



Correio Installation Instructions

(November 25, 2014)



Contents

Initial Correio Server installation	1
Initial Correio Downloader install	1
Initial USPS Database Download.....	4
Initial Correio AVS software install	8
Initial Database Install and Database Updates	13
Initial PowerOn Specfile Install	17
Migration to a New Server.....	20
Troubleshooting.....	21
Open Failure or DPV Error	21
Unable to Communicate with Correio Service.....	21

Initial Correio Server installation

The current versions of the Correio AVS installer and the Correio Downloader installer are both available for download at <http://www.cutek.com/correio-update>. For the Correio Downloader, you will need your credit union’s registration information; if you do not have that information, please contact support@cutek.com.

You will install the Correio software on the Correio server in the following order:

1. Install Correio Downloader and use Correio Downloader to download the most recent USPS database
2. Install Correio AVS and update via the downloaded database

Note: Depending on the speed of your internet connection, it may take several minutes or it may take several hours to download the USPS database.

Initial Correio Downloader install

You must install the Correio Downloader on your Correio server.

1. Run CorreioDownloaderSetup.x.y.z.msi (where x.y.z is the current version of the downloader software, as provided by Cutek)

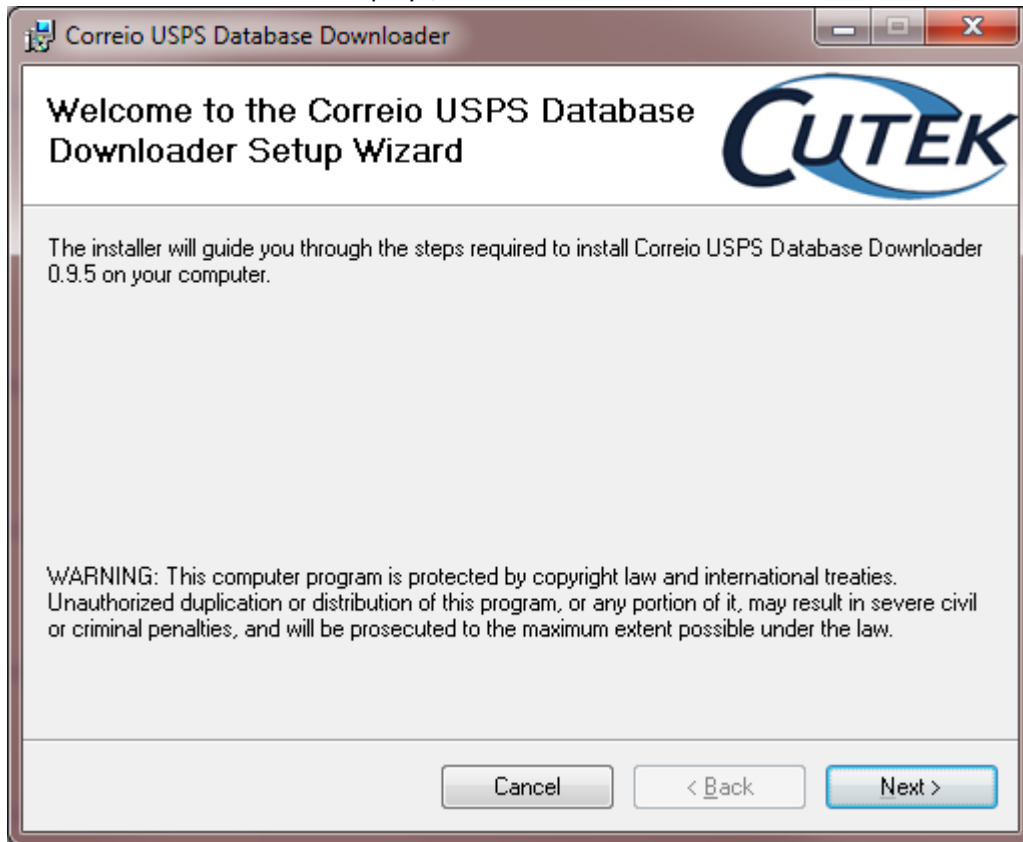


Correio Installation Instructions

(November 25, 2014)



2. When the Welcome screen displays, click Next



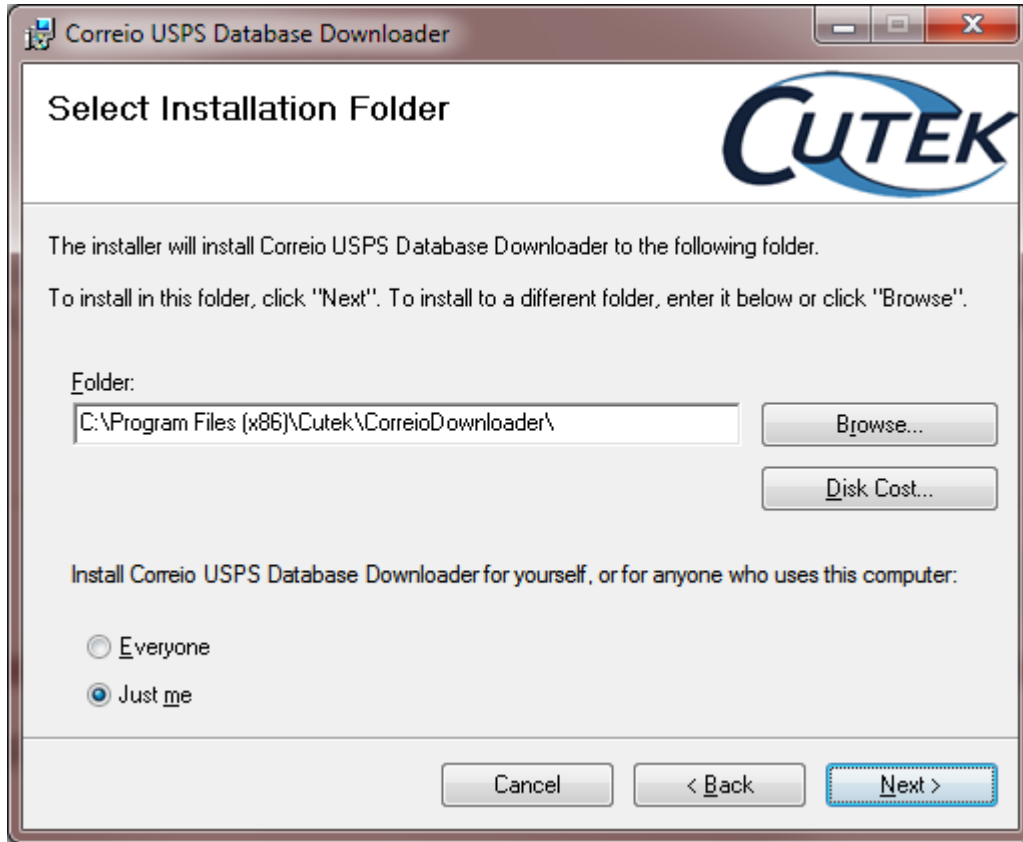


Correio Installation Instructions

(November 25, 2014)



3. Select Installation Folder: Accept the defaults or change "Just me" to "Everyone" and click Next



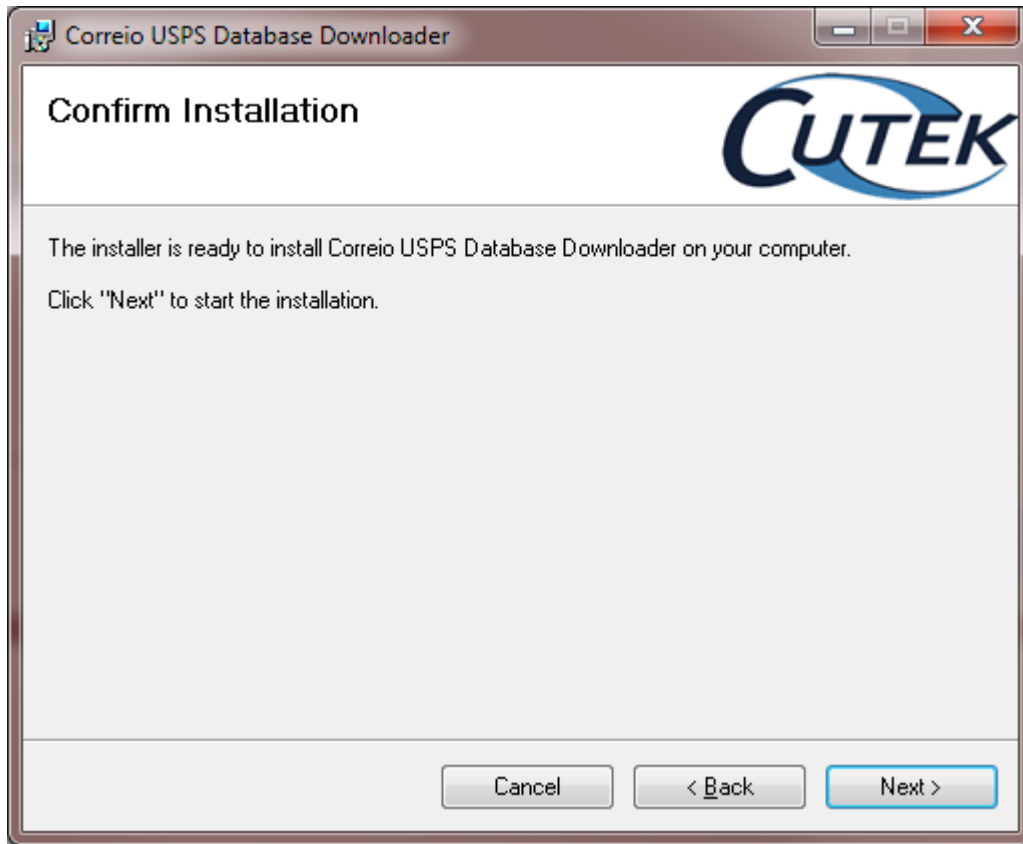


Correio Installation Instructions

(November 25, 2014)



4. Confirm Installation: click Next



5. Wait for the installation to complete.
6. If there are any .NET components that need to be installed, you will receive additional prompts that will need to be answered.
7. Installation Complete: click Close.

Initial USPS Database Download

- 1) Run the Correio Downloader software as administrator (there should be a shortcut in the Start menu or Start screen, but you should modify it to run the program as administrator)
- 2) The program will automatically connect to the internet to retrieve the current list of download databases available. When the list populates, select the most recent database (should already be

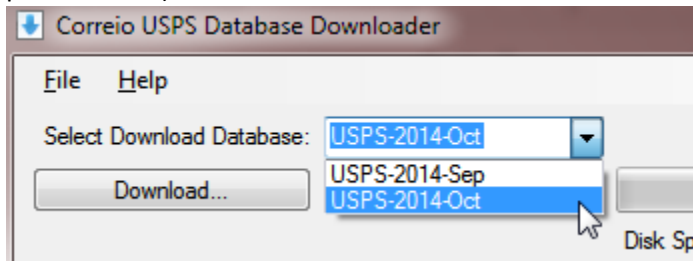


Correio Installation Instructions

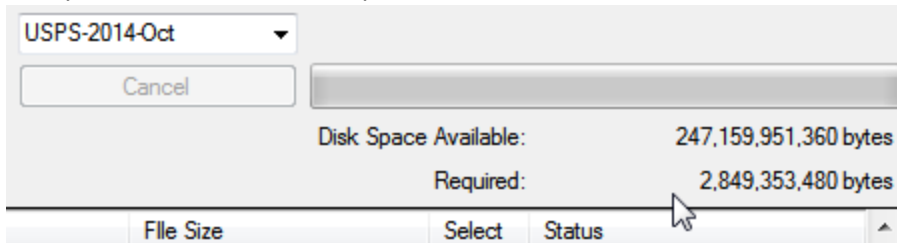
(November 25, 2014)



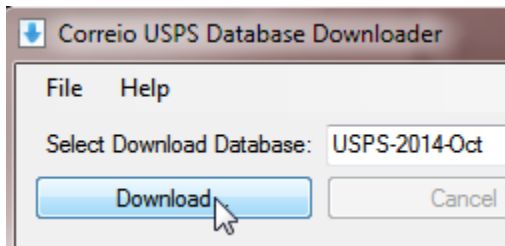
pre-selected.)



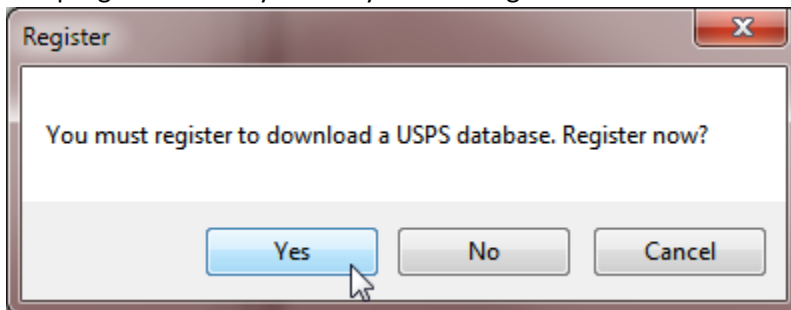
- 3) After you select the download database, the bottom window will list all of the files for that database with checkboxes next to them. Leave all checkboxes checked.
- 4) Verify there is sufficient disk space available



- 5) Press the Download button



- 6) The program will tell you that you must register to download a USPS database. Click Yes to register.





Correio Installation Instructions

(November 25, 2014)



- a) Enter your registration details exactly as provided by Cutek and press Okay. (Contact support@cutek.com if you do not have the registration details for your credit union.)

Registration

Institution Name: Cutek Federal Credit Union

Institution Key: SomeLongStringOfSeeminglyRandomCharactersThatYouWillNeedToCopyAndPaste|

Okay Cancel

- b) Press Download button again
- 7) When the “Browse For Folder” dialog displays, select an existing empty folder or use the Make Folder button to create a temporary folder to download the database into. Remember the folder location as you will need it later.

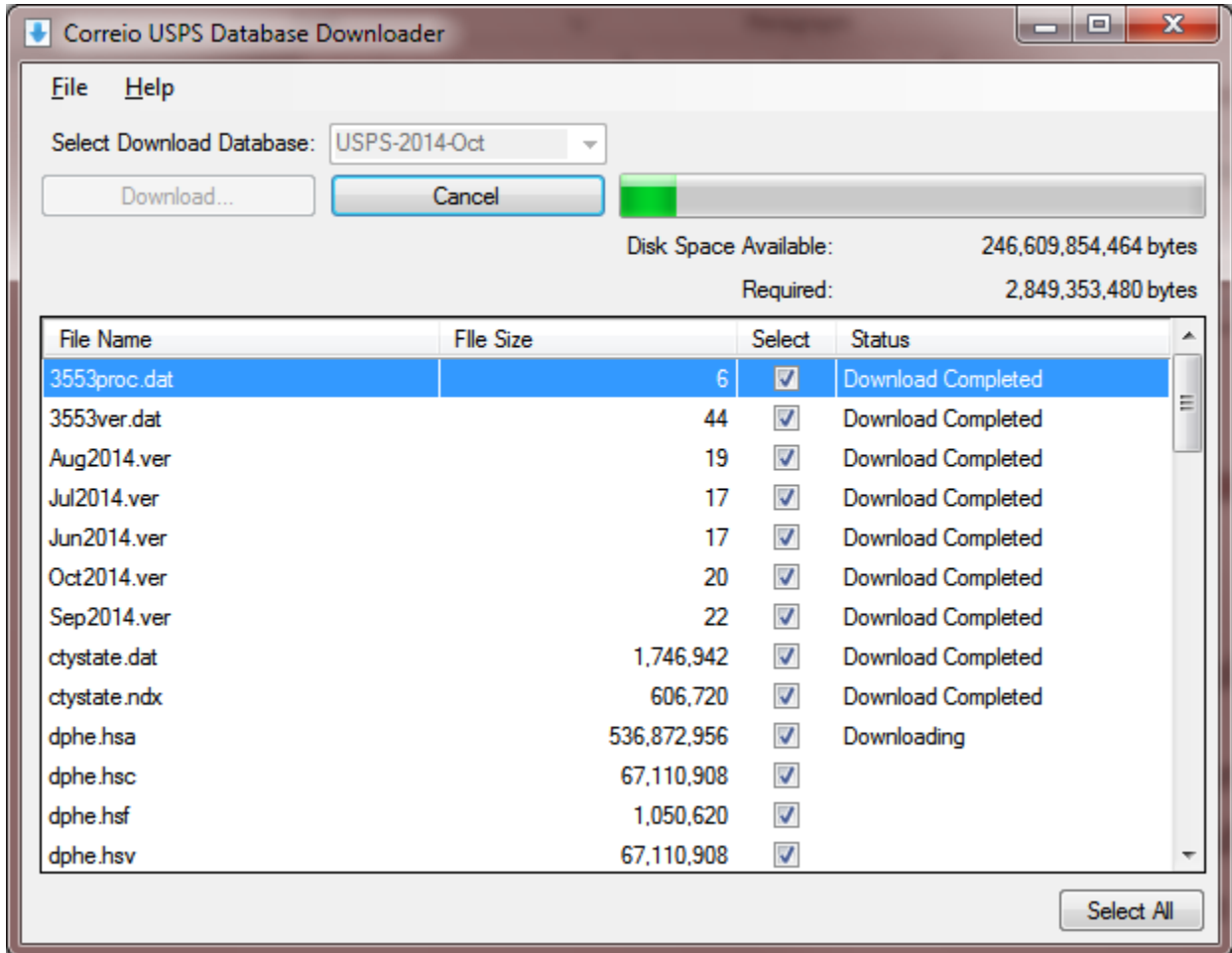


Correio Installation Instructions

(November 25, 2014)



- 8) The program will download the files and will display the status as it goes. Due to the total size of the database, this may take some time for all files to download



- a) If the program seems to get stuck or encounters any errors, you can click Cancel and adjust the checkboxes to select only the files that got stuck, exhibited errors, or still need to be downloaded. Press the Download button again and OK the Browse For Folders dialog and the program will try to download all checked files again.
- 9) When all downloads complete, the program will display an error message that the Correio program could not be found. This is OK and you may dismiss this error message.



Correio Installation Instructions

(November 25, 2014)



Initial Correio AVS software install

1. Run **Correio2Setup.msi**; the welcome screen will display:



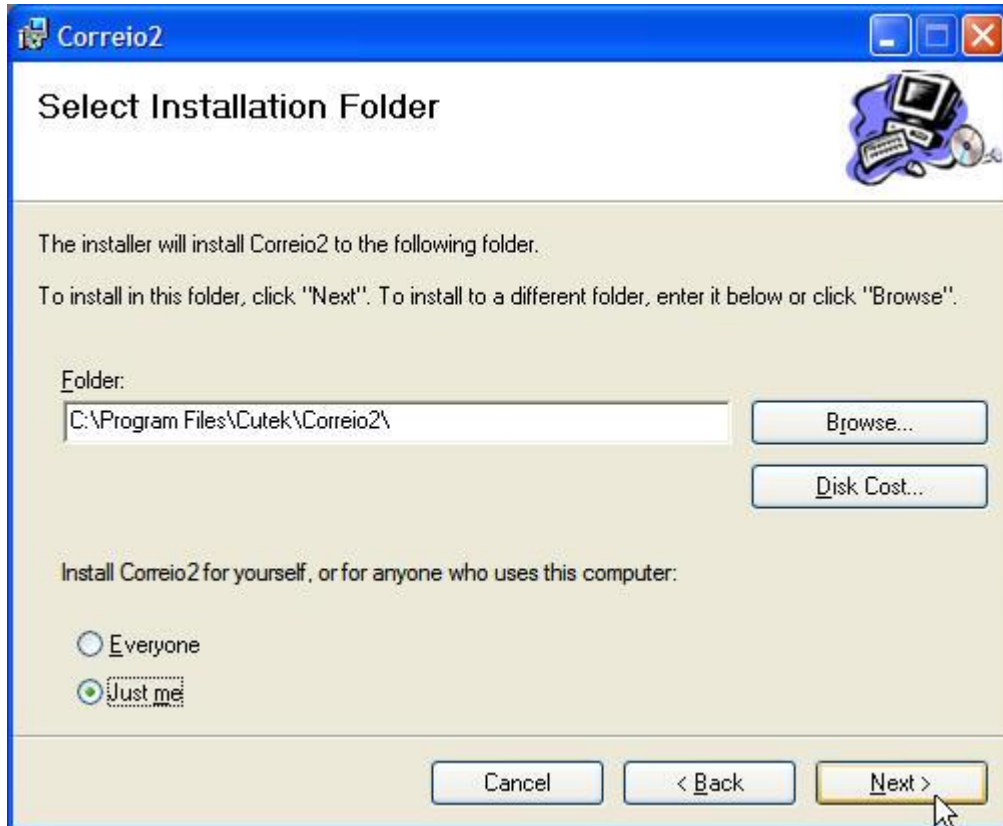


Correio Installation Instructions

(November 25, 2014)



2. Click Next to display the Select Installation Folder screen



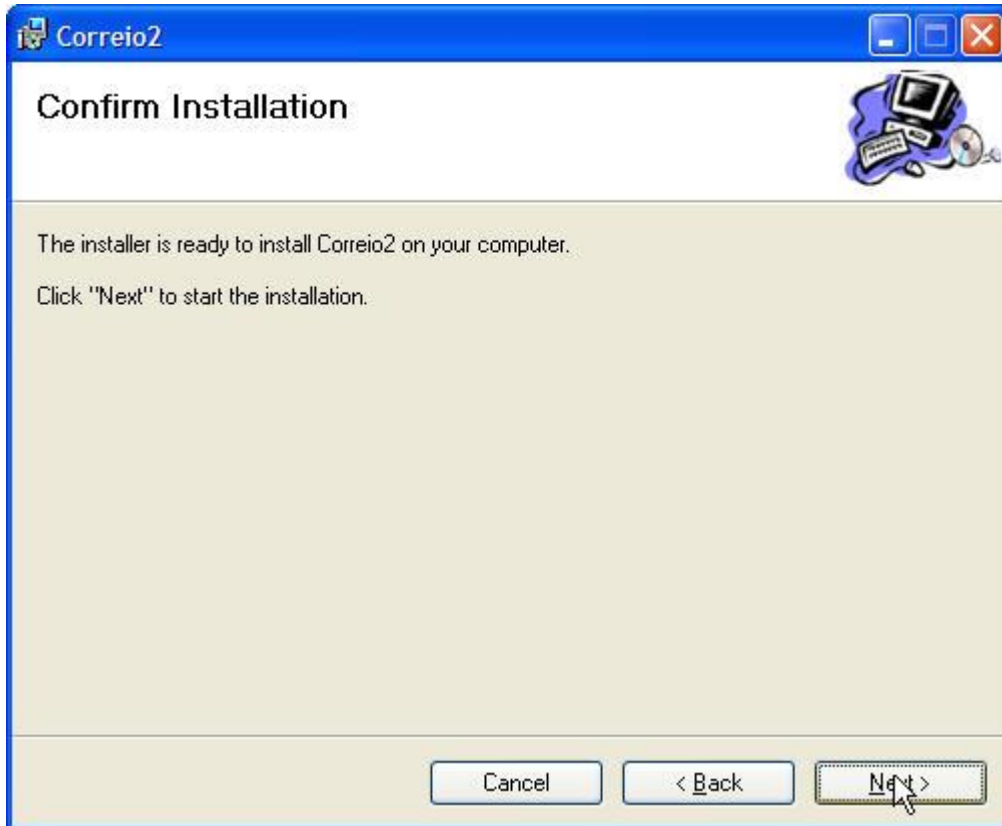


Correio Installation Instructions

(November 25, 2014)



3. Take the defaults and click Next to display the Confirmation screen



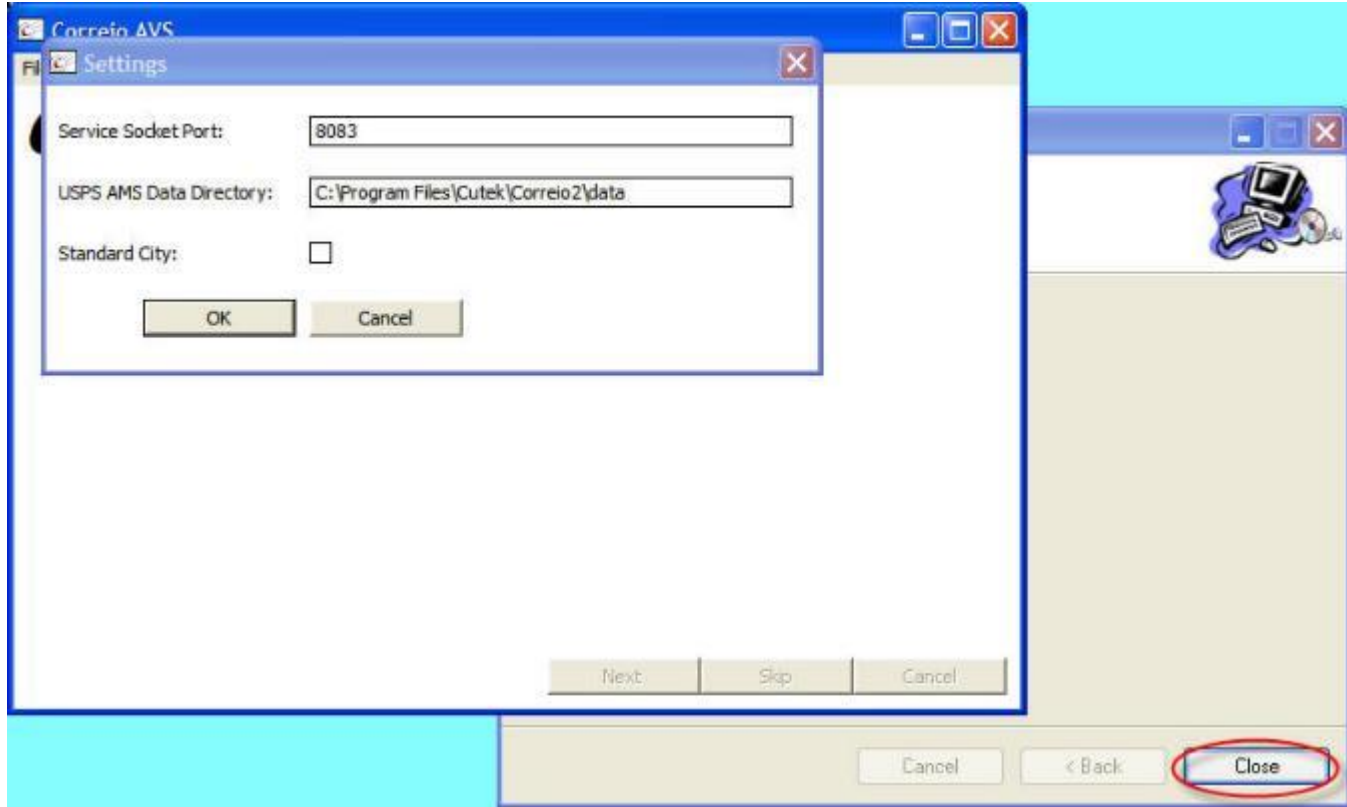


Correio Installation Instructions

(November 25, 2014)



4. Click **Next** to install Correio. The Installation Complete screen will display and then the Correio AVS window and the Settings dialog will display.



5. Click the Close button on the Installation Complete screen
6. Change the Settings and click OK:
 - **Service Socket Port:** This is the port that Correio will listen on. Take the default port of 8083 unless it conflicts with some other service on your PC or server
 - **USPS AMS Data Directory:** This is where the USPS data files will be stored. You can take the default
 - **Standard City:** Check this box



Correio Installation Instructions

(November 25, 2014)



7. The installation will continue from the Correio AVS window.





Correio Installation Instructions

(November 25, 2014)



Initial Database Install and Database Updates

1. You will receive a message to insert the disk labeled "Address Matching System Commercial":



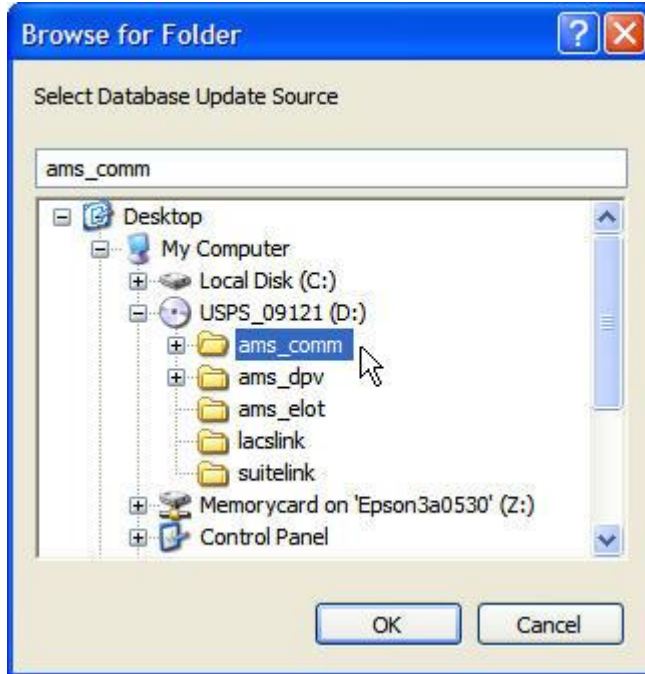


Correio Installation Instructions

(November 25, 2014)



2. Ignore the DVD instructions and click Next. Correio will search for a DVD and when it does not find the DVD, it will instead display the Browse for Folder dialog.



3. Navigate to the folder that contains the USPS database that you downloaded and click OK. Correio AVS will copy the files from this folder into the Correio data directory.



Correio Installation Instructions

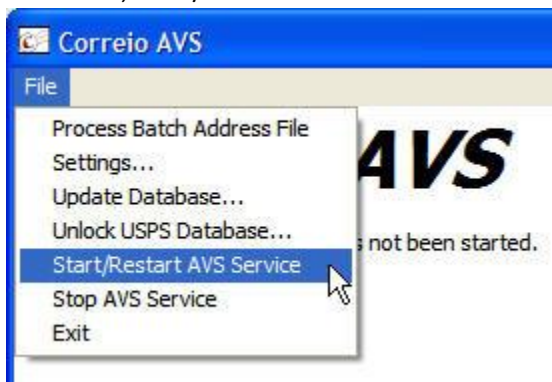
(November 25, 2014)



4. After all the files have loaded, Correio will display the status, "The service has not been started"



5. Select File, Start/Restart AVS Service



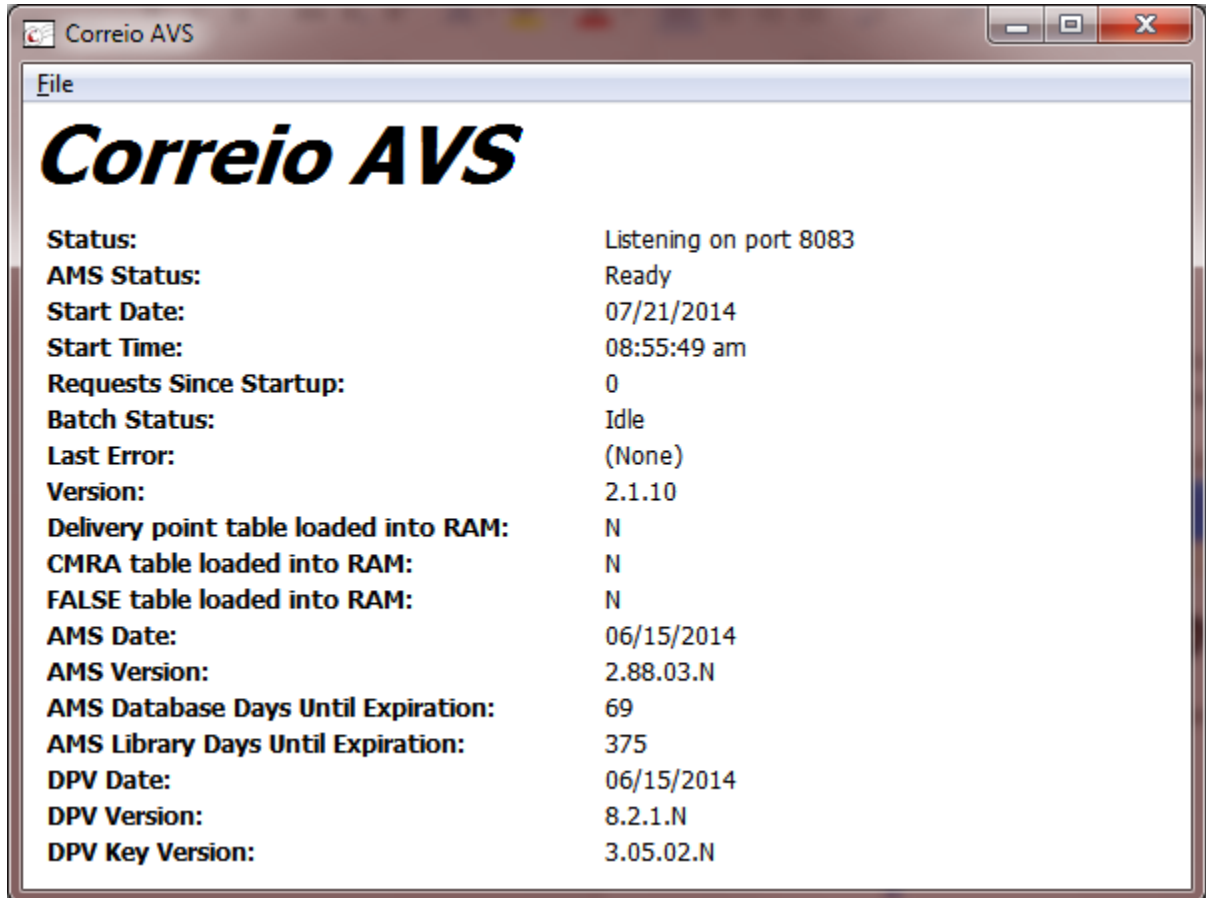


Correio Installation Instructions

(November 25, 2014)



- The install will be finished and Correio will display its status screen



You should verify that the AMS Date and DPV Date fields match the month and year of the database you downloaded.

You can close the Correio AVS window; the Correio Service will continue to run in the background and will start up automatically when you turn on your computer.



Correio Installation Instructions

(November 25, 2014)



Initial PowerOn Specfile Install

- Cutek will provide you with a zip file that contains all necessary PowerOn specfiles, SymForm files and Help files, for the Symitar portion of your Correio installation. If you have not already, please unzip the downloaded files to a folder on your computer
- Login to a test directory on Symitar
- Navigate to PowerOn Control, click the Open icon, type **VALIDATE+NAME** and press Enter. If there is an existing VALIDATE.NAME specfile with a red-icon next to it:
 - Right-click **VALIDATE.NAME** and select Rename.
 - Rename the specfile as VALIDATE.NAME.BAK to move it out of the way. (You will merge this with the Correio version later.)
 - Repeat for each VALIDATE.something.NAME specfile with a red icon next to it, renaming each by adding **.BAK** to the end of its existing name.
- While still in PowerOn Control, click the Open icon, type **VALIDATE.LOANAPP.PERSON+** and press Enter. If there is an existing VALIDATE.LOANAPP.PERSON specfile with a red-icon next to it:
 - Right-click **VALIDATE.LOANAPP.PERSON** and select Rename.
 - Rename the specfile as VALIDATE.LOANAPP.PERSON.BAK to move it out of the way. (You will merge this with the Correio version later.)
- While still in PowerOn Control, click the Open icon, type **VALIDATE.MBRADDR+** and press Enter. If there is an existing VALIDATE.MBRADDR specfile with a red-icon next to it:
 - Right-click **VALIDATE.MBRADDR** and select Rename.
 - Rename the specfile as VALIDATE.MBRADDR.BAK to move it out of the way. (You will merge this with the Correio version later.)
- Dismiss the Open Specfile dialog and navigate to PC Transfer
 - On the Local System side of PC Transfer, navigate to the folder that contains your downloaded files and folders.
 - Open the “Correio AVS Symitar PowerOn Specfiles” folder, select all the files in the folder and drag these files to “PowerOn Specfiles” on the Host System.
 - If there were any VALIDATE+NAME, VALIDATE.LOANAPP.PERSON or VALIDATE.MBRADDR specfiles with blue icons in the previous steps, answer Yes to “VALIDATE.{something} already exists. Are you sure you want to replace it?”
 - If you previously copied these files, answer Yes to all the “Are you sure you want to replace it?” prompts



Correio Installation Instructions

(November 25, 2014)



- On the Local System side, use the up-arrow and double-click to open the “Correio AVS Symitar Help files” folder. Copy the file in this folder to the Help Files folder on the Host System.
- On the Local System side, use the up-arrow and double-click to open the “Correio AVS Symitar SymForm files” folder. Copy the files in this folder to the SymForm Files folder on the Host System.
- On the Local System side, navigate to your SymForm Forms Path. If you do not know your SymForm Forms Path:
 - Click View and then Options
 - Change Category to “SymForm”
 - Note the value in the Forms Path
 - Click Cancel
- On the Host System side, double-click to open the “SymForm Files” folder.
- If there are a lot of files in SymForm Files, click the heading on the Date column in the right window twice to sort by date with the newest files at the top – these should be the Correio files you copied.
- Select the Correio files on the Host System and drag them to your SymForm path on the Local System
- Navigate to PowerOn Control and install the following specfiles for demand use:
 - ADDRESSCHANGE.ADMIN
 - ADDRESSCHANGE.FM.SUB
 - ADDRESSCHANGE3
 - ADDVER
 - CORREIO.ADMIN
 - VALIDATE.NAME (and all other VALIDATE+NAME specfiles)
 - VALIDATE.LOANAPP.PERSON
- If you are in a test environment, also install the following specfile, which can be used for development purposes:
 - ADDRESSCHANGE.PREFM



Correio Installation Instructions

(November 25, 2014)



- If you plan to use the SymForm version of ADDRESSCHANGE, also install the following specfiles:
 - ADDRESSCHANGE
 - ADDRESSCHANGE.AUTHBYDIALOG
- If you plan to use the SymForm ENV specfile, also install the following specfile:
 - ENV
- Navigate to Account Manager or Teller Transactions, select any account and run the demand PowerOn CORREIO.ADMIN specfile:
 - Set **Correio Host Name or IP Address** to the host name or IP address of the PC running Correio AVS. (In a Citrix environment, you should always use the host name rather than the IP address.)
 - Set **Correio Port** to the port that Correio AVS is running on.
 - Click the link to **Verify Correio Connectivity**. A browser window should display with the Correio status screen. If it does not, you will need to resolve this issue before you can use Correio.
 - Leave **Use local copy of Correio** as **No**. (This setting is for test purposes only.)
 - Set the ADDRESSCHANGE parameters as desired. Please refer to the separate Correio ADDRESSCHANGE or ADDRESSCHANGE3 documentation for details.
 - Click Submit to Host to save your changes
- Run the demand PowerOn ADDRESSCHANGE.ADMIN specfile:
 - Set the parameters as desired. Please refer to the separate Correio ADDRESSCHANGE3 documentation for details.
 - Click Submit to Host to save your changes
- Navigate to Parameter Manager, Select Field Control Parameters and select Name
 - Make sure that the following parameters are set to Validate field with specfile
 - Require Street
 - Require City
 - Require State
 - Require Zip Code
- Repeat this last step for the Application Person record



Correio Installation Instructions

(November 25, 2014)



- Repeat this last step for the Member Address record
- Navigate to Account Manager and pull up any account with multiple Name records
 - Click a Name at the Account level and try to change the address for that Name to a valid or invalid address and verify that it is interacting with Correio
 - Try the demand PowerOn ADDRESSCHANGE3 specfile to verify that it is working with Correio. You can refer to the separate Correio ADDRESSCHANGE3 documentation for instructions.
- If everything is working correctly:
 - If you renamed any of your existing VALIDATE+ specfiles, you will need to merge the standard Correio versions with your back-up copies to combine any old and new validation.
 - You may want to integrate Correio with any other specfiles that prompt or change addresses. Please refer to the Correio Technical Notes for information on how to do this.
 - If you do not have the intermediate/advanced reggen skills required for these changes, please contact Cutek for assistance at support@cutek.com.

Migration to a New Server

Note: Your Correio license allows you to install Correio and the USPS databases to a single server. If you need to migrate to a new server, you may install Correio on the new server, but you must also uninstall Correio from the old server as soon as you verify that Correio is working on the new server. A single Correio license does not allow you to run Correio on more than one server at the same time.

- Make a note of the Service Socket Port and Standard City settings on your current Correio server. You will want to use the same settings on your new Correio server. Also make a note of your registration details for the Correio Downloader software from your current Correio server.
- Follow the normal instructions to install Correio on the new server. Use the same registration details and settings as your old server.
- In Symitar, use the CORREIO.ADMIN demand PowerOn specfile to specify the Correio Host Name or IP Address, if it changed. Verify the server is up and running by clicking the link on the screen before submitting the change.
- Verify that Correio is working on Episys with the new server.
- On the old server, run CorreioShell.exe and stop the Correio service.
- Exit the program and then uninstall Correio using the Windows Control Panel



Correio Installation Instructions

(November 25, 2014)



Troubleshooting

Open Failure or DPV Error

If, after installation, Correio displays an error similar to any of the following, you will need to contact Cutek at support@cutek.com to obtain special keys to unlock the USPS databases:

- Open Failure [Z4CXLOG.DAT]
- DPV Error – Check DPV Error Code [DPV]

Unable to Communicate with Correio Service

The CorreioShell.exe program must be run as Administrator on some Windows security configurations or you will see this error. To fix this, use Windows Explorer to go to the folder where Correio is installed, right-click on CorreioShell.exe and select Properties. Under the Compatibility tab, click the “Change settings for all users” button, check the Privilege Level option to “Run this program as an administrator” and click OK twice. Relaunch CorreioShell.exe and it should display properly.