evisions
IntelleCheck

Payment Processing Solution

IntelleCheck Installation Guide

Product version 3.8

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Overview

This guide contains instructions for installing IntelleCheck in a Banner® by Ellucian™ environment. It assumes that you have already installed and configured MAPS, which is the Multiple Application Platform Server on which the Evisions Higher Education products run. If you have not yet installed MAPS, please refer to the MAPS Installation Guide for detailed instructions on how to import your license, download the IntelleCheck mapplet and IntelleCheck client application, and configure your users, groups, database connections, and printers for use with IntelleCheck.

You may find it useful to take a look at some of the IntelleCheck documentation before beginning the installation. The Resources section of this document contains links to the product Help, End User Guide, and Administrator Guide, which can help you to understand the product and its functions.

The following procedures must be followed closely to ensure a proper installation. It is assumed you have a working knowledge of your Banner® host operating system and are familiar with the basic structure of your Banner® installation. Please do not take shortcuts when typing the commands contained in this document, as they are specific. It is also assumed that you have a working knowledge of Oracle and basic administration commands. Keep in mind that all commands shown are case sensitive for UNIX.

If you encounter any problems or have any questions during this installation, please don't hesitate to contact Evisions Support so we can assist.

System Requirements

IntelleCheck requires:

- Any version of Banner
- Any Banner platform (Unix or NT)
- Oracle table space size – Approximately 70MB
- Printers – A laser printer that is PCL 5 compatible is required. Refer to the IntelleCheck Implementation Guide for further details about printer and toner requirements.

Please refer to the MAPS - Hardware and Software Requirements document for system requirements for the MAPS server and end user machines.

Step 1: Create the "evisions" Oracle User

You will need to create a new Oracle user called `evisions` in each Banner® Oracle instance where you will be using IntelleCheck. This user will own the Evisions IntelleCheck Oracle tables.

In SQLPLUS, type the following (changing the password/tablespace as needed):

```
CREATE USER EVISIONS IDENTIFIED BY PASSWORD DEFAULT TABLESPACE DEVELOPMENT TEMPORARY TABLESPACE
TEMP;
```

Then, make sure that this user has appropriate access to be able to create the necessary tables.

In SQLPLUS, type:

```
GRANT RESOURCE, CONNECT, BAN_DEFAULT_CONNECT, BAN_DEFAULT_Q, CREATE TABLE, CREATE PUBLIC
SYNONYM, DROP PUBLIC SYNONYM, UNLIMITED TABLESPACE TO EVISIONS;
GRANT SELECT ON GXVBANK TO EVISIONS;
GRANT SELECT ON PTRPICT TO EVISIONS;
```

> **Important Note**
>
> If you already have a user called `evisions` that is used for another Evisions product, ensure that this user has the `BAN_DEFAULT_Q` role. If this was not done when the user was created, it should be done now using the `BANSECR` process in Banner.

Step 2: Configure MAPS for Use with IntelleCheck

Log in to the machine where MAPS is installed, either directly or via a tool such as Remote Desktop. You must log in from the server because you will be creating new data connections for IntelleCheck and configuring printers.

Open a web browser and navigate to the URL for your MAPS installation. If this is a new installation, the default URL from the server is http://localhost:8080. Adjust the protocol and port number as required if you have changed these settings in MAPS.

Go to the **MAPS Config** section in the eLauncher and select the button to launch the MAPS Config application:
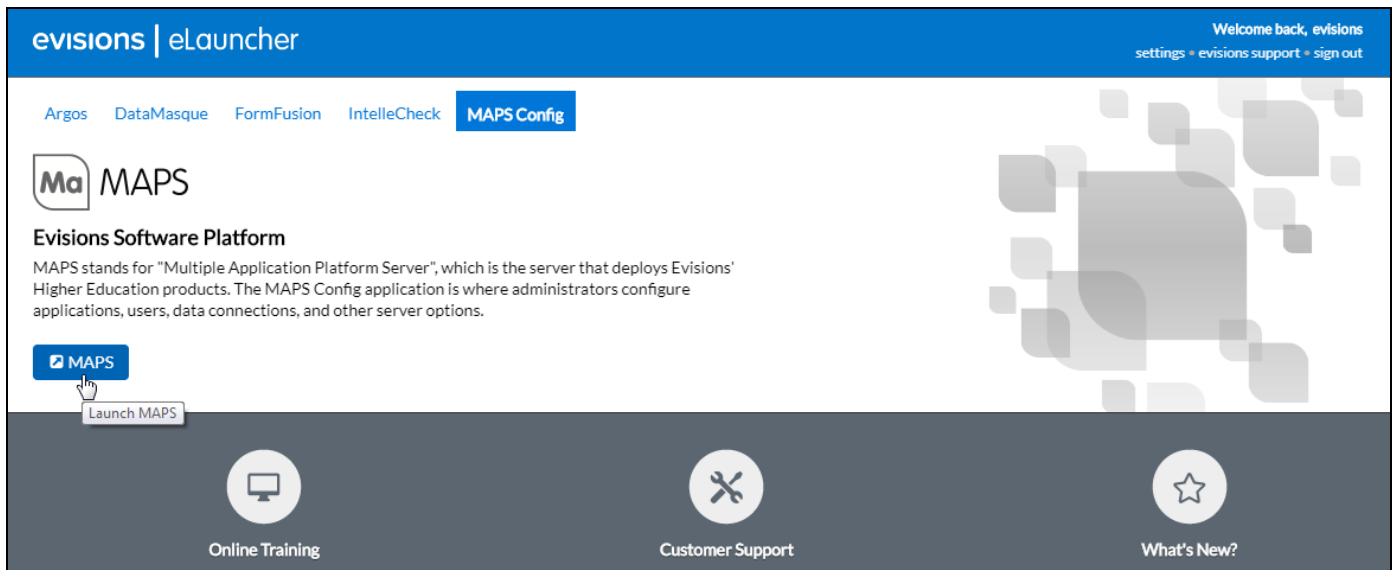
When prompted, log in to MAPS using your administrative credentials. The default credentials for a new installation are "Administrator" and "Password" (with a capital 'P').

Import/Update Product License

Go to the **License** screen in MAPS. If you are a new Evisions client, you will have been supplied with a license file to import. This is generally emailed to the person who submitted the purchase order. Please open a case if you require assistance locating your license file.

Click the **Read from File** button to browse for the file:
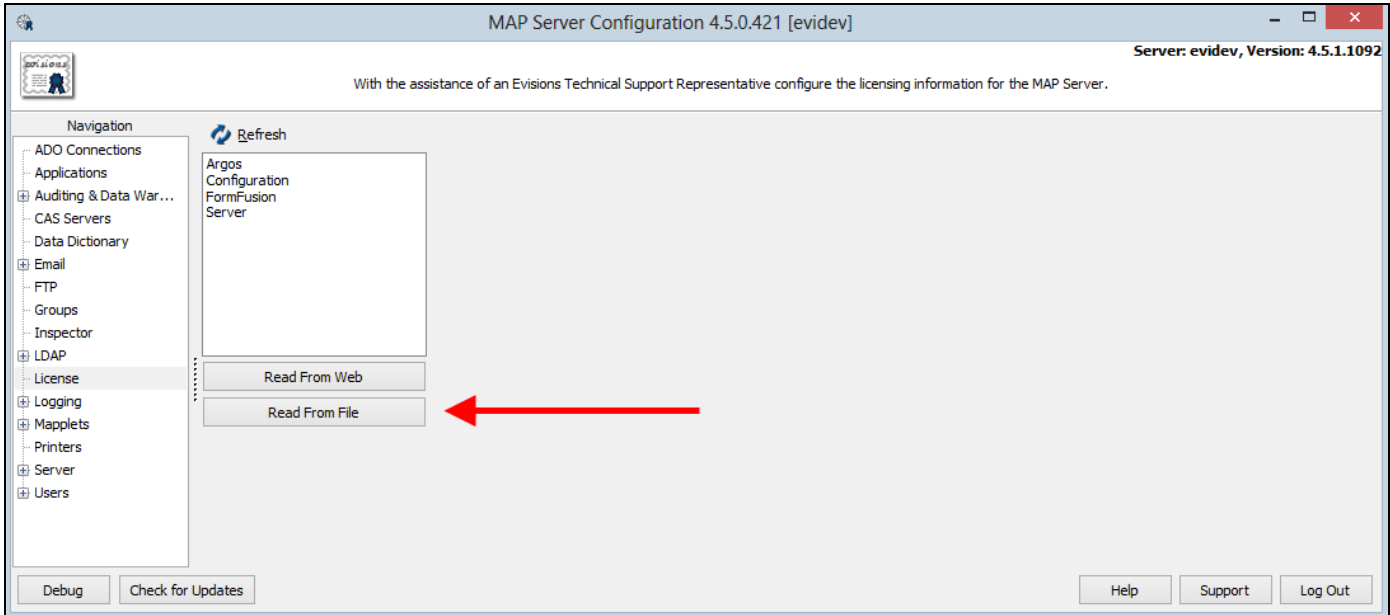

If you have other MAPS applications, you can use the **Check for Updates** button instead to retrieve your updated license file from Evisions' servers. You could also click **Read from Web** on the License screen to download the new license file.

Whenever a new application is added to your license, you will be prompted to download and install the necessary application files. Click **Yes** to proceed, then wait for the IntelleCheck files to finish downloading.

When the installation has finished, you will see that IntelleCheck has been added to the list of products on the License screen. Selecting IntelleCheck in the list displays detailed license information, including license information for any of the optional modules.

To confirm that IntelleCheck has been installed, verify that you see the IntelleCheck mapplet on the **Mapplets** screen, and the IntelleCheck client application on the **Applications** screen.

Configure Users and Groups

In order to use IntelleCheck, you will need to add some users to MAPS. You can either add users individually, or as part of an LDAP group. For full details on adding users and groups, refer to the MAPS Help.

IntelleCheck requires the use of a user named "evisions". To create this user in MAPS, go to the **Users** screen and click the **Add** button.
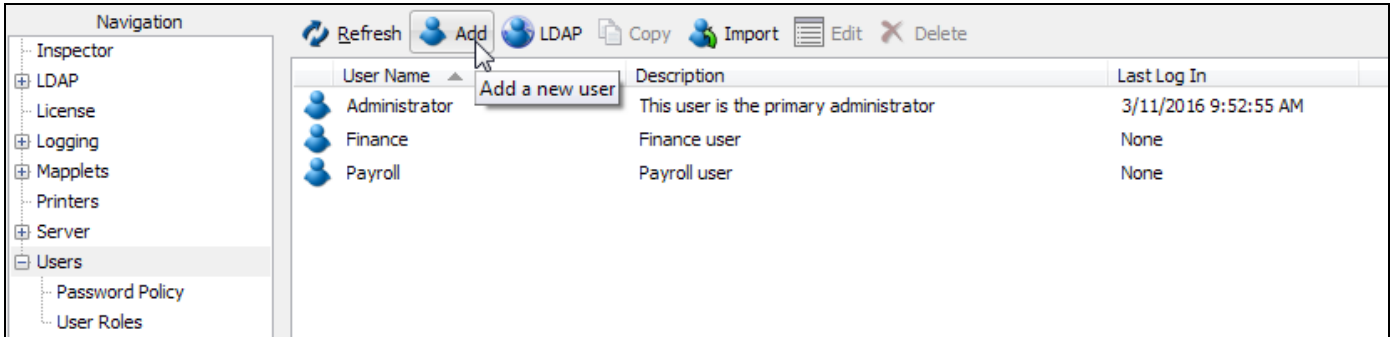
Enter "evisions" as the username on the **General** screen. On the **Source** screen, enter the password for this user. If this will be the actual password, uncheck the box that requires the user to change their password at next logon.
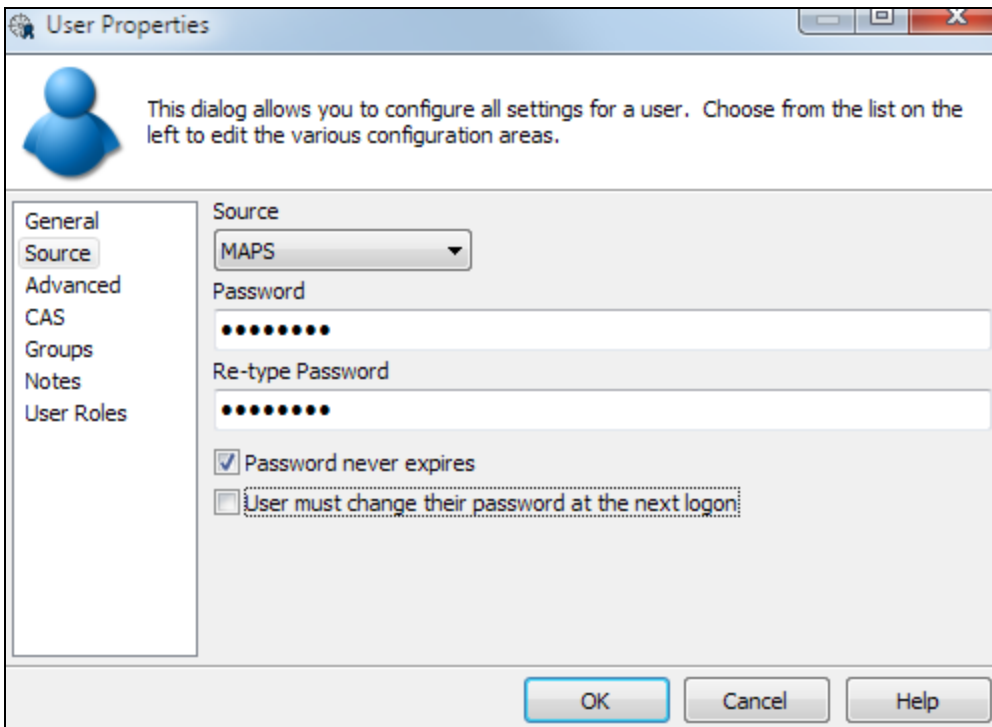
Add any additional users you wish to add at this time. When finished, go to the **Groups** screen to configure your IntelleCheck group(s).

Click the **Add** button to add a new group.
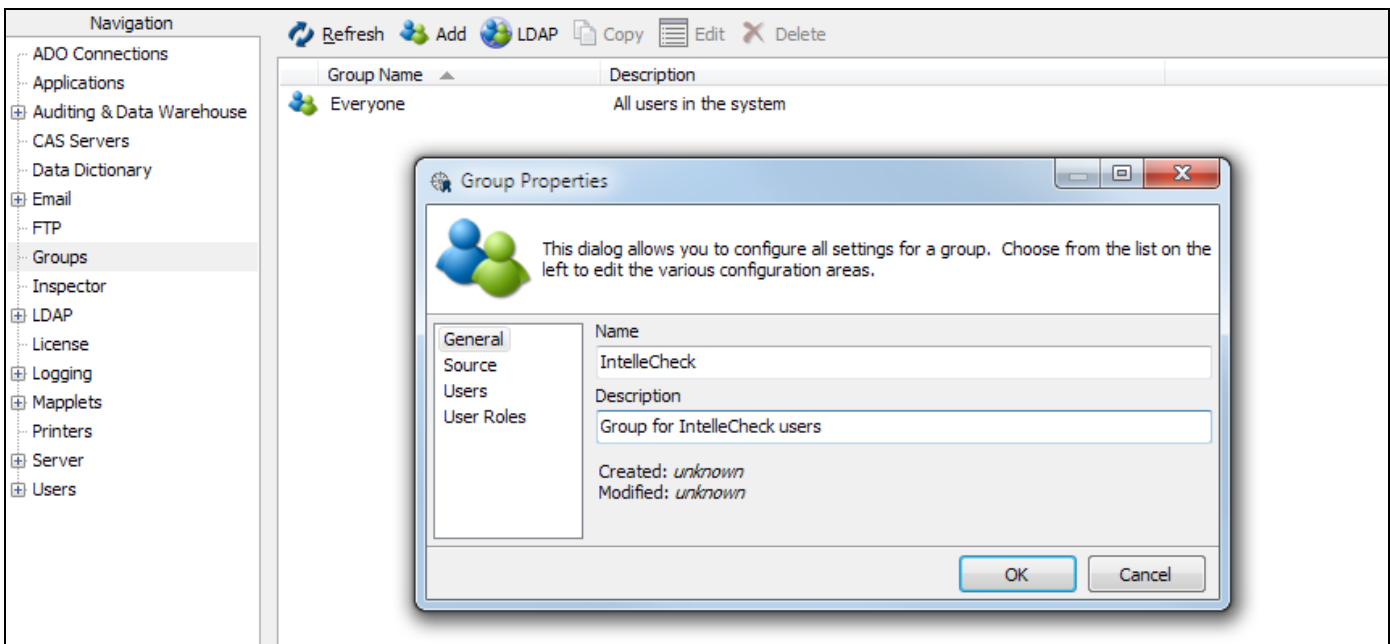
Within the Group Properties dialog, go to the **Users** section. Add the "evisions" user to the **Members** list by selecting this user from the list of non-members and then clicking the arrow button. The "evisions" user will now appear in the list of group members.
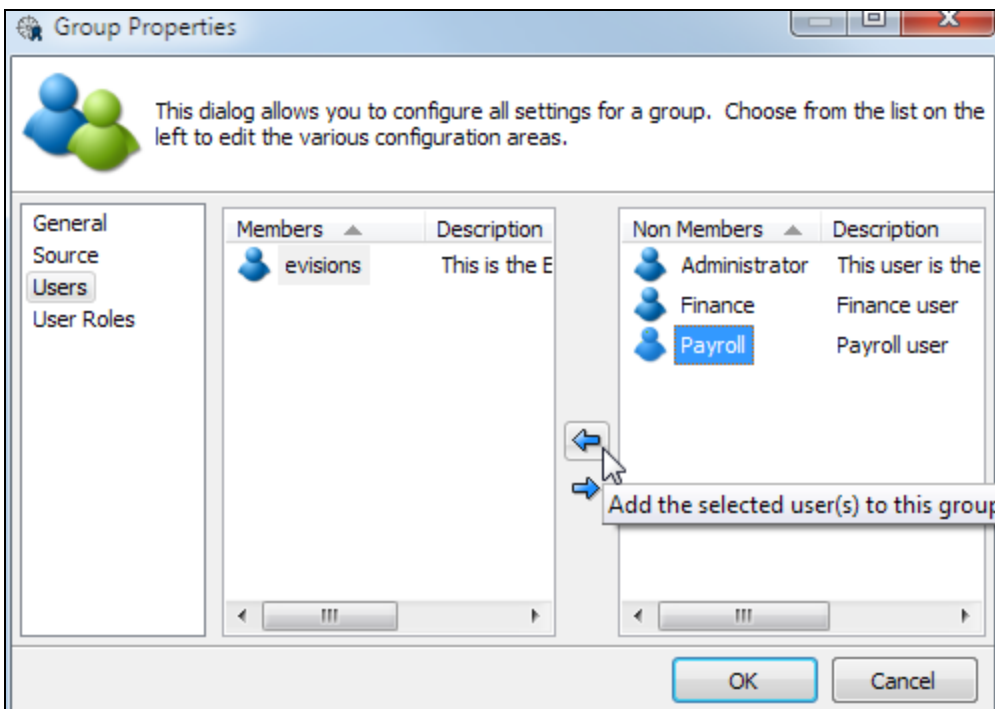
You may also add additional users to the IntelleCheck group at this time. For more information, refer to the MAPS Help.

Configure Data Connections

You will need to create a new data connection specifically for IntelleCheck for each Oracle instance that you will be using with IntelleCheck (you may already have a data connection for a given Oracle instance if you have previously configured it for another product).

Go to the **Data Connections** screen. After selecting the appropriate connection pool (if any), click **Add Connection**.

Enter a name for this connection (we recommend using the database name), then go to the **Driver Properties** tab. Here, you can choose whether to use an ADO connection or a native Oracle connection, depending on the database provider you are using.

To create an ADO connection, select "ADO" in the drop-down and then click on the ellipsis (…) to build the ADO connection string.
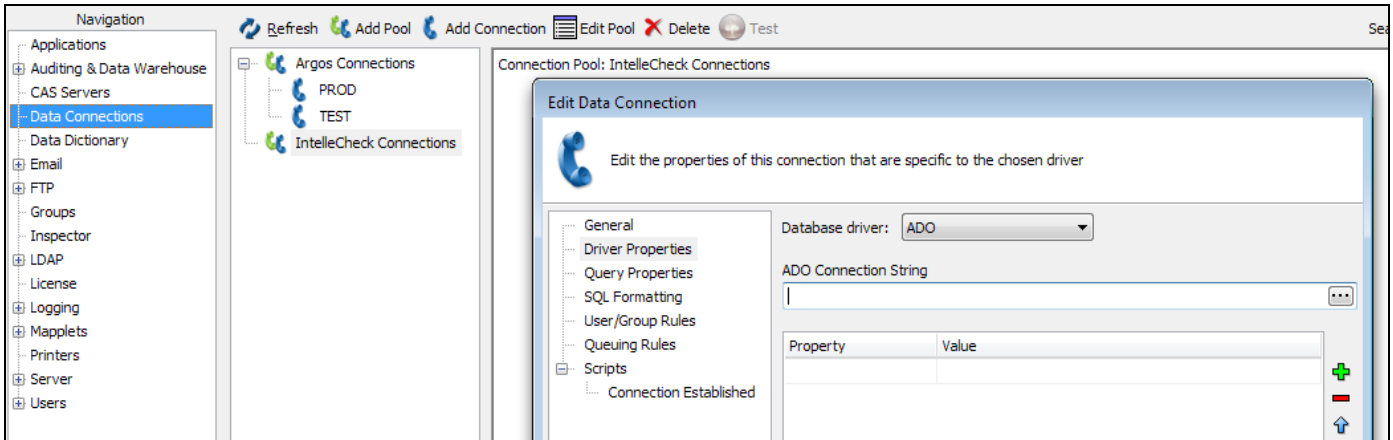
In the Data Link Properties dialog that opens, on the Provider tab, select the Oracle Provider for OLEDB.
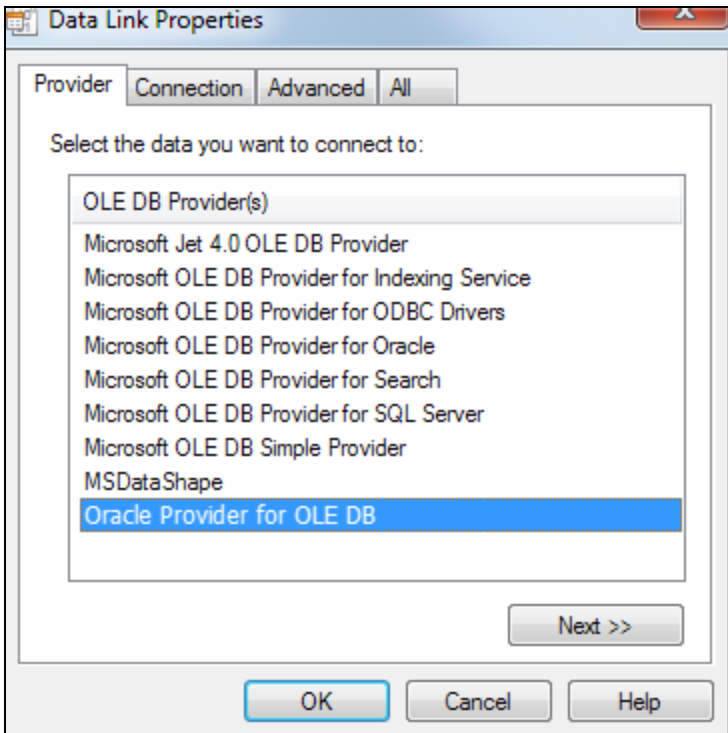
On the Connection tab, enter the data source name, and the login information for the `evisions` Oracle user (database user). If you will be using the connection username and password, check the box to allow saving password. You can then use the **Test Connection** button to verify that the data source configuration is correct.
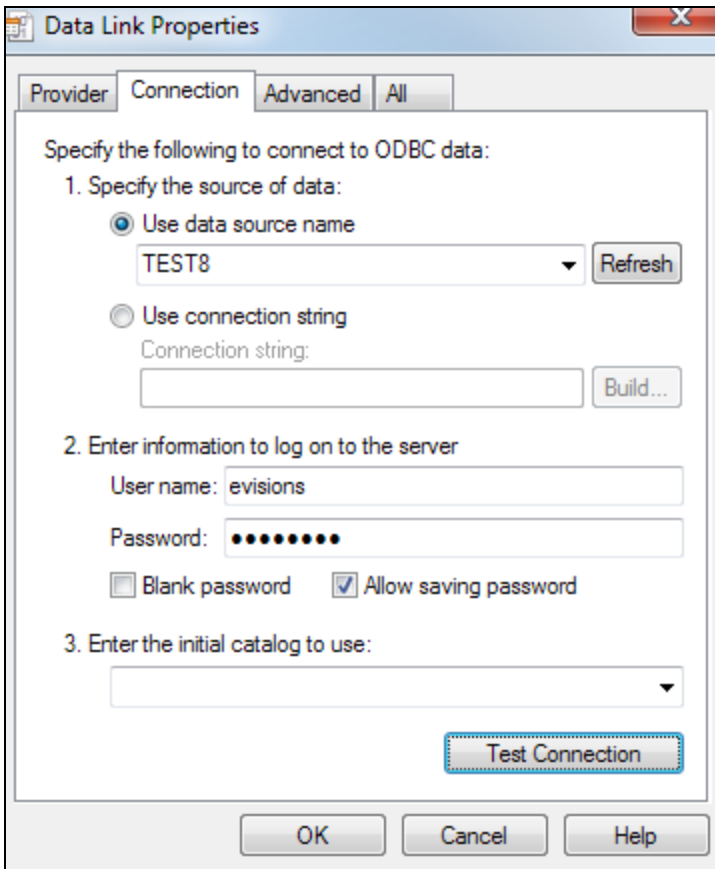
Click **OK** to return to the Edit Data Connection dialog.
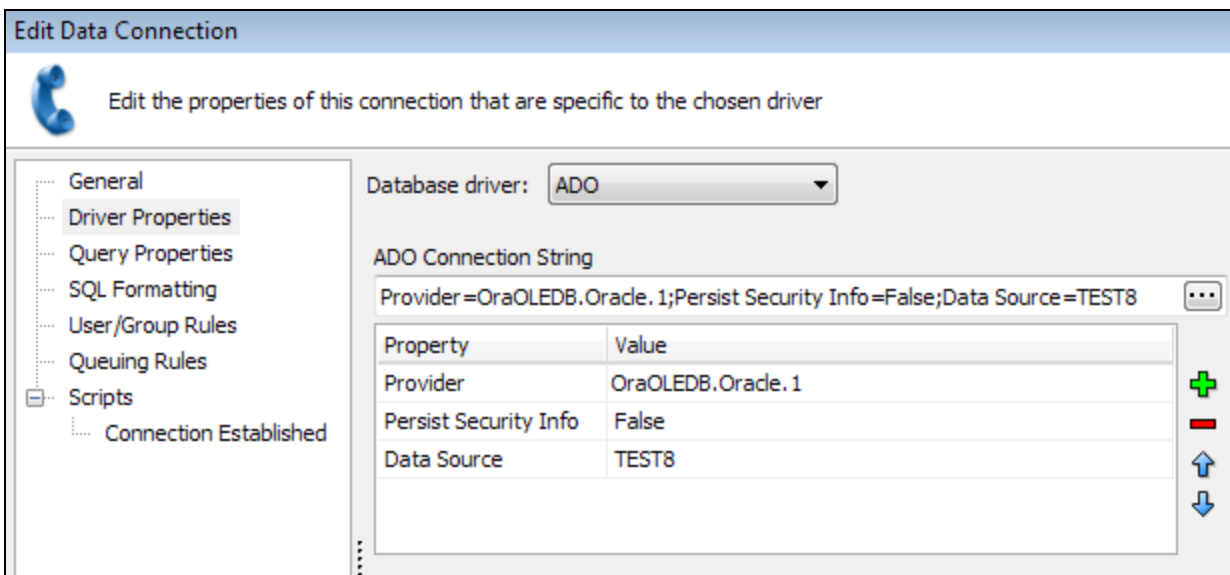
If you want to use a native Oracle connection, you would simply select Oracle in the database driver drop-down, and then enter the desired properties. Native connections may be faster than ADO connections for certain types of queries.

- If you have more than one Oracle Home, you may wish to specify which one to use, or leave it set to <use default>.
- The Service Name is the name of your database. This drop-down list is populated based on the databases in your tnsnames.ora file.
- As with ADO connections, you can choose to specify a connection username and password here, or use the credentials defined on the User/Group rules screen (described on the next page) for specific individuals or groups.

Regardless of which Oracle driver you are using, next you will go to the **SQL Formatting** screen and select the appropriate SQL format for your database. In this case, we are selecting Oracle.

Next, go to the **User/Group Rules** screen.
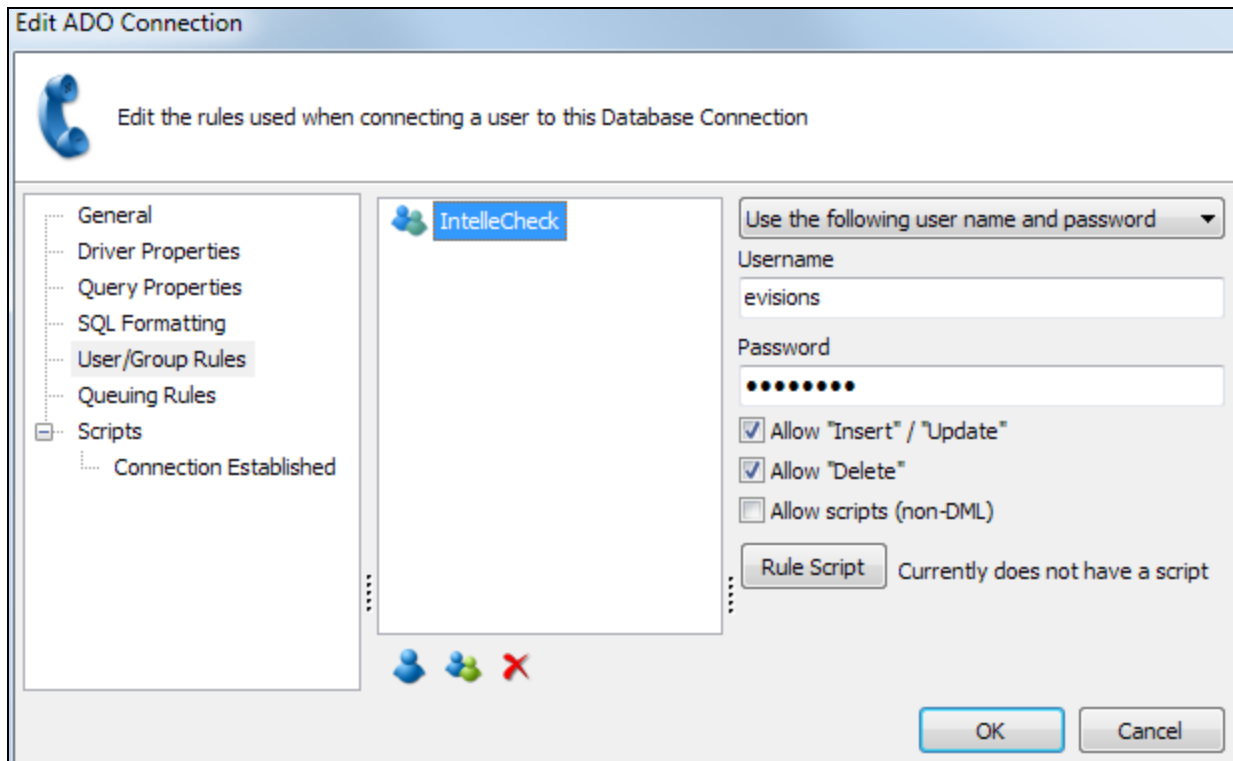
Select the "Everyone" group and click the ✖ button to remove this group from the connection, since we do not want all users to be able to connect to IntelleCheck. Alternatively, leave the "Everyone" group but change the dropdown for this group to "Not allowed to connect".

Use the Add Group 👥 button to select the IntelleCheck group that you just created. If you checked the option to remember the password, you can select "Use connection username and password". Otherwise, select "Use the following username and password" and enter the database login credentials for the Oracle `evisions` user below.

Check the boxes to allow insert/update and delete operations to be performed using this connection. You will have the option within IntelleCheck to control which users have permission to perform various functions, but the connection itself must be allowed to perform these operations.

For more information on data connection configuration, refer to the MAPS Help.

Configure Email Servers

Go to the **Email** section, then select the **Servers** page beneath it. This is where you configure the email servers that IntelleCheck will use when emailing Direct Deposit advices, file copies, etc. If you have other Evisions Higher Education products, you may already have an email server configured. If not, click the **Add Server** button.

Enter a friendly name for this email server, along with the host or IP address and port number. If you do not know what security method should be used with this email server, leave it set to the default of "auto detect".

The **username** and **password** should be the credentials for the email account to be used for sending the emails.

If you wish to retain a log of email messages, check the **Logging** box. Email log messages will be included in the MAPS log unless you specify an alternate filename. If you send out a large number of emails, email logging may vastly increase the size of the MAPS log if you do not specify an alternate email log file.

Click **OK** to add the email server.

Select the email server. Right-click in the **authorized for use with** pane on the right, and select **Add Group**. Select the IntelleCheck group so that users in this group will be able to use the mail server. You may also add additional users or groups if desired.
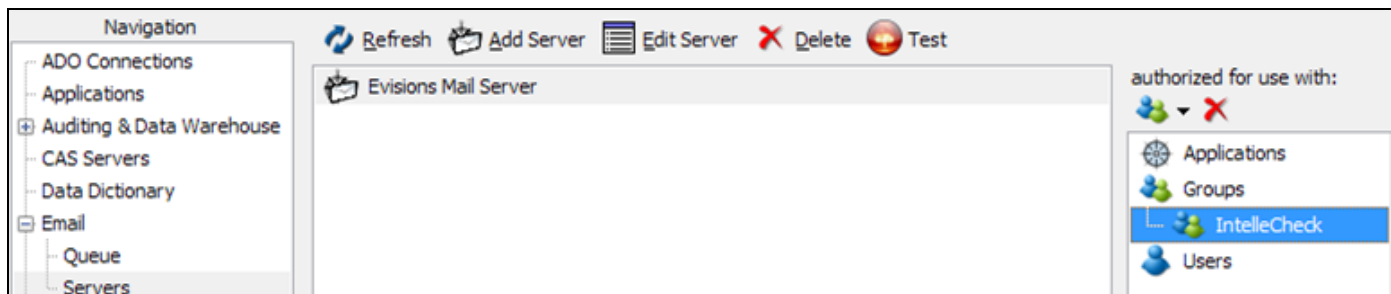
Configure Printers

By default, IntelleCheck allows users to print to their local printers, as well as to any MAPS printers they have access to that are authorized for use with IntelleCheck.

> **Supported Printers**
>
> IntelleCheck supports laser printers that are compatible with PCL 5. PCL 6 drivers may or may not also include support for PCL 5. If you are using the HP Universal Print Driver, please ensure that you download the PCL 5 version (6.1) for use with IntelleCheck.

Adding Printers to MAPS

To add a printer to MAPS, go to **Printers** in the Navigation pane, then select **Add Printer**. The Print Setup dialog will show you a list of all printers installed on the machine. Select the appropriate printer from the dropdown, then click OK.
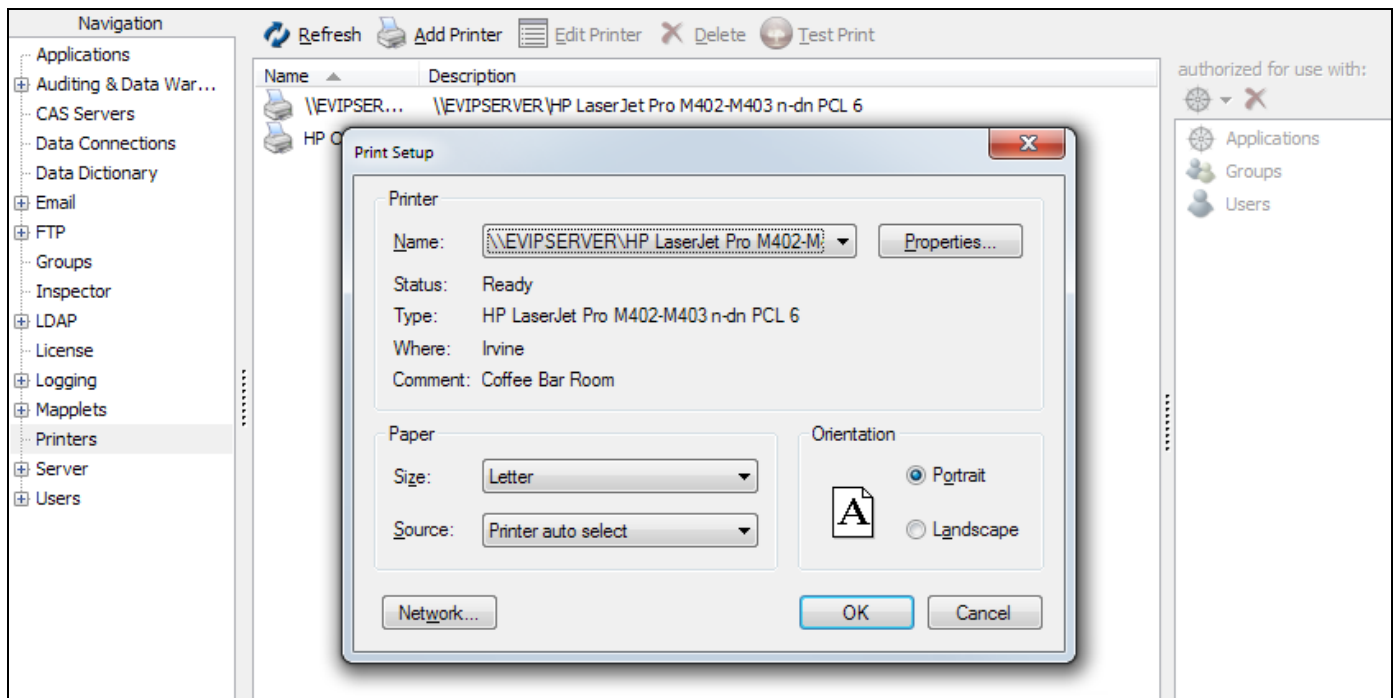
Notes:

- You must add printers from the MAPS server itself, or from a Remote Desktop connection to the server.
- You should log in to the server where MAPS is installed as the user the MAPS service is running as, and this user must have permissions to use the printers you wish to add.
- The printer driver must be installed on your server or installed as a network printer and accessible to MAPS for it to appear in the Print Setup dialog.
- MAPS requires a printer to be added to the server if one doesn't already exist. It can be a dummy printer if no physical printers are connected to the server. In either case at least one printer must be added to the server.

> ### Configure Printers from the Server!
>
> The printers that appear in the dialog are those that are available to the local system. In order for your printers to work correctly, you MUST add printers from the machine where MAPS is installed, or via a Remote Desktop session to this machine.

You can now authorize the printer for use by individual applications, users, and groups. Right-click in the **Authorized for use with** pane on the right (or use the dropdown menu) and choose **Add Application**, **Add Group**, or **Add User**. These options open a list of available users, groups, or applications that can be authorized for use with the selected printer.
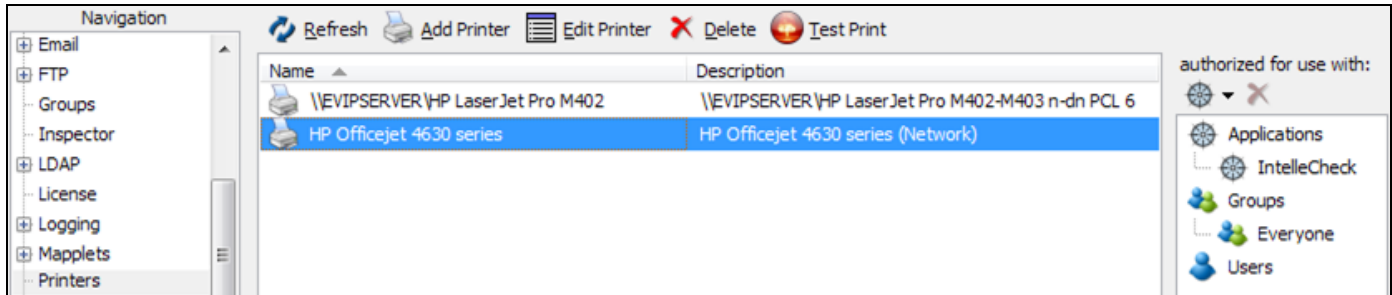
In this example, use of the HP Officejet 4630 printer is limited to the IntelleCheck application, and is available to all users (the "Everyone" group) who use IntelleCheck. To restrict access to specific users or groups, authorize those users or groups individually instead of using the "Everyone" group.

To verify that the printer was added to MAPS successfully, select the printer and then click the Test Print button at the top of the screen to send a test page to the printer.

If you run into any problems adding your printers, refer to the Troubleshooting section of the MAPS Help.

Printer Configuration by Account Code

The **Administration** -> **Account** area of IntelleCheck allows you to specify per account code whether users are allowed to print payments to their local printers or to specific MAPS printers. This gives you fine-grain control over which payments can be printed to which printers.

For maximum security, you may wish to only allow users to print checks to specific designated printers that are in a secure physical location.

Add Authorizations for IntelleCheck

The final step in the MAPS configuration is to authorize the users, groups, data connections, printers, and email servers that you just added so that they can be used with IntelleCheck.

Go to the **Applications** screen and select the IntelleCheck application.

> If you do not see IntelleCheck in the list of applications, click the **Check for Updates** button at the bottom of the configuration tool. You should see a message asking if you want to install IntelleCheck. Click Yes to add IntelleCheck to MAPS.

Right click anywhere in the **authorized for use with** pane on the right and select **Add Connection**.
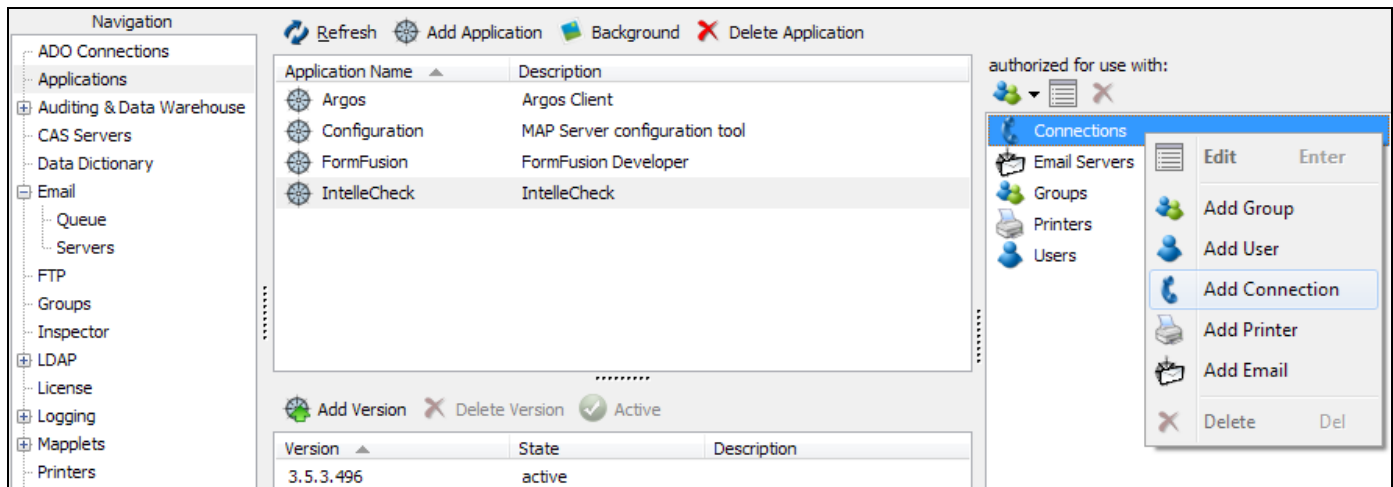
Select the data connection(s) that you added earlier, then click **OK**. In a similar manner, add the IntelleCheck group, any individual users that you want to be able to use IntelleCheck, and the email server.
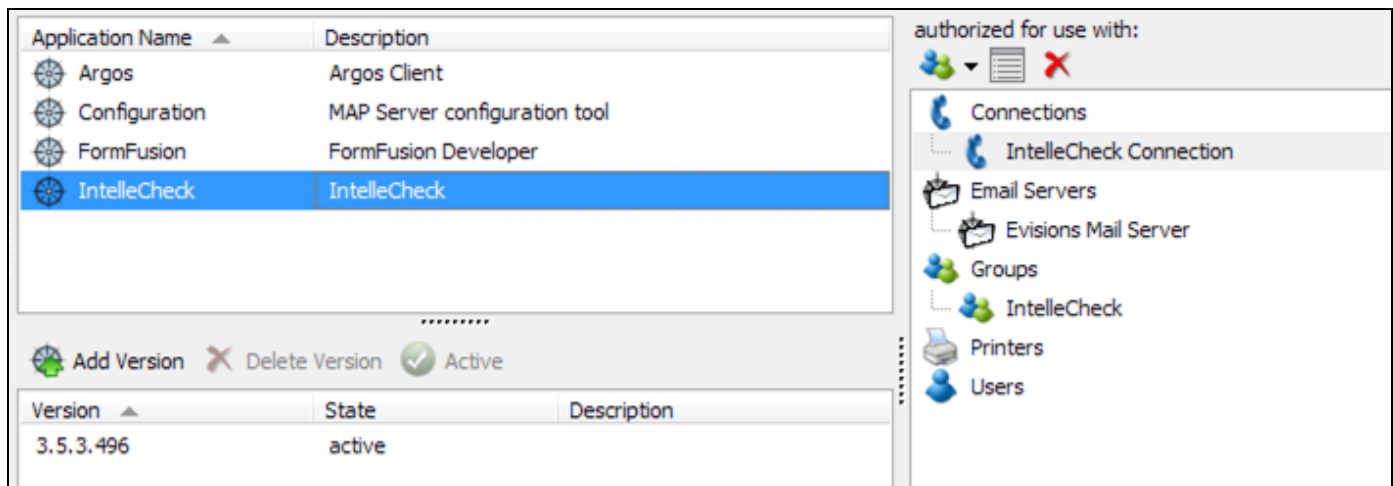
The MAPS configuration for your IntelleCheck installation is now complete.

Step 3: Create the IntelleCheck Tables

Delete this text and replace it with your own content.Launch IntelleCheck from your web browser, using the URL described in Step 2.
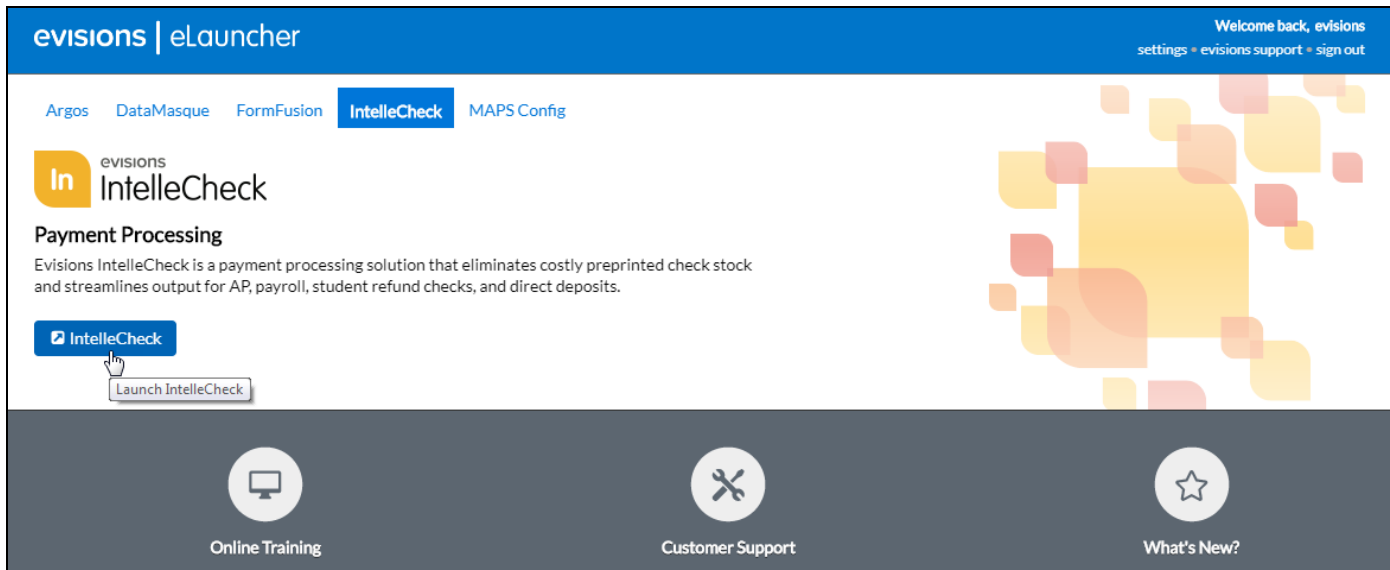
If prompted to select a version, choose the desired version (typically the newest). Note: You can control which versions appear in this list on the Applications screen in MAPS. If only one version is currently active, you will not be prompted to choose a version.

From the IntelleCheck main menu, choose **Administration** and then go to **Database**.
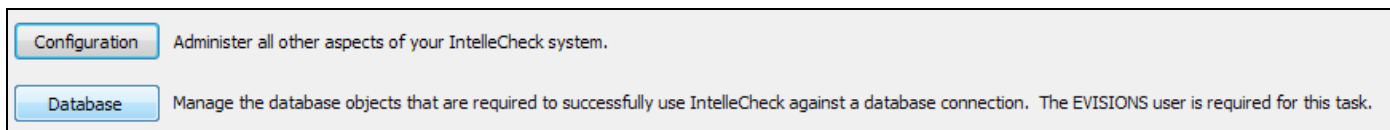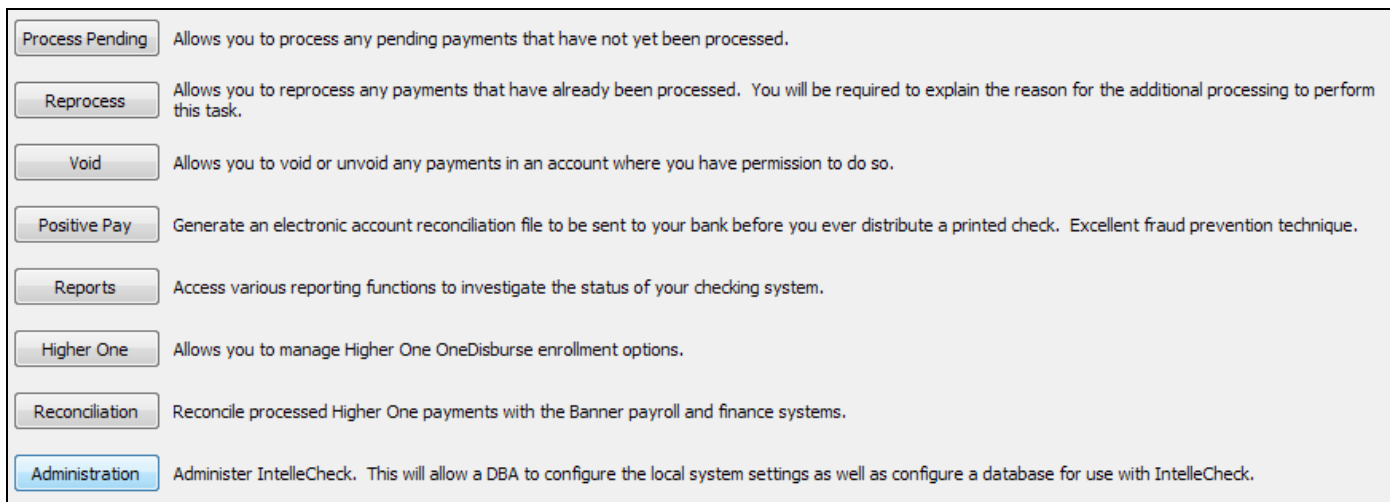
You will then be prompted to log in to the database.

The username defaults to "evisions" for table maintenance. Enter the password for the MAPS "Evisions" user. Select the data connection for the Oracle instance that you wish to create the IntelleCheck tables for. If you do not see any data connections listed, click the **Refresh** button.

Select **Create Objects**. You will be prompted to select a path to export the table creations scripts to.

Enter the desired path, then select **Extract All**. When complete, select **Finish** to continue.

Before each new table is created, you will be given an opportunity to review or modify the script. If you wish to use the default scripts, you can select **No to All** and you will no longer be prompted.

Repeat for Additional Oracle Instances

Repeat Step 3 to create the IntelleCheck tables for each Oracle instance that you wish to use with IntelleCheck.

Step 4: Configure IntelleCheck

From the main IntelleCheck menu, select **Administration** and then **Configuration**.
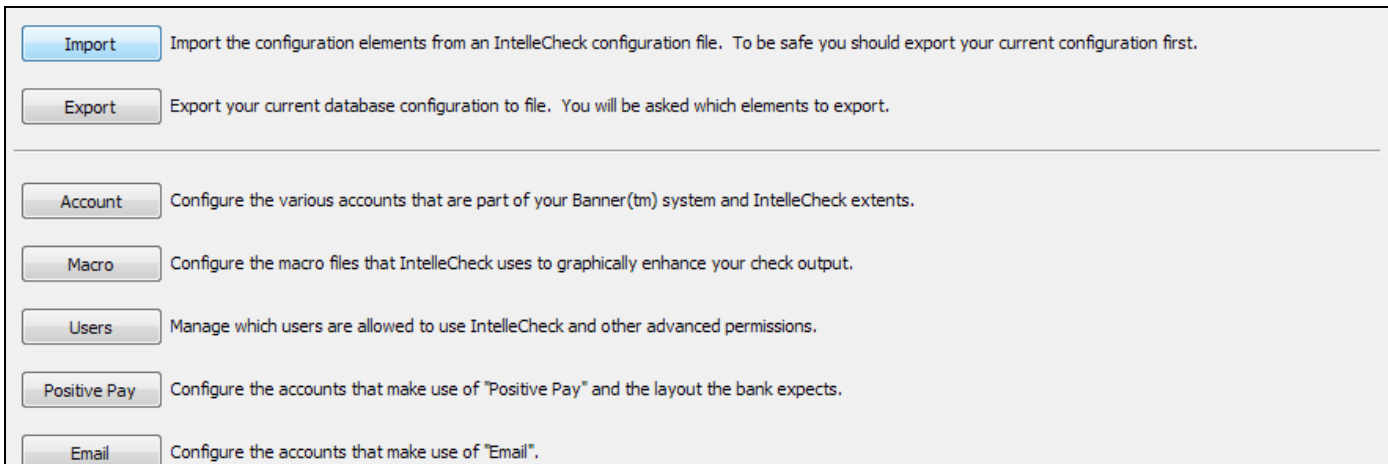
Import Configuration File

You will now need to import the setup file that was provided to you by Evisions (.icc file). Note: If this is NOT a first-time IntelleCheck installation for this database instance, it is recommended that you export your current configuration before importing the configuration file.

Click the **Import** button to select the file. If you were provided with multiple configuration files, please perform the import step for each of the files in the order that they were provided to you.

Configure Users

Select the **User** button to manage which users will have access to the various AP and/or Payroll accounts. You can add or remove users by selecting the user and clicking the blue arrows.
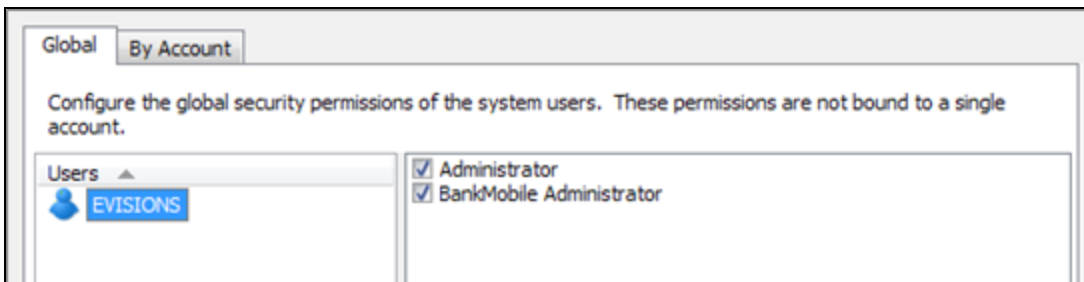
The users displayed on the **Global** tab are IntelleCheck and/or BankMobile administrators. Administrator privileges are required in order to access the Configuration area. BankMobile administration privileges are required in order to access the BankMobile configuration area.

Users listed on the **By Account** tab only have permission to use the accounts that they are added to. On this screen, first select the account (bank code for AP or pay ID for Payroll) you want to manage. The accounts are automatically pulled from your Banner tables for both AP and Payroll. The Users list underneath the account dropdown shows the list of all users who have access to this account. To add a user, select them in the **Existing Users** list on the left, and then click the right arrow button to move them to the list of users.
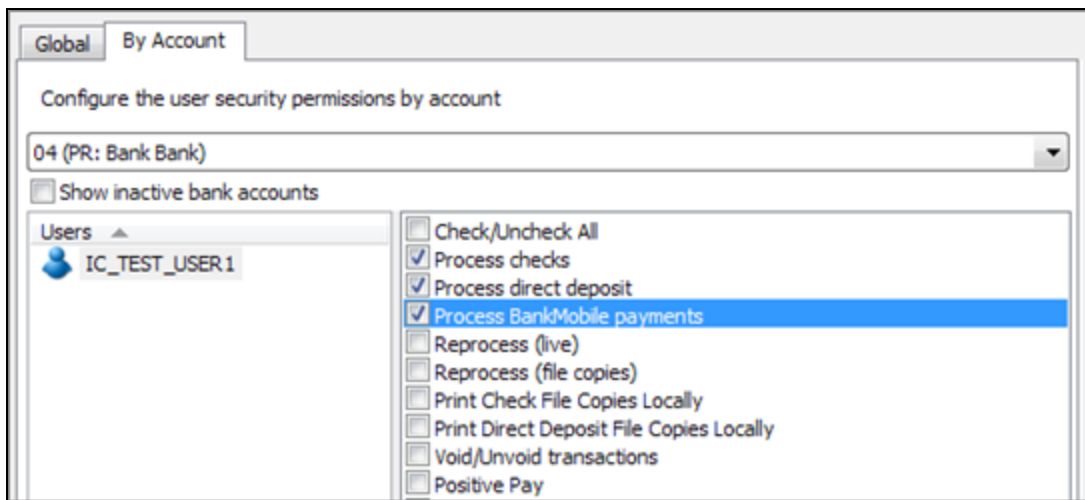
You can add or remove account options by checking or unchecking the boxes on the right. Each option grants a specific permission for this account, such as the ability to process checks, process direct deposits, perform reconciliation, etc.

You will need to repeat this step for each account that you wish to manage.

Configure Email

If you purchased the option to email direct deposit advices, you will need to refer to the Email section of the IntelleCheck Administrator Guide to complete the setup. The IntelleCheck Administrator Guide is located within the IntelleCheck Help.

> **Repeat for Additional Oracle Instances**
>
> If you will be using IntelleCheck with more than one Oracle instance, repeat Step 4 to perform the IntelleCheck configuration for each Oracle instance that you wish to use with IntelleCheck.

Step 5: Install IntelleCheck Files on the Banner Server

Depending on which IntelleCheck modules you have purchased, Evisions will provide you with one or more source code files that you will need to copy to your Banner® server. It is recommended that you create a separate directory to keep the IntelleCheck files in, so that you can find them easier when they need to be updated.

- `fabchkp.pc` – AP
- `fardird.pc` – AP direct deposit
- `phpchkl.pc` – Payroll checks and/or direct deposit

UNIX Installation

1. Create a directory called "evisions" under the home directory of the "banner" user on your UNIX host and place the `fabchkp.pc`, `fardird.pc` and/or `phpchkl.pc` files there. When you FTP the files over, please make sure you are using an ASCII transfer method (not binary) to prevent compilation issues.

2. Log in to your UNIX host as the "banner" user (or your equivalent if you do not have a "banner" user) and navigate to the directory that you placed the files in.

3. The `fabchkp.pc`, `fardird.pc` and `phpchkl.pc` files that Evisions provides are customized versions of the baseline Banner files of the same name. Before proceeding, back up the baseline files, which should be located in your `$EXE_HOME` directory (or `$BANNER_HOME/general/exe`), as they will be overwritten during the next step. **Note:** Make sure you are pointed to the proper Oracle SID and Banner environment (codetree) before you perform the backup.

   Type the following commands to back up the files:

   ```
   cp $EXE_HOME/fabchkp $EXE_HOME/fabchkp_backup
   cp $EXE_HOME/fardird $EXE_HOME/fardird_backup
   cp $EXE_HOME/phpchkl $EXE_HOME/phpchkl_backup
   ```

   Note: Use the `cp` command, NOT `mv`. Using `mv` will affect the links (indirectly) and could cause problems in the future.

   Before proceeding, verify that the files have been successfully backed up. You should also verify that you are still pointing to the correct Oracle SID and Banner environment.

4. Compile the new Evisions version of `fabchkp.pc`, `fardird.pc` and/or `phpchkl.pc` using the following commands:

   For AP checks:

   ```
   make –f $BANNER_HOME/general/c/sctproc.mk fabchkp
   ```

   For AP direct deposits:

   ```
   make –f $BANNER_HOME/general/c/sctproc.mk fardird
   ```

   For Payroll checks/direct deposits:

   ```
   make –f $BANNER_HOME/general/c/sctproc.mk CHECKOPT="sqlcheck=full
   userid=baninst1/password" phpchkl
   ```

   Note: These commands are all one line. Where noted, replace "password" with your password for baninst1.

   If the compilation was successful, you will see the new executables in the `$EXE_HOME` directory.

Troubleshooting Compile Issues

If the IntelleCheck tables were not created successfully in Step 3, you may receive compile errors such as "`identifier 'EVIBCCHK' must be declared`".

If you have any problems or questions, please [contact Evisions Support](#) and we will be happy to assist.

NT Installation

1. Create a directory called "evisions" on the Banner server and place the `fabchkp.pc`, `fardird.pc` and/or `phpchkl.pc` files in it.

2. The `fabchkp.pc`, `fardird.pc` and `phpchkl.pc` files that Evisions provides are customized versions of the baseline Banner files of the same name. Before proceeding, back up the baseline executable files, which should be located in your `%BANNER_EXE%` directory, as they will be overwritten during the next step. From Windows Explorer, copy `fabchkp.exe`, `fardird.exe` and/or `phpchkl.exe` and name them `fabchkp_backup.exe`, `fardird_backup.exe` and/or `phpchkl_backup.exe`.

   Before proceeding, verify that the files have been successfully backed up. You should also verify that you are still pointing to the correct Oracle SID and Banner environment.

3. Open a command prompt on the server and navigate to the directory where you copied the Evisions versions of the source files.

4. Compile the new Evisions version of `fabchkp.pc`, `fardird.pc` and/or `phpchkl.pc` using the following commands:

   For AP checks:

   > `perl %BANNER_HOME%\general\misc\sctproc.pl -prog="c:\evisions\fabchkp.pc"`

   For AP direct deposits:

   > `perl %BANNER_HOME%\general\misc\sctproc.pl -prog="c:\evisions\fardird.pc"`

   For Payroll checks/direct deposits:

   > `perl %BANNER_HOME%\general\misc\sctproc.pl -prog="c:\evisions\phpchkl.pc" -checkopt=full`

   Note: These commands are all one line. Where noted, replace "password" with your password for baninst1.

   If the compilation was successful, you will see the new executables in the `%BANNER_EXE%` directory.

Troubleshooting Compile Issues

If you receive compile errors, please make sure that `SQLCHECK` is set to `LIMITED` in the `sctproc.pl` compile script.

If the IntelleCheck tables were not created successfully in Step 3, you may receive compile errors such as "`identifier 'EVIBCCHK' must be declared`".

If you have any problems or questions, please contact Evisions Support and we will be happy to assist.

Step 6: Test Your Installation

1. To test your installation, run checks in Banner as normal. Once the `fabchkp`, `fardird`, or `phpchk1` process is complete (depending on whether you are testing AP or Payroll checks), launch IntelleCheck and click on the **Process Pending** button. Then, log in to the database you are using.

> ### Troubleshooting
>
> If you receive a message that says "There are no checks to print" after logging in, there are several things to check:
>
> - Make sure that you are logging in to the same database in IntelleCheck that you processed the checks for in Banner.
> - Make sure that the user logging in to IntelleCheck has been granted access to the account for which checks were processed (Step 4).
> - Review the log file in the jobsub directory to look for error messages. If you see a message in the log file similar to "`0 lines written to fabchkp_12345.lis`", this means that Banner did not produce any check output.
> - If the log file contains a "table or view does not exist" error, make sure that the IntelleCheck tables have been created for this database (Step 3).

2. Once you are in the Process Pending area, select the appropriate bank code/account and batch using the drop-down boxes, then click **Next**.

3. IntelleCheck will show you all of the checks that have not yet been printed for the selected account and batch. Click **Select All** and then click **Next**.

4. Select the printer where the checks should be printed.

5. If desired, check the box to **Print File Copy** and select an appropriate printer. File copies are typically printed to a different printer than the checks, in order to conserve the MICR toner used for checks.

6. If you have Positive Pay configured for this account, you can select the **Generate Positive Pay** box and enter the desired filename to have IntelleCheck create the Positive Pay file when it prints the checks. If Positive Pay is not set up for this account, the option will be grayed out.

7. If desired, check the option on the **Reporting** tab to generate a check register or check summary report.

8. Click **Process**. The checks will be sent to your chosen printer, and you will be returned to the main menu in IntelleCheck.

Getting Help

For information on using the software, please refer to the product Help, which contains detailed information on all aspects of the product.

If you are having problems with the installation or configuration, you can search our support site, which includes a knowledge base of common issues. If you are unable to find the solution, submit a HelpDesk request with a detailed explanation of the problem you are experiencing.

Please do not hesitate to contact the Evisions HelpDesk if any questions or problems arise. We are here to help you and want to ensure your success.

Can't find what you're looking for?

We would love to make our documentation better! If you have a moment to let us know what we missed or how we can make the help more useful, please email us at TechDocs@evisions.com.

Glossary

A

Argos

Evisions' web-enabled reporting solution.

B

BankMobile

BankMobile is an optional module within IntelleCheck. Evisions has integrated IntelleCheck with BankMobile Disbursements (formerly HigherOne OneDisburse) for easy processing of electronic refunds. For more information, please visit www.bank-mobiledisbursements.com.

F

FAABATC

Batch Check Print Form.

FAAONLC

Online Check Print Form.

FABCHKA

Batch Check Accounting Process.

FABCHKP

The check print process in the Banner® Finance module. The code for this process is modified by Evisions for use with IntelleCheck.

FABCHKR

Batch Check Register.

FABCHKS

Batch Check Process.

FAPDIRD

Direct Deposit File Creation Process (Canada uses FAPCDIR).

FAPTREG

Direct Deposit File Register.

FARDIRD

The direct deposit process in the Banner® Finance module. The code for this process is modified by Evisions for use with IntelleCheck.

FARINVS

Invoice Selection Report.

FGRACTG

Posting Process.

I

ICC File

IntelleCheck Configuration (ICC) files contain the macros that create the visual information on your checks (logos, signatures, boxes, etc.), email layouts, and positive pay layouts.

IntelleCheck

IntelleCheck is Evisions' solution for Ellucian's™ Banner Digital Campus payment processing. IntelleCheck seamlessly integrates with Banner and enhances Banner output for AP, Payroll, Student Refund checks and Direct Deposit Advices.

M

MICR Font

Magnetic ink character recognition used by banking industry to facilitate the processing of checks.

P

PHPCHKL

The check print and direct deposit process in the Banner® Human Resources module. The code for this process is modified by Evisions for use with IntelleCheck.

PJL command

Printer Job Language command.