

Upgrade to FaxPress 9.1.x

This article applies to the following:

- FaxPress units running FaxPress software versions 6.x and above
- FaxPress SBE, 2500, 5000, 7000 and 7500 (Flashing the EPROM is required for Windows 2003 server installations.)

IMPORTANT

1. The FaxPress version 9.1.5 is NOT an upgrade to FaxPress 9.1. Please read the 9.1.x Release Notes for further information: http://www.castelle.com/products/fp_releasenotes.htm.

2. FaxPress models Office Connect, 1500N, 3000 and 3500 are discontinued products and are not supported with version 9.1.x. Please contact the Castelle Sales Department at 1-800-289-7555 for trade-in options.

3. Windows 95, 98, NT4, and ME are no longer Microsoft supported Operating Systems and are not supported with version 9.1.x.

4. 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

When upgrading to 9.1.x, all of the Add-On products that are part of the FaxPress 9.1.x software release, will require only one product activation key code, which can be obtained from the web during the FaxPress server installation.

FaxPress 9.x Product Activation Key Link: <http://www.castelle.com/cgi-bin/fp90keycode.pl>

Before You Start the Upgrade Process:

- Disable any Antivirus programs.
- Use the FaxPress Archiver to archive all Incoming and Outgoing faxes. If you do not currently have the FaxPress Archiver installed, utilize the CD/Download for your current version to install the Archive Service. Detailed installation and configuration instructions can be found in the FaxPress Administrators Guide.
- 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,
- Make sure 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 9.x Administrators Guide on our website: <http://www.castelle.com/WebHelp/fp9/default.htm>

****NOTE****

Installation of the FaxPress Server on Windows Vista is NOT Supported. For all FaxPress Server installations it is recommended that the installation be performed on a Server/Workstation using Windows 2000, XP, 2003, or Novell.

Installing the FaxPress Server Upgrade

There are two methods for installation. You can install the FaxPress 9.1.x over your current FaxPress installation, or you can install the FaxPress 9.1.x to a new Castelle directory

Method I (Recommended)

The most highly recommended method to consider when upgrading the server software is to install to a new Castelle Directory. Not only is this the best option for a clean upgrade, but it is also the best option to use in order to minimize any loss of data and avoid possible file corruption.

For a clean install, please follow the following instructions:

- Exit all other programs before starting the FaxPress 9.1.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 9.1.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 do **not** copy the old ZQ directory into the new directory, unless you need the faxes in the ZQ.

- From your ****NEW**** \Castelle\rename the user and phonebks directories.
- From the Castelle.old structure under the Castelle\copy the user and phonebks directories to the ****NEW**** \Castelle\- From the ****NEW**** \Castelle\ directory, **rename** the Archive directory to Archive.old.
- From the Castelle.old structure, **copy** the Archive directory to the ****NEW**** \Castelle\ directory.

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

PCL

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

DOC

- Go to the ****NEW**** Castelle\- Copy coverpg.doc 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 Chapter 9 in the FaxPress User Guide available at <http://www.castelle.com/support/documentation/guides/>.

If you would like to continue using the previous Individual Line Configurations, you can import the necessary files using the following steps:

- Go to the ****NEW**** Castelle\- Move all files named **fxcfg*.a** and **linech*.cfg** (* = number of active fax lines being used, i.e. 1-8. Varies with FaxPress Model) and place them into the Line Configuration Backups folder.
- **Copy** all files named **fxcfg*.a**, **internet.cfg**, and **linech*.cfg** from the ****OLD**** Castelle**NEW**Castelle\

If you would like to continue using the previous Archived Faxes, follow the below steps:

- From the ****NEW**** \Castelle\ directory, **rename** the Archive directory to Archive.old.
- From the Castelle.old structure, **copy** the Archive directory to the ****NEW**** \Castelle\ directory.
- Open the ****NEW****\Castelle\Archive folder.
- Right-click and open the Share Properties of the Database Folder.
- Make the folder a Shared Folder and make the Share name **FPRESSDB**.
- For both the Sharing and Securities tabs, select Permissions and add the following Users and Groups with Full Control:
 - **FAXPRESS** – Local User Group
 - **SERVICE LOGON** – The account logon that is used for the FaxPress Archive Logon.
- For the Sharing tab, select Permissions and add the following Users and Groups with Read Only Rights:
 - **EVERYONE** – This will allow all users to be able to open and view their Archived Faxes.

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 Administrators Guide or visit our website at <http://www.castelle.com/support/documentation.htm>.

Method II

You can also install the FaxPress over your previous FaxPress installation.

Note: When installing the FaxPress 9.1.x over any version prior to 8.2/8.2.5, you will be prompted to install FaxPress 8.2/8.2.5 first. You can download the FaxPress 8.2/8.2.5 by selecting the below URL:

Click here to download FaxPress 8.2/8.2.5: http://www.castelle.com/support/downloads/fp82_825.zip

To install over a previous FaxPress installation, please follow the following instructions:

- Exit all other programs before starting the FaxPress 9.1.x installation.
- Export all current Phonebooks as
- Power **off** the FaxPress.
- **Back up** the Castelle directory on the file server hosting the FaxPress unit.
- Power **on** the FaxPress.
- Insert the FaxPress 9.1.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**.

Installing the FaxPress Client Upgrade (Normal Users)

You must exit all other programs before starting the FaxPress 9.1.x installation.

Insert 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, enter the value of your CD-ROM device**. Select Client Installation, and then install the FaxPress Client.

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 9.1.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, enter 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 6 in the FaxPress Administrators Guide. If you do not have a copy, the Administrators Guide is available on our web site at <http://www.castelle.com/support/documentation/guides/>.

Add-On Products:

****Note****

For all FaxPress Add-On installations it is recommended that the installation be performed on a Server/Workstation using Windows 2000, XP, or 2003.

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 6.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.
- Install the E-mail Gateway service.
- 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 utility.

"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 2000/2003/XP.

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.

If you run into any problems, please refer to the Troubleshooting NT Installations Tech Note at http://www.castelle.com/products/fp_upgrades.htm.

b. Installing the FaxPress Server on Windows 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 2003 Server 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.x server software to be installed on Windows 2003 server, the FaxPress EPROM must first be flashed.

Note: If you are **not** installing the FaxPress 9.0.x 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 instruction below:

- Make sure that your FaxPress unit is up and running.
- Log into the workstation or server with local Administrator privileges.
- Browse you FaxPress CD and click on FPFlash.

- 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 a 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 or Windows 2000 with a Scope ID, and you are using a FaxPress server unit with pre-version 6.0 firmware; you will need to flash the Boot PROM to version 7.0 or newer.

For detailed instructions on flashing your Boot PROM, please visit our web site at http://www.castelle.com/products/fp_upgrades.htm

2. FaxPress Upgrades to Novell Servers

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

Requirements for Installing on NDS

- Client PC must be a 32-bit Windows platform: 2000/2003/XP.
- 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 printer 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/products/fp_upgrades.htm.

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