



DeskBank Installation Guide

Contents

Introduction	3
About this guide	3
What do we need to start using DeskBank?	3
Who does what?	3
Registration	3
How to get help	3
DeskBank's Online Help	4
Backups	4
General Disclaimer	4
Copyright Statement	4
Installing DeskBank	5
What you will need	5
If something goes wrong	5
Installing DeskBank on a stand-alone or network client PC	6
Installing DeskBank on a Network Server	9
Starting DeskBank on Windows NT Server	13
Using DeskBank for the first time	14
Adding Users	17
Moving DeskBank	18
Changing Stand alone PC	18
Installing a new network client PC	18
Moving to a new Server	19
Changing from Stand alone to Network install	19

Introduction

About this guide

This guide contains important information about the setup and installation of DeskBank. Please read all of this guide before attempting to install DeskBank.

What do we need to start using DeskBank?

- DeskBank Installation Guide (*this guide*)
- DeskBank software (file 'Single.exe' or 'Server.exe')
- DeskBank Starter Guide (the Starter Guide will become available on your PC or network after the installation of the DeskBank software)
- your Site ID
- DeskBank Bank User IDs and passwords

Note: Please ensure all DeskBank users read the Starter Guide which accompanies the software before they start accessing DeskBank.

Who does what?

An experienced PC user should be able to install DeskBank on a stand-alone PC, however to install DeskBank on a network you should be an experienced Network Administrator.

In both cases, the DeskBank Administrator needs to be present to complete the installation.

Westpac will:

- load the details for your site onto the Westpac Host computer e.g. accounts you want to access
- provide the DeskBank software
- provide the DeskBank Administrator with the details they need to log on for the first time
- provide Bank User ID password receipt forms to be signed and return by the required DeskBank users.

Your organisation will:

- download the DeskBank software
 - log on the DeskBank Administrator/s
 - add DeskBank users
 - return your signed Bank User ID password receipt forms.
-

Registration

DeskBank software is automatically registered during the first transmission after the installation is completed.

How to get help

Contact the DeskBank Helpdesk on **0800 433 752** if you have any questions or problems during installation.

DeskBank's Online Help

DeskBank's **online help** provides you with information about DeskBank features and functions, as well as step by step instructions for each task you can perform on DeskBank.

Online Help has the same functionality as other Windows Help. It can be accessed by **Pressing** the F1 key, or by clicking on **Help** on the **File** menu and selecting **Help Topics**, or alternatively

Backups

The DeskBank Backup utility should be run on a regular basis, preferably daily. DeskBank will remind you if the backup has not been run according to the frequency set in System Administration, Application Settings

The backup can be performed while DeskBank is running.

The following files are copied:

c:\wt_deskb\data\deskbank.db

c:\wt_deskb\data\deskbank.log

Note: If DeskBank is running on your network, your normal network backup process is unlikely to include the DeskBank database as the file is held open by the system and most backup programs do not include open files. We recommend that you use the DeskBank backup utility to create the backup files which can then be used in your network backup. The DeskBank backup process also truncates the deskbank.log file which helps maintain good levels of performance.

General Disclaimer

The Bank's sole intention in producing the DeskBank Installation Guide is to provide basic guidance on the installation and use of DeskBank.

The guide is not an exhaustive reference and should not be interpreted as such. We urge you to contact the DeskBank Helpdesk should clarification on the installation or usage of DeskBank be required. The Bank will accept no responsibility for any loss, damage, injury, cost or expense incurred through the use of DeskBank contrary to the instructions offered in this guide or by any Westpac officer or through any intentional misuse or abuse of DeskBank and its functions.

Copyright Statement

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Installing DeskBank

What you will need

Stand-alone PC or network client PC.

This is when either:

- only one PC in your organisation will be used for DeskBank. The PC may be connected to your network for print and file sharing purposes.
- OR the DeskBank database runs on your network server and one or more client PCs have access to DeskBank

The PC will need:

	Recommended
Processor	Pentium III 550
RAM Microsoft – Windows – all version up to Windows 7	256 Meg
Hard Drive	100 Meg free space
Internet connection	Broadband

Network installation: This is when the DeskBank database is on a network server and one or more client PCs are used to access DeskBank.

To install DeskBank on a network server, you will need:

	Recommended
Processor	Pentium III 550
RAM Microsoft – Windows – all version up to Windows 7 , Server 2008 (incl 64bit)	256 Meg
Hard Drive	120 Meg free space

Installing DeskBank

If you are...

[see page](#)

installing on a stand-alone or network client PC	6
installing on a network	9

If something goes wrong

If something goes wrong during the install process, please note down any error messages and contact the DeskBank Helpdesk on [0800 433 752](tel:0800433752).

Installing DeskBank on a stand-alone or network client PC

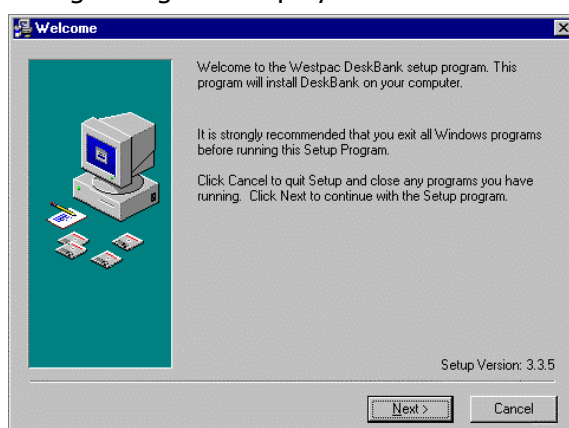
Follow these steps if you want to use DeskBank on only one PC or your PC needs to connect to a network based DeskBank database.

If you are installing DeskBank on a PC with a Windows operating system, check with your Network Administrator that you have administrator (User Manager, Local Administrator) privileges to the PC.

- Before you begin, make sure all Windows programs are closed. We also recommend rebooting the PC before starting the installation, especially if it has been running other programs since it was last rebooted.
- Before starting the installation, double click on the file 'Single.zip' and extract the file 'Single.exe' and save.
- Double click on 'Single.exe' to run the installation.

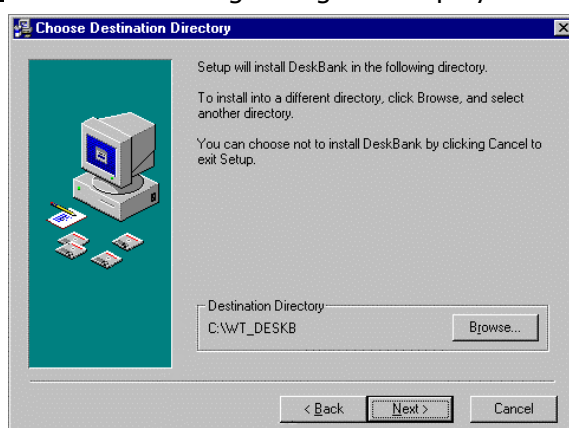
Note: If you are installing on a network client PC you need to run **Single.exe** from the **Wt_Desk\Client** directory on the server

The following dialog box displays.



If you have not closed all Windows programs yet, choose **Cancel** and close the programs. Then restart the installation by double clicking on **Single.exe**.

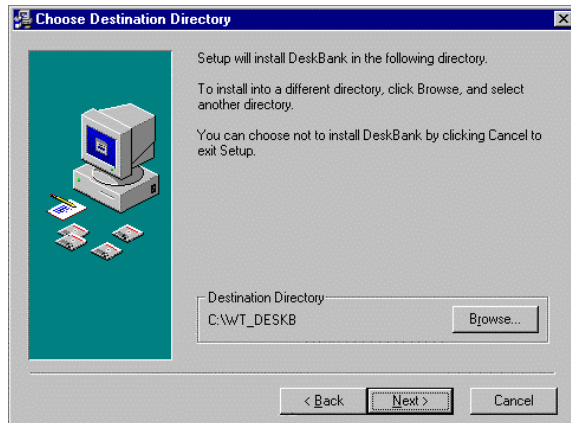
Click **Next**. The following dialog box displays.



Change the destination directories if required. (Click **Browse** to select a new destination directory and click **OK**.)

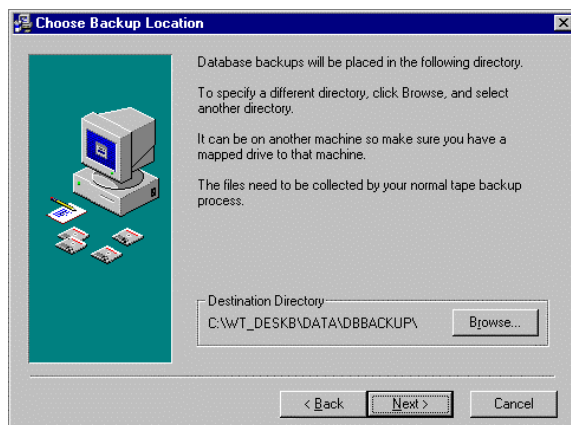
NOTE: We recommend that you use the destination directories provided by the Setup utility as it is easier to support standard DeskBank software installations.

Click **Next**. The following dialog box displays.



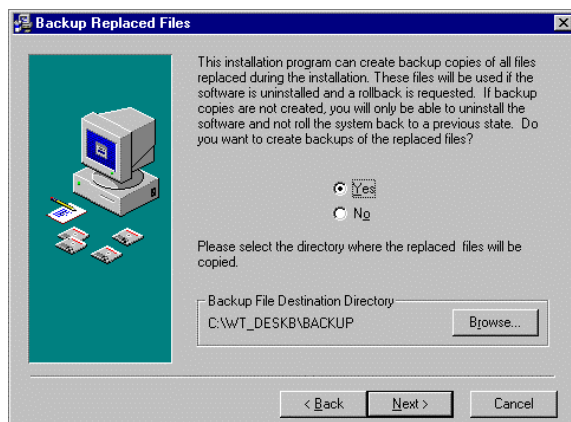
The DeskBank backup utility should be installed on each PC to enable a backup to be taken regularly.

Click **Next**. The following dialog box displays.



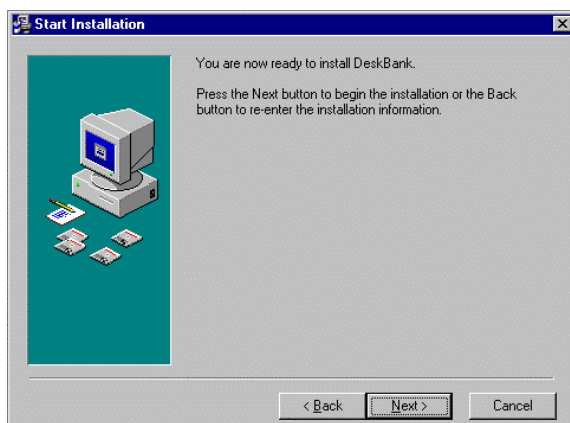
The default directory that the DeskBank backups will be written to is shown. If you want the backups to be installed somewhere else, e.g. a Network drive, click on browse and select the location

Click **Next**. The following dialog box displays.



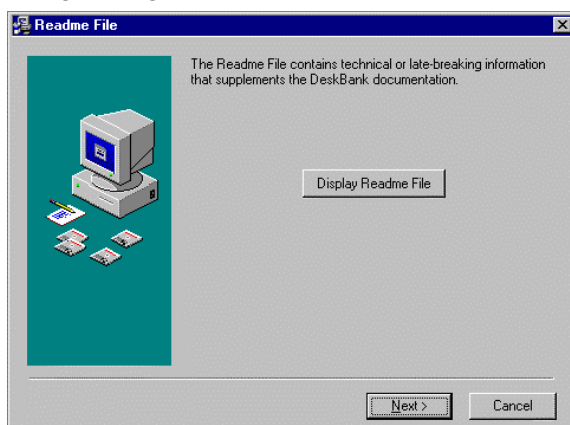
The DeskBank installation may overwrite some existing Windows system files if the existing version is older than the one that DeskBank requires. A backup copy of any overwritten files will be stored in the specified backup directory to enable recovery of those files if required.

Click **Next**. The following dialog box displays.



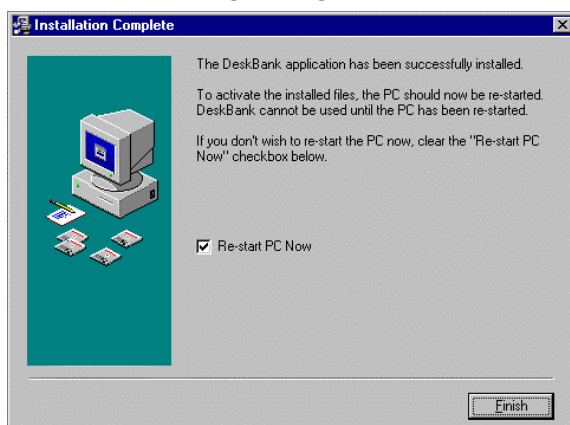
Click **Next** to begin the installation.

A progress box will display during the installation. Once the installation is complete the following dialog box will display



*If required, click **Display Readme File**.*

Click **Next**. The following dialog box displays.



The PC must be rebooted to complete the installation. Click on **Finish**

Once the PC has re-started you are ready to begin working with DeskBank.

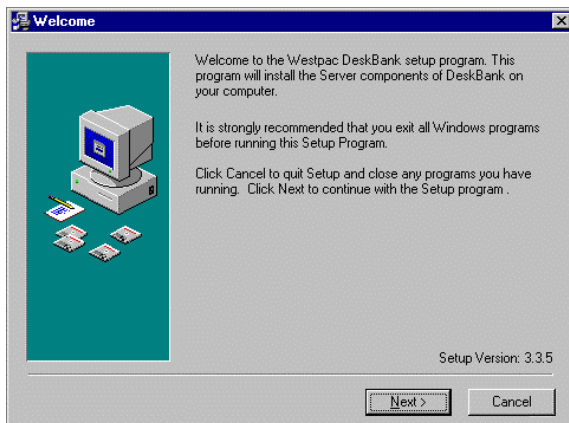
If this is an entirely new DeskBank installation that is not being supported by an Electronic Banking Consultant visiting your organisation, go to **Using DeskBank for the first time** on page 14.

Installing DeskBank on a Network Server

Follow these steps if you have a network server and want to use DeskBank on more than one PC. Before you begin, make sure all Windows programs are closed.

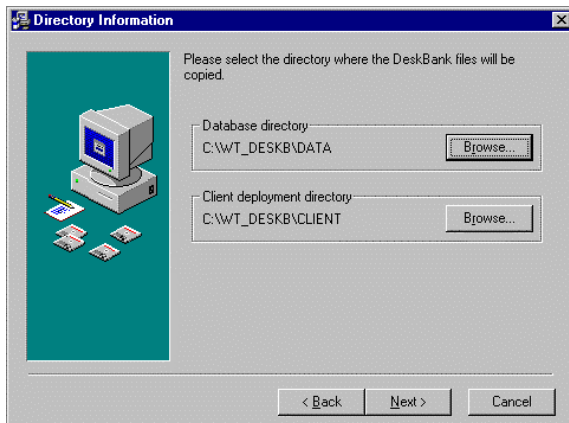
- Before starting the installation, double click on the file 'Server.zip' and extract the file 'Server.exe' and save.
- Double click on 'Server.exe' to run the installation.

The following dialog box displays.



If you have not closed all Windows programs yet, choose **Cancel** and close the programs. Then restart the installation by double clicking on **Server.exe**.

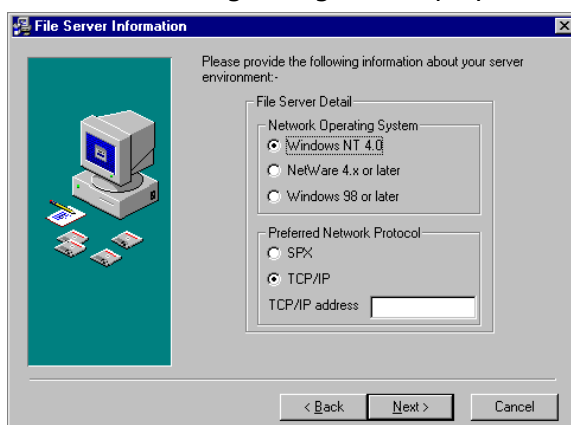
Click **Next**. The following dialog box displays.



Change the destination directories if required. (Click **Browse** to select a new destination directory and click **OK**.)

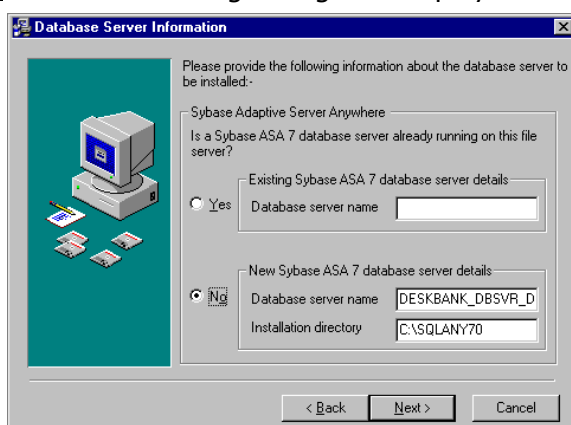
NOTE: We recommend that you use the destination directories provided by the Setup utility. It is easier to support standard DeskBank software installations.

Click **Next**. The following dialog box displays.



Select the appropriate File Server and Network Protocol and enter the Server TCP/IP address if using that protocol. The TCP/IP address can be obtained by typing IPCONFIG at a DOS prompt.

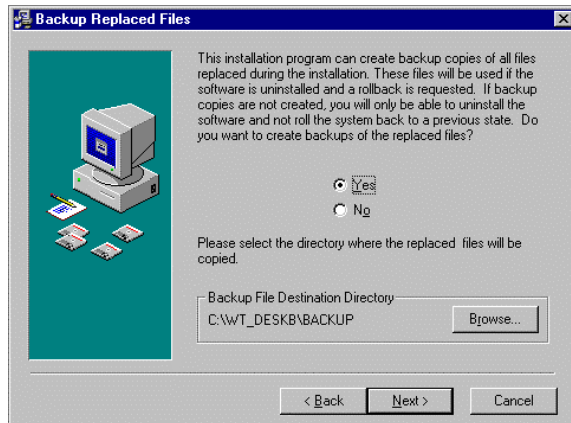
Click **Next**. The following dialog box displays.



Select one of the following options.

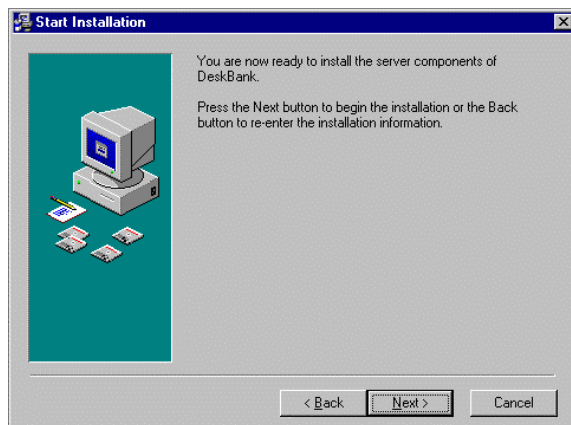
1. **If you have a Sybase Adaptive Server Anywhere 7.0 database server already running on this server.**
Then type the Database Server name into the Existing Sybase ASA 7.0 database server details section.
2. **If you do not have Sybase Adaptive Server Anywhere 7.0 database server already running on this server..**
Then type the Database Server name and the installation directory into the New Sybase ASA 7.0 database server details section.

Click **N**ext. The following dialog box displays.



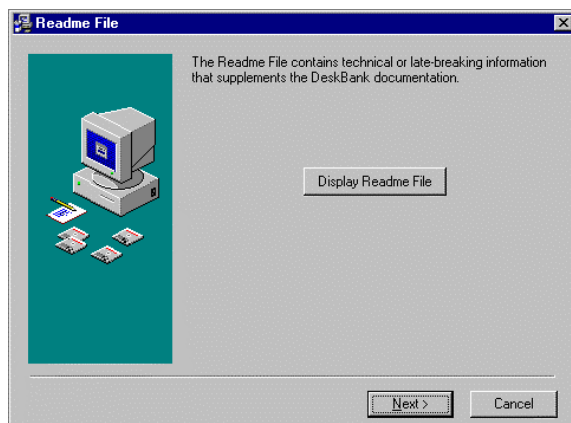
The DeskBank installation may overwrite some existing Windows system files if the existing version is older than the one that DeskBank requires. A backup copy of any overwritten files will be stored in the specified backup directory to enable recovery of those files if required.

Click **N**ext. The following dialog box displays.



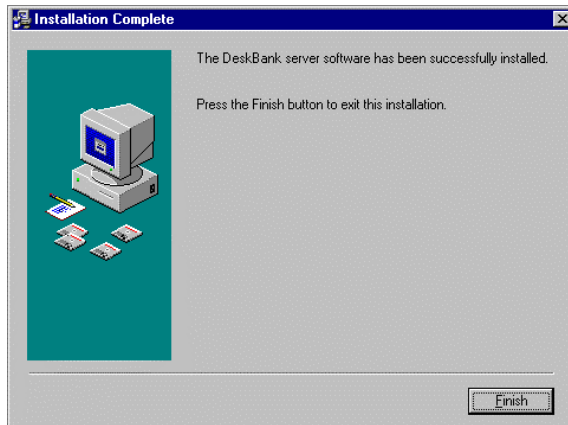
Click **N**ext to begin the installation.

A progress box will display during the installation. Once the installation is complete the following dialog box will display



*If required, click **D**isplay Readme File.*

Click **N**ext. The following dialog box displays.



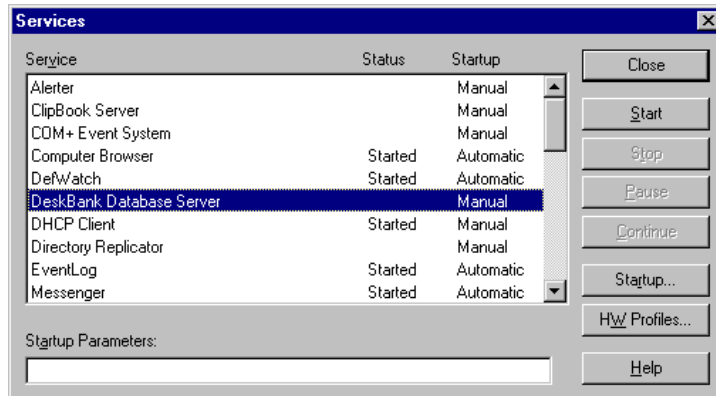
Click **F**inish to complete the installation and exit the Setup utility.

Starting DeskBank on Windows NT Server

The information below is based on Windows NT 4.0, the same process applies to later version of , but the screens may look different.

During installation of the DeskBank server component, a Windows NT Service is created named "DeskBank Database Server". This service starts the Sybase Adaptive Server Anywhere database engine that runs the DeskBank database. The DeskBank Database Server Service is configured to start manually during installation. Complete the following steps:

1. To start DeskBank for the first time, go to **Control Panel**, open **Services** (under Administrative Tools in Windows 7, 2000 or XP) , find **DeskBank Database Server** and click on Start, see below



2. After confirming the service has started successfully, click **Startup** to display the following screen



Change the Startup Type to **Automatic**. This will ensure that if your server is restarted the DeskBank Database Server will also restart automatically.

3. Install DeskBank on the client PCs by accessing the client deployment directory and running single.exe on each DeskBank PC. Refer to the instructions for **Installing DeskBank on a stand alone or network client PC** on page 6 for further information, e.g. install process flow etc.

Note: Unless you have made changes to the destination directory, the default client deployment directory is c:\wt_deskb\client. You must install single.exe from the client directory for DeskBank to be able to connect to the database server.

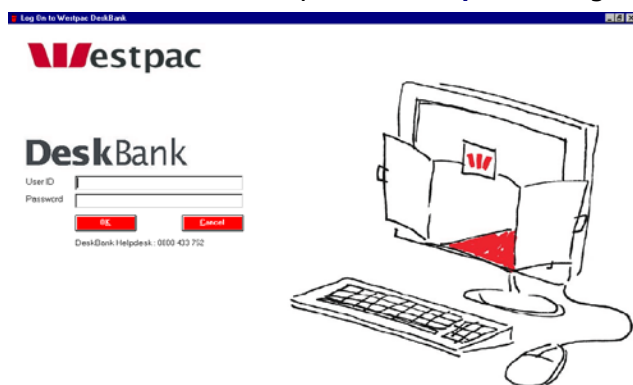
Using DeskBank for the first time

The following information is intended to assist with completing the installation if an Electronic Banking Consultant does not visit you to assist with the installation. In that case you will be contacted and taken through the installation over the phone.

To use DeskBank for the first time:

- you must be the DeskBank Administrator for your site and have the initial User ID and password issued by the DeskBank Helpdesk.
- check that your internet is connected. To log on to DeskBank

- 1 Double click  on your **Desktop**. The Logon screen displays.



- 2 Enter the initial User ID and Password provided by the DeskBank Helpdesk
- 3 Click **OK**. The following dialog box displays.

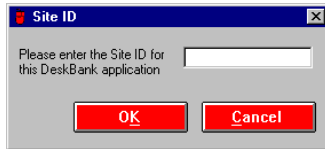


- 4 Click **OK**.

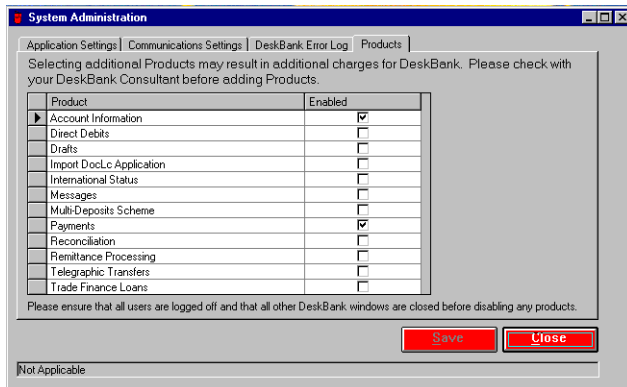


- 5 Enter your:
 - old password
 - a new password of 4-10 alphanumeric characters
 - the new password again to verify it

- 6 Click **OK**. The following dialog box displays.



- 7 Enter the Site ID provided by Westpac and click **OK**. The following dialog box displays.



- 8 Tick the 'Enabled' box for any DeskBank products that you want to be able to access.

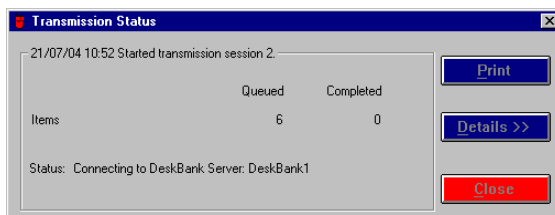
- 9 Click **Close**. The following dialog box displays



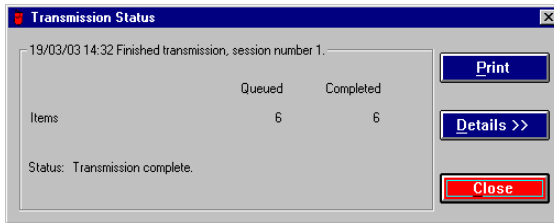
- 10 Complete the fields on the Logon to Westpac box with the information provided by the DeskBank Helpdesk click **OK**:

- Bank User ID
- Password **Note** The Bank User ID Password provided by the DeskBank Helpdesk will be expired so you will need to enter a new password
- New Password
- Verify New Password

- 11 Click **OK**: The following dialog box displays.



- 12 The **Transmission Status** screen will update with the progress of the transmission to the Westpac Host computer. When the transmission is complete the transmission status screen will update as below



Click **C**lose to return to the main DeskBank screen. Then refer to **A**dding Users below for the next steps.

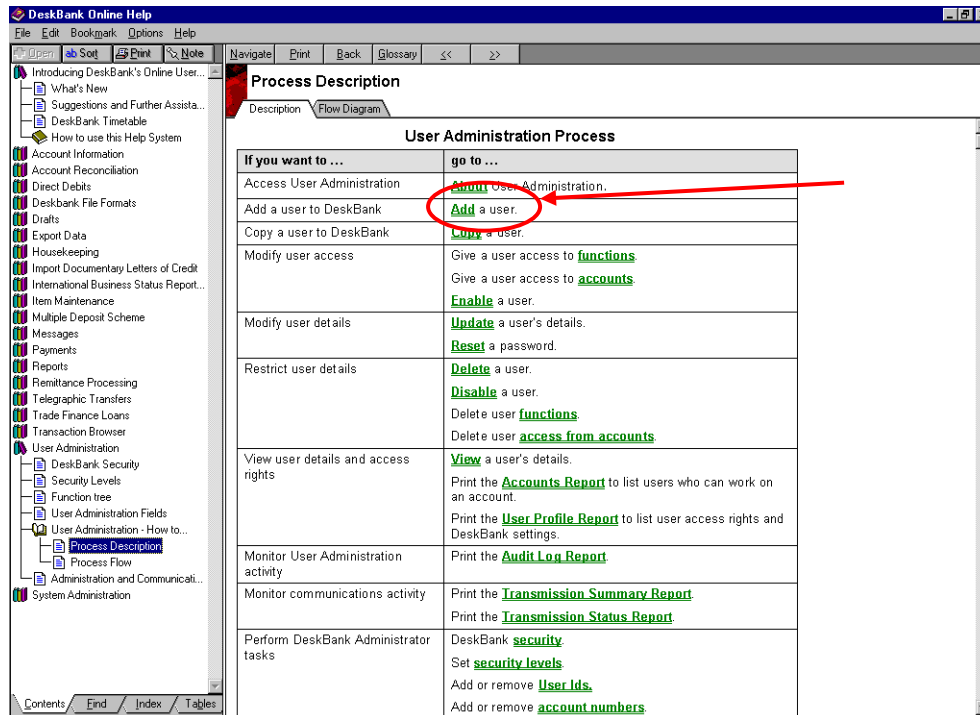
If the transmission **f**ails, the status "Transmission failed" displays along with the reason for the failure. If you are unable to solve the reason for transmission failure, contact the DeskBank Helpdesk on **0800 433 752**.

Adding Users

The next step is to add Users to DeskBank. Use the Online Help facility for assistance with this process.

Click on **Help** from the file menu and select **Help Topics**.

On the contents Menu select User Administration/User Administration How to/ Process Description



Click on **Add** a User to get step by step instructions.

The Help pages can be printed by clicking the **Print** button at the top of each screen.

Moving DeskBank

Please refer to the appropriate scenario below to identify your situation and follow the steps shown.

Changing Stand alone PC

In this scenario only one PC is running DeskBank and the PC needs to be replaced.

1. Follow the steps shown for Installing DeskBank on a Stand Alone PC on page 6 of this guide.
2. Confirm that DeskBank will start on the new PC by starting DeskBank to bring up the Logon Screen. Do not attempt to Logon, just click on **Cancel** to close DeskBank down.
3. Copy (**Do not move**) the following files from the existing PC to the new PC to overwrite the files of the same name that were just installed
C:\Wt_Deskbank\Data\Deskbank.db
C:\Wt_Deskbank\Data\Deskbank.log
5. Start DeskBank on the new PC and log on using your usual DeskBank User ID and Password.
6. Confirm that up can communicate with Westpac correctly by clicking on **File** and selecting **Update DeskBank Profile**. This will start a communication session with the Westpac computer but will not send any transactions that may be currently queued.
7. Check that the Printer is set up correctly by printing a report from the Reports screen.

If you have any problems during the above steps please take a note of any error messages that appear and contact the DeskBank Helpdesk on **0800 433752** for assistance.

Installing a new network client PC

In this scenario DeskBank is already operating on your network with existing client PCs.

Install DeskBank on the client PCs by accessing the client deployment directory and running single.exe on each DeskBank PC. Refer to the instructions for **Installing DeskBank on a stand alone or network client PC** on page 6 for further information, e.g. install process flow etc.

Note: Unless you have made changes to the destination directory, the default client deployment directory is c:\wt_deskbank\client. You must install single.exe from the client directory for DeskBank to be able to connect to the database server.

Moving to a new Server

In this scenario the Server that is running the Sybase Adaptive Server Anywhere database engine is being replaced.

1. Install the new server using the instructions for **Installing DeskBank on a Network Server** on page 9, including checking that the new DeskBank Database Server will start. Shut down the new DeskBank Database Server before moving to the next step.
2. Shut down the existing DeskBank Database Server Service and Copy (**do not move**) the following files from the existing Server to the new Server to overwrite the files of the same name that were just installed
 - C:\Wt_Deskb\Data\Deskbank.db
 - C:\Wt_Deskb\Data\Deskbank.log
3. Start the new DeskBank database Server.
4. If the new Server has the same name and TCP/IP address as the existing server, the client PCs should be able to connect immediately.
5. If the Server name or TCP/IP address has changed, you will need to reinstall DeskBank on the client PCs by mapping a drive to the Wt_Deskb\Client directory on the new server and running Single.exe.

Changing from Stand alone to Network install

In this scenario DeskBank has been running on only one PC (which could be connected to a network for file and printer sharing) and you now want it run on the network so that more Users can access DeskBank. If you are changing an existing PC to a Network installation please ensure you have a Backup copy of the Deskbank.db and Deskbank.log files before starting the Network installation.

1. Install the new server using the instructions for **Installing DeskBank on a Network Server** on page 9, including checking that the new DeskBank Database Server will start.
2. Check that the existing Stand Alone DeskBank is not running and Copy (**do not move**) the following files from the existing PC to the new Server to overwrite the files of the same name that were just installed
 - C:\Wt_Deskb\Data\Deskbank.db
 - C:\Wt_Deskb\Data\Deskbank.log
3. Install DeskBank on the client PCs by accessing the client deployment directory and running single.exe on each DeskBank PC. Refer to the instructions for installing a Stand Alone PC on page 6 for further information, e.g. install process flow etc.

Note: Unless you have made changes to the destination directory, the default client deployment directory is c:\wt_deskb\client. You must install single.exe from the client directory for DeskBank to find the database server

4. Reinstall the original Stand Alone PC as per the instructions above. By leaving the reinstall of this PC until last you can ensure that the new client PCs are operating correctly and if you have any problems you can easily go back to using the Stand Alone installation until the problems are resolved.