FORTRA

Robot Easy View
8.36

Installation Guide

Installing or Updating Easy View

Before You Begin

Read these instructions completely before attempting an installation or update.

- This document provides specific instructions on how to install or update Robot Easy View.

- The Easy View installation process creates or changes two user profiles: RBTUSER and RBTADMIN. These profiles own all EASY VIEW objects. RBTADMIN has the characteristics of a QSECOFR profile. RBTUSER has attributes like QPGMR. Directory entries are added automatically for the RBTADMIN and RBTUSER profiles. The RBTADMIN and RBTUSER profiles were created for the following reasons:

  - They satisfy requests from corporate auditors that our objects be owned differently from IBM objects.

  - They allow us to build a secure product for your environment.

  - They isolate HelpSystems products from IBM changes to the QPGMR or QSECOFR profile defaults.

  > **NOTE:** If you have made any manual changes to the RBTUSER or RBTADMIN user profiles and their authorities, these changes will be lost with any product installation or conversion.

- **For installs only:** When you're finished loading Easy View, follow the steps below to enter the license code.

Installing or Updating Easy View

Use these instructions to install or update Robot Easy View. This process downloads everything to your PC and loads the objects on the IBM i. Read the following steps carefully to proceed.

1. Download the Easy View installer (**setupEasyView.exe**). Double-click it to start it.

2. On the Choose Components panel, select which components you want to install. You can choose to install the Manuals and the Software for IBM i. Click **Next**.

3. On the IBM i Details panel:

   a. Select or enter the IBM i where you want to load Easy View.

   b. Enter a user profile and password that's a member of the user class *SECOFR and has at least the following special authorities: *ALLOBJ, *SECADM, *JOBCTL, and *IOSYSCFG. The user profile should have Limit capabilities set to *NO. This profile will be used to restore and copy objects, and for product maintenance on the IBM i.

   c. (Optional) In the Advanced Settings section:

      • Enter a port number or use the arrows if you want to change the FTP port number to something other than the default of 21.

      • Select **Secure File Transfe**r if you want to use FTPS (FTP over SSL) during the file transfer. The default FTPS secure port is 990, but it can be changed to the required secure port for your environment.

      • In the **Timeout (seconds)** field, enter the number of seconds the session should be kept active during an FTP transfer. You can choose anywhere between 25 and 1800 seconds (30 minutes).

      Note: If the transfer takes longer than the amount of time specified, the session will expire.

   d. Click **Next**.

4. You have two options on the Product Load Options panel:

    a. Click **Immediate Load** if you'd like to load the product on the IBM i now.

        Note: If you are doing an update, this ends Easy View until the product load completes. After you are done, we'll restart the product.

    b. Click **Staged Load** if you'd like to transfer the objects now and load them on the IBM i at a later time.

        Note: See "Loading Staged Objects on the IBM i" below for instructions on how to load the staged objects on your selected IBM i system.

5. The Product Load Progress panel for Easy View launches. When the processing is complete, you have two choices:

- If this is the only installation or update of Easy View that you are doing, click **Finish**.

- If you have installations or updates to do on other IBM i systems, click **Restart**. Then, return to step 4.

Note: If the Product Load Progress panel ends with an overall Failed message, the product upload could not complete properly. To find the reason the upload failed, click **View Logs** and review your logs. You can also use **Download** at the top of the logs to save the information for future review.

Loading Staged Objects on the IBM i

If you chose to stage your objects during the installation or update process, do the following to manually load them on the IBM i you identified above.

1. Execute the following command to display the Work with Loads panel:

    HSLOADMGR/HSWRKLOAD

2. Enter option **1**, Load, next to the Load Name for Easy View and press Enter.

The installation program installs Easy View, the RBTSYSLIB library (as needed), and two user profiles (RBTADMIN and RBTUSER). It adds RBTSYSLIB to the system portion of your library list, if required.

Entering the License Code

Note: You only need to enter a license code after installing Easy View. If you updated Easy View, skip these steps.

After you load Easy View, you must enter a license code in order to use the product. If you have not received a license code, contact your Regional Sales Manager.

1. Execute the following command on the IBM i to open the Installed Robot Products panel:

    RSLVER

    Note: If this is the only Robot product you install, then **RBTSYSLIB** is not installed on your system and the RSLVER command cannot be used. To enter the license code, execute the following command instead:

    ADDLIBLE EZVIEW

    CALL EV240

2. Enter option **1** by Easy View to open the Easy View License Setup panel.

3. Copy your new license code. Then, paste it into the first entry field under **License Code** (it will automatically fill the other fields).

4. Press **Enter**.

After You Are Done

- To access the product's Main Menu on the IBM i, execute the command **RBO** on a command line to display the Robot Automated Operations Solution panel. Then, enter option **17** for Easy View.

- If Easy View is the only product on this system, execute the following commands (instead of **RBO**) to access the main menu:

  ADDLIBLE EZVIEW

  GO EZVIEW

- Set up Easy View on your system as described in the *Easy View User Guide*.

- Three libraries were restored to your system for use during the installation or update process: HSLOADMGR, HSLOADMGRW, and RBTCDRLIB. We do not remove them from your system in case you are doing multiple installations. You can delete them when you are finished.

  Note: You can move the library HSLOADMGR to a different system on the IBM i and use it to complete additional installs or updates.

Converting From Easy View 7 to 8

Before You Begin

Read these instructions completely before you begin.

- Easy View must be at R07M30 or higher before you can convert to Easy View 8. To check the version, execute the **RSLVER** command.

- The Easy View conversion process creates or changes two user profiles: RBTUSER and RBTADMIN. These profiles were created for the following reasons:

  - They satisfy requests from corporate auditors that our objects be owned differently from IBM objects.

  - They allow us to build a secure product for your environment.

  - They isolate the Robot products from IBM changes to the QPGMR or QSECOFR profile defaults.

  > **NOTE:** If you've made any manual changes to the RBTUSER or RBTADMIN user profiles or their authorities, these changes will be lost with any product installation or conversion.

- The files in the Easy View product library (EZVIEW) are shipped with a standard of 10,000 records. If you've made changes to the size of the files in the EZVIEW library, you'll need to purge some information prior to your conversion.

  - Two files to check are EVPAUDT and EVPFLDS. Use the **DSPFD** command to find the number of records in these files. If you have more than 10,000 records, you must purge the file before you run the conversion. Be sure to save a copy of the

file if you need to restore the data after the conversion.

- To reduce the number of records in EVPAUDT, use the **PRGAUDIT** command, or option **5** from the Easy View Setup menu (EZSETUP).

- To clear EVPFLDS, use the command **CLREZVIEW OPTION(*DDSONLY)**, or option **4** from the Easy View Setup menu (EZSETUP).

Converting Easy View

The Easy View conversion process downloads everything to your PC and loads the objects to the IBM i. This process is described in the following section.

1. Download the Easy View installer (**setupEasyView.exe**) from My Account page on our website. Double-click it to start it.

2. On the Choose Components panel, select which components you want to load. You can choose the Manuals and the Software for IBM i. Click **Next**.

3. On the IBM i Details panel:

   a. Select or enter the IBM i where you want to convert Easy View.

   b. Enter a user profile and password that's a member of the user class *SECOFR and has at least the following special authorities: *ALLOBJ, *SECADM, *JOBCTL, and *IOSYSCFG. The user profile should have Limit capabilities set to *NO. This profile will be used to restore and copy objects, and for product maintenance on the IBM i.

   c. (Optional) In the Advanced Settings section:

- Enter a port number or use the arrows if you want to change the FTP port number to something other than the default of 21.

- Select **Secure File Transfer** if you want to use FTPS (FTP over SSL) during the file transfer. The default FTPS secure port is 990, but it can be changed to the required secure port for your environment.

- In the **Timeout (seconds)** field, enter the number of seconds the session should be kept active during an FTP transfer. You can choose anywhere between 25 and 1800 seconds (30 minutes).

  Note: If the transfer takes longer than the amount of time specified, the session will expire.

  d. Click **Next**.

4. You have two options on the Product Load Options panel:

   a. Click **Immediate Load** if you'd like to load the product on the IBM i now. This ends Easy View until the product load completes. After you are done, we'll restart the product.

   b. Click **Staged Load** if you'd like to transfer the objects now and load them on the IBM i at a later time. See "Loading Staged Objects on the IBM i" below for instructions on how to load the staged objects on your selected IBM i system.

5. The Product Load Progress panel for Easy View launches. When the processing is complete, you have two choices:

   - If this is the only conversion of Easy View that you are doing, click **Finish**.

   - If you have conversions to do on other IBM i systems, click **Restart**. Then, return to step 4.

> **NOTE:** If the Product Load Progress panel ends with an overall Failed message, the product upload could not complete properly. To find the reason the upload failed, click **View Logs** and review your logs. You can also use **Download** at the top of the logs to save the information for future review.

Loading Staged Objects on the IBM i

If you chose to stage your objects during [the conversion process](#), do the following to manually load them on the IBM i you identified above.

1. Execute the following command to make sure no users are signed on to the product you are installing:

    WRKOBJLCK OBJ(EZVIEW) OBJTYPE(*LIB)

2. Delete any EASY VIEW objects that are not in your EZVIEW library. For example, the EZVIEW command may be in library QGPL. To delete the command, enter:

    DLTCMD QGPL/EZVIEW

3. Execute the following command to display the Work with Loads panel:

    HSLOADMGR/HSWRKLOAD

4. Enter option **1**, Load, next to the Load Name for Easy View and press **Enter**.

After You Are Done

*   After the conversion completes, execute the **WRKSPLF** command to check the spooled files for any errors that may have occurred. If you have any questions, contact Technical Support.

*   Three libraries were restored to your system for use during the conversion process: HSLOADMGR, HSLOADMGRW, and RBTCDRLIB. We do not remove them from your system in case you are doing multiple conversions. You can delete them when you are finished.

    > **NOTE:** You can move the library HSLOADMGR to a different system on the IBM i and use it to complete additional conversions.