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2. How to Install Automation Engine 14.1

2.1 Before installing Automation Engine 14.1

Before you install Automation Engine 14.1 on your system, prepare or check these topics:

- Check the document Pre-Installation IT Requirements and FAQs, which is a chapter in the Automation Engine Complete Manual, available on http://help.esko.com/products/Automation%20Engine.
- Install Automation Engine 14.1 on a "clean" system, where no Esko software has been installed yet. If any other version of Automation Engine was installed already, see the section How to Upgrade to Automation Engine 14.1 on page 12.
- You will need the DVD: "Automation Engine 14.1 installation".

Note: If you downloaded the software from MySoftware.esko.com, you will need to mount the corresponding .iso files as virtual DVD, or unpack the .iso files first.

Note: make sure you are aware which type of installation you are doing. This is explained in the next page, in Types of Installations.

- Your Windows operating system must be a "Server" type
- Your Windows operating system must be a 64 bit.
- You need to have Administrator privileges.
- You need internet access from that server computer.
- Your computer must meet the minimum requirements for the installation, as described on www.esko.com/systemrequirements.
- Make sure your anti-virus software is not blocking the installation or configuration.
- SQL Server can be installed on the Automation Engine server, but this is not recommended. If you want to use a full version of SQL Server, we recommend to install it on a separate computer.
- You may not have an ISS web server installed on your system.
- You need software licenses for Automation Engine: a product key file. If you do not have a product key file yet, contact Esko Customer Support.

2.2 Types of Installations

The installation procedure will ask you which type of installation you want to do: Standard, Special or As OBGE.

Standard Automation Engine Installation

Choose this option to install a standalone or Master Automation Engine, which will use the default supplied Microsoft SQL Express edition that will be installed on the Automation Engine server.
• Install an Automation Engine **Assistant**: Choose this option to install an Automation Engine that you will (later) configure to be used as an Automation Engine Assistant. This option will not install a Microsoft SQL Express server.

• Install an Automation Engine **Master for use with an existing Microsoft SQL Sever**: Choose this option to install an Automation Engine Master that will use a remote SQL Server that is already available in the network. This option will not install a Microsoft SQL Express server on the Automation Engine Master.

**Note**: In above options, an embedded mini-server engine is used. This embedded engine is not fit for production; it is a temporary setup until you have chosen a different supported database engine.

**Installation of Automation Engine as On Board Graphics Engine**

An **OBGE** is an Automation Engine used only to calculate the view files for an Esko WebCenter. This will typically be installed on the WebCenter Application Server. Also here, you have this similar choice:

• Install **for use with an existing Microsoft SQL server** (for example using the SQL Server already used by WebCenter).

• Install **OBGE**: This will install the OBGE and a local Microsoft SQL Express.

### 2.3 How to perform the Automation Engine 14.1 System Readiness Check

Before you install Automation Engine 14.1, a System Readiness Check is required. This checks whether the operating system is suited for installing and running this Esko product.

1. On the DVD, in the section **Software installation**, click the Install link in either "**Standard Automation Engine Installation**", "**Special Automation Engine Installation**" or "**Installation of Automation Engine as OBGE**", depending on the type of installation you want to do (as explained in **Types of Installations** on page 5).

2. In the section **Installation**, under **Instructions**, click **Run the Automation Engine Readiness Check**.

3. At the end of the **Readiness Check**, read the resulting messages carefully.

4. If the **Readiness Check** resulted in any problem, correct it before proceeding.

5. Click **Exit**.

6. Proceed to install the **Esko License Server**.

### 2.4 How to install the Esko License Server

Use of the Automation Engine software is protected by licenses. These licenses are distributed as a product key file (in .html). To import the licenses into the Esko License Server, the product keys in the product key file must be activated using the **Activate Server Licenses** tool.

You need:

• A product key file for the Automation Engine 14.1 products. If you do not have a product key file yet, contact **Esko Customer Support**.
Follow these steps:

1. On the DVD, in the section Installation, under Instructions, click Install the License Server Components.
2. Install the Esko License Server by clicking Install the Network License Manager.
3. Follow the instructions of the installation wizard.
4. When the installation is finished, click Network License manager > Network License Manager.
5. **Local License Manager:** If you want to activate the license on your local computer (typical in case of an Automation Engine Master), follow these steps:
   a) In the Esko Network License Manager, click Activate.
   b) Follow the instructions of the Activate License Wizard.
   c) When asked how to activate the licenses, choose on-line activation.
   d) When asked about the product keys, choose I have a file containing one or more product keys.
   e) Click Browse to select the product key file.
   f) When asked, fill in your Account Name and Password.
   g) Click Finish.
      The licensed products you can use are now visible in the Esko License Server.
   h) Close the License Manager and click Go back in the top-right corner of the page to return to the Installation page.
6. **Remote License Manager:** If you are using a remote license manager (typical in case of an Automation Engine Assistant), you only need to indicate where it is. Follow these steps:
   a) In the Network License manager, open the Help menu and click License client configuration.
   b) In the License Client Configuration window, in the field "computer name of the License server" type in the host name of the license server and click Apply.
   c) Click Exit.
7. Now continue by clicking on Install the prerequisite components.

### 2.5 How to install the Automation Engine prerequisite components

Depending on the products to be installed on this particular system, various prerequisite components are required for installation. The installation wizard for the prerequisite components checks the licenses, lists the prerequisite components to install, requests confirmation for installation and then installs the required components.

The installation wizard installs the following components:

- **Microsoft Visual Studio Redistributables**
- **Database Engine for the Automation Engine** components (if you choose a Standard Automation Engine Installation)
- **Esko CAD-X components** for Standard and Enterprise Editions.
Follow these steps:

1. On the DVD, in the section installation, click **Install the Prerequisites Components**.
2. Follow the instructions of the installation wizard.
3. When you choose a **Standard** installation, when asked to enter a password for the SQL Server, click **Use Default** to use the default sa password. Or you can enter a **Password**, confirm it and click **Use Password** to use a different password, for example because of "Strong Password" requirements.
4. The installation wizard will ask you to close all Esko applications. Click **Yes** when asked **Ready to continue**?
5. Follow the instructions of the installation wizard.
6. Click **Continue**. Click **Yes** in the **Installshield Wizard Complete** message window.
7. Depending on your activated licenses, the **Automation Engine Prerequisite Components First Installation** process may ask you separately about the **CAD-X** component installation for both the Standard Edition component and the Enterprise Edition component. In both cases, click **Yes** when asked **Ready to continue**?
8. Follow the instructions of the installation wizard.
9. Click **Exit**.
   You will be redirected to the installation page to continue with the next step.

### 2.6 How to install Automation Engine 14.1

1. After running the **System Readiness Check** and installing the **License Server Components**, when all prerequisites are fulfilled, you can start the installation.
2. Click the **Install Automation Engine 14.1** link on the installation page.
   The **Automation Engine 14.1 Software Installation** wizard will open up.
3. Follow the instructions of the installation wizard.
4. Read the **Software and Data license agreement** carefully and select **Yes, I accept the license agreement**.
5. When asked to select the products to install on this system, select **Automation Engine 14.1**.
   The group **Common Components** cannot be deselected and will be installed on all systems.
6. Select the **Destination Folder** for the chosen products or accept the defaults.
7. Follow the instructions of the installation wizard.
8. At the end of the installation, click **Finish**.

The pre-installation task checks the password complexity rules and domain policies. If the default password for the **BGSYSTEM** user does not fulfill the requirements, a pop-up dialog requests a password.

During installation, only a **BGSYSTEM** user is created. This user will be used as Automation Engine **System Account** (you can choose to change it later using the **System Account page**).

A clean installation ends with two empty user groups: **BGUSERS** and **BGADMIN**.
Learn more about *Users and Groups* in the separate chapter *Pre-Install IT Requirements Guide*.

## 2.7 How to Install Automation Engine Pilot

The Automation Engine Client software is distributed via the **Server Web Page**.

**Note:** Whenever your Automation Engine Server is updated, the Pilot will request an update. The automatic update mechanism alerts you to update when hot-fixes and minor version updates (for example 14.1 to 14.1.1) are available. If you are doing a major version upgrade (for example: 14.0 to 14.1), then re-install the client applications.

1. Open your web browser and go to http://servername:9999/ or http://servername, where `servername` is the name of your server running Automation Engine.
2. The first time you install one of the client apps, you will be asked to create an administrator account.

   ![Automation Engine Server](image)

   Once you have created the **administrator account**, you will be directed to either

   - the **Main Applications** page where you can download Client Applications if you did install a Standard automation engine
   - or to the **Create Automation Engine Database** page if you did install an **Automation Engine Master for use with an existing Microsoft SQL Server**, where you then can configure and create your Automation Engine databases.

   In the **Create Automation Engine Database** window, select your **Microsoft SQL Server** and **Instance** name, type in the **sa** password and type in the **Database folder** and either

   - click **create** to start the automatic creation and configuration of the databases,
   - or, if you want to create and configure the databases manually, click **Continue using embedded databases**.
Attention: It is not supported to use Automation Engine with embedded databases in a production environment.

Learn more about creating databases for Automation Engine in Creating a Database. Learn more about configuring an Automation Engine database in Automation Engine Database.

After creation and configuration of the databases, you will be redirected to the Main page where you can download the client apps.

3. Click Download.
4. Start the installation by double-clicking the downloaded executable.
5. Follow the instructions of the installation wizard.
6. Read the Software and Data license agreement carefully and select Yes, I accept the license agreement.
7. Follow the instructions of the installation wizard.
8. At the end of the installation, click Finish.
9. Double-click the Automation Engine Pilot shortcut on the desktop. The Pilot will ask for your account information.
10. Fill in your User name, Password and the Server Name. The Pilot will start up.

2.8 Initial Configuration

After an initial installation, you typically want to configure a minimal setup that includes:

- **Containers.** Define which existing or new data shares contain the data that Automation Engine will be able to work with. Learn more in Containers.

  Note: An initial installation already creates an ExampleJobContainer on the disk where you installed the server software.

- **Users.** An initial installation creates 2 user groups and some default users. Learn more about creating (domain) users and setting their Access Rights in Creating Users.

- **Task Cleanup Rules:** A new installation will also have created a default Task Cleanup rules. Learn more about changing or adding such rules in Task Cleanup Rules.
3. How to Create a full Backup of Automation Engine 14.1

You can create backups with the tools available in Server Admin section of the Automation Engine Server Web Page.

These tools are documented in the page Backup of the chapter Automation Engine Server Management.
4. How to Upgrade to Automation Engine 14.1

You need to upgrade to Automation Engine 14.1 in the following order:

1. Create a backup of your current Automation Engine.
2. Perform the System Readiness Check.
3. Upgrade the License Manager.
4. Upgrade the prerequisite components.
5. Upgrade the Automation Engine software.

4.1 Before Upgrading to Automation Engine 14.1

Before you upgrade to Automation Engine 14.1, prepare the following:

- Check the document Pre-Install IT Requirements Guide, a separate chapter in the Automation Engine complete manual.
- You will need the DVD "Automation Engine 14.1 installation".

Note: If you downloaded the software from MySoftware.esko.com, you will need to mount the corresponding .iso file as virtual DVD.

- You must have a working version of Automation Engine 10 or higher.
- Your computer must meet the minimum requirements for the installation, as described on www.esko.com/en/SystemRequirements.
- You need a product key file for the upgrade (every new major version requires a new license set). If you do not have a product key file yet, contact Esko Customer Support.
- Use Status Overview to make sure no more users are connected or using the system.
- The upgrade will check if you are still using tasks that have become Outdated in the version that you are installing. If any are found, you will have the chance to abort the installation. Learn more about such tasks in Outdated and Soon Outdated Tasks.
4.2 How to Create a Backup of your Current Automation Engine

As an extra security measure, we advise to create a backup of your current version of Automation Engine before upgrading.

- When your current version is 14.0, make a backup as described in Backup.
- When your current version is 12 or 12.1, make a backup as described in Creating a Backup in v 12.
- When your current version is 10, you first need to create a special Restore Point in Automation Engine 10. This tool is available in the Automation Engine Server Web page, in the section Client Apps > Tools.
- When your version is 7 or lower, contact Esko Customer Support.

4.3 How to Perform the Automation Engine 14.1 System Readiness Check

1. On the DVD, in the section Installation, under Instructions, click Run the Automation Engine Readiness Check.
   Read more in How to perform the Automation Engine 14.1 System Readiness Check on page 6.
2. Proceed to install the Esko License Server. Click Install the License Server Components.

4.4 How to upgrade the Esko License Server Components

The Automation Engine 14.1 products are protected by (new) licenses. These licenses are distributed as a product key file (in .html). To import these new licenses into the Esko License Server, you must first upgrade the Esko License Server components.

1. On the DVD, in the section Installation, click Install the License Server Components.
2. Follow the instructions of the installation wizard.
   During the upgrade of the Network License Manager, the current Esko License Server will be stopped temporary, during which the currently used licenses will be unavailable.
3. When the installation has finished, click Load the new licenses.
4. In the Load new licenses window, click Activate Server Licenses.
5. In the Network License Manager, click Activate.
6. Follow the instructions of the Activate License Wizard.
7. Select on-line activation.
8. Select I have a file containing one or more product keys.
9. Click Browse to select the product key file.
10. Fill in your **Account Name** and **Password**.

11. Click **Finish**.

   The licenses for the upgraded products are now listed in the License Manager.

12. Close the License Manager and click **Go back** in the top-right corner of the page.

13. Click on **Continue with the installation of the prerequisite components** link.

### 4.5 How to Upgrade the Prerequisite Components

Follow these steps to upgrade the **Prerequisite Components** to version 14.1:

1. On the installation page, click **Install the prerequisite components**.
2. Follow the instructions of the installation wizard.
3. The installation wizard will ask you to close all Esko applications. Click **Yes** when asked **Ready to continue?**
4. Follow the instructions of the installation wizard.
5. Click **Continue**. Click **Yes** in the **Installshield Wizard Complete** message window.
6. **Automation Engine 14.1 Prerequisite Components Installation** window will ask you about **CAD-X** component installation, both 'Standard' and 'Enterprise'. Click **Yes** if ArtiosCAD is not installed.
7. Follow the instructions of the installation wizard
8. Click **Exit**.

   You will be redirected to the installation page to continue with the next step.

### 4.6 How to upgrade Automation Engine software

1. Click on the **Install the Suite 14.1 Automation Engine** link on the installation page.

   The Automation Engine 14.1 Software Installation wizard will open up.

2. Follow the instructions of the installation wizard.
3. Read the **Software and Data license agreement** carefully and select **Yes, I accept the license agreement**.
4. When asked to select the products to install on this system, select **Automation Engine 14.1**.

   The group **Common Components** cannot be deselected and will be installed on all systems.
5. Follow the instructions of the installation wizard.
6. Select the **Destination Folder** for the chosen products or accept the defaults.
7. During the pre-installation this question will appear "If you continue Automation Engine 14.1 will be installed but it may not be possible to return to <number-of-your-current-version>. Do you want to continue the installation anyway?". Answer **Yes**.
8. Follow the instructions of the installation wizard.
9. At the end of the installation, click **Finish**.
5. How to Upgrade onto a New Server Computer

These are the typical cases when you want to change the hardware (computer) of your Automation Engine server:

- You decide yourself that your server needs to be updated, usually for performance reasons.
- Your server no longer matches Esko’s requirements for a Automation Engine server. A typical case is when the Windows OS is no longer supported.

For example: Automation Engine 14.1 server is no longer supported on Windows 2003 or Windows 2008 RTM 32bit. If your server runs Windows 2003 or Windows 2008-32bit, the hardware will also be too old by now to use it for such a vital production tool. This means you will most probably not change the OS on that old server but install Automation Engine on a new computer with a recent Windows OS. For a list of supported OS, see http://www.esko.com/systemrequirements.

**Note:** Your new server can have a different name than the old server.

To move your Automation Engine server configuration to a new server, follow these main steps:

1. **Install Automation Engine on the new server**

   First you install Automation Engine on this 'virgin' new server. Follow the standard procedure as described in *How to Install Automation Engine 14.1* on page 5.

2. **Backup your old server config, using the backup tool from your old Automation Engine server**

   To get the configuration of your old server onto your new one, use the backup tool that is offered in the *Automation Engine Server Web Page* of the old server (go to http://nameofyourOLDserver:9999/ and log in).
Attention: If your old server is on Automation Engine 10, follow these steps:

- You always first make a **Restore Point** of your v10. (This is no longer needed when your current version is 12 or higher).

  A Restore Point consists of special backup of the Automation Engine server and of the Automation Engine database. A Restore Point is only used in case you would want to go back to that old version 10. Follow these steps:

  1. In Automation Engine 10, start the **Server Admin** Wizard.
  2. In the Automation Engine **Administration**, click the **Automation Engine** tab and Click **Manage Restore Points**.
  3. Click **Set up Restore Point**. Select the location where the backups will be stored or accept the default. Click **Create Restore Point**.

- You then need to use a **special tool to make a backup of that v10**. This backup is the usual set that makes sure the upgrade also install your previous configuration.

  1. Find this tool on your new installation server, on the **Server Web page > Client Apps > Tools > Automation Engine 10 backup**:

  ![Automation Engine Server](http://dvmaedemo999/serveradmin/Tool: Automation Engine 10 Backup)

  2. Download this tool, place it on the old v10 server, run the tool and save its result on a share or medium (USB/DVD). You will use that special backup in the next step:

  3. **Restore** that backup on your new Automation Engine.

  To do this, use the **Restore** function as documented in **Restore**.
6. How to Repair an Automation Engine Server

You typically need to repair a system when software program files got deleted or became corrupt. For example a virus can cause such damage.

**Note:** Only Automation Engine components of the same version as the one on the DVD can be repaired/re-installed.

To repair the Automation Engine 14.1 software, proceed as follows:

1. Open the **Automation Engine Software Installation** window:
   - If you insert the distribution DVD into the DVD drive, or mount the corresponding .iso file, the window appears automatically.
   - If you unpacked a downloaded .iso file, or if the window doesn’t open automatically, double-click `setup.exe` in the root folder.
2. Select the installation language.
3. Click **Proceed to the installation**.
4. Click **Repair / reinstall Automation Engine** and **Choose** which component you want to repair.
7. How to install the Configuration Manager

The Configuration Manager tool collects a lot of data regarding software versions, hot-fixes, OS etc. This information can be useful for Esko customer service.

Only install the Configuration Manager if there is no Configuration Manager active on your network yet. There can only be one Configuration Manager active on the network.

How to install the Configuration Manager is described in its own (installation) manual. Find it on http://help.esko.com/products/Configuration%20Manager.