

# Start-Up Guide



**OPW**   
FUEL MANAGEMENT SYSTEMS  
A **DOVER** COMPANY

This Start-Up Guide has been designed to guide you through the Phoenix installation process and get you ready for use.

## Component Considerations

Before performing the actual Phoenix™ SQL installation, you must decide where the Phoenix database will reside. You can install a free version of Microsoft's SQL Server Express 2005 on the same machine Phoenix SQL will be installed, directly from the Phoenix DVD, or you can choose to point Phoenix at an existing installation of Microsoft's SQL Server (Standard or Enterprise versions 2005/2008/2010) already installed on a machine within your company network.

Next, you must decide where the “Phoenix ServiceEngine” will be installed. This component must have direct access to the SQL Server for database management and it must have connection-point access to each fuel site you intend to manage. 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 you choose to install Phoenix on must have IIS (Internet Information Services) enabled and should be securely managed behind a corporate firewall.

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

## Installation Prerequisites

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. When you arrive at the “Select SQL Server Option” page, you are given the following options:
- **Install SQL Server 2005 Express Edition:** Select this option if you don't have access to a remote installation of SQL Server Standard or Enterprise Editions.
  - **Select SQL Server:** Select this option if an existing installation of SQL Server 2005 Express was installed on this machine, or if you have a remote version available on your company network. Select the Server name from the populated list, enter the appropriate User Name and Password by providing the administrator credentials that give rights to allow database creation.
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

Here at the Software Setup screen you may begin to install the different components of Phoenix SQL.

1. Start at the top of the list and select **PhoenixSQL** and click “Install.”
2. Follow the prompts to move forward with the installation.
3. Accept the End-User License Agreement, then click “Next.”
4. You will be given the option of Installation Type:
  - **Typical (Recommended):** Allow this to be the default Installation Type.
  - **Custom:** For advanced users, if chosen, please enter the Website Name/Virtual Directory Name and determine the Destination Path using the Browse button on the right.



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Click “Next.”

5. Enter the name you want your Phoenix Database to be called. Click “Next.”
6. Now, you must create a password (minimum of 6 characters) for the “Sysadmin” user of Phoenix SQL. Remember this password! When logging into Phoenix SQL for the first time you must use the user name of: “Sysadmin” and the password created.
7. Click “Next” and follow the prompts to move forward with the installation.
8. You will be asked to choose the SMTP Configuration “From address”: The “From address” is the e-mail that will be seen when the ServiceEngine and/or Phoenix SQL sends an e-mail.
  - **Configure SMTP using IP address (all except for Vista or higher version):** Recommended by default if using an operating system older than Vista.
  - **Install SMTP server for Vista or higher version of OS:** Recommended by default if using a Vista or Windows® 7 operating system.
  - **Configure SMTP using Mail Server (any OS):** If selected, a Mail Server name is required.
9. Click “Next” and follow the prompts to move forward with the installation.
10. Phoenix SQL has successfully installed! A Phoenix SQL desktop icon will appear.
11. Click “Close.” Now you will proceed with the Phoenix SQL ServiceEngine Installation.

# Installing Phoenix™ SQL ServiceEngine

1. If installing the ServiceEngine component on the same machine, select **ServiceEngine** and click “Install.” If you intend on installing the ServiceEngine on a secondary machine, exit the installation and move to that machine, restarting the installation again.

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2. You will be given the option of Installation Type:

- **Typical** (*Recommended*): Allow this to be the default Installation Type.
- **Custom**: For advanced users, if chosen, please enter the Destination Path using the Browser button on the right.

Click “Next.”

3. This next screen displays/requires the following Database details: Server Name, User Name, Password and Phoenix Database Name. You must provide this information if you are installing the ServiceEngine on a separate machine. Click “Next.”

4. The Email Configuration setup determines who will receive notification when the ServiceEngine fails or shuts down.

**To:** (required field)

**CC:**

**BC:**

**Subject:**

**Body:**

Optional

5. Click “Next” to Install.

6. ServiceEngine has successfully installed. Click “Close.”

## Running the Phoenix™ SQL Migration Utility

Before proceeding with the Migration Utility process, you must first log into Phoenix SQL and activate the purchased serial number. You cannot migrate your existing P4W database without first purchasing your copy of Phoenix SQL. To purchase, login as “Sysadmin” and go to the “My Account” page to activate. *Click “Account” on bottom toolbar.*

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

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**Note:** The P4W database must be located on the Phoenix SQL machine before migrating.

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

**Account/Site Contacts and Managers:** Under this version of Phoenix, an Account Contact and Site Manager must be assigned to each, respectively, from an Address Book that is now available. This data does not exist in your P4W database; therefore, Phoenix assigns the only available entry of “Tech Support” to each Account and Site configured within your database. It is recommended that you create Address Book entries for these contacts so they can be associated to their respective Accounts and Sites.

**R/W ChipKey® Users:** If you use a System2 or FSC3000 with ChipKey Mileage Reasonability, you must edit all defined cards that are R/W ChipKeys and enable the checkbox, “Is R/W ChipKey.”

**Maintenance Card Account Users:** If you managed cards in Phoenix for Windows® under the built-in “Maintenance” cards account and that account contained “Single” cards, you must reassign these “Single” cards to a new Phoenix SQL account or one of your existing accounts.

1. Login into Phoenix SQL. If you want to place these “Single” cards in a new Account, click on the “Accounts” menu on the left to add a new account.
2. Once you’ve determined where these “Single” cards will be reassigned, select the “Global” cards account from the “Cards Info” page “View by Account” dropdown and click “Edit.”
3. On the Ribbon bar, click the “Reassign Account” button.
4. In the message that appears, select the cards defined as “Single” and reassign them to a new account.

## Phoenix™ SQL Software Features

- Server based and SQL enabled
- 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
- Compatible with multiple operating systems – Windows® XP, 2003 Server, Vista and Windows® 7
- Export transactions in Excel, CSV and XML
- Multi-level access and security features
- Browser enabled; supported browsers include Internet Explorer 7, Internet Explorer 8 and Mozilla Firefox 3.5 & 3.6

### OPW Fuel Management Systems

6900 Santa Fe Drive | Hodgkins, Illinois, USA 60525

Tel: 708 485-4200 | Fax: 708 485-7137 | [www.opwglobal.com](http://www.opwglobal.com)