

Upgrade from FaxPress 7.x-8.x

This article applies to the following:

- FaxPress units running FaxPress software version 7.x
- FaxPress SBE, 2500, 5000, 7000 and 7500 (Flashing the EPROM is required for Windows 2003 server installations.)

Note: FaxPress models Office Connect, 1500N, and 3500 are discontinued products and not supported with version 8.x. Please contact the Castelle Sales Department at 1-800 289 7555 for trade-in options.

Note: The purchase of a software upgrade does not entitle the buyer/customer to any support on FaxPress hardware. In cases where the hardware needs to be upgraded in order to run the new software (including upgrades necessitated by failures that can occur in flashing the Boot PROM or modifying the EPROM), the cost of the hardware upgrade is the responsibility of the customer. It is not included in the cost of the software. Customers that desire both software and hardware support should inquire into Castelle's Extended Support Agreement. Please contact your Castelle Sales Representative for details at:

Tel: 1-800-289-7555 or 408-852-8000

E-mail: sales@castelle.com

Before You Start the Upgrade Process

- Disable any antivirus programs.
- **Back up** the Castelle directory on the file server hosting the FaxPress unit.
- Verify that you are on the same network segment as the FaxPress you are installing. If you have a 10/100 Base-T FaxPress unit and you are in an auto-sensing environment, use a workstation that is on the same hub or switch as the FaxPress. You may need to drop in a passive hub, one that does not reproduce the signal, or lock the port to 10/100 Base-T, half-duplex. Castelle does not support IP teaming nor 1-Gigabit network cards.
- Make sure that all active faxes sending or receiving on the fax lines are completed before doing an upgrade installation. The detailed instructions for Server Installation are provided in the FaxPress 8.x Manual on our website at <http://www.castelle.com/support/documentation/>.
- If you are using the FaxPress broadcast or the drop directory features, you must install FaxPress 8.x Rev. C from our website at http://www.castelle.com/support/downloads/FaxPress_8.0-RevC.zip.

Installing the FaxPress Server Upgrade

There are two methods to consider when upgrading the server software. Method I is for a FaxPress unit that is operating properly. Method II is for a FaxPress unit that is experiencing problems.

Method I

If the FaxPress unit is operating properly, please follow the instructions below:

- Exit all other programs before starting the FaxPress 8.x installation.
- Go to Explorer on your local drive.
- Go to the Castelle\serial_number\System directory and delete the *FaxPress.sys* file.
- Install over the top of the current installation; all information should remain intact.
- Insert the FaxPress 8.x CD. The AutoRun screen will come up and allow you to start the installation; if not, go to *Start/Run* and select *Install.exe* from the CD. (If the installation appears to be hanging, verify the virus scan has been disabled and then reinstall.)
- Once the FaxPress has booted completely, the FaxPress should be at a solid green LED and the red LED should be off, test by logging into the FaxPress as Supervisor.

Method II

If the FaxPress unit is not operating properly/experiencing problems, please follow the instructions below:

- Exit all other programs before starting the FaxPress 8.x installation.
- Power **off** the FaxPress.
- Rename your current Castelle directory to *Castelle.old*.
- Power **on** the FaxPress.
- Starting with the FaxPress at a **red** LED, insert the FaxPress 8.x CD. The AutoRun screen will come up and allow you to start the installation; if not, go to *Start/Run* and select *Install.exe* from the CD. If the installation appears to be hanging, verify the virus scan has been disabled and then reinstall.
- Once successfully installed, test by logging in as Supervisor with **no password**.
- Power **off** the FaxPress.

Note: It is recommended that you **not** copy the old ZQ directory into the new directory, as it may be a source of the FaxPress unit's current operating problem.

- From your ****NEW**** \Castelle\delete the *user* and *phonbks* directories.
- From the *Castelle.old* structure under the Castelle\copy the *user* and *phonbks* directories to the ****NEW**** \Castelle\

If you would like to continue using existing PCL cover pages and not create new ones using the Microsoft Editor, you can import PCL cover pages with following steps:

- Go to the ****NEW**** Castelle\coverpg to *coverpg.old*.
- Copy *coverpg* from the ****OLD**** Castelle**NEW** Castelle\

Note: You will **not** be able to modify the existing PCL cover pages. If you have new information or need to modify the cover page, you will need to recreate your cover page using the new Microsoft Editor or PCL Editor. This requires you to install the PCL Editor support during the FaxPress server install.

For detailed instructions on creating a cover page with Microsoft, please refer to FaxPress Manual. For help with the PCL Cover Page Editor, visit our web page at <http://www.castelle.com/support/faxpress/6.x/technotes/coverpages/default.htm>.

- After all desired changes have been made, power **on** the FaxPress and wait for the green LED.
- If you have a **red** LED on the FaxPress after a successful install, refer to the Troubleshooting section in the FaxPress Manual or visit our website at <http://www.castelle.com/support/documentation/>. Once the FaxPress has booted completely, test by logging into the FaxPress as Supervisor.

Installing the FaxPress Client Upgrade (Normal Users)

You must exit all other programs before starting the FaxPress 8.x installation.

Note: Selecting Microsoft Word when upgrading to 8.x from any earlier version of FaxPress means all existing fax cover page templates created using the old PCL based Castelle Cover Page Editor will no longer be supported. New fax cover page templates will need to be created and published using Word.

Selecting PCL format will give you two options:

1. Only install Castelle DCX Driver.
2. Install both Castelle DCX and Castelle Cover Page Drivers.

Castelle DCX Driver is used to convert your native attachment files to DCX format and to send faxes. This driver must be installed.

Castelle Cover Page Driver is used to process the cover page file you created or modified using Castelle's PCL Cover Page Editor. If you do not need to use Castelle's PCL Cover Page Editor then you should not select to install this driver. Depending on your need, you can select to install only the Castelle DCX Driver or to install both the Castelle DCX Driver and the Castelle Cover Page Driver.

Put the CD-ROM in the drive. The AutoRun program will be launched from your CD-ROM drive **if enabled**. **Otherwise, go to Start\Run and type X:install, where the X is the value of your CD-ROM device**. Select *Client Installation*, and then install the FaxPress Client.

Note: If you are installing on a Win98SE and the drivers will not install, please refer to our web site tech note at: http://www.castelle.com/support/faxpress/6.x/technotes/client/error_installing_printer.doc for detailed information.

Once the new Client is installed, you can copy your saved faxes to the new directory specified in the personal preferences of the Client.

To recover a local phone book:

1. Go to FaxMain/Personal Folders/Local Phone Books, then right-click on *FaxPress Phone Books* or *External Database Phone Books*. The *Add/Create Phone Book* pop-up window will appear.
2. Click on *Browse* to find the copy of your old phone book.
3. Click *Open*, and then click *OK*.

Installing FaxPress Client Upgrade (FaxPress Administrators Only)

You must exit all other programs before starting the FaxPress 8.x installation.

Put the CD-ROM in the drive. The AutoRun program will be launched from your CD-ROM drive **if enabled**. **Otherwise go to Start\Run and type X:install, where the X is the value of your CD-ROM device**. Select *Administrative Installation*, and then install the FaxPress Client for Administrators. Be sure to include administration tools. For detailed instructions on the Client Installation, please refer to Chapter 2 in the FaxPress Manual.

You will need to configure your server settings. For detailed information, please refer to Chapter 3 in the FaxPress Manual. If you do not have a copy, the Manual is available on our web site at <http://www.castelle.com/support/documentation/>.

Note: If you are having problems installing the FaxPress Client on your Windows NT 4.0 Client, please refer to http://www.castelle.com/support/documentation/tech_notes/nt_issues.htm for more information. If you are still having installation issues after following instructions from the previous tech note, please contact Tech Support at 408-852-8080.

Add-On Products:

If you are running the Archive service:

- Stop the service.

- Upgrade the Client and Server software.
- Reinstall the Archive service.

If you are running Exchange Direct (Outlook Direct in version 7.x):

- Install Outlook Direct from the *Add-on Products* menu. The settings should be saved.

If you are running the SMTP Gateway:

- Stop the service.
- Upgrade the Client and Server software.
- Reinstall the E-mail Gateway service.
- Start the FaxPress Inbound Email Gateway service.
- Start the FaxPress Outbound Email Gateway service.

If you are running the Exchange Connector/E-mail Gateway:

- Stop the service.
- Upgrade the Client and Server software.
- **Install** the Exchange Connector service on your Exchange server. This will require a reboot so schedule for off hours.
- Start the FaxPress Inbound Email Gateway service.
- Start the FaxPress Outbound Email Gateway service.

Note: The FaxPress SBE model does not support any of the Gateways nor the Outlook Direct Client option.

If you are running Reform and get CPI or DLL errors after the upgrade:

- Reinstall the reform application from your 7.x CD *Add-on Products* menu.
- For detailed installation instructions go to:

<http://www.castelle.com/support/faxpress/6.x/addonproducts/REFORM/Technotes/default.htm>

"If you have problems with the above Software upgrade, please review the below Windows NT and Novell NetWare specific information and re-run the upgrade."

1. FaxPress upgrades to NT Windows Servers:

a. Installing the FaxPress Server on Windows NT 4.0/2000/2003

Note: All NT installations can run either locally on the machine you are installing on, or remotely from another NT workstation or server. The only exception is when Scope ID is used. In this case, install on the local machine only.

Requirements for Installing on a Primary Domain Controller (PDC)

- Log into the domain with Administrator privileges.
- If you are not installing from the PDC itself but instead installing from another NT server or workstation to the PDC, you must map a drive to the location on the PDC where you would like to install the FaxPress server software.

Requirements for Installing on a Backup Domain Controller (BDC)

- Log into the domain with Administrator privileges.
- Have a network connection from the BDC to the PDC of the same domain. Even though you are installing on the BDC, the installation has to create the FaxPress serial number user on the PDC of that domain.
- If you are not installing from the BDC itself, but instead installing from another NT server or workstation to the BDC, you must map a drive to the location on the BDC where you would like to install the FaxPress server software.

Important: Once the installation is complete, please perform the following steps:

- Synchronize the BDC with the PDC. To synchronize, please run the Server Manager utility from the NT administrative tools. Select the BDC you have installed on and choose *Synchronize with PDC*.
- Reboot the FaxPress.

Requirements for Installing On NT 4.0 WS, NT 4.0 Server, Standalone, Member Server and Not Domain Controller Server

- Log into the workstation or server with local Administrator privileges.

If you run into any problems, please refer to the Troubleshooting NT Installations Tech Note at

<http://www.castelle.com/support/faxpress/6.x/technotes/upgrade/default.htm>.

b. Installing the FaxPress Server on Windows NT 4.0/2000/2003/XP

Note: All Windows NT installations can run either locally on the machine you are installing on, or remotely from another NT workstation or server. The only exception is when Scope ID is used. In this case, install on the local machine only.

Windows Server 2003 Support

The FaxPress server's 7.0 EPROM contains firmware allowing the unit to log onto the Master File Server and download the FaxPress system files. This EPROM is used during the initial boot sequence and not during further operation of the FaxPress. For the FaxPress 8.0 server software to be installed on Windows Server 2003, the FaxPress EPROM must first be flashed.

Note: If you are **not** installing the FaxPress 8.0 software to a Windows 2003 server, you do not need to flash the EPROM.

If you are installing the FaxPress under a Windows 2003 server, please follow the instructions below:

- Log into the workstation or server with local Administrator privileges.
- Make sure that your FaxPress unit is up and running.
- Browse you FaxPress CD and click on the *FPFlash* folder.
- Click on the *FP Flash for TCP/IP.exe*.
- **If you are using TCP/IP, in the FaxPress Name field, type in the IP address of the FaxPress unit.**
- **If you are using IPX/SPX, in the FaxPress Name field, type in the serial number of the FaxPress unit.**
- Click on the *Find Bin File* button and choose the bin file that matches your unit.
- Click on the *Flash* button.

This will flash your EPROM to version 7.0, which is the required EPROM version for you to install the FaxPress unit under Windows 2003 server. This is only required for a Windows 2003 server.

Important: If you intend to install on Novell NetWare 5/6 Pure IP, NT or Windows 2000 with a Scope ID, Windows 98 or our ODSS storage server and you are using a FaxPress server unit with pre-version 6.0 firmware, you will need to flash the Boot PROM to version 6.2 SP1 or newer.

For detailed instructions on flashing your Boot PROM, please visit our web site at <http://www.castelle.com/support/faxpress/6.x/technotes/upgrade/default.htm>.

2. FaxPress Upgrades to Novell Servers

a. Installing the FaxPress Server in a NetWare Environment with IPX/SPX

Requirements for Installing on NDS:

- Log into the workstation or server with local Administrator privileges.
- Client PC must be a 32 bit Windows platform: 98/Me/NT 4.0/2000/2003/XP. If you are installing from an NT/2000/XP workstation and you are having problems with the installation, try a 95/98 workstation.
- Novell Client 32 needs to be installed on the PC you are installing from.
- You need to log into NDS with Supervisor privileges to the context where you are installing the FaxPress.
Note: If your server is in a different context from your Users and Groups, you must have Supervisor rights to both contexts.
- Verify that the Master File Server you are trying to install on has a read\write replica to the root. Use NDS Manager to do this.

b. Installing on a Bindery Server

In addition to the NDS requirements, you will also need to log into this file server with Supervisor privileges. Please make sure you have Supervisor privileges on this file server, not only Supervisor privileges on the PC you are installing from.

c. Installing the FaxPress Server in a NetWare 5/6 Environment with "Pure IP"

The requirements for installing on NDS are the same as **Installing the FaxPress Server in a Netware Environment with IPX/SPX**.

We recommend that you use this mode of installation only under the following conditions:

- You are installing in a NetWare 5/6 environment. Older versions of NetWare supported "Emulated IP" which used IP packets over IPX/SPX. This mode is **not** supported because it is not "pure IP."
- You are using "pure IP" only. In mixed environments where both TCP/IP and IPX/SPX are used, Castelle recommends you use the IPX/SPX installation.

Note: NDPS is not supported. FaxPress will only print to traditional Novell print queues or **host** sharable printers using IP. If you are using NDPS, you need to use a gateway, provided by Novell, to link between the traditional print queues and NDPS devices.

If you run into any problems, please refer to the Troubleshooting Netware Installations Tech Note at <http://www.castelle.com/support/faxpress/6.x/technotes/upgrade/default.htm>.

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