create a user account for accessing the database. Do not use an existing employee, because this credential cannot perform Point-of-Sale functions. Do not create more than one database credential, and do not change the account created in this step.

   a. Click **Add New Employee**.

   b. On the General tab, enter a last name.

   c. On the Job Information tab, select a default job.

   d. On the Security tab, select **Update Enhanced Security**, create login credentials, select **This is a database user**, and then click **Save**.

10. Generate an encryption key to enable ringing transactions.

   a. Make sure there are no open checks in the system and no offline workstations, or the operation will fail.

   b. Insert a USB drive to the PC or workstation generating the key.

   c. In the Configurator, navigate to the Restaurant form.

    d. On the Security tab, click **Generate New Key**, enter the database user's credentials, and then click **Yes** each time you are prompted by the key generator.

    e. Select **Enable Enhanced Security** to enable ringing credit card transactions.

    f. Store the USB drive in a secure location so that it can be retrieved when a database restoration is required.

11. Create accounts for all employees that will need to access the Configurator.

12. If you upgraded e7, you can now click **Restore the Database** to restore the backup in `\MICROS\e7\DBBackups\`

13. See the *Oracle Hospitality e7 Security Guide* for information and instructions for securing the server, the workstations, and the application.

Installing e7 on Workstations using a CAL Server

1. On each workstation, click the **Start** button, select **Programs**, select **CAL**, and then select **Reconfigure CAL**.

2. Select the e7 POS CAL server, click **Next**, and then click **Save** to install e7 on all connected workstations.

3. On the e7 Network Identification dialog box, enter the **Network Location ID** that you set during installation.

4. If you see an error message for programming an employee and a job, click **OK**.

5. If you see an error message for requiring a new encryption key, click **OK**.

6. If you see an error message describing the encryption key process, click **OK**.

7. In the e7 Configurator, click **Retrieve the Database**, click **Refresh**, and then close e7 when the operation completes.

8. See the *Oracle Hospitality e7 Security Guide* for information and instructions for securing the server, the workstations, and the application.

Installing e7 on Standalone Microsoft Windows Compact Edition Workstations

1. See the *Oracle Hospitality e7 Release Notes* and verify that:

   • The version of e7 you are installing supports your workstations.

   • Your workstation is using the required platform version.

   • You installed the required Microsoft .NET Compact Framework version.

2. Prepare the following:

   • PC or laptop to extract installation files from archives.

   • Transfer media, such as a USB thumb drive, to transfer installation files to the workstation.

3. To install or upgrade a Windows Compact Edition platform:

   a. Download `clienttype_platform_version.exe`.

    b. Double-click `clienttype_platform_version.exe`, select the location to which you want to extract the installer files, click **Unzip**, and then click **Close**.

    c. Copy the extracted folder to your transfer media, then attach the transfer media to the workstation using the port specified for each workstation. See Workstation USB Port.

    d. To install the platform on the workstation, double-click `Standalone CAL or BIOS Update version\StandaloneInstall.exe` and follow the instructions provided by the installation wizard.

    e. To update the platform on the workstation, double-click `Standalone Platform Update version\StandaloneInstall.exe` and follow the instructions provided by the installation wizard.

4. To install or upgrade e7:

    a. Download `clienttype_build_version.exe`.

    b. Double-click `clienttype_build_version.exe`, select the location to which you want to extract the installer files, click **Unzip**, and then click **Close**.

    c. Copy `StandaloneInstall.exe` to your transfer media, then attach the transfer media to the workstation using the port specified for each workstation. See Workstation USB Port.

    d. On the workstation, double-click `StandaloneInstall.exe` and follow the instructions provided by the installation wizard.

    e. If you are installing e7 with Protégé support, double-click `StandaloneInstall.exe` after completing installation to install the Protégé files.

5. See the *Oracle Hospitality e7 Security Guide* for information and instructions for securing the server, the workstations, and the application.

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Upgrade

Perform the following preparation steps if you are performing a version upgrade of e7 instead of a clean installation:

- Best Practices for Upgrading from a Non-PCI-Compliant Version
- Creating a Database Backup
- Restoring from a Database Backup
- Upgrading in an Environment with a CAL Server

Best Practices for Upgrading from a Non-PCI-Compliant Version

PCI Compliance in the *Oracle Hospitality e7 Release Notes* contains more information about compliant and non-compliant versions. If you are upgrading from a non-compliant version, you must remove historical data containing sensitive information to ensure the upgrade is conducted in adherence to PCI compliance. See the *Oracle Hospitality e7 Upgrade Best Practices* for more information and instructions on ensuring PCI compliance.

Creating a Database Backup

1. From the e7 Configurator, select **Backup the Database**.
2. Verify that the e7 Configurator created a backup in the `\MICROS\e7\DbBackups\` folder.

Restoring from a Database Backup

1. Insert the USB drive with the key encryption key.
2. From the e7 Configurator, select **Restore the Database**.

   This restores the database using the backup found in the `\MICROS\e7\DbBackups\` folder.

Upgrading in an Environment with a CAL Server

Perform the following steps if your environment includes a central PC server with the Client Application Loader (CAL):

1. Turn off all workstations or remove them from the network.
2. Install the new version of Oracle Hospitality e7 on the PC server.
3. Turn on all workstations or add them to the network.

4. Restart the PC server. When the server finishes restarting, the workstations automatically upgrade to the new version.

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Post-Installation Configurations

This chapter provides instructions for configuring or setting up specific e7 applications.

Enabling Gift Cards After Upgrading to e7 4.1 MR1 or Later

If you are upgrading to e7 4.1 MR1 or later from an older version, you must perform the following steps to enable gift cards:

1. Start e7 and wait for the error message:.

   ```
   Failed to load TIF Module: SVC Due to the lack of signature
   ```

2. Click **OK** on all nodes.

3. In the Configurator, select **Restaurant** from the menu, select the **Security** form, and select **Allow unsigned interfaces**.

4. Restart e7 on all nodes when prompted.

Installing the Remote Transfer Agent for Reporting and Analytics

The Remote Transfer Agent (RTA) sends data from the e7 system to Reporting and Analytics. To use e7 with Oracle Hospitality Reporting and Analytics, download and install the RTA client on the PC server. If you cannot find or do not have access to the necessary reports and portlets, see the *Oracle Hospitality Enterprise Back Office* documentation or contact your system administrator.

1. Shut down e7.

2. In Reporting and Analytics, find the restaurant ID and download password:

   a. In a browser, go to the Reporting and Analytics application, and then log in with an administrator account.

   b. Go to the **.Connect Admin** portlet or **RTA Admin** portlet depending on your system configurations, select your location, and then click **Display Password**.

      If **.Connect Admin** or **RTA Admin** do not populate a list of locations, you do not have the **Can View Download passwords** portlet permission enabled for your role.

   c. Make a note of the **Restaurant ID** and **Download Password** values.

3. Download and install the RTA client:

   a. In Reporting and Analytics, click **Admin**, and then click **Store Download**.

      b. Click **Install RTA Client**, enter the **Restaurant ID** and **Download Password**, and then click **Next**. If the installation fails, Reporting and Analytics opens the error log in a text editor.

4. For new installations of e7:

      a. Go to `INSTALL_DIR/myMicros/`, right-click `/RTA/`, and then click **Properties**.

      b. On the **Security** tab, click the **USERS** group, and then verify that the **Full Control** permission is set to **Allowed**.

      c. If the permission is not enabled, click **Edit**, select **Allow** for **Full Control**, click **Apply**, and then click **OK**.

Configuring the Embedded Transfer Agent for Reporting and Analytics

The Embedded Transfer Agent (ETA) sends data from the e7 system to Reporting and Analytics.

1. Make sure you know your restaurant ID and password:

      a. In a browser, go to the Reporting and Analytics application, and then log in with an administrator account.

      b. Go to **.Connect Admin** or **RTA Admin** depending on your system configurations, select your location, and select **Display Password**.

      If **.Connect Admin** or **RTA Admin** do not populate a list of locations, you do not have the **Can View Download passwords** portlet permission enabled for your role.

      c. Make a note of the **Restaurant ID** value and the **Password** value.

2. Configure e7 settings as described in the following table:

Setting	Description
Server Name	Mail server URL, provided by Provisioning Team. Example: www.mymicros.net or mail.mymicroseu.net
Send To	Main mailbox that receives all mail, provided by Provisioning Team. Example: server1
Errors To	Errors mailbox, provided by Provisioning Team. Example: errors
Site Name	Restaurant ID, provided by Provisioning Team and/or RTA Admin portlet. Example: ABC_0001
Site Password	Password, provided by Provisioning Team. Example: abC123

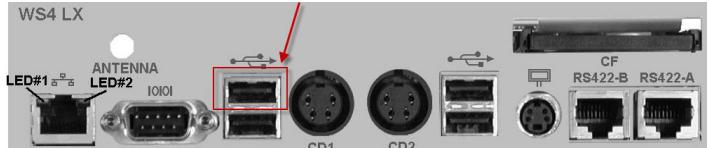| Setting	Description
Communication Method	Enter 1 or 2 depending on your cloud configuration. If you do not know which number to enter, contact Oracle Support.
Encryption Mode	Enter 2
Key Server URL Part 1 and 2	Portal server URL including webservice path, provided by Provisioning Team. Example: http://www.mymicros.net/posting/postingService/AgentResource/grXML
Key Server Username	Restaurant ID, provided by Provisioning Team or RTA Admin portlet. Example: ABC_0001
Key Server Password	Password, provided by Provisioning Team or RTA Admin portlet. Example: password1234

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Uninstalling e7

1. Close the e7 application.

2. Uninstall the e7 application (`Micros e7 version_number`) using the Microsoft Windows programs and applications manager.

3. In the Microsoft Windows Services Manager, stop the **MICROS CAL Service**.

4. On the PC server, navigate to `/Users/Public/`, and then delete the `/Micros/` folder.

5. On each workstation, navigate to the e7 installation folder, and then delete the `/Micros/` folder.

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Workstation USB Port

Use the following table to find the USB port you can use when attaching transfer media to a workstation for installing e7:

Workstation	Input/Output Diagram
Workstation 4X	
Workstation 5	
Workstation 5A	