



Application Update Instructions

^{SMS} | Host 2023r1

Instructions for updating to ^{SMS} | Host 2023r1 from
^{SMS} | Host version v.21.x or earlier

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Introduction

This document is intended for Springer-Miller Systems customers and staff when updating an SMS | Host system that is currently on version 21x or earlier to SMS | Host 2023r1.

There are numerous instructions and operations to be aware of regarding the update. Springer-Miller Systems strongly recommends that you read this document in its entirety before proceeding with installation.

IMPORTANT: If your SMS | Host system is already on version 22x, please refer to [SMS | Host v22.x \(and later\) to 2023r1 Update Instructions](#) (SMS Doc #1021450) for the steps required to update your system.

Please note that the underlying version number associated with the 2023r1 release is 22.820417.

CD Image

The CD image contains the files and installation programs (“update routine”) to bring the following SMS products (if installed at your site) up to 2023r1 from versions v21.x or earlier.

- SMS | Host and associated modules
- SMS | Retail POS
- Zip Verification module

Important Note for Customers Updating from a version prior to SMS|Host v.21

SMS|Host v.21 was the first version of SMS|Host to enforce tokenization and removal of support for storage of any non-tokenized card holder data. A pre-requisite for updating to 2023r1 is that your SMS|Host system must be completely devoid of any encrypted card holder data. If the 2023r1 update routine detects any non tokenized card holder data in your system, it will halt the update.

As a result of the “no non-tokenized data” requirement, there are numerous steps and tasks involved when updating to 2023r1 from a version prior to v21, to ensure no non-tokenized card holder data exists in your system prior to your update. The specific tasks that will be taken will depend on the version of SMS|Host you are currently on, whether you are currently using a credit card interface for payment processing, whether card holder data is tokenized, whether you are currently SPS enabled and whether or not you intend to install a credit card interface or convert to a different one as part of your update to 2023r1.

Your update coordinator will work with you to determine the specific steps you will need to go through in preparation for your live update to 2023r1.

Pre-Update Tasks

Schedule Your Update with SMS

Please send an email to upgrades@springermiller.com to begin the update scheduling process. You will be contacted by a SMS coordinator who will ask you to complete an *Upgrade Request Form* to identify hardware specifications and currently installed SMS software.

Please refer to the document **SMS Exhibit-A** (available directly from the [SMS Customer Community](#) portal or through your SMS Account Representative) for the minimum hardware specifications required for running the latest versions of our product. If the hardware that you are currently running does not meet requirements, the SMS coordinator will inform you. Your update will be delayed until your hardware has been updated to meet the *Exhibit A* specifications.

Once your hardware has been approved, the SMS coordinator will contact you to finalize a date for your update.

Review SMS|Host 2023r1 Functionality

Review the functionality added to versions of SMS|Host after your current version, up to and including SMS|Host 2023r1 by referring to the documentation available from the [SMS|Host 2023r1 Help Site](#) and the [SMS Customer Community](#) portal.

Create an SMS|Host 2023r1 Demo System

Create and update a training/demo system based on your current live system configuration. Use this system to carry out a thorough review of the new functionality in SMS|Host 2023r1 and to train your staff.

- If your production system is currently on a version prior to SMS|Host v21, please refer to SMS document # 1018690, [Create a SMS|Host and SMS|POS Demo System and Update it to v21+](#) for instructions to create a 2023r1 demo system.
- If your production system is currently on v.21 or higher, please refer to SMS document # 1021180, [Create a SMS|Host and SMS|POS Demo System and Update it to 2022r1+](#) for instructions to create a 2023r1 demo system.

Important Note for Thin Client / RDS / Terminal Services Customers

If you are using thin client deployment for SMS|Host at your property, you will need an updated publishing routine file to be installed in your live system before you attempt to publish the new demo. You may either download the required file

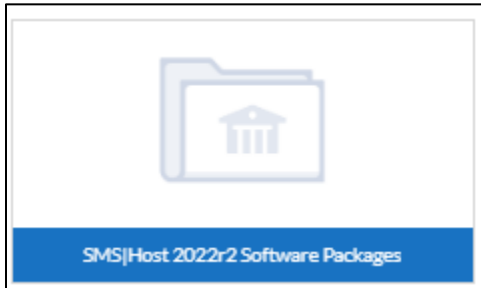
from the SMS Customer Community, or request assistance from Support to coordinate distributing and installing the file in your live SMS | Host system.

To download and install the publishing file from the Community

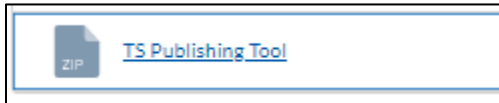
- 1) Logon to the SMS Customer Community and click on the **Resources** tab:



- 2) On the Resources page, scroll to the Libraries section at the bottom of the page and select the **SMS | Host 2022r2 Software Packages** library:



- 3) Open the **SMS | Host 2022r2 Software Packages** library to view the list of available files.
- 4) Locate and click on the file **TS Publishing Tool.zip** from the list of available files, as shown:



- 5) Copy the **TS Publishing Tool.zip** file to your `\hostplus\fxp32` folder and extract the contents of the zip file directly into `\hostplus\fxp32`.

This operation will not require exclusive use. The file that will be updated is **termtool.fxp**.

- 6) Once **termtool.fxp** has been installed in `\hostplus\fxp32`, you can launch the publishing routine and publish your newly updated 2023r1 demo system.

Please contact Springer-Miller Systems Support if you require any assistance creating your new demo system.

Before Your Scheduled Update

Verify Adequate Disk Space

The update process requires enough free disk space to copy files and manage your large databases safely while they are being updated. A safeguard is built into the update routine to verify that your system has enough free disk space to perform the update. If there is insufficient disk space, the update routine will halt.

How to Verify You Have Adequate Disk Space Available

Prior to running your scheduled update, take the following steps:

1. Run the update routine (as described on page 7) up to where it verifies your system's free disk space.
2. When the update asks for your key code, **DO NOT ENTER IT**. Exit the update routine.

If your system failed the disk space test, you'll need to free up disk space. Delete unnecessary files and run the update again to verify that you have enough space. Call SMS Customer Support if you are unable to free up enough disk space.

Pre-Installation Checklist

Check each of the following items "Complete" **BEFORE** starting the update.

Required Task...	Complete
Run a verified back-up immediately before starting the update routine.	<input type="checkbox"/>
<p>Ensure all users are completely logged out of the SMS Host and SMS POS systems before starting. Completely shut down all serial and XML interfaces and stop SMS Diplomat. As the update requires exclusive use of all files, putting interfaces to sleep is not sufficient – they must be shut down. See the Exclusive Use Manager topic on the SMS Host help site for information and instructions on gaining exclusive use of your system.</p> <p>Note for demo system updates: Exclusive use of the demo system is still required. As there are no serial or XML interfaces active, putting interfaces to sleep and stopping SMS Diplomat is not required. Consult SMS Support for assistance if you have any problems obtaining exclusive use of the system.</p>	<input type="checkbox"/>
<p>Ensure all workstations are identically mapped to the SMS software. In other words, use the same mapped drive letter and path on each workstation. Ensure that the fileserver uses the same drive mapping as the workstations.</p> <p>Note: In the majority of cases, the update must be launched from the mapped drive on the fileserver.</p>	<input type="checkbox"/>

FAQs

How can I tell if my workstation is completely logged out?

If the SMS | Host user code and password screen is open you are still considered "logged in." You must <Escape> past this screen, and close the SMS | Host application entirely.

How can I tell if ALL users are completely logged out?

Please refer to the [Exclusive Use Manager](#) topic on the SMS | Host help site for information and instructions on gaining exclusive use of your system.

How can I tell if my server and workstations use the same drive mapping?

Example: Your SMS | Host data is located on your server's C:\SMSSHOT\HOSTPLUS directory and your workstations map to this directory as H:\HOSTPLUS. So, your server should also be mapped to C:\SMSSHOT\HOSTPLUS as H:\HOSTPLUS. When prompted by the update to enter your SMS | Host path, you would enter H:\HOSTPLUS.

Update Procedure

Download the Latest SMS|Host 2023r1 Update Files

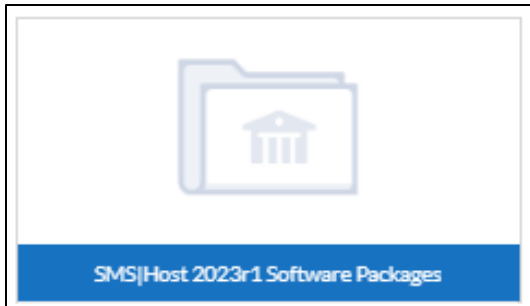
Before running the 2023r1 update, you must download the v.22 cd image and current update patch from the *SMS|Host 2023r1 Software Packages* library on the [Springer-Miller Systems Customer Community](#).

If you do not have access to the Customer Community, please contact [Springer-Miller Systems Support](#) for assistance.

- 1) Create a new directory on the SMS|Host fileserver that will be used to store the 22.0 cd image. We recommend you name it **\22cd**. The directory should NOT be located within **\hostplus** or **\hostdemo**.
- 2) Logon to the SMS Customer Community and click on the **Resources** tab:



- 3) On the Resources page, scroll to the Libraries section and select the **SMS|Host 2023r1 Software Packages** library:

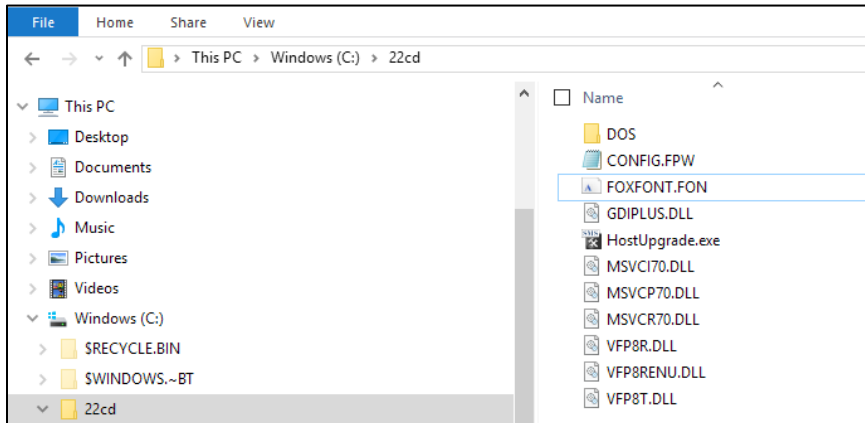


- 4) Open the **SMS|Host 2023r1 Software Packages** library to view the list of available files.
- 5) Locate and click on the zip file **SMS|Host v22 cd image** from the list of available files, as shown:



- 6) Download the zip file to the **\22cd** image directory that you created on the fileserver (in step 1 above).
- 7) Extract the contents of the 22.0 cd image zip file into the root of the directory you created, using an extraction tool such as the built-in Windows extraction utility or an application such as 7-Zip or WinZip.

- 8) In the example below, the cd image has been extracted into a folder called “22CD” on the server:



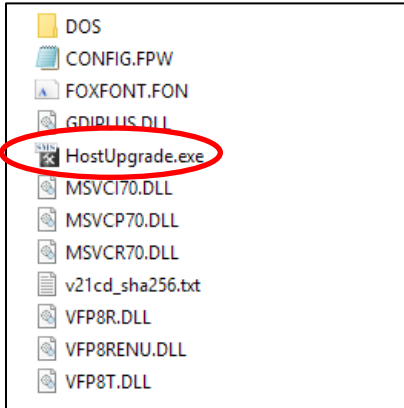
- 9) Share out the directory where you extracted the cd image and map a drive letter to it.
- 10) Download the 2023r1 update patch from the **SMS | Host 2023r1 Software Packages** library on the Springer-Miller Systems Customer Community. The patch will be named **22820417.exe**.
- 11) Copy the patch file to your **\hostplus\tempdist** (or **\hostdemo\tempdist**) directory. If there is no **tempdist** directory under **\hostplus** (or **\hostdemo**), create one.
- 12) Verify that your **\hostplus\tempdist** or **\hostdemo\tempdist** directory contains only the **22820417.exe** patch and no other files or sub-directories.
- If there are any other files or sub-directories in the **\hostplus\tempdist** (or **\hostdemo\tempdist**) directory, delete them.
- 13) Do not attempt to launch the patch file executable file from the **\hostplus\tempdist** directory.

Don't Have Internet Access?

Contact the Springer-Miller Systems Customer Support Center at (702) 560 6900 (or your local Springer-Miller International Customer Support phone number) to discuss alternative methods of receiving software updates.

Launch the Update

1. Exit all open non-essential applications on the fileserver.
2. To launch the v.22 update routine, open Windows Explorer, browse to the mapped v.22 cd drive and double-click on the file **HostUpgrade.exe** as shown:



During the Update

1. When prompted, enter the entire path of your SMS | Host directory, including the drive letter. (Example: **H:\HOSTPLUS** or **H:\HOSTDEMO**).

SMS requires that you launch the live update from the mapped drive on the physical file server, rather than launching the update from a workstation. When launched from a mapped drive on the file server, the update routine will detect the physical location of the SMS | Host system and will execute the update from that local drive, rather than using the mapped drive. Running the update in this manner ensures that it takes full advantage of the server's processing power and hence reduces the time needed to complete the update.

If you are updating a demo system and do not want to launch the update from the file server, you may run the update from a mapped workstation. The update will notify you that it has detected you are attempting to run the update from a workstation and warn that this is only advisable if you are updating a demo system. Answer **Y** to continue.

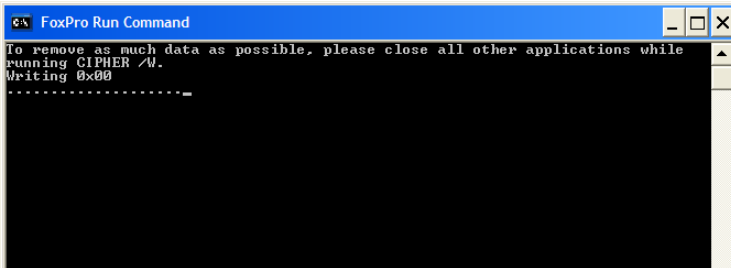
2. The system will search for installed modules and display their physical paths on the screen, rather than the mapped paths. If the paths are correct, press **Y** to continue.
3. The update routine will verify that you have enough available disk space to perform the update.
4. When prompted for a Key Code, please contact [Springer-Miller Systems Support](#). Enter the Key Code to continue.
5. The update will move ahead with installing new files, enabling any relevant settings and making updates to database structures and indexes as necessary.
6. If you do not currently have R&R ReportWorks v.12 installed, the following warning message will display:
This version of Host requires that R&R be on version 12 or higher. Press "Y" to continue.
This is an informational message only and serves as a reminder to install R&R v12 as soon as possible.
7. The update process is complete when the following message displays: **Update process complete. Press 'Y' to return.**

Secure Delete Process

The upgrade of SMS | Host and SMS | POS software is now complete and you may begin to use the system.

If you have updated from a version prior to SMS | Host v21.0x, a secure delete utility will run automatically on the server to cleanse the disk drive of any previously deleted data that may contain sensitive information, such as credit card numbers.

The following screen will display immediately after the update completes:



Exclusive use is not required when this utility is running; therefore users can start accessing SMS | Host and SMS | POS immediately. Please be aware that due to the nature of the tool there will be an increased I/O load on your server as the utility overwrites all un-allocated blocks on the disk multiple times and may negatively impact the performance of your system until it completes.

Note: If you receive an error message, or you are unsure how to proceed at any point during the update process, please STOP and contact Springer-Miller Systems Customer Support Center for assistance.

After the Update Completes

Register SMS | Host on all Servers and Workstations

Prior to launching SMS | Host 2023r1 for the first time, a user with local admin rights must launch the *SetupHost* installer on every machine that will be used to access the application, in order to correctly setup the machine for running the SMS | Host application.

Pre-Requirement: The Microsoft® .Net Framework v4.8 Runtime must be installed before attempting to run *SetupHost* on each machine. The .Net Framework v4.8 Runtime is available for download directly from Microsoft®:

<https://dotnet.microsoft.com/download/dotnet-framework/net48>

1. User with admin rights, accesses each machine and launches **setuphost.exe** from **\hostplus\install**. The following screen will display:



2. Press **Install** to run
3. The installer will register the appropriate components and copy in required system files.

4. When complete, the installer will display a “Completed successfully!” message, as shown:



5. If *SetupHost* has already been run on a specific machine and the admin user inadvertently runs it again, the **Install** button will be greyed out, preventing the installer from being re-run:



Specify Client-Side Deployment Folder

The update to 2023r1 will enforce client-side installation for all non-Thin Client deployed SMS | Host systems. Client-side installation copies selected files from the `\hostplus\fxp32` and `\pos\fxp32` folders to a local folder on each machine where SMS | Host is launched.

The default location for client-side files to copy to is `\psms\localdeploy\lc_host` and `lc_pos`. Following initial launch of SMS | Host 2023r1, properties have the option of selecting an alternative client-side installation location on each machine - `%programdata%` or `%appdata%`

A user with local admin rights to the fileserver should launch SMS | Host immediately after the update and after running the *SetupHost* installer, in order to copy client-side files to the `\psms\localdeploy\lc_host` and `\lc_pos` folder on that machine.

The user should then launch client-side configuration screen in SMS | Host (menu path **F, L, E, 7**) and select the desired location for the client-side deploy folder on every workstation and server that will access SMS | Host from a mapped drive:

```

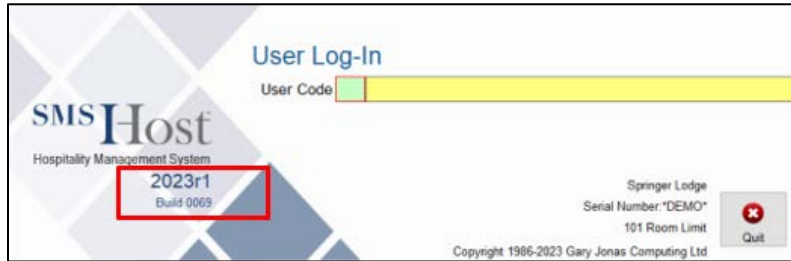
CLIENT-SIDE SETTINGS
Local Deploy Folder Location
2 - C:\PSMS\
3 - %ProgramData - eg C:\ProgramData
4 - %AppData - eg C:\Users\\AppData\Roaming
Enter selection number for Local Deploy Folder Location 2
Automatically refresh Terminal Services folder N
  
```

Once a folder location has been selected, exit out of SMS | Host and allow all other users to logon to SMS | Host. Remember to run *SetupHost* as an admin on all machines prior to letting users logon to SMS | Host 2023r1 for the first time.

Refer to the [SMS | Host Deployment Guide](#) (SMS doc# 1021090) for details on client-side deployment and configuration.

Verify Update Complete

On first launch of SMS | Host, following the update, the title screen of both SMS | Host and SMS | POS (if applicable) should display the new release number “2023r1” and build number “Build XXXX”:



If **2023r1** and the Build number are not displayed on the logon screen, the update was not successful. In this case, please contact [Springer-Miller Systems Customer Support](#) immediately.

Re-start Interfaces

Remember to re-launch all serial interfaces from the relevant desktop icons and to re-start SMS | Diplomat.

RDS / Terminal Services / Citrix / Thin Client Configurations Only

This step is REQUIRED for configurations with an RDS, Citrix® or Microsoft® Terminal Services implementation of a “thin client” architecture.

After completing the SMS | Host update, and before allowing users to enter the updated system, local copies of the necessary SMS | Host and SMS | POS program files must be deployed to each server that is configured for RDS, Citrix or Terminal Services.

Refer to the document [Publishing and Maintaining SMS | Host on an RDS, Citrix or Terminal Server](#) for instructions about how to perform these tasks.

Contact Support

Please contact [Springer-Miller Systems Customer Support](#) to inform them of your successful update.