M3014-QS Phoenix SQL® Start-up

PC or Server Requirements

- Runs on multiple Microsoft operating systems (Windows® 7, Windows® 8.1, Windows® Server 2008 RC2, Windows® Server 2012, Windows® Server 2012 RC2)

- Windows® PC or Server with Quad Core, 2.4 GHz or faster processor

- At least 8 GB of RAM, DVD-ROM drive, 120 GB hard disk space

- 10/100/1000 LAN connection, Internet access for activating software, and serial port if direct connect or modem feature is used

- Internet Information Services (IIS) 7.5 or higher

Phoenix SQL® Software Features

- Server-based and SQL-enabled – SQL 2008/2012/2014 (Express or Enterprise)

- Provides simultaneous multi-user access

- Centralized card database for multiple sites

- Allows for the creation of "Fuel Zones" to limit where fleet cards can fuel

- Provides communications through modem, Ethernet or direct connection

- Export transactions in Excel, CSV and XML

- Compatible with Windows® 7 32/64 bit, Windows® 8.1 32/64 bit, Windows® Server 2008 RC2, Windows® Server 2012, Windows® Server 2012 RC2

- Export transactions in Excel, CSV and XML

- Multi-level access and security features

Phoenix SQL Tutorial Video

A video tutorial for Phoenix SQL® is available at the OPW Global channel on YouTube. Use the links below.

Type this URL into a browser or, if you have this pdf open on a pc, click the hyperlink to open the video:

https://www.youtube.com/watch?v=Lr0ADQMyV8s&t=8s

If you have a QR code scanner/reader on your smartphone, scan the code below to open the video on your phone.

Phoenix SQL® Start-up

This section is a guide for the Phoenix SQL® installation process.

Component Considerations

Before performing the actual Phoenix® installation, first decide where the Phoenix database will reside. Install a free version of Microsoft's SQL Server Express 2005 (provided on the Phoenix installation CD) on the same machine the Phoenix Web services will be installed, or point Phoenix at an existing installation of Microsoft's SQL Server (Express or Enterprise versions 2005/2008/2012/2014) already installed on a machine in the company network.

Next, decide where the Phoenix Service Engine component will be installed. This component must have direct access to the SQL Server for database management and have connection-point access to each fuel site that will be managed. This can be done using a serial COM port for direct connections, a modem for dial-up access, or TCP/IP connectivity using your company LAN. Due to security issues, the use of public Internet to access fuel site controllers is not recommended. Finally, because Phoenix is a Web-enabled application, the PC chosen for Phoenix installation must have IIS (Internet Information Services) 7.5 or higher enabled and must be securely managed behind a corporate firewall.

Note for Current Phoenix for Windows Users:

After installing Phoenix SQL, there is a database migration utility that will import existing Phoenix for Windows® data. Once complete, depending on how Phoenix is used, some modifications may need to be made to the imported data with respect to Accounts and their associated Cards.

Installation Prerequisites

Follow these steps to install Phoenix SQL on your machine(s):

1. Insert the Phoenix SQL Installation CD.

2. The Phoenix Installation Wizard should auto-run.

> **NOTE:** Before installing, you must first exit all other open applications.

3. Click **Next** to allow Phoenix to install the prerequisites needed to operate.,

4. Click **Next**, and follow the Phoenix SQL Installation Wizard process.

5. At the "Select SQL Server Option" page the following options are presented:

   - **Install SQL Server 2005 Express Edition**: Select this option if you do not have access to a remote installation of SQL Server Express or Enterprise Editions.

   - **Select SQL Server**: Select this option if an existing installation of SQL Server 2005 Express Edition, or SQL Server 2008 was installed on this machine, or if a remote version is available on the company network. Select the server name from the populated list, enter the appropriate Username and Password by providing the administrator credentials that give rights to allow a Database to be created.

6. Click **Next** and setup will auto-run the SQL Server install. After all third-party applications have finished installing, click **Next** to continue.

Installing Phoenix SQL®

Installation of the different options of Phoenix SQL begins at the *Software Setup* screen.

> **Software**
>
> PhoenixSQL
> ServiceEngine
> PhoenixSQL Migration Utility

1. Start at the top of the list and select **Phoenix SQL** and click **Install**.

2. Follow the prompts to move forward with the installation.

3. Accept the End-User License Agreement, then click **Next**.

4. Select an **Installation Type** option:

   - **Typical**: (Recommended) This is the default **Installation Type**.

   - **Custom**: (For advanced users) Enter the *Website Name/Virtual Directory Name* and determine the *Destination Path* using the **Browser** button on the right.

5. Click **Next**.

6. Enter the Phoenix **Database Name**.

7. Click **Next**.

8. Create a password (minimum of six characters) for the *Sysadmin* user of Phoenix SQL.

> **IMPORTANT:** Remember this password! When logging into Phoenix SQL® for the first time, the username *Sysadmin* and the password you created must be used.

9. Click **Next** and follow the prompts to move forward with the installation.

10. The next prompt will ask for the *SMTP Configuration* **From Address**: This is the email address that will be seen when the Service Engine and/or Phoenix SQL® sends an email.

    - **Configure SMTP using IP address**: Recommended by default if using an operating system older than Vista.

    - **Install SMTP server for Windows® 7 or higher version of OS**: Recommended by default if using a Windows® 7 (or higher) operating system.

    - **Configure SMTP using Mail Server (any OS)**: If selected, a Mail Server name is required.

11.   Click **Next** and follow the prompts to move forward with the installation.

12.   Phoenix SQL has been successfully installed! A Phoenix SQL desktop icon will come into view.

13.   Click **Close**. Proceed with the Phoenix SQL Service Engine Installation.

Installing Phoenix SQL® Service Engine

1.   If installing the Service Engine component on the same machine, select *Service Engine* and click **Install**. If installing Service Engine on a secondary machine, exit the installation, move to that machine and restart the installation again.

2.   The option of Installation Type will be given:

   ▪   **Typical**: (Recommended) This is the default **Installation Type**.

   ▪   **Custom**: (For advanced users) Enter the *Destination Path* using the **Browser** button on the right.

3.   Click **Next**.

4.   The next screen displays/requires the following Database details: **Server Name**, **User Name**, **Password** and **Phoenix Database** name.

> **IMPORTANT:** You must provide this information if you are installing the *Service Engine* on a separate machine.

5.   Click **Next**.

6.   The **Email Configuration** setup determines who will receive notification if the *Service Engine* fails or shuts down.

> **NOTE:** The "**TO:**" field is required.

7.   Click **Next** to install.

8.   **Service Engine** has successfully installed.

9.   Click **Close**.

Activating Phoenix SQL® after Purchase

Whenever Phoenix SQL is installed, it first opens as a DEMO version providing a 60-day, two-site configurable version.

Once purchased, Phoenix SQL can be Activated for use with purchased features.

To activate Phoenix SQL, log in as "sysadmin" and click the **Account** button on the *Main Toolbar*. When the *Account* page is displayed, click the **Activate** button on the *Ribbon Bar*. This brings up the *Product Activation* page.

Fill in the required information and click **Apply** to activate Phoenix.

When entering the required data, be sure to enter the Company Name as it is to be displayed. The name entered here will be displayed as part of the header on ALL Phoenix Reports.

> **NOTE:** Once Phoenix is activated for use, the **Activate** button on the *Ribbon Bar* changes to **Upgrade**. This option is now available when additional features are purchased in the future.

Running Phoenix SQL® Migration Utility

Before proceeding with the *Migration Utility* process, first log into Phoenix SQL and activate the purchased serial number (see above). Without a purchased copy of Phoenix SQL, it is not possible to migrate the existing Phoenix for Windows® database. To purchase, login as "Sysadmin" and go to *My Account* page to activate. Click **Account** on bottom toolbar.

> **NOTE:** To migrate a database to use with Phoenix SQL it must be available on the machine where Phoenix SQL is installed. If it resides on another machine or network you will need to find the location of the database and copy this file to the local machine where Phoenix SQL is installed.

1. In order to migrate an existing Phoenix for Windows® database, run the Phoenix SQL installation. At the Software Setup screen, select Phoenix SQL Migration Utility and click **Install**.

2. Once a database has been migrated in Phoenix SQL, the following changes should be made to ensure correct card management and site setup:

- **Account/Site Contact Managers**: Under this version of Phoenix, an *Account Contact* and *Site Manager* must be assigned to each *Account* and *Site* respectively from an *Address Book* that is now available. This data does not exist in the **Phoenix for Windows** database. Phoenix assigns the only available entry of "Tech Support" to each *Account* and *Site* configured within the database. It is recommended that *Address Book* entries be created for these contacts so they can be associated to their respective *Accounts* and *Sites*.

- **R/W ChipKey® Users**: If using a System2™ or with ChipKey® Mileage Reasonability, all defined cards that are R/W ChipKey®s must be edited and the checkbox **Is R/W ChipKey®** must be enabled.

- **Maintenance Card Account** Users: If the built-in Maintenance Cards account was used to manage cards in Phoenix for Windows® and that account contained "Single" cards, these "Single" cards must be re-assigned to a new or existing Phoenix SQL® account.

  i. Log in to Phoenix SQL. If it is desired to place these "Single" cards in a new Account, click on the **Accounts** menu on the left to add a new account.

  ii. Once the re-assigned location for Single cards is decided, select the *Global Cards* account from the Cards Info page, **View by Account** dropdown menu and click **Edit**.

  iii. On the **Ribbon Bar**, click the **Reassign Account** button.

  iv. In the message that comes into view, select the **Cards Defined** as "Single" and reassign them to a new account.

Access Phoenix SQL® Remotely

During the Phoenix SQL installation process, when prompted for Typical or Custom install, the option to select a Virtual Directory for the remote access of Phoenix SQL will also be presented. The default name of this virtual directory is "*PhoenixSQL*". This name must be referenced when attempting to log into Phoenix SQL for another machine using a web-based browser.

The address entered into the browser to access Phoenix SQL is:

<Phoenix Machine IP>/PhoenixSQL/Login.aspx–