IT Utilities

Database Backup

The importance of backup systems can be easily understood because computers are electronic items, and they can be prone to failure. The most threatening kind of failure is data loss or corruption of data. Once you lose or corrupt your data, you have no other option than restoring it from the backup taken before data corruption or deletion. Ignoring the importance of system backups may cause permanent loss of important data.

No matter how sound technology your computer has, no one can guarantee that it will never fail. You should take regular backups of your important data files and copy them to a safe location.

A Counterpoint backup automatically:

1. Determines what data to backup
2. Selects the files and folders with your data
3. Allows you to set a backup schedule
4. Runs entirely at the server
5. Confirms your backup

The benefit of the Counterpoint backup is that your data is stored in a convenient zip file format. This format can be used for any emergency restore purposes or by Counterpoint support to analyze data issues.

The backup service is the CSI_Server program and is a windows service. Windows service programs run 24/7 and will automatically be re-started if the server is re-booted. It is responsible for starting automatic backups and is also the communications gateway between the Counterpoint Applications and the backup process. It uses the settings defined in CSI_Server.ini to determine where items are located.

Configuration Path Settings

The CSI_Server.ini contains database path and other settings to specify where certain folders are located. Browse to the folder X:\CSI\Prod\Exe and open the CSI_Server.ini file.

Note: The drive letter X being shown in these examples will be replaced with your actual drive letter. This drive letter should not be a mapped drive letter and should be the drive letter which is local to the server itself.

Database = X:\CSI\Prod\Data
TestDatabase = X:\CSI\Test\Data
SaveData = X:\CSI\prod\SaveData
ZeroBtr = X:\CSI\prod\zero_btr
LogFile = X:\CSI\prod\Data\Messages\CSI_Server_Log.txt

Change these settings to properly match with your server. For instance, if the Counterpoint Applications are installed on drive C: in the CSI\Prod\Exe folder then the settings would be set as follows:

Database = C:\CSI\Prod\Data
TestDatabase = C:\CSI\Test\Data
SaveData = C:\CSI\prod\SaveData
ZeroBtr = C:\CSI\prod\zero_btr
LogFile = C:\CSI\prod\Data\Messages\CSI_Server_Log.txt

Enabling Automatic Backups

Backups can be configured to run at a specific time each day. The CSI_Server.ini file contains the settings that determine when the backup is to run.

To change these settings, browse to the X:\CSI\Prod\Exe folder and open the CSI_Server.ini file. Scroll down in the file and locate the section [Backup]. Below is an example section. Based on these settings the backup will run at 2:00 am every day except on Saturday and Sunday.

[Backup]
Enabled = 1
WeekDays =1111100
Interval = 86400
StartTime = 2:00am
MonthDaysToRun =
WeekNumber =
TimeSlot =
Exe = X:\CSI\Prod\\Exe\CSI_Backup.exe
StartInFolder =
CommandLine = C:\CSI\Prod\Data, auto
KeepProgramRunning = 0

Installing and Starting Backup Services

To start the backup service, browse to the folder X:\CSI\Prod\Exe\CSI_Server_MNGR.exe, and double click on the program CSI_Server_Mngr.exe.

Click "Instal;", then "Start".

The green light will show stating that the service is now running.

You can now close this screen.

Running a Backup on the Server

Running the CSI_Backup program directly can only be done on the server. All client PC's need to run backups from within the Counterpoint applications only.

Creating the Shortcut

First create a shortcut for CSI_Backup. Locate CSI_Backup.exe in the X:\CSI\Prod\Exe folder. A new shortcut will be created in the same folder called "Shortcut to CSI_Backup.exe". Right click on this shortcut and select "Properties" from the popup menu. Change the "Start in" parameter to the data folder to backup.

Next, click on the "General" tab and change the name to something that identifies the database to be backed up.
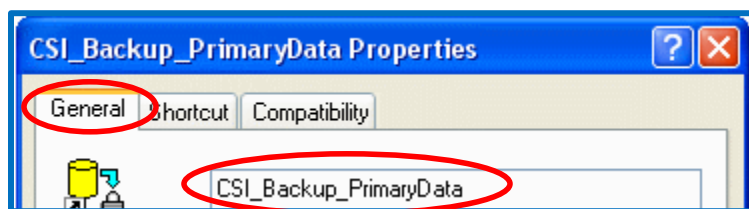
When finished, click on "OK".

Running the Backup

You are now ready to run the backup. Double click on the shortcut icon just created. The main screen shows the database path to backup. The status window shows we are running in manual mode and also shows other information loaded from the INI file.

The "Browse" button can be used to locate a different database to backup. Select "System to Backup". Automatic backups always backup both Traffic and Affiliate.

Press "Backup" to start the process.

Do not close the backup window while backup is running.

Each step being performed during the backup process is shown in the status window.
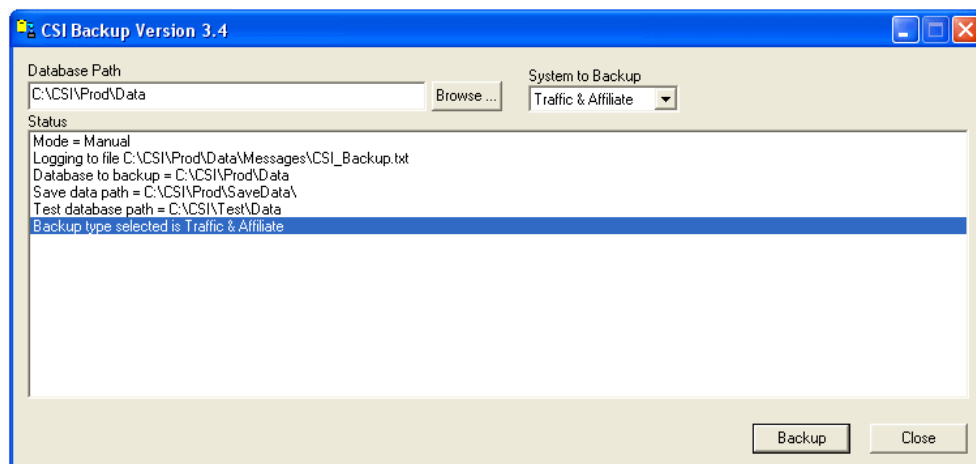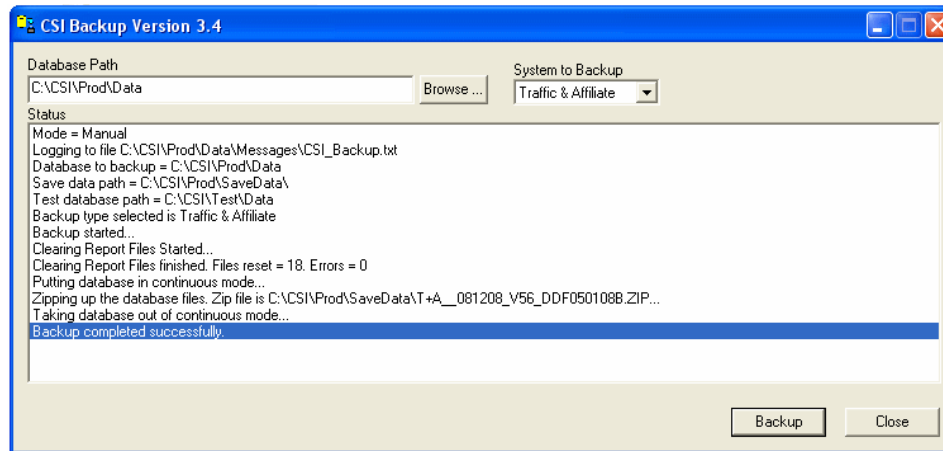
When the backup is completed, you will see the message, "Backup completed successfully". The backup window can then be closed.

Backup Verification

Backup verification can be done from within the Traffic or Affiliate system by viewing the information in the Accessories->Messages Viewer.

Any user that has access to "Site Options" can verify the last backup and change the days and time that the backup runs.

They will need to contact Counterpoint Support for the Site Options password, and then select the Site Options->Bkup tab.

Once the "Using CSI Backup" option has been checked, any day and time changes that are made here are automatically updated to the CSI_Server.ini.

- Indicate that you are using the Counterpoint Backup program, select the days on which you wish to run your backup, and enter a time to run the backup that will not interfere with any other programs running on your server

- The file name will appear in the yellow field automatically once you run a backup. The naming structure is T+A (Traffic and Affiliate), the database name as defined in "Client Name Abbreviation" (Site Options->General), the month/date/year, the database version, and the DDF file dates

 The File Location, Date, and Time of the last backup will automatically update. The backup is saved in the CSI\Prod\SaveData folder

- The file size of the last backup will automatically update

Running the Backup From the Traffic System
Select "Task", "Backup", "Complete System Backup".
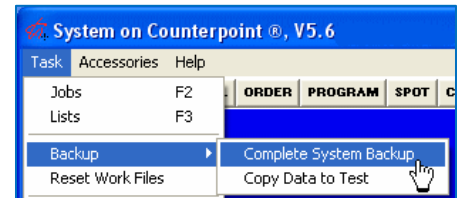
Running the Backup From the Affiliate System
Select "File", "Backup", "Complete System Backup".
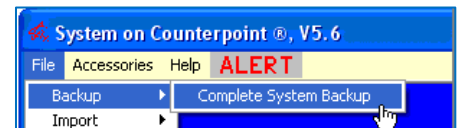
The backup screen will display showing when the last backup was performed along with the current backup state.
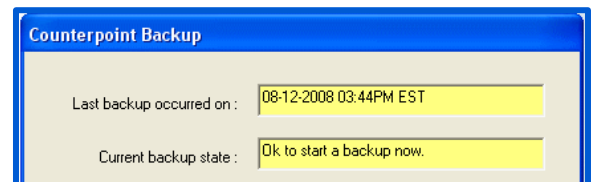
Press "Start" to begin and you will see the current backup status as the backup progresses. You can close the Counterpoint Backup Screen and continue working within Counterpoint as the backup progresses.

If a manual or automatic backup is currently in progress, the "Current backup state" will say that a backup is currently in progress and will disable the "Start" button to prevent two backups from running at the same time.

Backup Failure Notifications

If any errors occur during the backup process, you will receive an error message.

Backup Failure

<<< WARNING >>>
<<< Your last database back failed. >>>

Adding to or editing information while in this condition could result in data loss and/or data corruption.

Although you may continue to view information, it is imperative that you call Counterpoint or email Counterpoint at service@counterpoint.net ASAP to remedy this condition.

OK
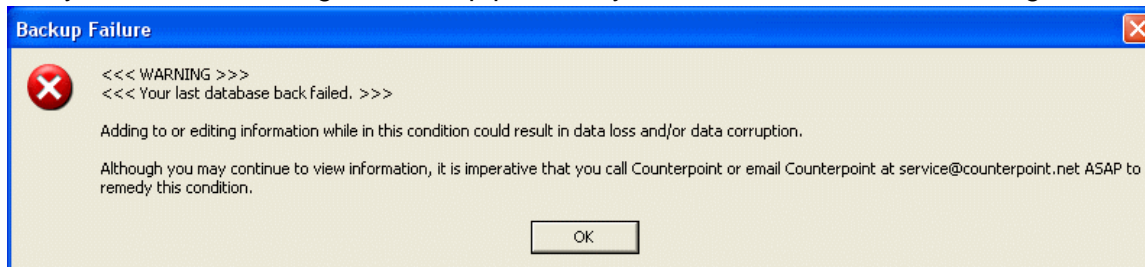
Access the server where backups are running and browse to the X:\CSI\Prod\Exe folder.
Double click on the CSI_Backup shortcut program to attempt a manual backup.

CSI_Backup will detect this condition and the error message will be shown in the status window.
"WARNING: Database files are stuck in Continuous mode."

CSI Backup Version 3.5

Database Path
C:\CSI\Prod\V56\Data   Browse ...

System to Backup
Traffic & Affiliate

Status
Mode = Manual
Logging to file C:\CSI\Prod\V56\Data\Messages\CSI_Backup.txt
Database to backup = C:\CSI\Prod\V56\Data
Save data path = C:\CSI\Prod\V56\SaveData\
Test database path = C:\CSI\Test\V56\Data
Backup type selected is Traffic & Affiliate
WARNING: Database files are stuck in Continuous mode.

Take Files out of continuous mode   Close
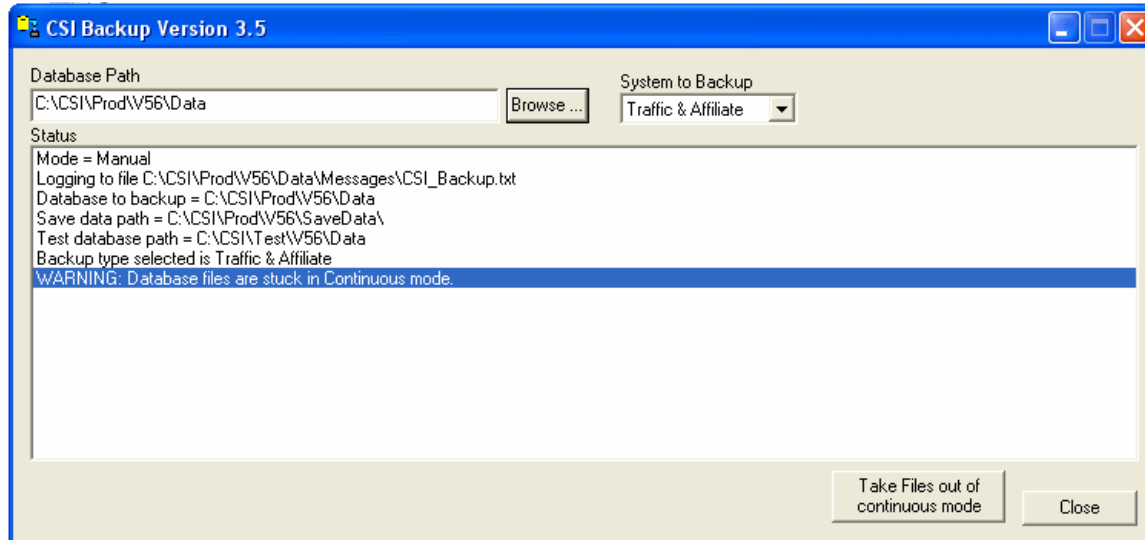
1. Click "Take Files out of Continuous Mode" to resolve the issue.
2. You will be prompted whether to open each file or not. Select "Yes". Select "Yes" tells CSI_Backup to open and hold each file open until PSQL has rolled the delta files back in to the main table.
3. If CSI_Backup is still unable to resolve the issue, ensure all users are logged off the server and re-boot it. After the server has restarted, run CSI_Backup again and click the button "Take Files out of continuous mode".

Backup Troubleshooting Tips

Verify CSI_Server is running
Refer to "Starting the backup service" and verify the traffic light is green.

Verify Port 5305 is Open
The Windows Firewall on certain machines block ports over 5000. Port 5305 must be opened to run the Counterpoint Backup and to prevent a lag in sign on time. Select Counterpoint on the Exceptions tab, or manually open port 5305 in Windows Firewall to allow Counterpoint to communicate using Port 5305.

Verify CSI_Server is logging messages
CSI_Server will detect when its ini file is changed within 15 seconds. A good test to verify if CSI_Server is running ok is to open the CSI_Server.ini file and save it and then verify that CSI_Server properly detected this. Do the following actions to perform this check.

Open the file X:\CSI\Prod\Exe\CSI_Server.ini file and from the main menu select "File", "Save", then select "File", "Exit". Wait at least 15 seconds and then browse to the X:\csi\prod\data\messages folder and verify that the CSI_Server_Log.txt files date and time is set to approximately the current time when the save was performed. You can also open the CSI_Server_Log.txt file and verify that the following statement was recently written to it, "CSI_Server.ini settings are being reloaded". This statement will be followed by all sections defined as well.

If this test did not work it may be due to a previous version of the CSI_Server being stuck. Perform the steps outlined in the next section called "How to remove a previous stuck version of CSI_Server"

Un-installing a previous version of Backup Services
If a previous version of the backup gets stuck in Continuous Mode, you may have to uninstall the version.

To remove an already running backup service, browse to the folder X:\CSI\Prod\Exe\ and double click on the program CSI_Server_Mngr.exe..

Click "Stop", then "Remove". The yellow light shows stating that the service is now stopped and un-installed.

You must now restart the PC.

Once the PC has restarted, Start the Backup Services by clicking "Install", then "Start".

The green light will show stating that the service is now running.

You can now close this screen.

Backup Has Not Occurred Warning Message
Occasionally, this message will appear to Traffic and/or Affiliate users:
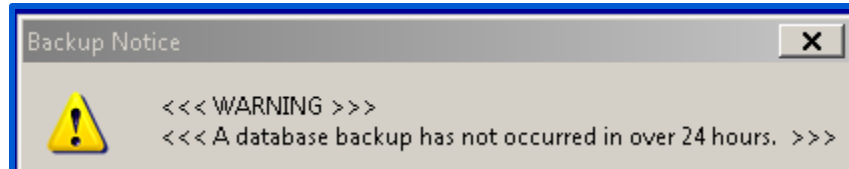
The CSI_Server.ini database path specifies where the database is located that should be backed up. The database cannot be on a mapped drive and must be on the same machine on which PSQL is installed.

- Check Site Options->Backups, to determine the date of the last backup
- Look in the SaveData location and verify the date of the last backup
  - o The save location for the backup file is specified on the SaveData path on the csi_server.ini file
- The save data folder can be on a mapped drive
- DZIPLOG.TXT lists the files that were backed up as well as any files that were skipped
  - o DZIPLOG.TXT and can be found in the users system directory, most likely C:\Winnt
- Stop/Start CSI Server Manager, and see if this resolves the warning message

BAT File Setup

IT must also create a BAT file for the autoimport with the following setup:

REM Notes (the word REM means a REMARK line)

REM *the next line must be changed to match the customer's server name*
Net Use M: \\SERVER NAME\CSI
REM *Change to the M drive*
M:
REM *Set the working folder*
CD\
CD prod\data
REM *Start the import process*
M:\prod\exe\Affiliat2.exe autoimport
REM *Pause*
Save the BAT file in the C:\CSI\PROD\EXE folder
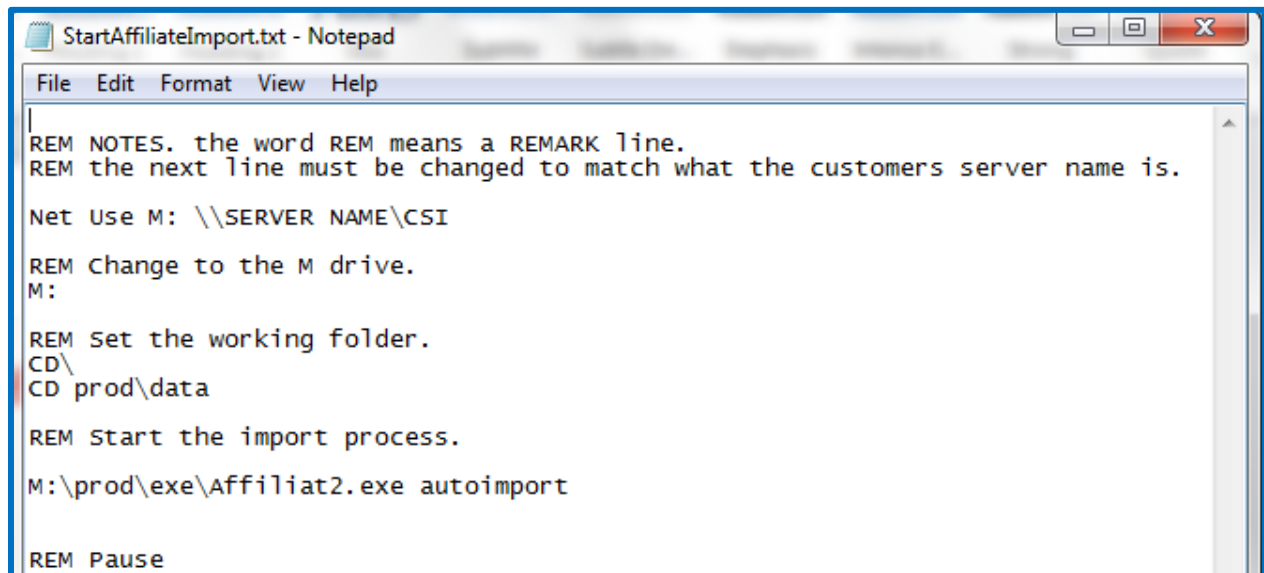
Here is an example of the BAT file setup (Note: Save the file as a .BAT file not a .TXT)

```
StartAffiliateImport.txt - Notepad

File  Edit  Format  View  Help

REM NOTES. the word REM means a REMARK line.
REM the next line must be changed to match what the customers server name is.

Net Use M: \\SERVER NAME\CSI

REM Change to the M drive.
M:

REM Set the working folder.
CD\
CD prod\data

REM Start the import process.

M:\prod\exe\Affiliat2.exe autoimport


REM Pause
```

Counterpoint Software Version

Occasionally Counterpoint support will need to know the exact version of Counterpoint you are running to troubleshoot an issue. The version, build number, and patch number (if applicable) is displayed in the Counterpoint Traffic and Affiliate header.
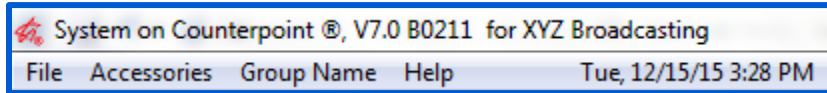
In this example:

- System on Counterpoint is the user name
- V7.0 is the software version
- B0211 is the Build number
- If applicable, P## would display the patch number

CSI Copy Database

The CSI Copy Database utility can be used to copy database backup zip files from a source folder to a destination folder. It both copies database backup files and verifies that the file was copied successfully and is valid.

Database backups that have not yet been copied to the destination folder are displayed at the top of the screen with a green box to the left of the filename. All the files with a green box next to them will be copied when the Copy process runs. To deselect a zip file from being copied, click once on the green box. Click the box a second time to reselect the zip file for being copied.
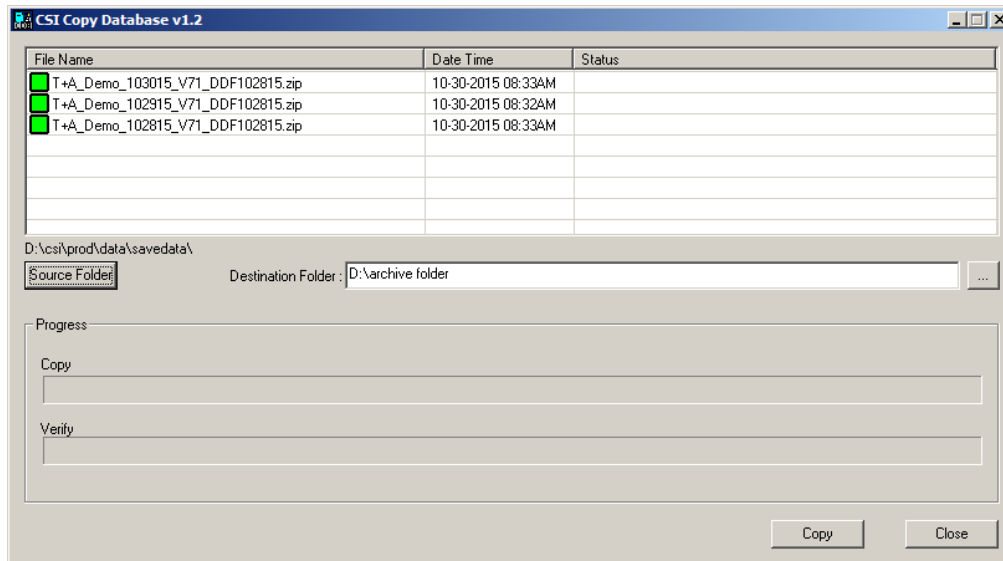
The source folder and destination folder must be set manually the first time the utility is run. The utility saves the last used source and destination paths and will default to those paths in the future (although the source and destination paths can still be manually changed if needed).

The database copy process is initiated by pressing the Copy button. When the copy process has been completed for each file, a Pass indicator will appear next to the source folder button if all the files were copied successfully. A Fail indicator will appear if any file was unable to be copied after three retries. All copied zip files will be placed in the destination folder.

When launching the CSI Copy Database utility, if there are no files to copy – perhaps because there are no zip files in the source folder that have not already been copied to the destination folder – the words "No files need copying" will appear in the Filename area of the screen. The CSI Copy Database program only shows those zip files that have not already been copied to the destination folder.
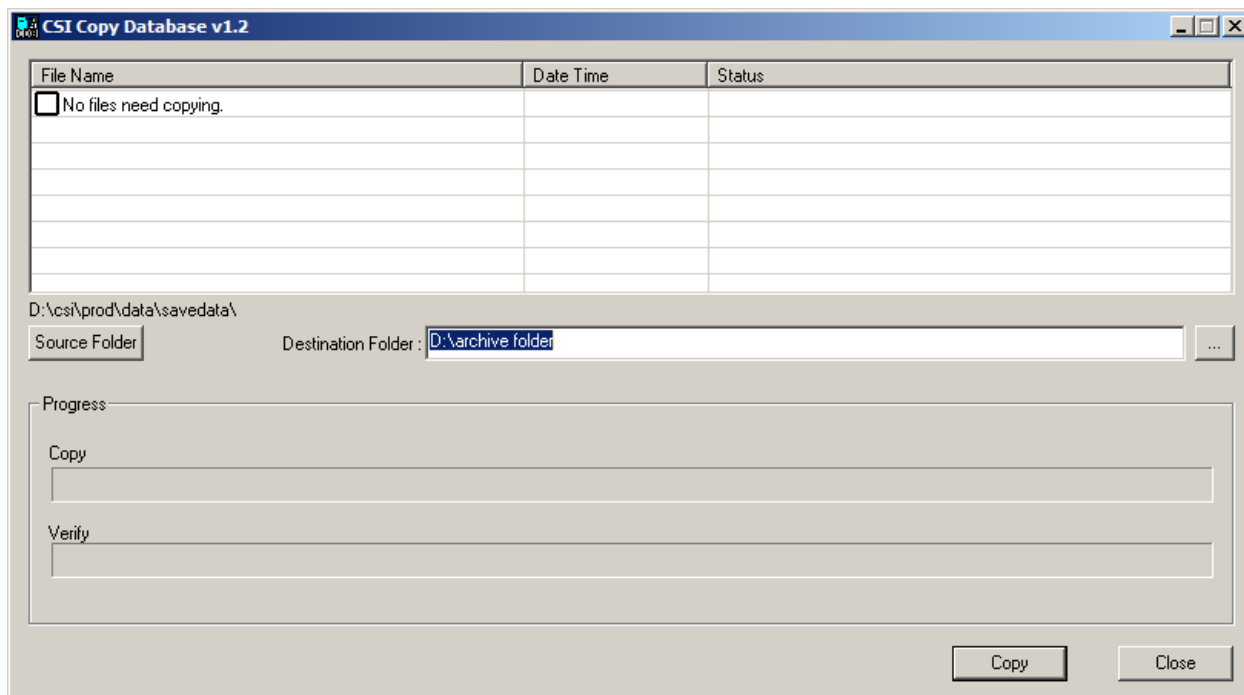
Setup Instructions

CSI Copy Database is a standalone executable located in the csi\prod\exe folder. To start the utility, simply double click on CSICopyDB.exe, or create a shortcut that points to CSICopyDB.exe and run the shortcut.

This utility is intended to be run manually at least once the first time it is used. This will ensure that the source and destination paths are set correctly and that the destination path is accessible. It can also be configured to run automatically using the CSI_Server Manager program.

Manual Procedure

This section describes how to run the CSI Copy Database program manually.

1. Launch CSICopyDB.exe
2. If the Source folder has not already been set, press the Source Folder button and browse to the folder where the database backups are stored (typically csi\prod\data\savedata).
3. If the Destination folder has not already been set, press the "…" button and browse to the destination folder (where the zip files should be copied to).
4. Press the Copy button. All the zip files found in the source folder that are indicated with a green box to the left of the filename will be copied.
5. When the copy process is complete, all the copied files will have been copied to the destination folder.

The following image shows the results after successfully copying several files to the destination folder. The status is shown for each copied file and a Pass indicator is shown next to the Source Folder button.
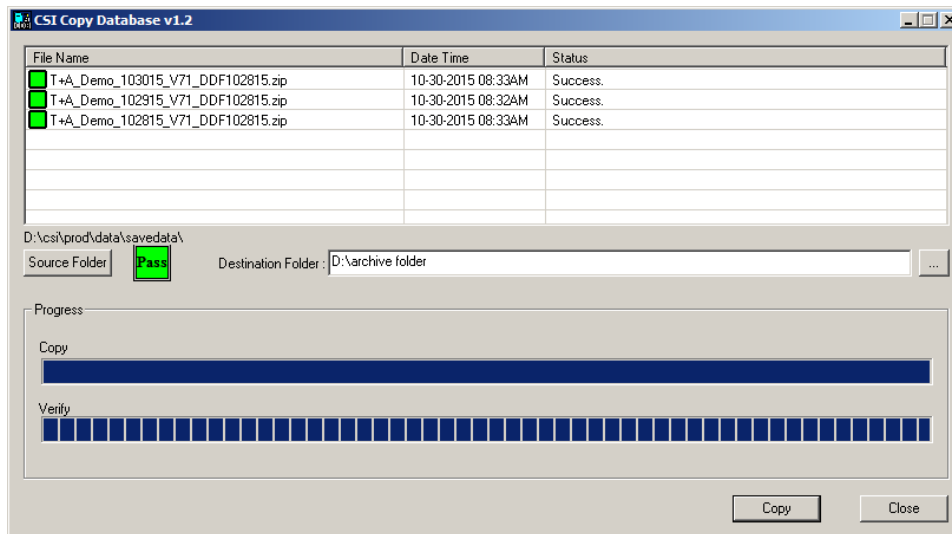
Automatic Configuration

The CSI Copy Database program can also be configured to run automatically on a schedule by using the CSI Server Manager program.

To configure the CSI Copy Database program to run automatically on a schedule, the CSI_Server.ini file must be edited as follows:

1. Using a text editor such as Notepad, open the CSI_Server.ini file. It's typically located in the csi\prod\exe folder.
2. Locate the line starting with SectionNames =
3. Add a comma to the end of the existing section names followed by the name CopyDB. The end result should look something like this: SectionNames = Backup, CopyDB
4. Create a new section at the end of the CSI_Server.ini file using the following fields:

```
[CopyDB]
Enabled = 1
WeekDays = 1111111
Interval = 86400
StartTime = 3:00am
MonthDaysToRun =
WeekNumber =
TimeSlot =
Exe = d:\CSI\Prod\Exe\CSICopyDB.exe
StartInFolder = d:\CSI\Prod\Exe
CommandLine = auto
KeepProgramRunning = 0
```

5. Set the StartTime to be at least one hour after the automatic backup program is set to run.
6. Edit the drive letters and paths for the Exe and StartInFolder as needed to match your configuration.

7. Save the changed file.

By following these steps, the CSI Copy Database program will be configured to run automatically once a day at the specified start time.

Additional Details

The CSI Copy Database utility saves its settings in an .ini file called CSICopy.ini. This .ini file is created automatically when the program runs for the first time.

Activity is also logged in a file called CSICopyDB_Log.txt. This file will be created in the same folder where the CSICopyDB.exe is located unless a different location is specified in the CSICopy.ini file.

Below is an example CSICopy.ini file. The LastSourcePath and LastDestPath are set automatically and should not be manually edited. The LogFile path can be set to a different path if required.

```
[MainSettings]
LastSourcePath = C:\CSI\Prod\SaveData\
LastDestPath = D:\DatabaseBackups
LogFile = C:\CSI\Prod\Data\Messages
```

CSINetUtilities

CsiNetUtilities.Dll is required to use the internal Counterpoint email program.

Running a version of csiNetUtilities with an incompatible version of Counterpoint can result in the inability to send e-mail from within Counterpoint.

To verify the csiNetUtilities version, look in the c:\csi\Components\vx.x folder, right mouse click the utility, and select Properties->Detail.

CSI_Server_Mngr.EXE

CSI_Server_Mngr.exe installs, starts, stops and removes CSI_Server. This utility must be installed in the same folder where CSI_Server is installed.

Yellow light – CSI_Server is not installed.
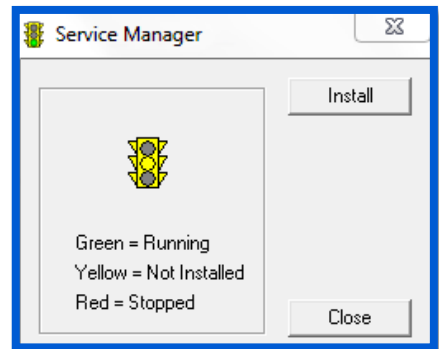   Click on the "Install" button to install it.

Red light – CSI_Server is installed but is not running.
      Click on the "Start" button to start it.
      Click on the "Remove button to un-install it.

Green light – CSI_Server is installed and running.
      Click on the "Stop" button to stop it.

NOTE: CSI_Server should be installed in the same folder where all the other exe files are installed.
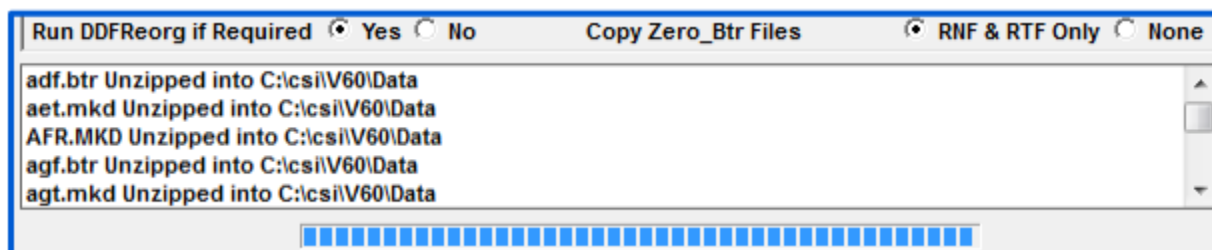
DB Unzip

From time to time, you may need to unzip a Counterpoint Database into a test system, or restore a Counterpoint Backup. The DB Unzip program will unzip databases into the correct Counterpoint location. The following procedures will walk you through using DB Unzip. Locate the DB Unzip program in the X:\CSI\Prod\Exe Folder, and double click on the DBUnzipEXE file.

Running DB Unzip

- Zip Password (DBVxx): Enter the password in the Password field; the password consists of DBV (Database version), plus the version of Counterpoint you are unzipping (58, 60, etc.), i.e., DBV60
- Unzip Database from Subfolder: Browse to your zipped database location, from the Unzip Database From box on the left hand side and select your zip file. Typically, your database or backup will be located in the CSI\Prod\Savedata folder
- Unzip Database into Subfolder: On the right hand side, browse to your CSI\Prod\Data folder
- Leave "Run DDF Reorg if Required" set to "Yes", and Copy Zero_Btr files set to "RNF & RTF Only" selected.
- Click Unzip.

Results

Once the extraction completes (and DDF Reorg gets run if needed), all results will appear in the white box below. If you receive any errors, please contact support@counterpoint.net for assistance.

Run DDFReorg if Required ⦿ Yes ○ No	Copy Zero_Btr Files	⦿ RNF & RTF Only ○ None

```
adf.btr Unzipped into C:\csi\V60\Data
aet.mkd Unzipped into C:\csi\V60\Data
AFR.MKD Unzipped into C:\csi\V60\Data
agf.btr Unzipped into C:\csi\V60\Data
agt.mkd Unzipped into C:\csi\V60\Data
```
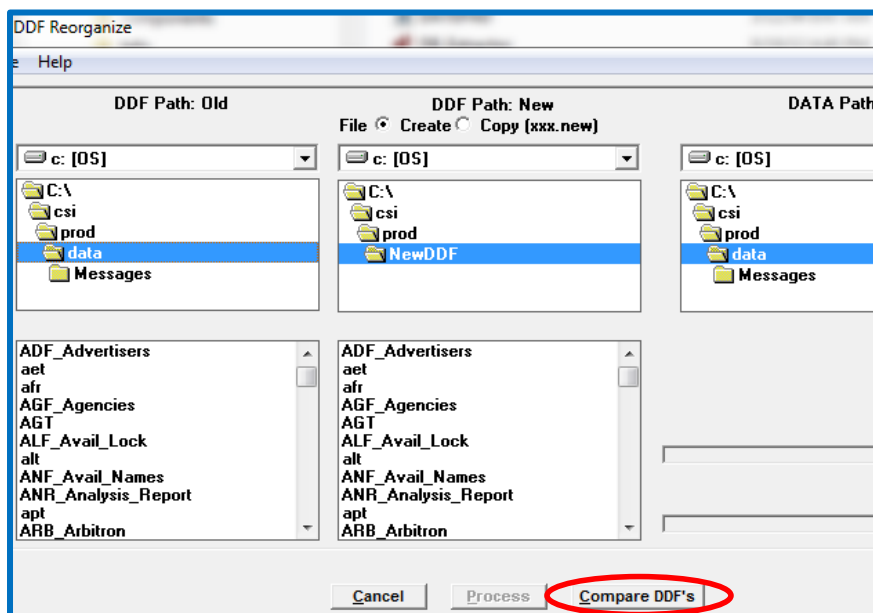
DDF Reorganize

When installing new software, software updates, or software patches, occasionally you must run programs that compare and update your DDF files to ensure all files, dates, and times are in sync with one another.
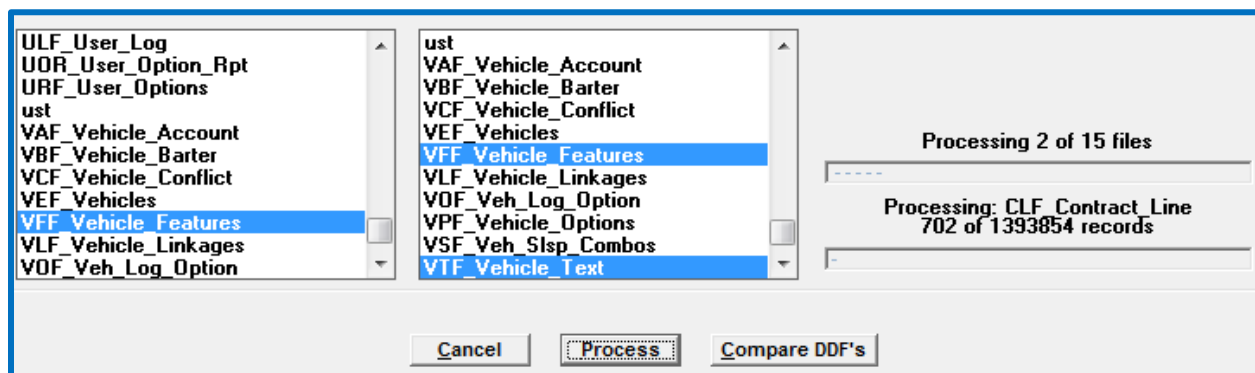
To run DDF Reorganize manually, locate the DDFReorg.EXE in your X:csi\Prod\EXE folder, and double click it.

Running DDF Reorganize

Double click on the Data folder in the first section, the DDF Path: Old box. A list of files will appear in the white box below and in the second DDF Path: New box, the same files will appear and NewDDF will be highlighted. If you do not see the Data folder, double click on the Counterpoint drive letter, the CSI folder, and the Prod folder. Click "Compare DDFs".

The program will compare all files and highlight any that need to be Reorganized. Once your list of files are highlighted, click Process, and you will see the number of files to be Reorganized on the right hand side, along with the conversion progress.

When finished, click Done.

After running DDF Reorganize on a database, you must run DDF Offset to complete the process.

Running DDF Offset

To run DDF Offset manually, locate the DDFOFFSET.EXE in your X:\Prod\EXE folder, and double click.

In the DDF Table names area, double click on the csi\Prod folder to expand the Prod directory. Double click on the Data folder and your data files will appear in the white box below the folder structure. Click Generate.

When completed, you can view your results in the data folder. Click Done.

DSN Setup

Read these instructions before beginning. Contact Counterpoint Support and let them know you are creating a DSN so support@counterpoint.net can be ready to assist you if needed. DSN stands for Data Source Name, and provides connectivity to a database through an ODBC driver. The DSN contains database name, directory, database driver, and other information. The Counterpoint application requires a DSN.

A DSN is created for each database that you have defined.

Steps to Create a DSN on the Server

> **NOTE: Create a 32 bit DSN whether you are running 32 or 64 bit Pervasive.**

Windows 64 Bit PC
You need to create a 32 bit DSN (database) even if you are running on a 64-bit system. Below are the steps to follow.
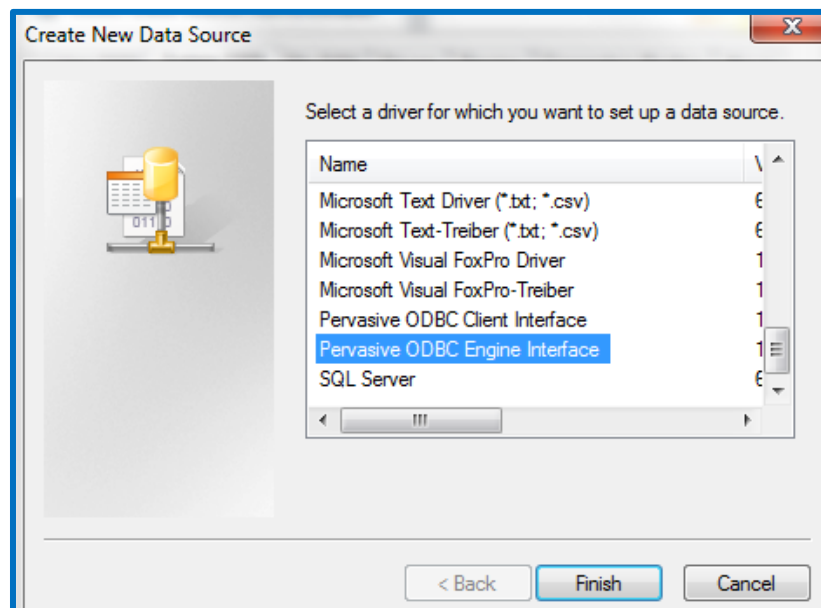
PSQL Control Center
Press START button on Menu Bar and select Programs->PSQL->PSQL 11->Control Center and Documentation
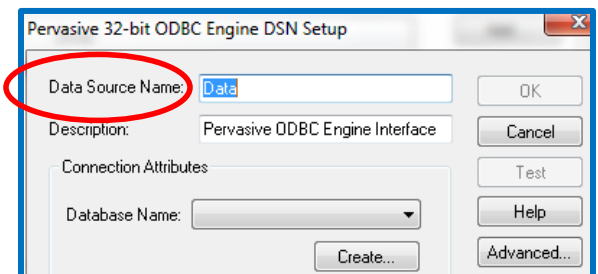
Create DSN
1. Go to Tools->32-bit ODBC Administrator
2. In the ODBC Data Source Administrator, choose the System DSN tab
3. Select ADD button
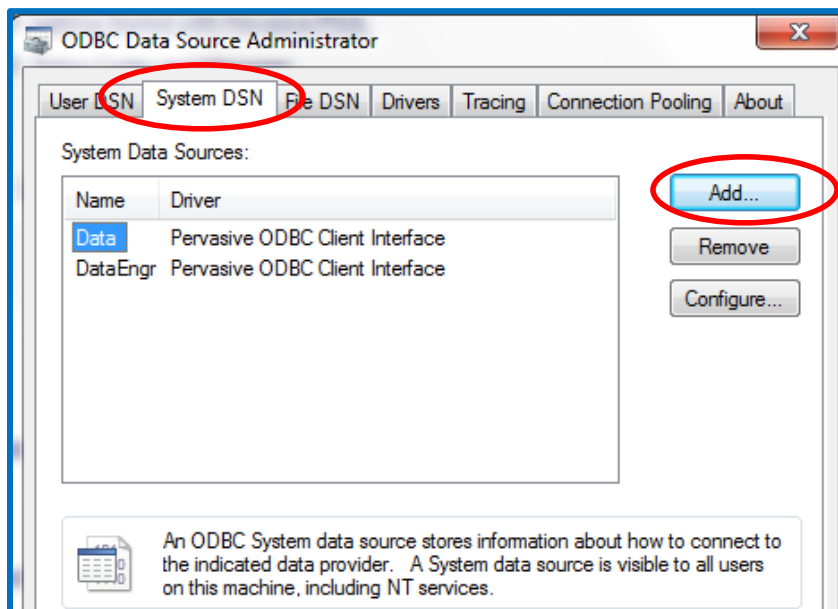
4. Scroll down the list and choose ODBC Engine Interface
5. Click Finish.

6. Enter your Data Source Name. This must match the data source name defined on the Traffic and Affiliat.ini file.
7. Click Create.

8. Enter the Database Name. This must match the data source name defined on the Traffic and Affiliat.ini file.
9. Click Browse to browse to your database location
10. Click OK and OK again.
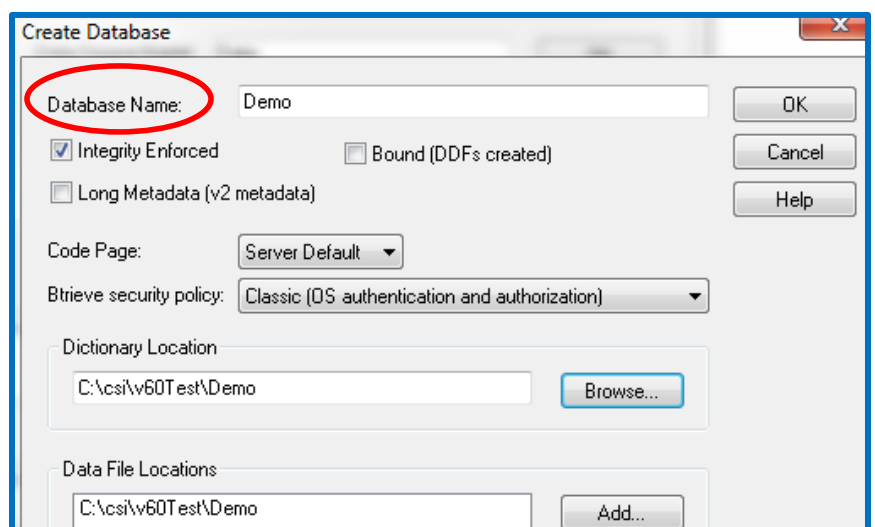
11. Test new setup by clicking Test.

12.   You should receive "Connection Successful". If so, click OK. If you do not, contact
        support@counterpoint.net.

Email Configuration

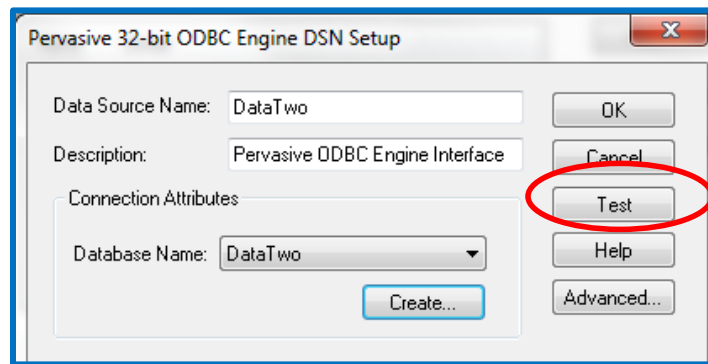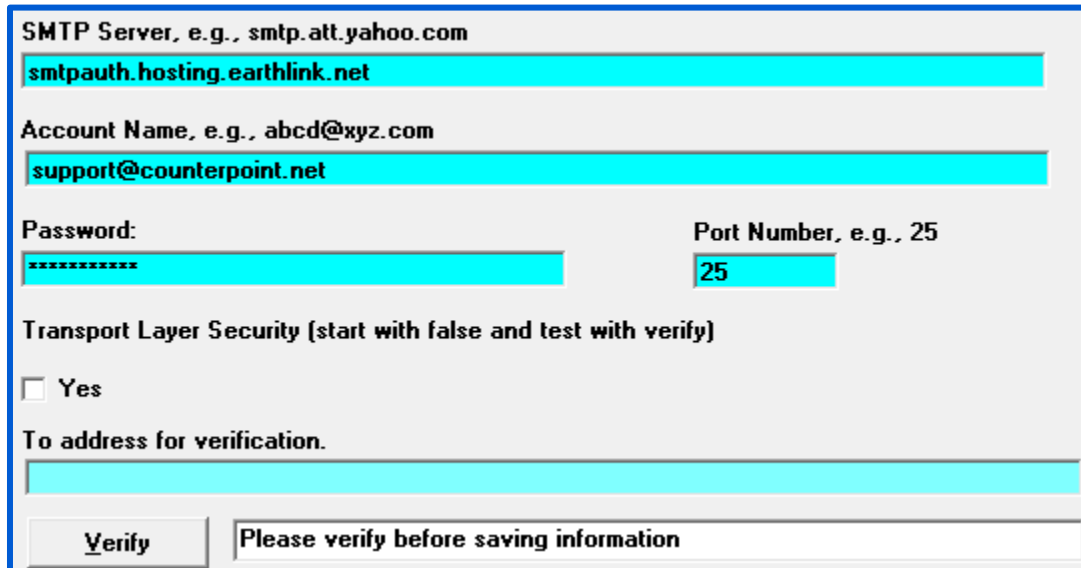All email configurations regarding the User Status screen is entered into the Traffic system under Site Options -> Email tab. The first four fields are required. The last two (Transport Security Layer and To address) are optional.

- SMTP Server: This comes from your Internet Provider.
- Account Name: This is the username to access the SMTP. It's almost always the email address.
- Password: This is the password on the account from which you will be sending emails.
- Port Number: This comes from your Internet Provider.
- Transport Security Layer: Few networks use this, if you do not know if your network does, leave it blank. If the verify test fails, set the question to Yes.
- To address for verification: Pressing the Verify button will run a test to verify that your settings are correct. If correct, "Verified" will appear. It is recommended to run the Verify test before saving when first entering the settings on this screen.

Logo Specifications

Counterpoint can accommodate several logos. Please follow the specifications to ensure the printed logos are legible.

Custom Logo

The Custlogo is the logo that appears in the upper left of the contract input screen. The logo file is named CUSTLOGO.BMP or CUSTLOGO.JPG , and should be placed in Logo path specified on the Traffic.ini.

Report logo

The Rptlogo is the logo that shows on all printed reports. The logo file is named RPTLOGO.BMP or RPTLOGO.JPG , and should be placed in Logo path specified on the Traffic.ini for the JPG logo, and in the c:\csi folder for the BMP logo.

JPG Logo

JPGs must be no more than 172 pixels wide by 44 pixels tall.

BMP logo

BMPs must be no more than 195 pixels wide by 44 pixels tall.

GIF logo for the Web Site

GIFs must be no more than 200 pixels wide by 60 pixels tall. The file must be in the original format when sent to Counterpoint.

Logo on Certificate of Performance

Each Certificate of Performance printed can show a different logo for each program. Each logo must be a bitmap (.BMP) file.

As you create logos for these Certificates of Performance, it is recommended you name them in sequence, starting with G##.BMP, i.e., G01.BMP, G02.BMP, etc.

Keep a list of which G## is the logo for each vehicle. When you have created them all, move them into the x:\CSI\PROD\DATA directory, or whatever folder is defined as the Logo folder in the Traffic.INI file. In the Log Screen, click on the LOGO dropdown at the far right of the CP column, and select the proper logo for each vehicle (you cannot select the Logo dropdown unless you have a CP name in the CP column and TAB to the Logo column).

If a logo is defined for a log, but that G##.BMP is missing from the CSI\Prod\Data folder, you will receive the following error message:

> "Gxx.bmp does not exist in [logo path on traffic.ini]. Copy into [logo path on traffic.ini]."

When setting up custom logos, test each Certificate of Performance to ensure the logo appears correctly. The system will retain the logo you have assigned to the vehicle for the Certificate of Performance.

Multiple Logos on Invoices

If you have multiple logos that must appear on invoices, you can assign a logo to a Sales Source that will supersede the RptLogo.JPG.

- Enter the logo name and extension for the logo that will print on invoices and reports for the Sales Source
- Each logo name must be no more than 15 characters (excluding the extension)
- Each logo must reside in the Logo folder defined on the Traffic.INI
- The logo entered in this field will display on all invoices for this Sales Source
- If your network does not need multiple logos, and your RptLogo is a JPG, you may leave this filed blank

The Sales Source logo when defined will also appear on the following reports: Credit/Debit memo, Insertion Orders, Proposals/Contracts report (and Contract Snapshot), and the Statement report.

Troubleshooting Report Logo Issues

If a report is displaying the Counterpoint logo and the rptlogo and custlogo is in the logo folder as specified on the Traffic.ini:

- Add the rptlogo to the C:\CSI folder on the user's machine that is experiencing the issue
- Delete any logo in the C:\CSI folder named savedlogo
- Ensure users do not manually delete the logo out of the C:\CSI folder

If you are using a BMP logo, it may be necessary to change the file type to JPG, which can be done in any art program, such as Microsoft Paint.

New User Setup

Login to Counterpoint with User Name "Guide" and the Guide password and go to the Lists -> User Options Screen to define or edit User profiles.

Every user must have a username and password. The strength and the length of time the password is valid is determined in Site by your database administer.

- Define the User Sign On Name to access Counterpoint
- Leave the Password blank
- When signing on for the first time, the user will enter their name, and be prompted to create their password. This password will update the User Screen, and will remain active for the number of days defined in the Site Options->General tab
- Define the name that will appear on their report
- Select a Report Set. It can be changed any time
- Define their phone number, city and email address information

For complete User Options Screen information, please see the User Options Screen document.

Open Port 5305

The Windows Firewall on certain machines block ports over 5000. Port 5305 must be opened to run the Counterpoint Backup and to prevent a lag in sign on time.

Select Counterpoint on the Exceptions tab in Windows Firewall to allow Counterpoint to communicate using Port 5305.

If Counterpoint does not appear in the Exceptions tab, or you manually have to open port 5305, you can do so by:
1. Go to Start->Control Panel->Security->Windows Firewall
2. Click 'Allow a program through Windows Firewall'
3. Click 'Add port'
4. In the 'Name' field, enter Port-5305
5. In the 'Port number' field, enter 5305
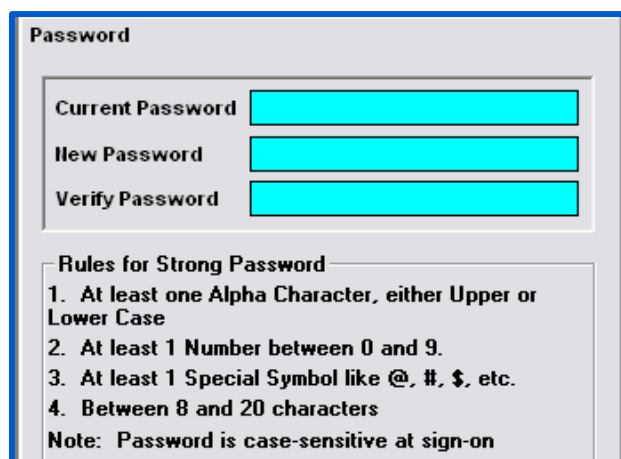6. Select TCP or UDP, depending on the protocol required for port 5305

Passwords

The password a new user creates can be comprised of any number of alpha, numeric, and special characters, from 1 to 20.

Once that password expires, the new password s/he creates cannot be equal to the prior password, but the third password they eventually create can be the same as the first.

Strong Passwords

If using Strong Passwords, the password a new user creates will expire in 6 weeks, at which point the user will receive a warning that the password must not be equal to any of the last 4 passwords used, and must be constructed as follows:

a) Between 8 and 20 characters long
b) The password must contain at least one alpha character, either upper or lower case. Once entered, alpha characters will be case sensitive
c) The password must contain at least one number between 0 and 9
d) The password must contain at least one special character (@, #, $, %, etc.)
e) The password must be substantially different from last password used
f) The password must not be easily-guessable
g) The password must not be personally-identifiable
h) The password must not be comprised solely of dictionary words

Password

Current Password

New Password

Verify Password

Rules for Strong Password
1. At least one Alpha Character, either Upper or Lower Case
2. At least 1 Number between 0 and 9.
3. At least 1 Special Symbol like @, #, $, etc.
4. Between 8 and 20 characters
Note: Password is case-sensitive at sign-on

If using the "Strong Password" feature instead of the standard password, you must turn the feature on in Site Options->Options.

Changing User Passwords

If given the proper rights, a user can look at their set of user permissions, but cannot change them, and will not see their own password.

To view passwords and/or change users' permissions, you must sign onto the system using the Guide login.

Automatically

The system prompts them for a new password when their old one expires or if none is defined for a new user. The number of days a password remains active is defined in the List-> Site Option Table.

Manually Changing a Password

The user must be allowed yellow (view) access to the User Option.

1. Login to Counterpoint.
   a) User Name: guide
   b) Password: guide (or your guide pw)
   c) Select: Task->List (or F3)
   d) Select User
   e) Select Erase Password
   f) The next time the user logs in, they will be prompted to create a new password

Registering Components in Windows

If you encounter an error when trying to setup Counterpoint on a Windows 7/64 bit, one or more components may not have been registered properly.

Register Fix Options

Find the Files

The file(s) to register must be located in C:\windows\sysWow64 and not system32. Make sure the file is there using windows Explorer. If it is there, skip to the Register the Files section, otherwise:

Copy the Files

Look for the missing file in csi\setup\ClientInstall\system32.

If it is there, copy and paste into the sysWow64 folder.

If it isn't there:

- If you are running Traffic V57 or higher, the DLLs and OCXs are in an MSI. Click on csiClientInstall.msi to complete the registration
    - You might want to right click the MSI and then choose 'run as administrator' to make it easier
    - You will need an Administrator username and password
- If this is for the Engineering system or Traffic/Affiliate v56, then they should see a list of DLLs and OCXs. If they can't find the one in the error contact support@counterpoint.net, as the file missing is a core component

Register the File

You must be running as an Administrator with full Administrator rights to register these files.

- Go to Start>All Programs>Accessories>Command Prompt
- Right click on that Command Prompt icon and choose 'Run as Administrator'
- You will be asked if you want to run UAC, click Yes
- When the black window opens with your command prompt type:
    - cd<push spacebar>C:\Windows\SysWOW64 <push Enter key>
- The prompt should change to: C:\Windows\SysWOW64
- Type the register command followed by the name of the missing DLL/OCX in this file name
    - *Example*: regsvr32 mscomm32.ocx
    - Note: there is a space between 'regsvr32' and 'mscomm32.ocx'.
- Press 'Enter' to complete the registration

mscomctl.ocx

The mscomctl.ocx file is included in CSIClientInstall. This should only have to run manually on machines having specific issues that reference the mscomctl.ocx file.

For new users/machines, this will automatically be installed when logging into Traffic.EXE (not Traffic2) for the first time.

Using CSIRegisterAid

Counterpoint has a tool called csiRegisterAid.

- After the files have been copied to sysWow64 (or system32 on 32 bit system), this application will do the registering
- Right click and 'Run as Admin'. Then click Register.

Shortcuts: Traffic, Affiliate, and Live Log

On each user's machine, create a shortcut to the Traffic, Affiliate, and Live Log systems (if applicable).

Point the Target to the Traffic (or Affiliate or Live Log) Exe, and the Start in to the location of the Traffic (and Affiliate) INI, typically CSI\Prod\Data.
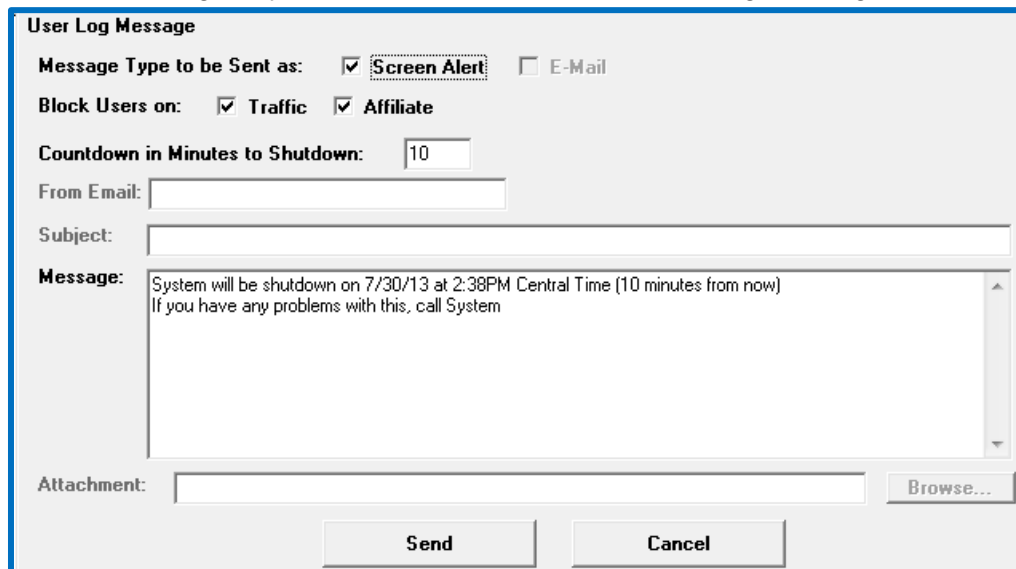
Upon first entering Traffic and/or Affiliate, the Traffic.Exe installs and registers necessary components and fonts. Once users are successfully in the systems, you can change the Target to point to Csi\Prod\Exe\Traffic2.exe for a faster login.
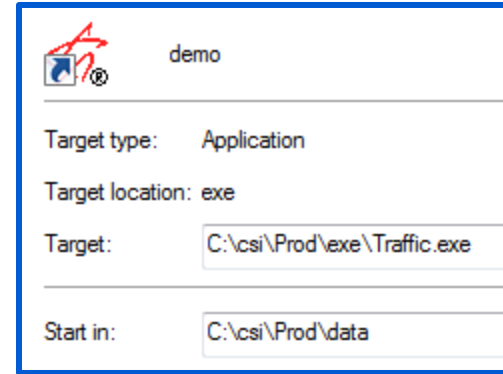
System Shutdown

From the Accessories menu, User Log screen, it is possible to initiate a system shutdown, for example to update software or perform other maintenance. Click either the Message or Sign Off Alert button to bring up the screen that will allow you to shut the system down, and/or block users from entering the system.

You can enter a message of your own, or send the default warning message.


Information Fields

Fill in the necessary information:
- **Message Type to be Sent as**: is defaulted to Screen Alert. This will send an Alert to all current users
- **Block Users on**: Select which system(s) from which you wish to block users
- **Countdown in Minutes to Shutdown**: Select the amount of time in which the System(s) will shutdown
- **From E-Mail** and **Subject** are only used if sending an E-mail to users
- **Message**: The message field is populated with a default message alerting users to the System shutdown. This message can be edited if necessary
- **Attachment**: If using the E-mail feature, you can browse and include an attachment

Once all fields are filled in, click Sent, and your Alert will appear on all current users' screens letting them know how much time they have to save their work.

Shutdown: 10m

Once the System has shutdown, the following message will appear on the users' screen:
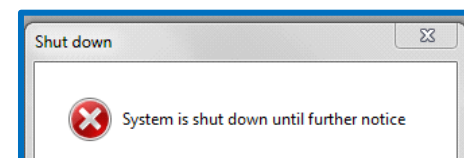
Procedures to Sign On

Once you have finished system maintenance, click "Sign On OK Message" and a message letting users know that they can log back in is sent.

Enter any additional message information and click Send.

Task Monitor

The Task Monitor is a standalone utility that runs in the background and monitors the status of various tasks. For more information on this program, please see the Task Monitor section of the Traffic Utilities help document that is available on the Counterpoint website.

Test Traffic Database

The benefit of a Counterpoint test Traffic database is that it can be used for training or to test a new feature or bug fix on the Traffic system.

How to setup a Test Traffic System

Install test software and copy current database to test data folder

1. Locate the most current Counterpoint installation disc. If you are unable to locate the Counterpoint installation disc, go to Step 6 below.
2. Get all users off the system.
3. Place the disc into the system as if you were updating the software.
4. On the Installation screen you will have the option to install the software into Prod or Test. Choose Test. This will create all necessary directories and folders that are needed.
5. Once this is complete, you need to copy the current database from Prod to Test.
    a. Log into the Production System
    b. Select Task, Backup.
    c. Select Copy Backup to Test.
6. If you cannot locate the install disc:
    a. Create a Test folder on the server under the CSI directory if it is not already created.
    b. Have all users exit Counterpoint.
    c. Copy the x:\csi\prod folder and subfolders contents (data, exe, reports, zero_btr, Newddf) to the corresponding Test folder.
    d. Update Test data with production data.

Create a test Traffic.ini

Change the Traffic.ini that is located in the test folder (x:\csi\test\data) to have the correct test drive and folder names in both areas ([Locations] and [TestLocations]). Note: the path to the test database\location of the test Traffic.ini must have the word "test" in it (for example: x:\csi\test\data). See the help document "INI values and examples" for more information.

Create Counterpoint Traffic Test System Shortcuts

1. Create a shortcut that will be used to access the test database on each user's system that requires access to it.
2. Name the shortcut "Counterpoint Test" or something similar to distinguish it from the Production system.
3. Right click on the shortcut and select Properties.
4. Make the Target point to the test Traffic.exe file in the csi\test\exe folder.
5. Edit the Start-in so that it points to the location of the test Traffic.ini, typically csi\test\data.
6. Now the shortcut can be used to launch the test Traffic system.
7. When running the test system, the words "Test system" will appear on the wallpaper of the Traffic system if everything was set up correctly.

Note: on versions prior to version 7.1, the Affiliate system does not support the "Test Locations" feature that can be set up on the Traffic.ini. To set up a test Affiliate system, the test Affiliate system must be configured using a separate folder structure from the production system, with separate shortcuts for launching the system. On version 7.1 and above, a test Affiliate system

can also be set up using TestLocations defined on the Affiliat.ini file (which is stored in the csi\test\data folder), along with separate test shortcuts for accessing the test Affiliate system.

User Options Overview

The User Options screen is where:

- You define all users' profiles
- Assign Sign On Names
- The password security for the database can be standard or Strong
- Define the data access levels users are allowed (input, read only, none)
- Define the reports they are allowed to run

For more information, please see the User Options Screen document that is available on the Counterpoint website.

User Status Screen

The User Status Screen allows you to:
- See who is on the Traffic and Affiliate system(s)
- When a user was last on the system
- View how long they were on the System(s)
- Limit user access when system maintenance or updates are needed
  - For more information on limiting user access, please see System Shutdown
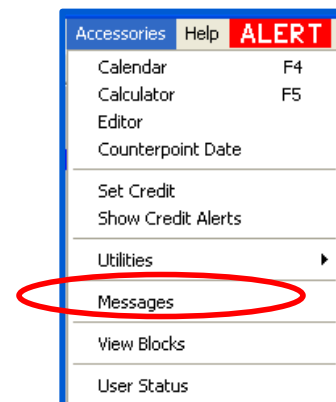
Accessing the User Status Screen

To access the User Status Screen, click on Accessories->User Status.

System	User Name	City	Phone #	E-Mail	Z	Sign On	Activity	Sign Off	Duration
Traffic	Guide			No	C	5/14/13 7:02AM	Users Log		0 Days 4H25M
Affiliate	Guide			Yes	C	5/14/13 7:04AM	Directory		0 Days 4H23M
Traffic	Carole Holton			No	C	5/8/13 11:28AM		5/8/13 11:28AM	0 Days 0H0M
Traffic	Chris			No	C	5/8/13 11:23AM		5/8/13 11:24AM	0 Days 0H1M
Traffic	Finn Lee			No	C	5/1/13 10:58AM		5/1/13 10:59AM	0 Days 0H1M
Traffic	A/E Julie			Yes	C	4/9/13 7:41AM		4/9/13 10:01AM	0 Days 2H20M
Traffic	Pete			No	C	12/27/12 8:11AM		12/27/12 8:11AM	0 Days 0H0M
Traffic	Guide			No	C	10/16/12 8:10AM		10/16/12 9:57AM	0 Days 1H47M
Affiliate	Guide			Yes	C	10/16/12 8:22AM		10/16/12 9:57AM	0 Days 1H35M
Traffic	Guide			No	P	10/11/12 2:38PM		10/11/12 3:39PM	0 Days 1H1M
Affiliate	Guide			Yes	P	10/11/12 3:35PM		10/11/12 3:35PM	0 Days 0H0M
Traffic	Guide			No	P	7/2/12 5:34PM		7/2/12 5:36PM	0 Days 0H2M
Affiliate	Guide			Yes	P	7/2/12 5:35PM		7/2/12 5:36PM	0 Days 0H1M
Affiliate	Julie McSpirit			Yes	P	6/19/12 10:40AM		6/19/12 10:44AM	0 Days 0H4M
Traffic	Accounting			No					
Traffic	assistant			No					
Traffic	Darlene Hosaka			No					
Traffic	Dick LeVine			No					
Traffic	Frank			No					

You can choose to view only those users currently in the system, or all users by selecting "current" (all currently active users) or "all" (all users).

You can sort the information by clicking on any header in blue.
- System- The System(s) the User is currently using
- User Name- Pulled from the users' profiles defined in the User Screen
  - When you mouse over the User name, you will see the PC Name and Network card ID
- City- Pulled from the users' profiles defined in the User Screen
- Phone Number- Pulled from the users' profiles defined in the User Screen
- E-Mail- Pulled from the users' profiles defined in the User Screen
  - When you mouse over the email, you will see the email address defined for the user
- Z- is the user's time zone
- Sign On- If viewing All users and the Sign On time is blank, the user has not yet signed on
- Activity- Indicates the Screen the User is in currently
- Sign Off- If blank, the user is still active in the system
- Duration- length of time signed onto the system
- Users that have never signed on after a new software release has been installed cannot be selected

You can see the total number of Active Users, along with the total number of Users if you selected "All" in the bottom right corner of the screen.

Activity Log

If you have rights to do so, you can click Show Activity Log in the upper right corner to view detailed information about a user.

User Status Buttons

- Cancel: Exit the User Status screen.
- Message: Send a message to users selected on above list. For a complete description see User Communications.
- Sign Off Alert: Sends a sign off message to users you have selected from the list. The button is enabled for users allowed to shut down the system. See System Shutdown for more information.
- Sign On OK Message: Used to inform users they can sign back into the system. Only users selected in the above list will be notified. This button is enabled only for the user that issued the Sign Off message
- Refresh: Retrieve the current status of users

View Blocks

System Blocks (or Locks) are used to prevent multiple users from entering and altering the same record simultaneously.

The View Blocks tool allows you to:

- See what task is being modified/locked by a user
- Remove a specific block for a user

Lockable Tasks

The Tasks that are capable of being locked are:

- *Orders*: Orders (proposals) are locked while being modified so that another user cannot alter the contract (proposal) during a revision
  - A locked contract (proposal) can be viewed by another user while being modified
- *Invoicing*: Final invoices can only be generated by one person at a time for two reasons
  - To keep invoice numbers in sync
  - The receivables file is updated during this time
- *Scheduling*: To prevent another user from modifying a contract while it is being scheduled, or the vehicle/flight from being trafficked during scheduling, Counterpoint automatically locks the Order, the Vehicle in the Spots Screen, and the date range in the Spots Screen during scheduling
- *Spot Screen/Spot Moves*: When moving spots or fill spots from one day to another, Counterpoint locks both the day the spot is being moved from and the day the spot is being moved into, while determining if the move is valid. Once the move is completed, both days are unlocked
- *Post Log*: When moving a spot from one day to another in Post Log, Counterpoint locks both the day the spot is being moved from and the day the spot is being moved into, while determining if the move is valid. Once the move is completed, both days are unlocked

Viewing Blocks

To view blocks, click on Accessories->View Blocks.
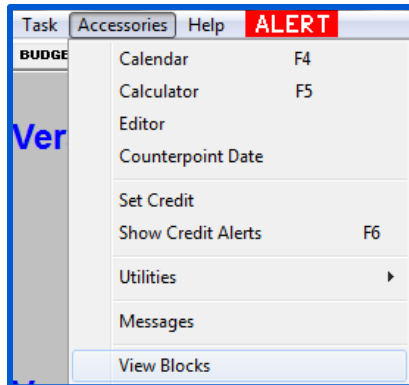
Sample Block

Here is a sample view of blocked tasks, which shows the users and the tasks that are locked.

Block Utilities

In addition to viewing all blocked tasks, the View Blocks tool offers two utilities: Erase and Refresh.

Unblocking/Unlocking a User

If a user's system freezes during a task that can be blocked, that task may need to be manually unblocked (unlocked). To unblock a task/user and allow it to be modified, call up the View Blocks tool. Select the task and click "Erase". This should only be done if a user is frozen.

Refresh

"Refresh" will update the data and indicate any additional blocks/locks. If nothing is locked, the list will be empty.

Web Server Logo Specifications

Logo Dimensions

The dimensions need to be set as close as possible to 200 x 60 pixels.

        Width = 200
        Height = 60

Editing the File

Use Microsoft Paint, or another image editing program to edit your Logo.

1. Open Logo File in Microsoft Paint
2. Click "Resize"
3. In the Resize Window, click on Pixels
           Horizontal: Enter 200
           Vertical: Enter 60
4. Slightly adjust the Horizontal and Vertical settings until you like how the Logo looks

File Format

The file must be saved in the GIF file format.

File Name

The file name must be: ClientWebLogoLarge.gif

Counterpoint Hosted Web Server

If counterpoint hosts your web server, please email the file to support@counterpoint.net.

Non-Counterpoint Hosted Web Servers

If Counterpoint does not host your web server, you will need to install the GIF file by copying, or saving the ClientWebLogoLarge.gif file on the web server to the wwwroot\AffWeb\Images folder.