Introduction

American Innovations (AI) is pleased to announce version 1.9 of our Pipeline Compliance System Axis® software (PCS Axis®). This document explains how to install PCS Axis in a client/server network (Figure 1).
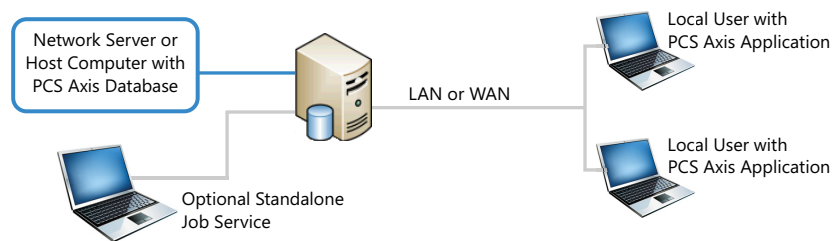

Figure 1. PCS Axis Client/Server Installation

Information in this document is intended for your company's IT System Administrator, Database Administrator (DBA), and PCS Axis Administrator.

IMPORTANT: The person who installs and sets up the PCS Axis database on the central database server must have full DBA privileges and be a member of the *sysadmin* fixed server role.

Topics in this document include those in the following list:

- *PCS Axis Best Practices* (page 2)

- *Installation Overview* (page 9)

- *Installation Requirements* (page 11)

- *Adding the Local Domain User Group Axis_Users* (page 14)

- *Restoring the PCS Axis Database and Setting Permission Roles* (page 15)

- *Running Fill Factor Reset and Creating a Database Maintenance Job* (page 17)

- *Installing PCS Axis Job Service* (page 18)

- *Starting PCS Axis Job Service* (page 21)

- *Installing the PCS Axis Application on a Local Client Computer* (page 24)

- *Setting Up Users in PCS Axis* (page 29)

- *Installation Checklist* (page 30)

- *Product Support and Training* (page 31)

PCS Axis Best Practices

PCS Axis Best Practices is a series of topics demonstrating best practices for setting up the PCS Axis®️ database and related services on a network server running Microsoft®️ SQL Server®️ 2008 R2. Topics include those in the following list:

- *Importing Large Amounts of Data in PCS Axis*

- *Running PCS Axis Job Service*

- *Managing the PCS Axis Database* (page 4)

- *Running SQL Server (MSSQLServer) Service* (page 7)

Importing Large Amounts of Data in PCS Axis

Index fragmentation may occur in the PCS Axis database after importing large amounts of data using Bridge Import, Bullhorn Bridge, or Field Computer. Index fragmentation can result in slow system performance. The list below identifies best practice methods that can prevent index fragmentation:

- Enable the option *Reindex after import* in the Bridge definition of a Bridge Import or Bullhorn Bridge. See [PCS Axis Help](#) for more information.

- Create a scheduled database maintenance job on the central database server using the *Reindex Stored Procedure* provided with the PCS Axis installation file. See the next section for information about how to create a scheduled database maintenance job.

Running PCS Axis Job Service

Run the *PCS Axis Job Service* under a domain account or a SQL Server account with access to the server and PCS Axis database. To set up *PCS Axis Job Service*, follow these steps:

1   Click the Windows **Start** button 🟦 and navigate to *Computer*. Right-click **Computer** and select **Manage** in the shortcut menu to open the *Computer Management* console (Figure 2, page 3).

2   Double-click **Services and Applications** in the left pane of the console. Then click **Services** to display a list of services in the middle pane.
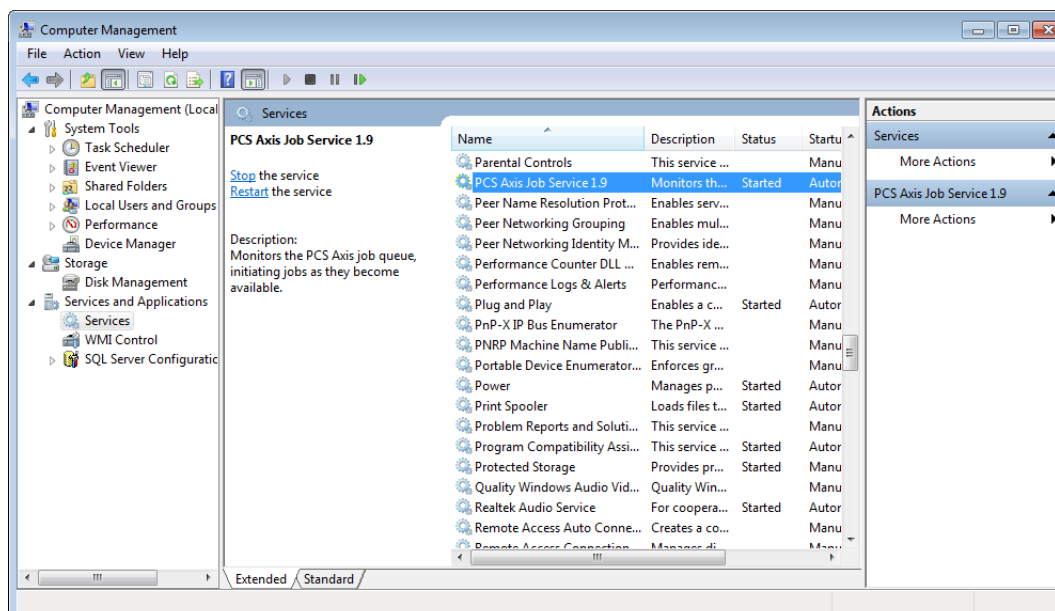
Figure 2. Computer Management Console

3 Right-click **PCS Axis Job Service 1.9** and select **Properties** in the shortcut menu to open the *Properties* dialog box (Figure 3, page 4).

4 Click the **Log On** tab and select the option **This account**.

5 Set up *PCS Axis Job Service* with a user account to log on as a service using a domain account or a SQL Server account with access to the server and PCS Axis database. Type the user name and password in the appropriate fields (*This account*, *Password*, *Confirm Password*). You can also view a list of appropriate user account by clicking *Browse > Advanced > Find Now*.

NOTE: The user account must be a member of the *Axis_Users* group and have access to the database server and PCS Axis database.

6 Click **Apply** and then **OK** to close the *Properties* dialog box and return to the *Computer Management* console.

7 Click **File** > **Exit** to close the *Computer Management* console.
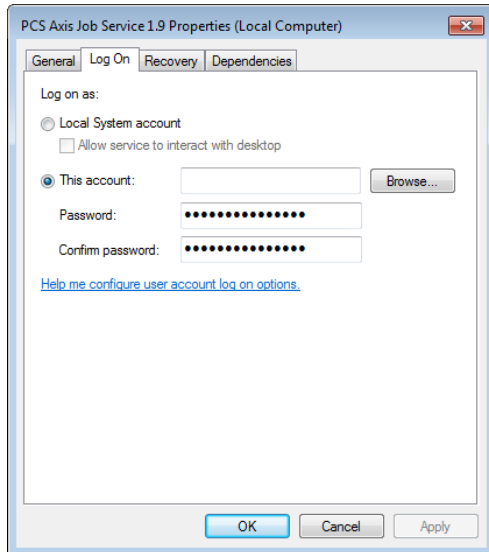
Figure 3. PCS Axis Job Service 1.9 Properties

Managing the PCS Axis Database

Information in this section covers best practices for managing the PCS Axis database using Microsoft® SQL Server® Management Studio (SSMS). Topics include those in the following list:

- *Setting the Database Owner*

- *Recommended Autogrowth Setting* (page 5)

Setting the Database Owner

To prevent errors from occurring when migrating or restoring the PCS Axis database, or when establishing a connection, set the "Owner" of the database using the "sa" account. To set the database "Owner" follow these steps:

1   Start SQL Server Management Studio (SSMS). Click **Start** > **Microsoft SQL Server 2008 R2** > **SQL Server Management Studio**.

2   Double-click the **Databases** folder in *Object Explorer* to open the folder.

3   Right-click the **PCS Axis database** and select **Properties** in the shortcut menu to open the *Database Properties* dialog box (Figure 4, page 5).

4   Select **Files** in the *Select a page* navigation panel.

5   Type **sa** in the *Owner* field. Then click **OK** to save changes and close the dialog box.
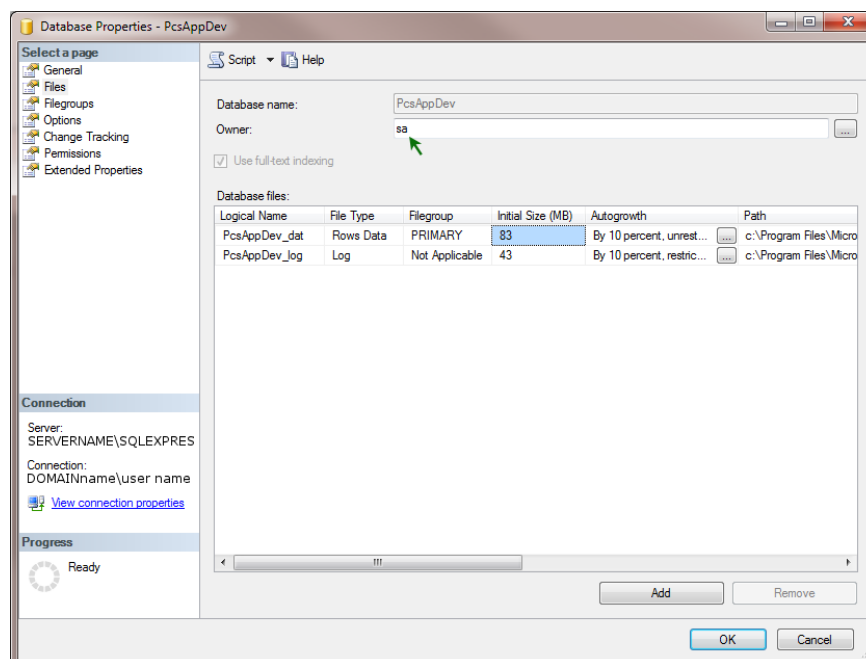
Figure 4. Database Owner

Recommended Autogrowth Setting

Information in this section applies to the PCS Axis database and log file. If you are running PCS Axis in a client/server network with synchronization, the information also applies to the publication and subscription databases.

Autogrowth indicates how much additional space is allocated when the PCS Axis database and log file require more space. Setting *Autogrowth* properties allow the PCS Axis database and log file to resize automatically based on a predetermined percentage. Because the database resizing process is a significant drain on computer resources, it is recommended that you set properties in a manner that does not allow the database to constantly resize itself.

NOTE: When using PCS Axis with synchronization, set *Autogrowth* properties after you create the publication and subscription databases.

To set *Autogrowth* properties for the database (*_dat*) and log (*_log*) files, follow these steps:

1   Start SSMS. Click **Start** > **Microsoft SQL Server 2008 R2** > **SQL Server Management Studio**.

2   Double-click **Databases** in *Object Explorer*.

3   Right-click the PCS Axis database and select **Properties** in the shortcut menu to open the *Database Properties* dialog box.

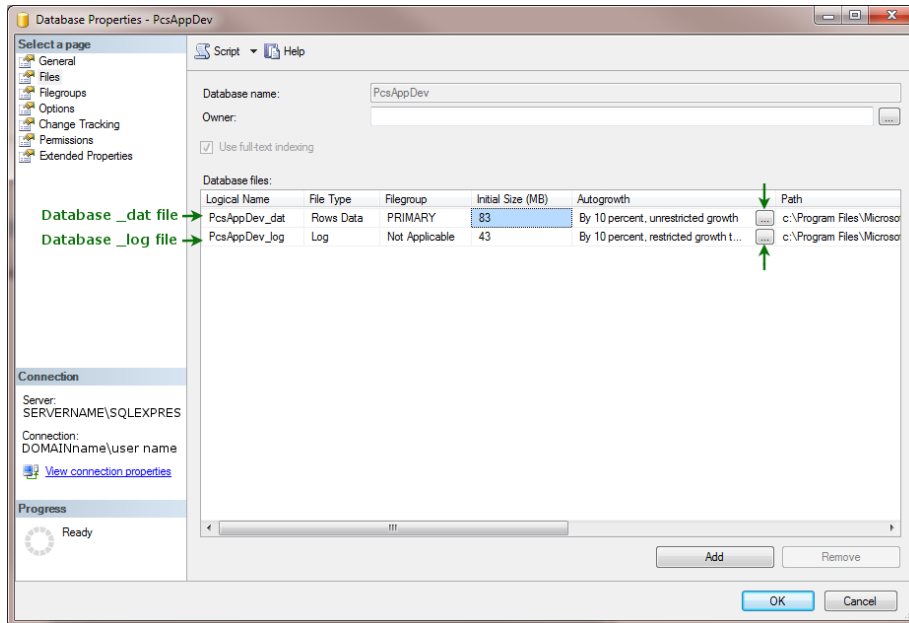4   Click **Files** in the *Select a page* navigation panel (Figure 5, page 6).

Figure 5. Files - Database Properties

5 Complete the following steps to set *Autogrowth* properties for the database (*_dat*) and log (*_log*) files:

a Click the **...** ellipsis button in the *Autogrowth* column of the database *_dat* file to open the *Change Autogrowth* dialog box (Figure 6).

b Click the **Enable Autogrowth** check box to place a check mark inside the check box.

c For the *File Growth* property setting, select the option **In Percent** and then type **10** in the adjacent field. This property setting automatically allocates 10% additional space when the database requires more space.

d Click **OK** to close the *Change Autogrowth* dialog box.

e Repeat step 5 for the database *_log* file.

f Click **OK** to close the *Database Properties* dialog box. Then click **File** > **Exit** to exit SSMS.
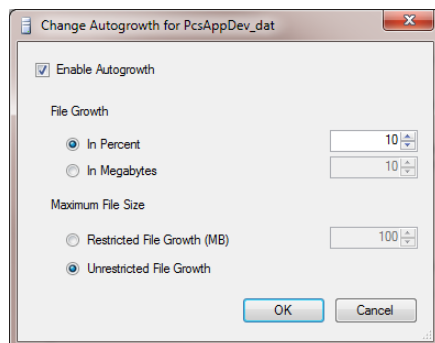

Figure 6. Change Autogrowth

Running SQL Server (MSSQLServer) Service

Run the Windows *SQL Server (MSSQLSERVER)* service under a domain account with access to the PCS Axis database. To set up the service, follow these steps:

1 Click the Windows **Start** button and navigate to *Computer*. Right-click **Computer** and select **Manage** in the shortcut menu to open the *Computer Management* console (Figure 7).

2 Double-click **Services and Applications** in the left pane of the console. Then click **Services** to display a list of services in the middle pane.
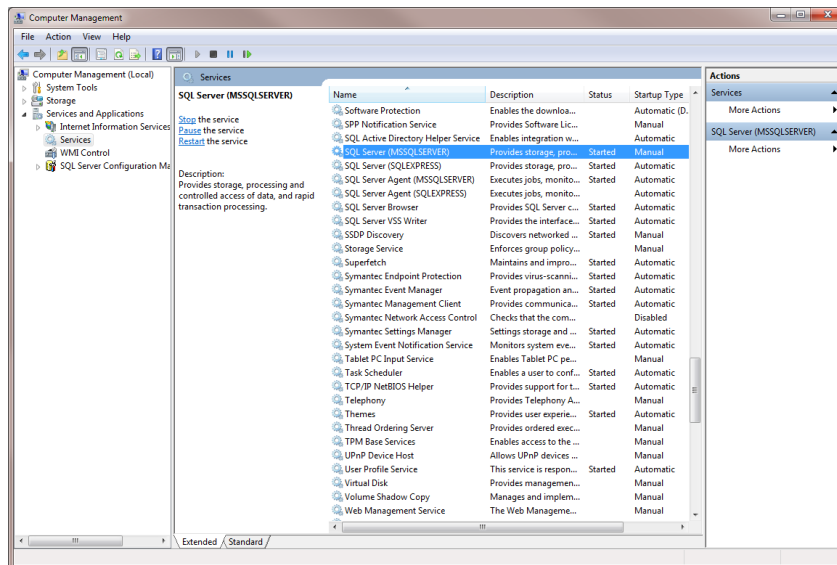

Figure 7. Computer Management Console

3 Right-click **SQL Server (MSSQLSERVER)** and select **Properties** in the shortcut menu to open the *Properties* dialog box (Figure 8).
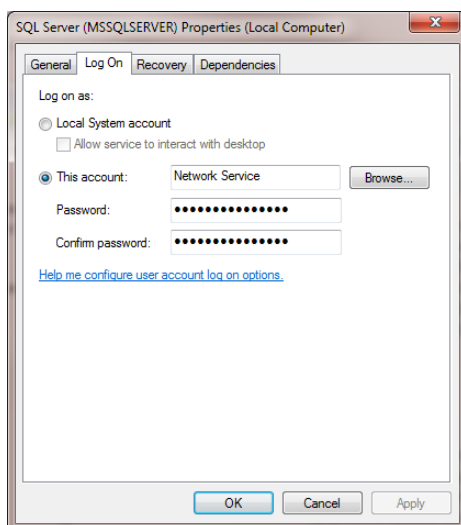

Figure 8. SQL Server (MSSQLSERVER) Properties

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4 Click the **Log On** tab and select the option **This account**.

5 Set up *SQL Server (MSSQLSERVER)* with a user account to log on as a service using a domain account with access to the PCS Axis database. Type the user name and password in the appropriate fields (*This account*, *Password*, *Confirm Password*). You can also view a list of appropriate user account by clicking *Browse > Advanced > Find Now*.

6 Click **Apply** and then **OK** to close the *Properties* dialog box and return to the *Computer Management* console.

7 Click **File** > **Exit** to close the *Computer Management* console.

Installation Overview

Installation tasks covered in this document include those identified in the following list. The term *central database server* is used in this document to refer to a network server or host computer.

IT System Administrator Tasks

● Run *Windows Computer Management* on the central database server to create a local domain user group named *Axis_Users*. Add all PCS Axis users in the *Axis_Users* group with appropriate permissions to access the central database server. See *Adding the Local Domain User Group Axis_Users* (page 14).

   NOTE: Remaining IT System Administrator tasks are completed when Database Administrator tasks are completed.

● Install the *PCS Axis Job Service* on the same server as the PCS Axis database or on a separate network server. See *Installing PCS Axis Job Service* (page 18).

● Start *PCS Axis Job Service* (see page 21).

● Install the PCS Axis application on the local computer of the PCS Axis Administrator and all other users. Use *Connection Manager* during the installation to set the server and database connection to the PCS Axis database on the central database server. See *Installing the PCS Axis Application on a Local Client Computer* (page 24).

Database Administrator Tasks

● Restore the PCS Axis database on the central database server using the database backup file provided by PCS Technical Services. See *Restoring the PCS Axis Database and Setting Permission Roles* (page 15).

   IMPORTANT: If someone other than your company's Database Administrator (DBA) plans to restore the PCS Axis database and create the publication database, this person must have full DBA privileges and be a member of the *sysadmin* fixed server role to successfully complete the database tasks on the central database server.

● Run the *Fill Factor Reset* script labeled *Defrag Fill Factor Reset Post Deployment.SQL* to reset the fill factor limit of the PCS Axis database. The *Fill Factor Reset* script is included in the PCS Axis download package provided by PCS Technical Services. Run this script after installing or upgrading the publication database as well as creating one or more subscription databases. See *Running Fill Factor Reset and Creating a Database Maintenance Job* (page 17).

- Create a scheduled database maintenance job on the central database server using the *Reindex Stored Procedure* labeled *dbo.DefragmentIndexes*. The stored procedure is included in the PCS Axis download package provided by PCS Technical Services. See *Running Fill Factor Reset and Creating a Database Maintenance Job* (page 17).

  NOTE: SQL server maintenance jobs can only be created when running a full version of SQL server. SQL Server Express does not support this feature.

- Create a new login for the PCS Axis database labeled *Axis_Users*. Set permission roles for the *Axis_Users* login to allow PCS Axis users access to the PCS Axis database. See *Restoring the PCS Axis Database and Setting Permission Roles* (page 15).

PCS Axis Administrator Task

Run the PCS Axis application to add all PCS Axis users in *User Management*. See *Setting Up Users in PCS Axis*, page 29.

Installation Requirements

Before installing PCS Axis, verify the following items are available and the client and server computers meet the system requirements identified in Table 1 (page 12) and Table 2 (page 13).

- *PCS Axis License File*: The installation process prompts you for the PCS Axis license file provided by AI.

- *Bridge Import License File*: If your company purchased the optional Bridge add-on to import data from a third-party application, activating Bridge import for operation requires the license file provided by AI.

  NOTE: A Bridge license file is not required to import data from Bullhorn® Asset Tracker (BAT™) or export data from PCS Axis. You can maintain all PCS Axis licenses for your organization in the same shared folder location. PCS Axis will request the file and location the first time each user opens the PCS Axis application. The Bridge activation key is assigned only once for the PCS Axis database; once it is assigned it functions for all users.

- *PCS Axis Installation File*: Install PCS Axis using either the installation DVD provided by AI or the installation file downloaded from a location identified in an email from PCS Technical Services.

- *System Requirements*: Verify the server and client computers meet the system requirements identified in Table 1 (page 12) and Table 2 (page 13).

Table 1. Local Client Computer Requirements

Properties	Recommended
Processor	Intel Core i7
Processor Speed	2.3 GHz or faster
RAM	8 GB
Operating System	Windows 7 64-bit, Service Pack 1 (SP1)
Available Disk Space	720 MB
Resolution	1920x1080
Microsoft .NET Framework	Version 4.5 (see note)

NOTES:

- *Microsoft .NET Framework*: If the target computer does not have Microsoft .NET Framework v4.5 installed, the PCS Axis installation automatically installs it for you. This feature requires an active Internet connection to complete the installation of .NET Framework v4.5.

- *PCS Axis Installation*: By default, only the PCS Axis application is selected for installation on the computer of local clients in a client/server network. See Table 2 (page 13) for information about the system requirements for installing the PCS Axis database and job service on the central database server.

- *Microsoft SQL Server Express 2008 R2 SP2, 64-bit*: For client systems that wish to use Synchronization, a 64-bit version of Microsoft SQL Server 2008 Express R2 SP2 (or Standard edition for databases exceeding 10 GB) must be installed on the subscriber's computer (the remote client). Once PCS Axis is installed, a subscription database must be created on the subscriber's computer prior to working off-line.

- *Disk Space with Synchronization:* If using a remote client to subscribe to and synchronize with a central database, sufficient disk space must be reserved for database use (11 GB when using Microsoft SQL Server 2008 Express).

Table 2. Dedicated Central Database Server Requirements

Properties	Recommended
Processor	Intel Xeon
Processor Speed	2 Quad Core CPUs at 2.4 GHz or faster
RAM	32 GB (see note)
Operating System	Windows Server 2008 R2
Relational Database Software	SQL Server 2008 R2
Available Disk Space	100 GB (see note)
Resolution	1920x1080

NOTES:

- Larger databases may require more RAM for optimum performance.

- Hosting the PCS database on a shared SQL server may result in poor performance.

- Consult with your company's IT personnel or DBA to determine where database backups will be created.

- The PCS Axis database installs on the central database server. If selected in *Setup Wizard* during the installation, the PCS Axis application and job service can install on the central database server as well. For local client and subscriber computer requirements, see Table 1 (page 12).

Adding the Local Domain User Group Axis_Users

Information in this section explains how to add a local domain user group on the central database server labeled *Axis_Users*. By adding the *Axis_Users* group, all PCS Axis users will have access to the server. The following information is intended for the IT System Administrator.

Complete the following steps on the central database server:

1   Open *Computer Management*. Click **Start** > **Administrative Tools** > **Computer Management**.

2   Click to expand **System Tools** and then **Local Users and Groups** in the navigation tree.

3   To add the local domain user group labeled *Axis_Users*, follow these steps:

   a   Right-click **Groups** and select **New Group** in the shortcut menu to open the *New Group* dialog box (Figure 9).

   b   Type **Axis_Users** in the *Group name* field and a description for the user group in the *Description* field.

   c   Click **Add** > **Advanced** > **Find Now** to view a list of user names. Add all PCS Axis users in the *Axis_Users* group.

   d   Click **Create** and then click **Close** to close the dialog box.

4   After the Database Administrator has restored the PCS Axis database on the central database server (see page 15), continue the installation with the section titled *Installing PCS Axis Job Service* (page 18).
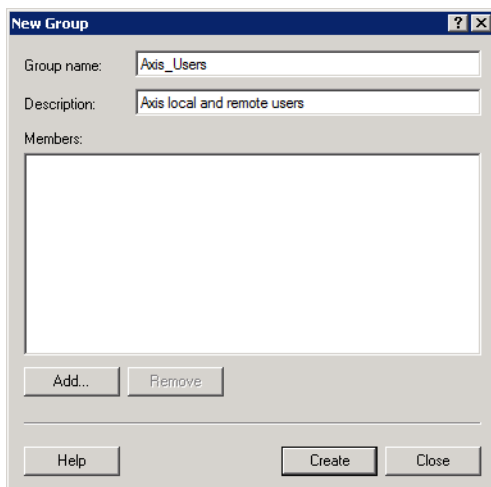

Figure 9. Axis_Users Local Domain User Group

Restoring the PCS Axis Database and Setting Permission Roles

Information in this section is intended for the Database Administrator. The information explains how to:

■ Restore the backup file of the PCS Axis database on the central database server.

■ Create a new login for the PCS Axis database labeled *Axis_Users*. Then set permission roles for the new login labeled *Axis_Users*.

Complete the following steps on the central database server:

1 Using the database backup file provided by PCS Technical Services, restore the PCS Axis database.

2 Start SQL Server Management Studio (SSMS). Connect to the central database server and then switch to the PCS Axis database.

3 Click to expand **Security**, then **Logins** in the navigation tree of *Object Explorer*. Right-click **Logins** and select **New Login** in the shortcut menu to open the *Login-New* dialog box (Figure 10).
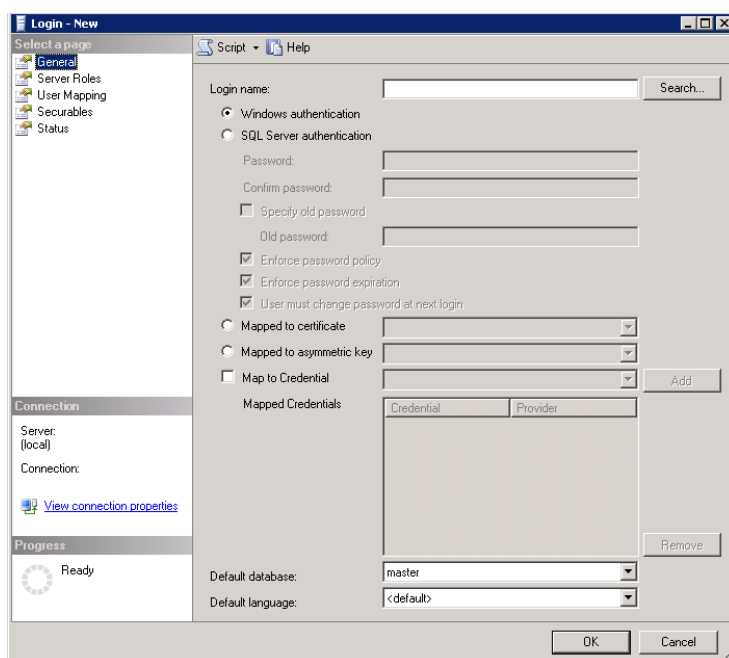
Figure 10. Login-New

4 Set the following properties in the *General* page:

a Type **Axis_Users** in the *Login name* field. If the group name *Axis_Users* does not appear in the selection list, complete the following steps:

(1) Select **Find People** in the selection list to open the *Select Users or Groups* dialog box.

(2) Click **Object Types** to open the *Object Types* dialog box.

(3) Click the **Group** check box, then click **OK** to return to the *File Sharing* dialog box.

(4) Select **Axis_Users** in the selection list, then click **Add**.

b Enable the option **Windows authentication** if it is not enabled.

c Select the **PCS Axis database** in the *Default database* field.

5 Click **Server Roles** in *Select a page* and enable the **public** check box.

6 Click **User Mapping** in *Select a page* and enable the following properties:

a In the group box **Users mapped to this login**, enable the *PCS Axis database*.

b In the group box **Database role membership for,** enable the following properties:

- o Axis_Users
- o db_datareader
- o db_datawriter
- o db_ddladmin
- o db_owner
- o public

c Click **OK** to save settings and close the *Login-New* dialog box.

Tasks performed by the Database Administrator are now complete.

Running Fill Factor Reset and Creating a Database Maintenance Job

Information in this section is intended for the Database Administrator (DBA). The information explains how to complete the following tasks on the central database server after installing or upgrading the PCS Axis database:

- Run the *Fill Factor Rest* script labeled *Defrag Fill Factor Reset Post Deployment.SQL* to reset the fill factor limit of the publication database.

- Use the *Reindex Stored Procedure* labeled *dbo.DefragmentIndexes* to create a scheduled database maintenance job. The stored procedure is intended to optimize system performance by reorganizing and defragmenting the indexes in the PCS Axis database.

  IMPORTANT: Schedule the database maintenance job to run daily or once a week during an off-peak time. Scheduling the database maintenance job at regular intervals will ensure optimum system performance.

Complete the following steps:

1 Start SQL Server Management Studio (SSMS). Click **Start** > **All Programs** > **Microsoft SQL Server 2008 R2** > **SQL Server Management Studio**.

2 Use SSMS to run the *Fill Factor Reset* script labeled **Defrag Fill Factor Reset Post Deployment.SQL** on the PCS Axis database.

3 Use SSMS to create a scheduled database maintenance job for the PCS Axis database using the *Reindex Stored Procedure* labeled **dbo.DefragmentIndexes**. Set the job to run daily or once a week during an off-peak time.

   IMPORTANT: AI recommends running the stored procedure daily or once a week during non-peak hours.

   For a best practice guide in creating database maintenance jobs, visit the Microsoft website at http://technet.microsoft.com/en-us/library/ms187658(v=sql.105).aspx.

4 Exit SSMS.

Installing PCS Axis Job Service

The following information is intended for the IT System Administrator. It explains how to install *PCS Axis Job Service* on a network server. You can install the service either on the same server as the PCS Axis database or on a separate network server.

Complete the following steps:

1   If you are using the installation DVD to install PCS Axis, insert the DVD in the DVD/CD-ROM drive of the computer. Open Windows Explorer to view the contents of the installation DVD.

    If you previously downloaded the installation file using a link in an email from PCS Technical Services, navigate to the location of the installation file.

    NOTE: A single installation file labeled *setup.exe* is used to install PCS Axis on a 32-bit and 64-bit computer. If the target computer does not have Microsoft .NET Framework v4.5 installed, the PCS Axis installation automatically installs it. This feature requires an active Internet connection to complete the installation of .NET Framework v4.5.

2   Double-click the **setup.exe** installation file to open the PCS Axis dialog box (Figure 11).

Figure 11. PCS Axis Installation

3   Click **Install** in the PCS Axis dialog box to open *Setup Wizard* (Figure 12, page 19).

4   Click **Next** to read the *End-User License Agreement*. To accept the license agreement, click the check box **I accept the terms in the License Agreement** to place a check mark inside the check box.
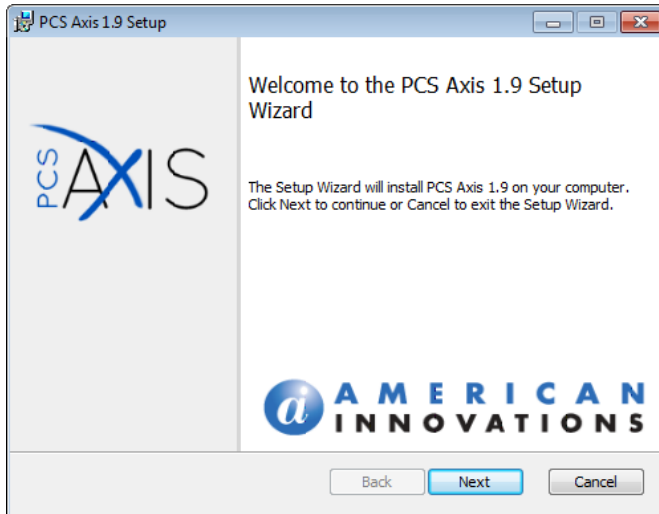
Figure 12. Setup Wizard

5   Click **Next** to display *Custom Setup* (Figure 13).

6   By default the PCS Axis application is selected for installation. If you are working on the central database server and do not want to install the application on the server, click the down arrow in ▭▾ **PCS Axis** and select the option **Entire feature will be unavailable**.

7   By default the *PCS Axis Job Service* is not selected for installation. To install the service on the server, click the down arrow in ✕▾ **PCS Axis Job Service** and select the option **Entire feature will be installed on local hard drive**.

8   Click **Next** and then click **Install** to begin the installation.
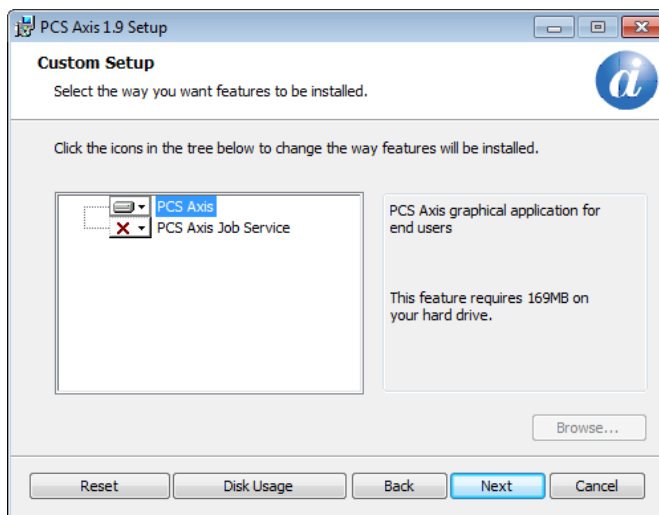
Figure 13. Custom Setup

When the installation completes and after a short delay, *Connection Manager* opens automatically on top of *Setup Wizard* (Figure 14).

9   Complete the following steps in *Connection Manager* to set *Server* and *Database* settings:

a   Type the name of the central database server in the **Server** field. Or click **Select** in the *Server* field to select the server in the *Select Server* dialog box.

b   Type the name of the PCS Axis database in the **Database** field. Or click **Select** in the *Database* field to select the database in the *Select Database* dialog box.

c   Click ⊕ **Test** to verify the connection to the server and database. When the message *Connection successful displays*, click ✓ **OK** to close the message.

d   Click 🖫 **Save and Close** to exit *Connection Manager*.

10   Click **Finish** in *Setup Wizard* and then click **Close** in the PCS Axis dialog box to close the PCS Axis installation file (setup.exe).

11   Installation of the *PCS Axis Job Service* is now complete. Continue with the next section to start the service (page 21).
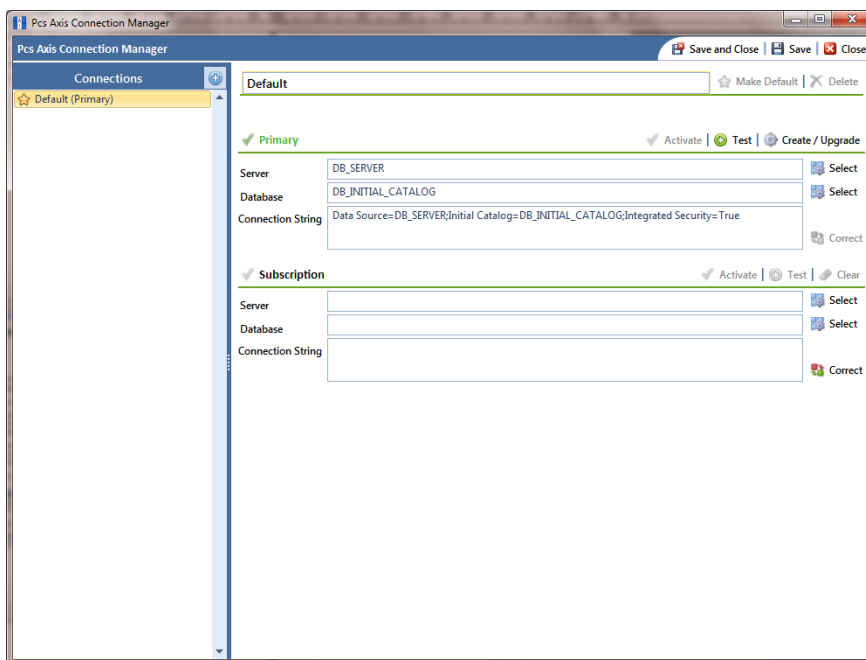
Figure 14.   Connection Manager

Starting PCS Axis Job Service

The purpose of *PCS Axis Job Service* is to monitor the PCS Axis job queue, initiating jobs as they become available. The following procedure explains how to use Windows Services to start *PCS Axis Job Service*. The information is intended for the IT System Administrator.

Complete the following steps:

1 If the PCS Axis database and *PCS Axis Job Service* are installed on two different network servers, complete the following steps to set up a user account to log on as a service. The user account must have access to the central database server and PCS Axis database.

    a Click the Windows **Start** button 🏁 and navigate to *Computer*. Right-click **Computer** and select **Manage** in the shortcut menu to open the *Computer Management* console (Figure 15).

    b Double-click **Services and Applications** in the left pane of the console. Then click **Services** to display a list of services in the middle pane.
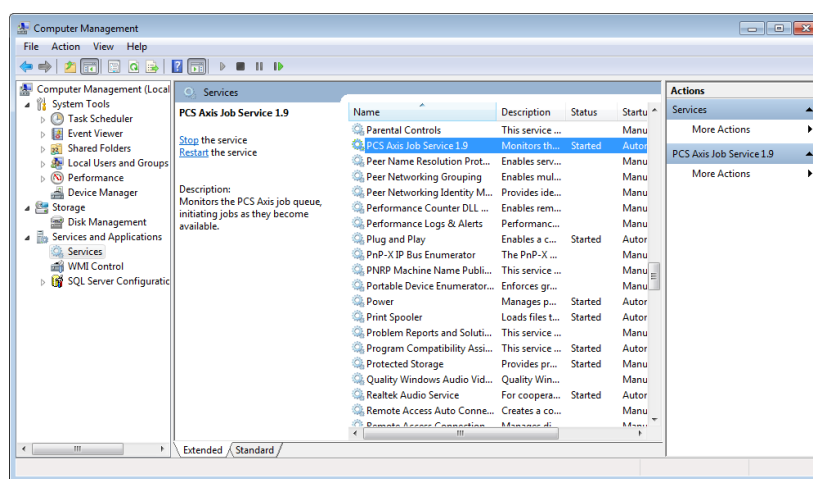
Figure 15. Computer Management Console

    c Right-click **PCS Axis Job Service 1.9** (Figure 15) and select **Properties** in the shortcut menu to open the *Properties* dialog box (Figure 16, page 22).

    d Click the **Log On** tab and select the option **This account**. To set up a user account to log on as a service, type the user name and password in the appropriate fields. You can view a list of appropriate user accounts by clicking *Browse > Advanced > Find Now*.

        NOTE: The user account must be a member of the *Axis_Users* group and have access to the central database server and PCS Axis database.

e Click **Apply** and then **OK** to close the *Properties* dialog box and return to the *Computer Management* console.
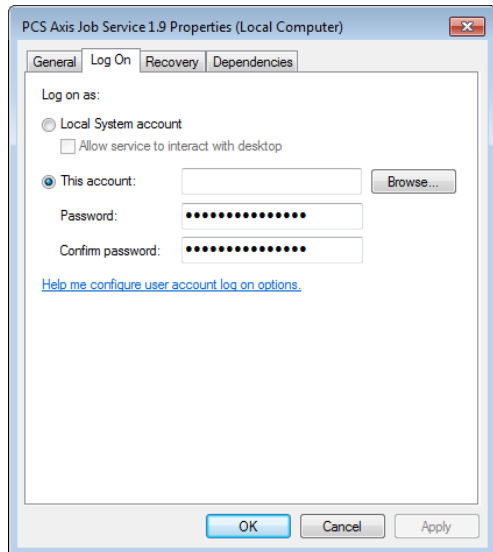

Figure 16. PCS Axis Job Service 1.9 Properties

2 Complete the following steps in the *Computer Management* console to start *PCS Axis Job Service*:

a Select **PCS Axis Job Service 1.9** and then click **Start** (Figure 17).

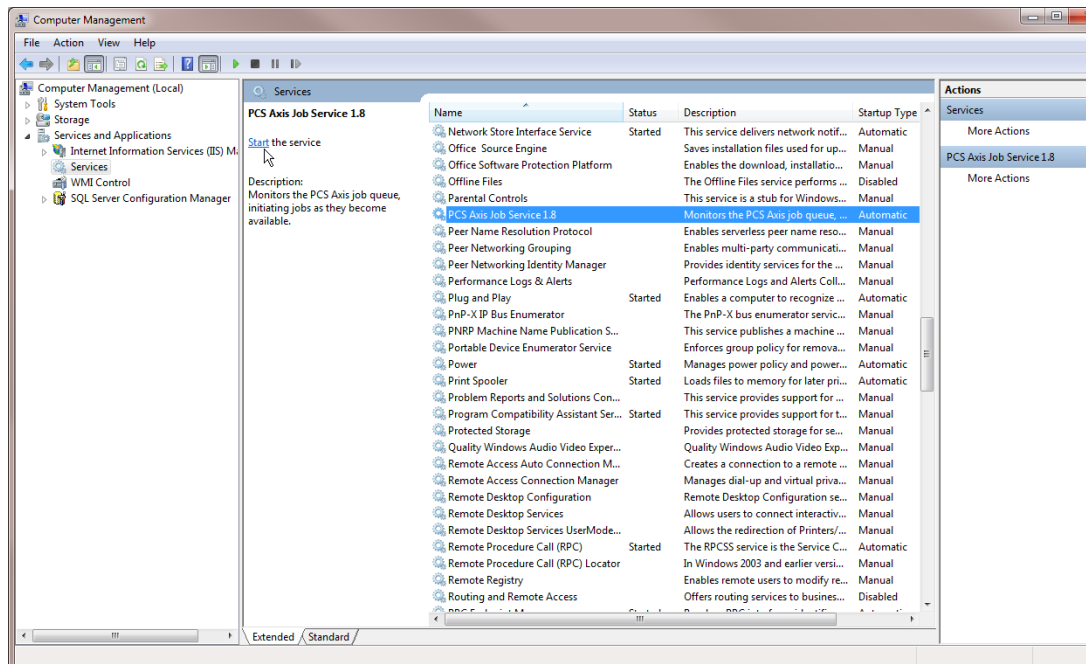**b** Click **File** > **Exit** to close the *Computer Management* console.

Figure 17. Computer Management Console

c In PCS Axis, click **Tools** > **Job Service Viewer**. Verify the message *Running* displays in the *Status* field (Figure 18).

Starting *PCS Axis Job Service* is now complete. Continue with the next section to install the PCS Axis application on local client computers (page 24).
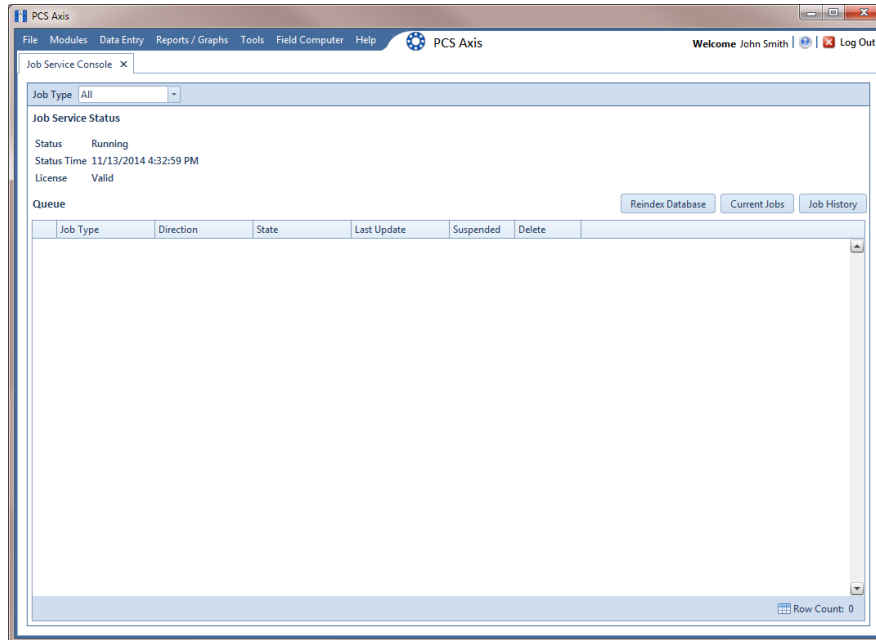
Figure 18. Job Service Console

Installing the PCS Axis Application on a Local Client Computer

Information in this section is intended for the IT System Administrator. It explains how to install only the PCS Axis application on the computer of local client users.

Complete the following steps:

1   If you are using the installation DVD to install PCS Axis, insert the DVD in the DVD/CD-ROM drive of the computer. Open Windows Explorer to view the contents of the installation DVD.

   If you previously downloaded the installation file using a link in an email from PCS Technical Services, navigate to the location of the installation file.

   NOTE: A single installation file labeled *setup.exe* is used to install PCS Axis on a 32-bit and 64-bit computer. If the target computer does not have Microsoft .NET Framework v4.5 installed, the PCS Axis installation automatically installs it. This feature requires an active Internet connection to complete the installation of .NET Framework v4.5.

2   Double-click the **setup.exe** installation file to open the PCS Axis dialog box (Figure 19).

Figure 19. PCS Axis Installation

3   Click **Install** in the PCS Axis dialog box to open *Setup Wizard* (Figure 20, page 25).

4   Click **Next** to read the *End-User License Agreement*. To accept the license agreement, click the check box **I accept the terms in the License Agreement** to place a check mark inside the check box.
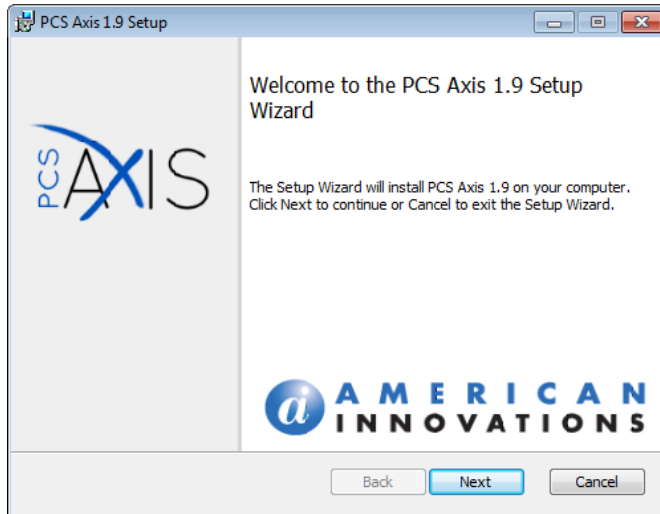
Figure 20. Setup Wizard

5 Click **Next** to display *Custom Setup* (Figure 21).

6 By default the [icon] **PCS Axis** application is selected for installation. The [X icon] *PCS Axis Job Service* **should not** be selected for installation. Verify selections in *Custom Setup* match those in the following figure (Figure 21).

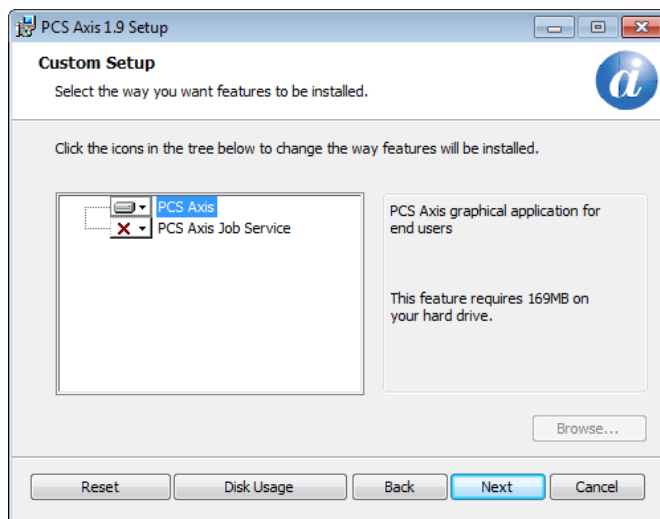**7** Click **Next** and then click **Install** to begin the installation.

Figure 21. Custom Setup

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pcstechservices@aiworldwide.com

When the installation completes and after a short delay, *Connection Manager* opens automatically on top of *Setup Wizard (*Figure 22).

8 Use *Connection Manager* to establish a connection to the PCS Axis database on the central database server as follows:

a Type the name of the central database server in the **Server** field. Or click **Select** in the *Server* field to select the server in the *Select Server* dialog box.

b Type the name of the PCS Axis database in the **Database** field. Or click **Select** in the *Database* field to select the database in the *Select Database* dialog box.

c Click ⊕ **Test** to verify the connection to the server and database. When the message *Connection successful* displays, click ✔ **OK** to close the message. Click 🗗 **Save and Close** to exit *Connection Manager*.

9 Click **Finish** in *Setup Wizard* and then click **Close** in the PCS Axis dialog box to close the PCS Axis installation file (setup.exe).
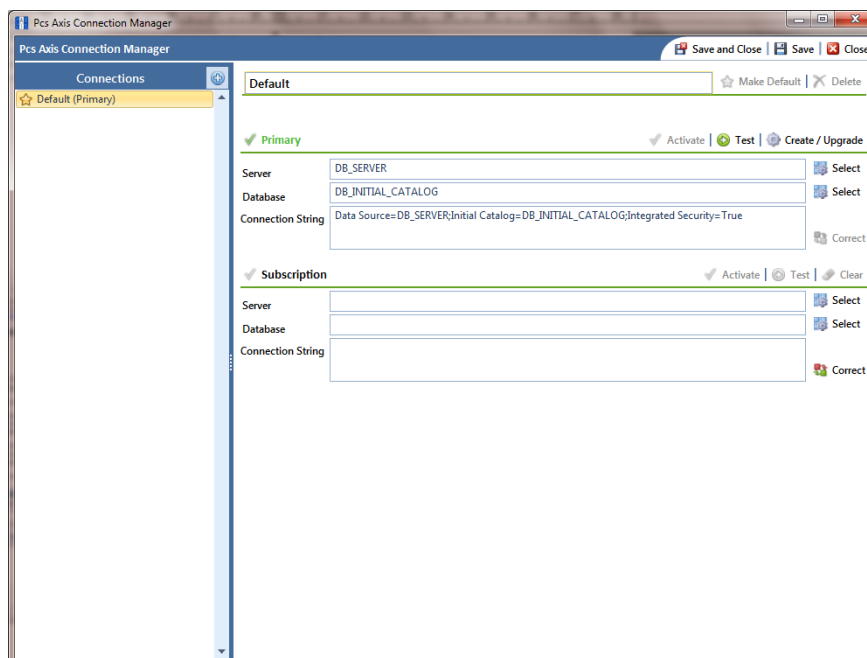

Figure 22.   Connection Manager

10 Start PCS Axis on the client computer. Click the Windows ⊞ **Start** button, then **All Programs** > 🔲 **PCS Axis 1.9**.

11 When the *Activation Key* message opens, click ✔ **OK** and then locate and select your PCS Axis activation key (Figure 23, page 27).

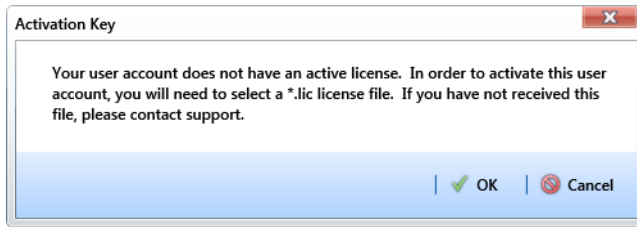**12** When the *License Agreement* window opens, click ✔ **I Agree**.

Figure 23. Activation Key

13 If your company purchased the optional Bridge import add-on, complete the following steps to activate the feature for operation:

a Click **Tools** > **Job Service Viewer** to open the *Job Service Console* (Figure 24).

b Click **Activate Bridge Import License**. When the *Activation Key* dialog box opens, navigate to the license file and select it. Then click **Open** to close the dialog box and return to the *Job Service Console*.

The message *Valid* displays in the *License* field. If *Not Valid* displays instead, contact PCS Technical Services for assistance using the contact information on page 31.
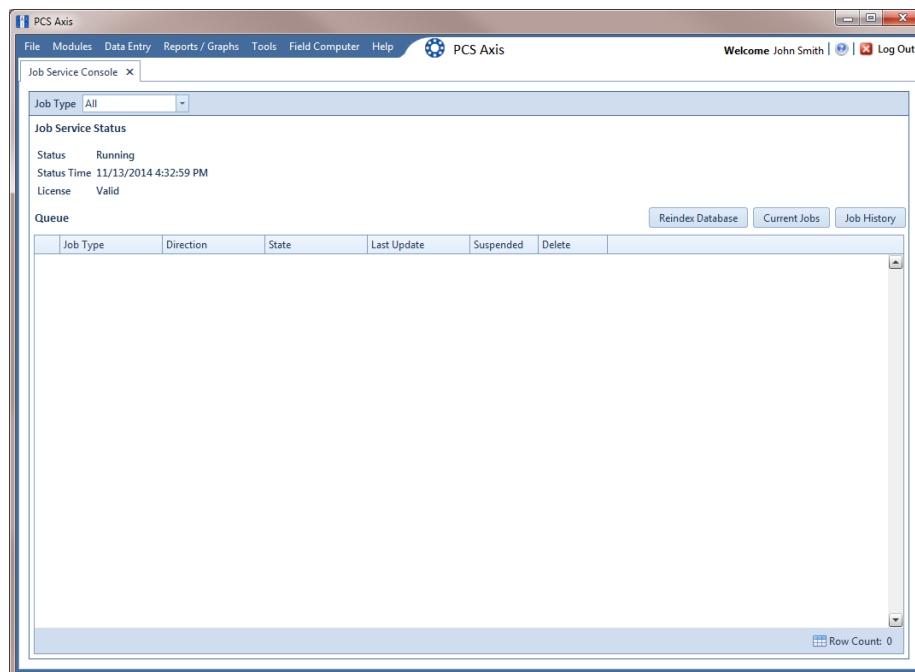

Figure 24. Job Service Console

14 Open the *About* window in PCS Axis to view information about the software and database version. Click **Help** > **About PCS Axis** to open the *About* window (Figure 25).

> **NOTE:** Clicking *Copy To Clipboard* in the *About* window copies the following information to the Windows clipboard: database connection; software application version; and build information (date and time). After copying information to the clipboard, you can then paste it in an email or other type of document, such as Microsoft Word. Use this feature when contacting PCS Technical Services for support with PCS Axis.
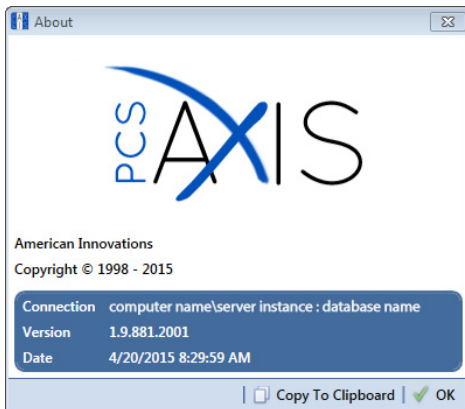

Figure 25. About PCS Axis

15 Repeat the steps in this section (pages 24-28) to install the PCS Axis application on all other local client computers.

The local client installation is complete after installing the PCS Axis application on all local client computers. Continue with the next section to set up users in PCS Axis (page 29).

Setting Up Users in PCS Axis

Information in this section explains how to add users in *User Management* of PCS Axis. The information is intended for the PCS Axis Administrator.

Complete the following steps:

1 Start the PCS Axis application and then click **Tools** > **User Management** > **Add**.

2 Type the user's Windows domain user name in the **User Name** field and then press **Tab**. PCS Axis automatically adds the user's email address. Verify **Active** is enabled.

3 Update other information as needed, such as a user **Role** selection.

4 Click **Save** and then repeat step 2 for each user you want to add. If needed, click the help button in *User Management* to view related information.

IT System Administrator Tasks

☐ Create a local domain user group labeled *Axis_Users* on the central database server. Add PCS Axis users to the *Axis_Users* group who are listed in Windows Active Directory.

> **NOTE:** Remaining IT tasks are completed when Database Administrator tasks are completed.

☐ Install PCS Axis Job Service on the same server as the PCS Axis database or on a separate network server. Then use Windows Services to start *PCS Axis Job Service.*

☐ Install the PCS Axis application on the local computer of the PCS Axis Administrator and all other users. Use PCS Axis Connection Manager during the installation to set the server and database connection.

Database Administrator Tasks

☐ Restore the PCS Axis database on the central database server.

☐ Use SQL Server Management Studio (SSMS) to run the provided *Fill Factor Reset* script labeled *Defrag Fill Factor Reset Post Deployment.SQL*. Run this script after installing or upgrading the publication database as well as creating one or more subscription database(s).

☐ Use SSMS to create a database maintenance job using the provided *Reindex Stored Procedure* labeled *dbo.DefragmentIndexes*.

☐ Create a new login for the PCS Axis database labeled *Axis_Users.*

☐ Set the following permission roles for the new login *Axis_Users*:

   ☐ Axis_Users

   ☐ db_datareader

   ☐ db_datawriter

   ☐ db_ddladmin

   ☐ db_owner

   ☐ public

PCS Axis Administrator Task

☐ Run PCS Axis and add users in *User Management*.

Product Support and Training

If you have a suggestion, question, feature request, or a bug to report-your feedback would be appreciated. Also if you have a training need for your organization or would like to know more about upcoming PCS Axis training classes, please use any of the following contact information to reach PCS Technical Services:

Support E-mail: pcstechservices@aiworldwide.com

Support Telephone: 1-800-229-3404 (select 1, then press 2)

American Innovations: http://www.aiworldwide.com