

# How to setup Check Factory on Terminal Server

Our testing was done on the simplest installation of a Terminal Server system. One PC was configured as the Terminal Server using Windows 2003 Enterprise Edition. All applications and files reside on the one machine. The test machine uses out of the box settings in most cases. Numerous remote session users can access the same version of Check Factory using one "Check Factory on Z:\LFECF000" printer.

Previous instructions from Trans-Micro regarding Terminal Server were based on the concept of one CF\_Userxx printer for each user. This has many drawbacks from a maintenance point of view. The current preferred method is to use one Check Factory printer and "trick" the system to print the job to each users' private folder using a shared USER folder and assigning a common drive letter to point to each users' private folder. This method also has the added benefit of assuring that each user has its' own private WINDOWS folder where vital Check Factory user data is stored.

**If you are an experienced Terminal Server administrator, the following is the short version:**

**On the terminal server console:**

Install Check Factory via Add New Programs

Create a USER folder off of the C: root. Declare this folder Shared. Give EVERYONE full control. Map drive letter Z:\ to the USER folder.

Open the Terminal Services Profile of each user. Connect the Terminal Services Home Folder Z: drive to: \\yourserver\USERS\UserName. Each user must be a member of Remote Desktop Users.

Add a printer named Check Factory using a HP Laserjet 4 driver (you MUST use this driver). Connect it to Local Port Z:\LFECF000 (that is: Z:\LFE zero zero zero) This is the "virtual" printer that the accounting software will print to when the services of Check Factory are required.

**For Each Remote User:**

Verify that the Z: drive points to their private USER\UserName folder. Verify that Z:\WINDOWS was automatically created. Check Factory will store CFUSER.INI in the Z:\WINDOWS folder.

Open the Check Factory program, Settings menu. Point the Source File to Z:\LFECF000. (Z:\LFECF000.SPL is using Quick Books or BusinessWorks) Restart Check Factory.

Make sure you have at least one Company installed in Check Factory for testing. See the Software Setup Guide.

Open Check Factory, Printers, Define/Align New printer. Align the printer. This is the printer where the paper comes out -- not the Check Factory printer set up previously.

*Final remote user printer connection test:*

Minimize Check Factory (and CFSpooler if using Quick Books or BusinessWorks). Open the properties of the Check Factory printer. Click Print Test Page on the General tab. Check Factory should pop up and process the job in about 10 seconds if all the connections have been made. On the multi colored screen, choose BLANK in the middle list box. Click OK then Click Print to Laser. Go to the printer and verify that a WIndows test page printed.

When running the accounting application make sure Check Factory is running and minimized prior to printing. Make sure the operator chooses the Check Factory printer when Check Factory services are required.

# Detailed Instructions

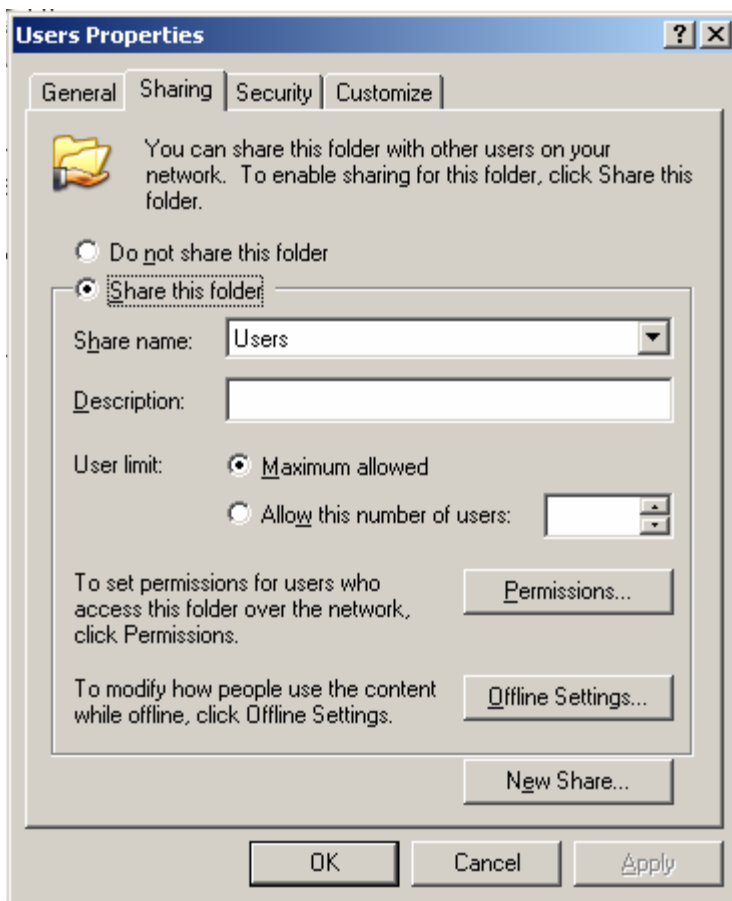
From the server console:

**Log in as Administrator**

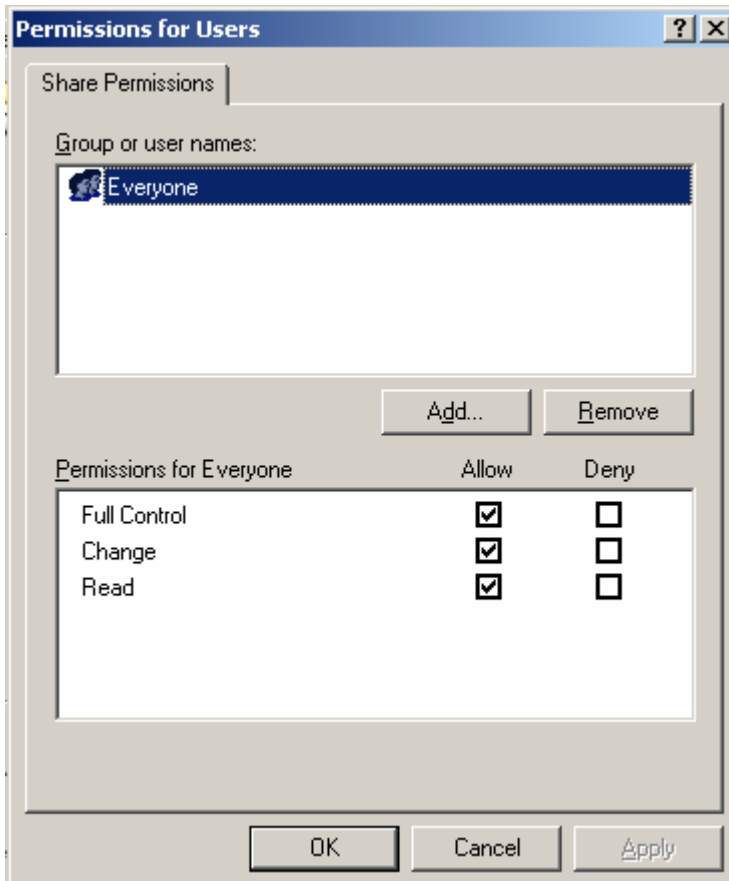
*The Terminal Services Administrator should do the following.*

**Install the Check Factory program via Start, Settings, Control Panel, Add Programs.**

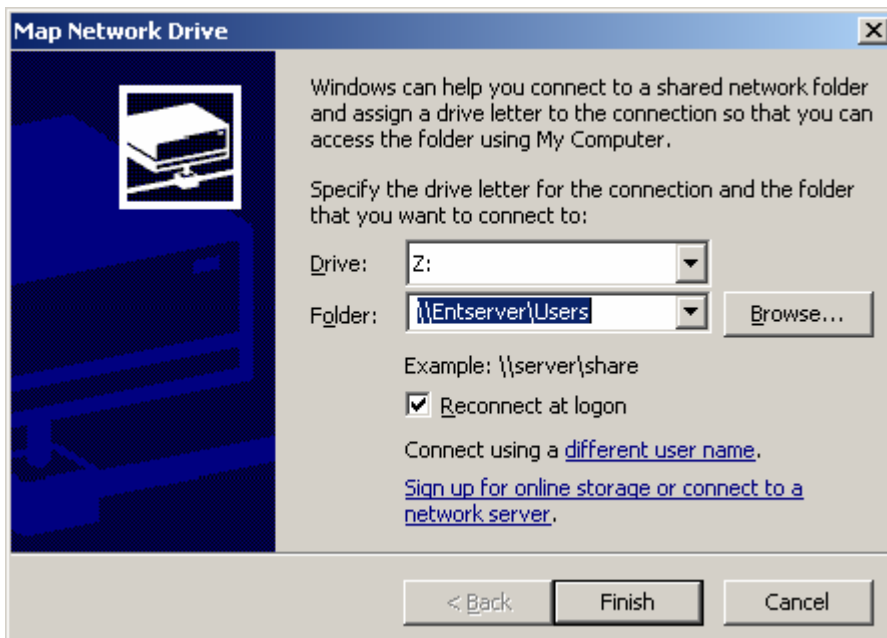
**Create a C:\USERS folder. Share this folder with the share name: USERS**



Click on Permissions. Give EVERYONE full control to the USERS folder.

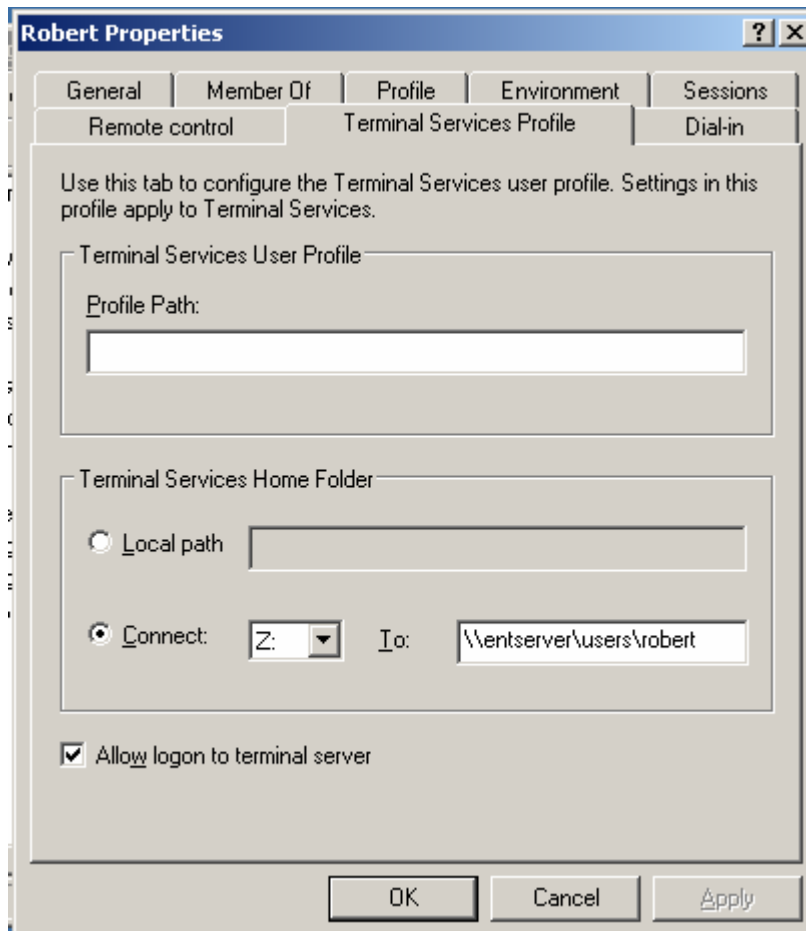


Map drive letter Z: to the shared USERS folder. Your server name will be different.

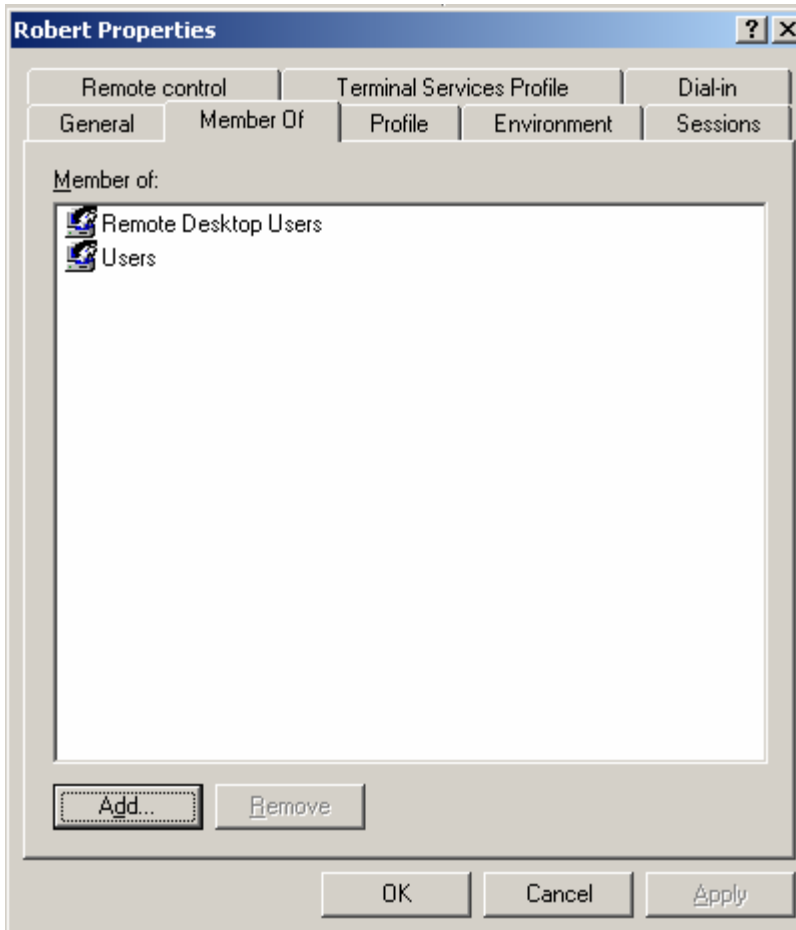


**Open Start, Control Panel, Administrative Tools, Computer Management, Local Users and Groups, Click Users.**

Add a user for each person that will use Check Factory. Click on the Terminal Services Profile tab. Under Terminal Services Home Folder click the Connect: radio button. Choose Z: from the drop down. Enter the UNC path to the users Home Path. Example: \\ENTSERVER\USERS\Robert. The Robert folder will be created for you. Verify the Allow Logon to Terminal Server check box is checked.



In the Member Of tab the user must be a member of Remote Desktop Users.



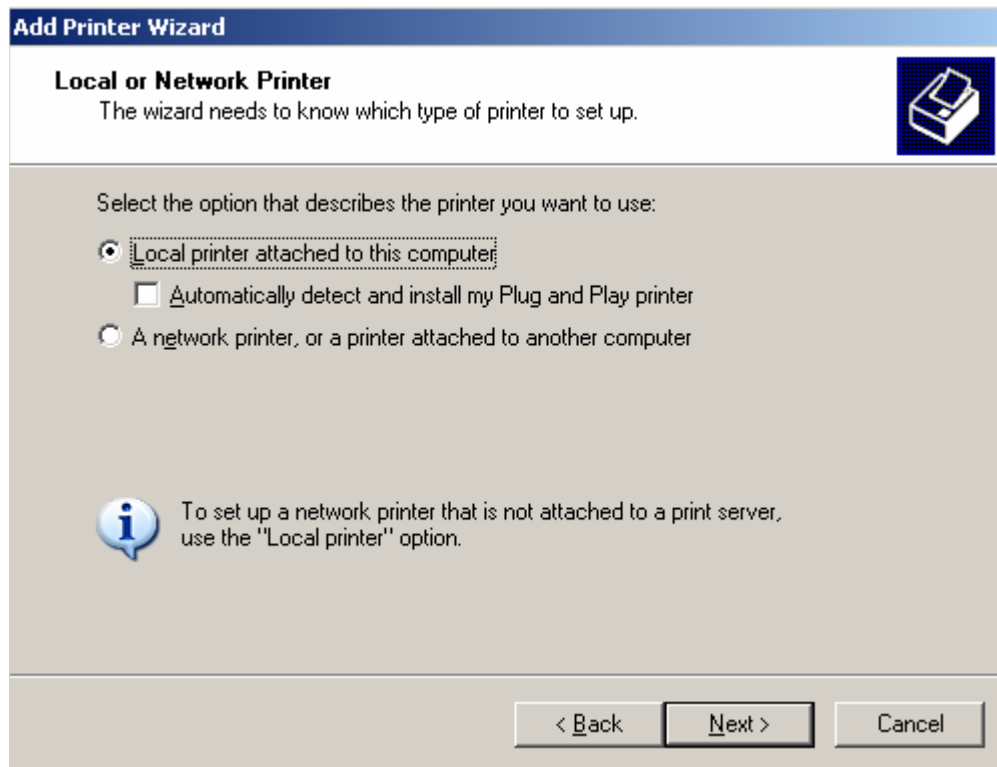
Click Close to Save the settings.

**Repeat the above for each user.**

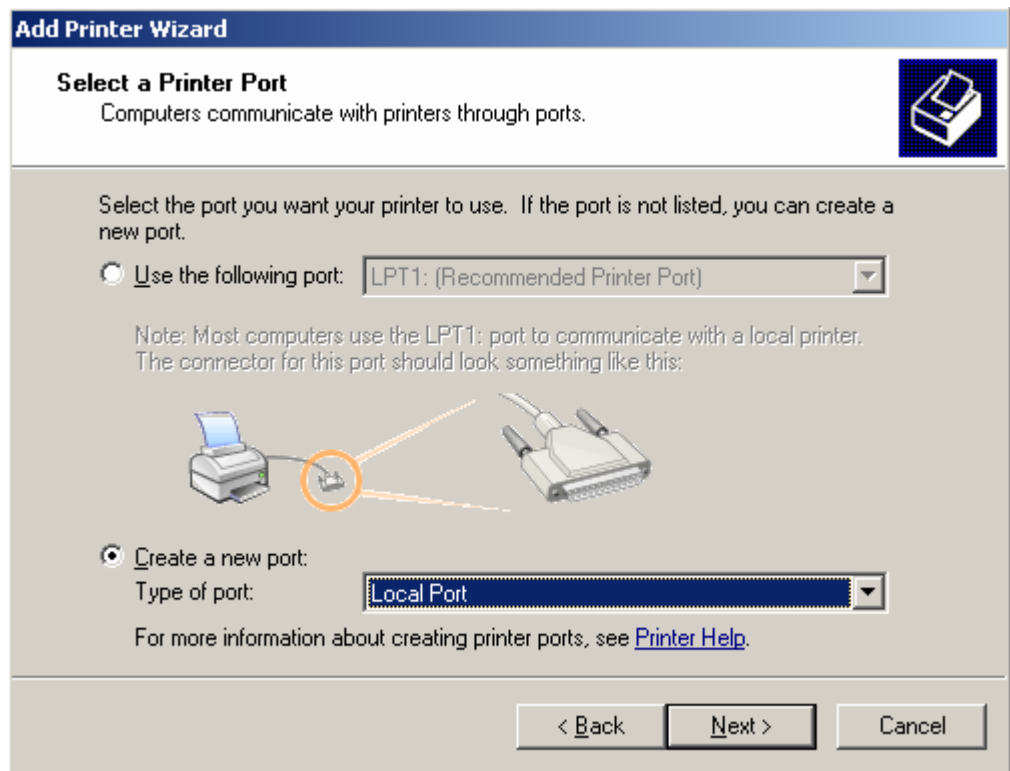
**Add a printer on the Terminal Server called "Check Factory".**

Click on Start, Settings, Printers and Faxes, Add Printer

Add a LOCAL printer



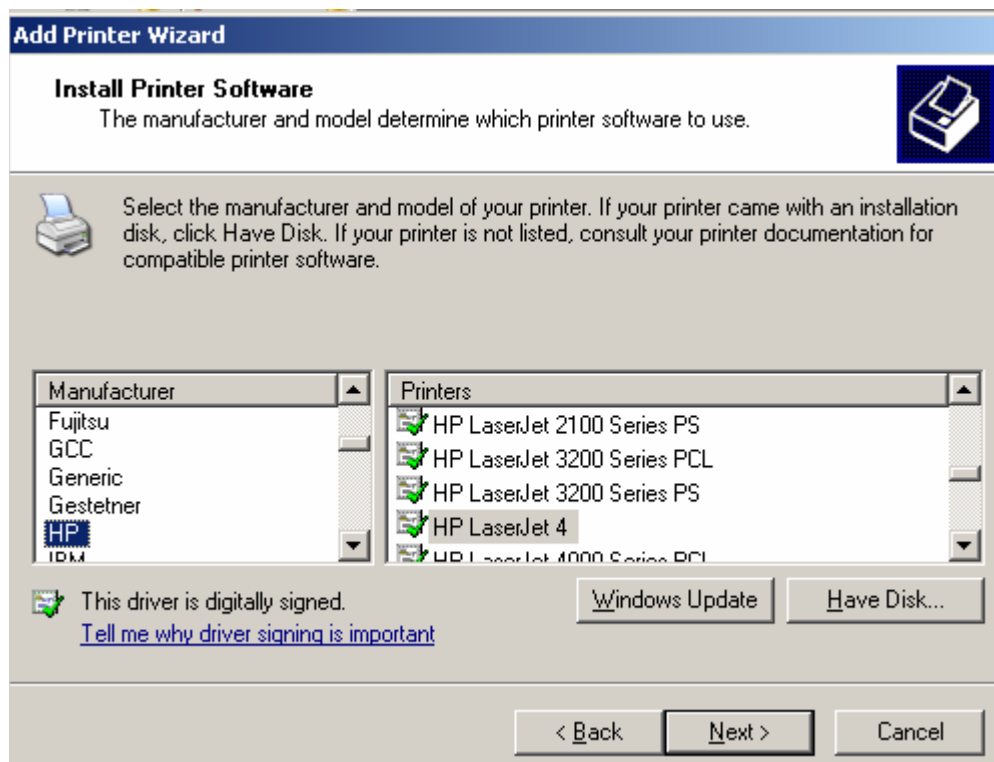
## Create a NEW PORT



Enter Z:\LFECF000 for the port name. (That is Z:\LFECF zero zero zero)




Choose HP as the manufacturer, HP Laserjet 4 under printers.



REPLACE the existing driver if prompted.

**Add Printer Wizard**

**Use Existing Driver**  
A driver is already installed for this printer. You can use or replace the existing driver.



HP LaserJet 4

Do you want to keep the existing driver or use the new one?

Keep existing driver (recommended)


Replace existing driver

< Back   Next >   Cancel

Name the printer: Check Factory. Do not set as default.

**Add Printer Wizard**

**Name Your Printer**  
You must assign a name to this printer.



Type a name for this printer. Because some programs do not support printer and server name combinations of more than 31 characters, it is best to keep the name as short as possible.

Printer name:

Do you want to use this printer as the default printer?

Yes


No

< Back   Next >   Cancel

Do not share the printer.

**Add Printer Wizard**

**Printer Sharing**  
You can share this printer with other network users.



If you want to share this printer, you must provide a share name. You can use the suggested name or type a new one. The share name will be visible to other network users.

Do not share this printer


Share name:

< Back   Next >   Cancel

Do not print a test page.

**Add Printer Wizard**

**Print Test Page**  
To confirm that the printer is installed properly, you can print a test page.



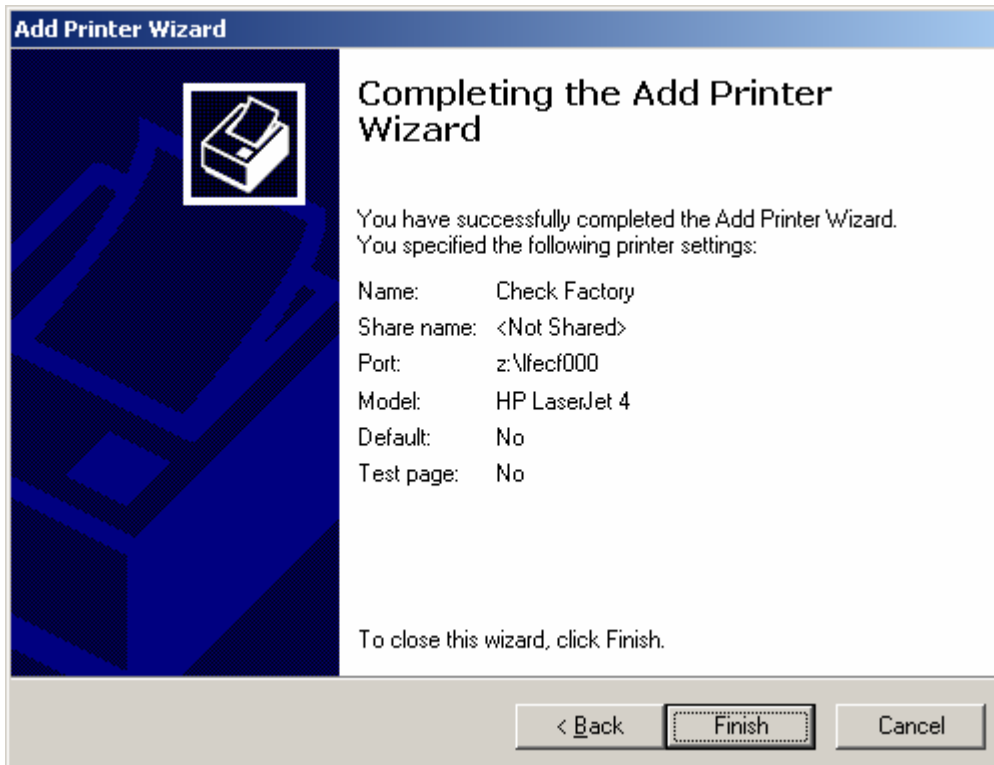
Do you want to print a test page?

Yes

No

< Back   Next >   Cancel

Click Finish.



This concludes work on the Terminal Server console.

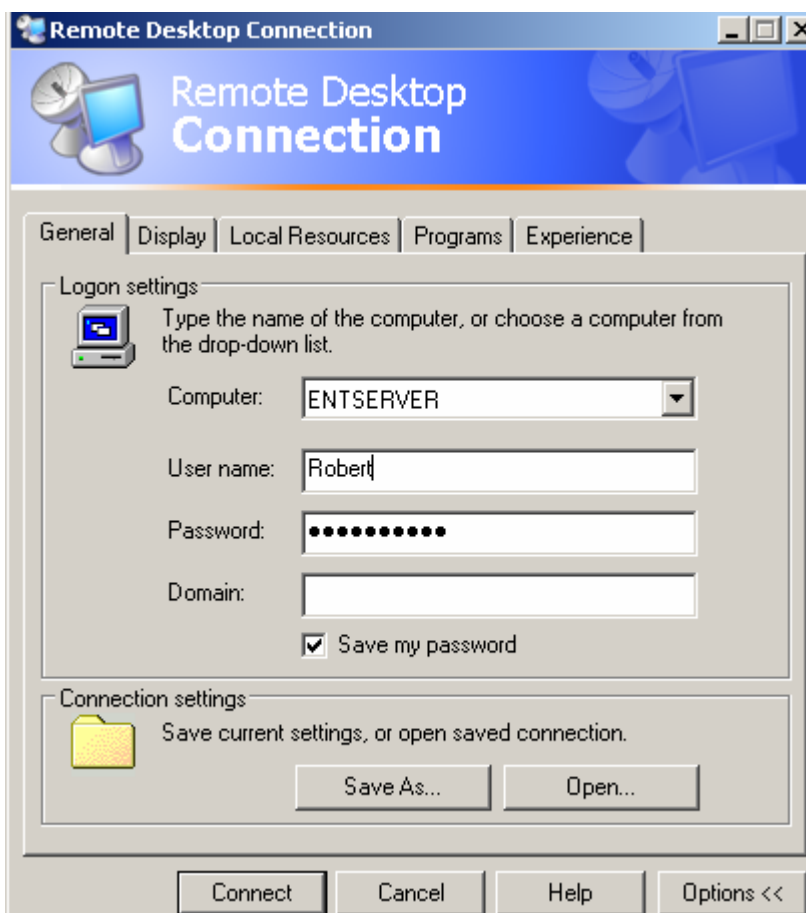
# Remote Session Testing

This must be done in turn for EACH user.

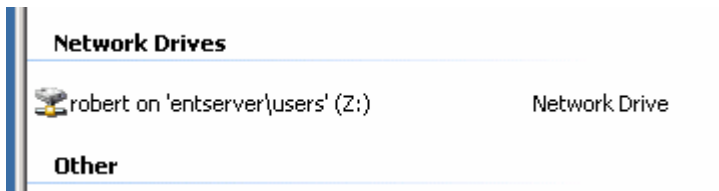
Bring up a Remote Connection.



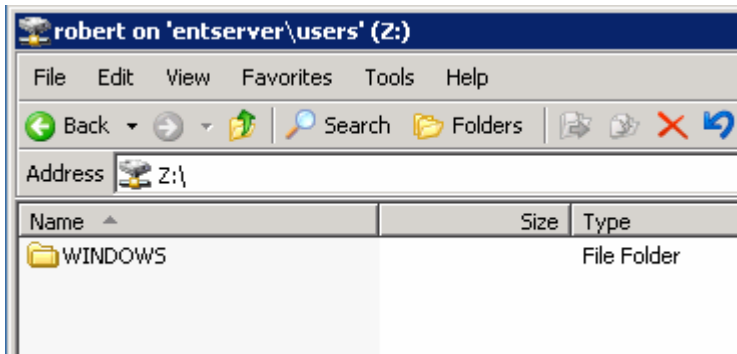
Log in to the Terminal Server.



**Open My Computer. From the View Menu click Details. Verify that this user has a Z: drive that points to the user's home folder.**



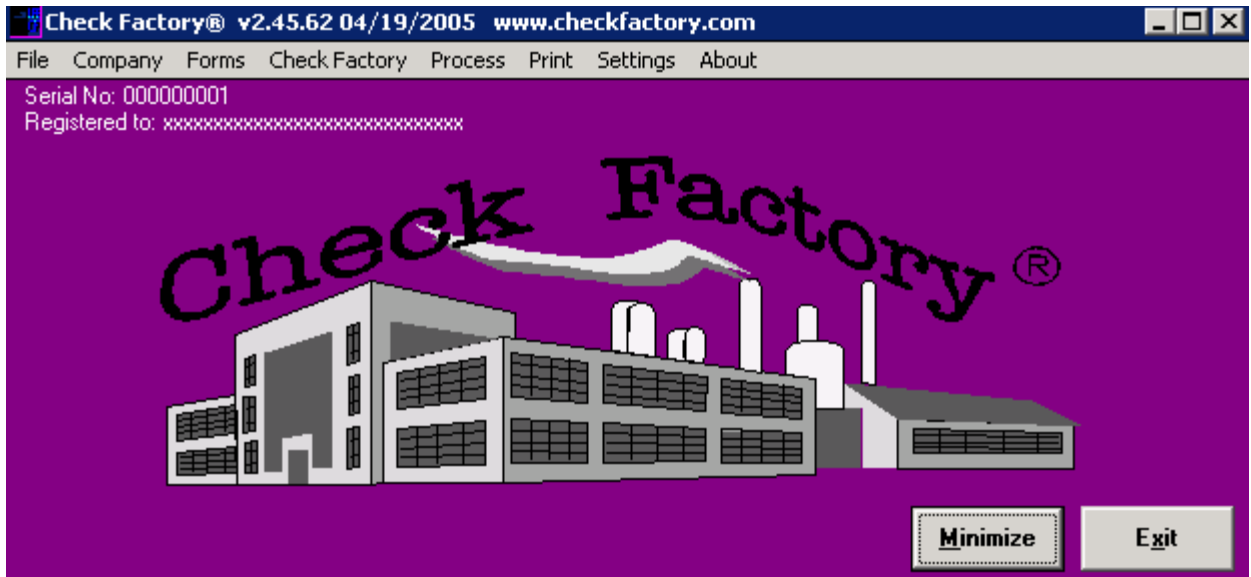
Double click on the Z: drive. You should see the users' private WINDOWS folder. This is where Check Factory stores user specific information in CFUSER.INI



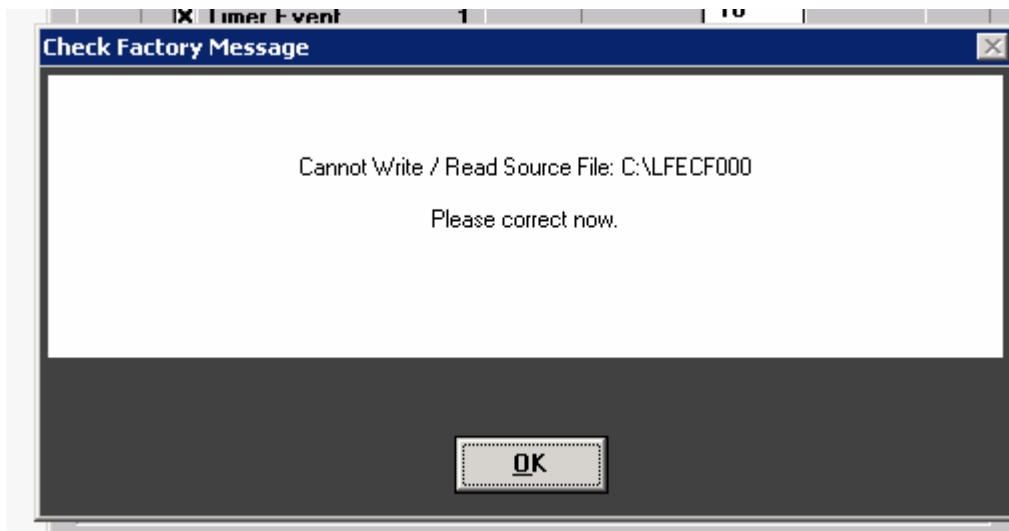
**Start the Check Factory program.**

You must have at least one Company installed in Check Factory before you can proceed with the printer connection and testing. Please see the Software Setup Guide and Check Factory manuals regarding Company and Account setup. This can be done from the server console or a remote session.

If you have at least one Company installed in Check Factory please proceed.



Click on the Settings Menu. You may get the following message if you do not have rights to C:\. Just click OK.



Click on the Source File button.

The screenshot shows a 'Settings' dialog box with a blue title bar and a close button. It is divided into two main sections: 'Global Settings (All Workstations)' and 'Workstation Settings (Drives and Paths should be on LOCAL drive)'.  
In the 'Global Settings' section, there is a 'Source File Capture Method' group with three checked options: 'Spool Event', 'Timer Event' (with a value of '1'), and 'Loop Event'. To the right, there is an 'End of Job Timeout' field containing the number '10'. Below these is a 'Startup Minimized' checkbox which is unchecked.  
The 'Workstation Settings' section contains three file path fields: 'Source File' (C:\LFECF000), 'Dest File' (C:\DESTFILE.000), and 'Last File' (C:\LASTFILE.000). Below these is a 'MICR Aligned Printers:' label and an empty text area.  
At the bottom, there are several buttons: 'Display Station Info', 'DestPrt AutoOk', 'Default Printer Font', 'Show Trigger Codes', and an 'OK' button.

Global Settings (All Workstations)	
Source File Capture Method	End of Job Timeout
<input checked="" type="checkbox"/> Spool Event	10
<input checked="" type="checkbox"/> Timer Event 1	
<input type="checkbox"/> Loop Event	
<input type="checkbox"/> Startup Minimized	

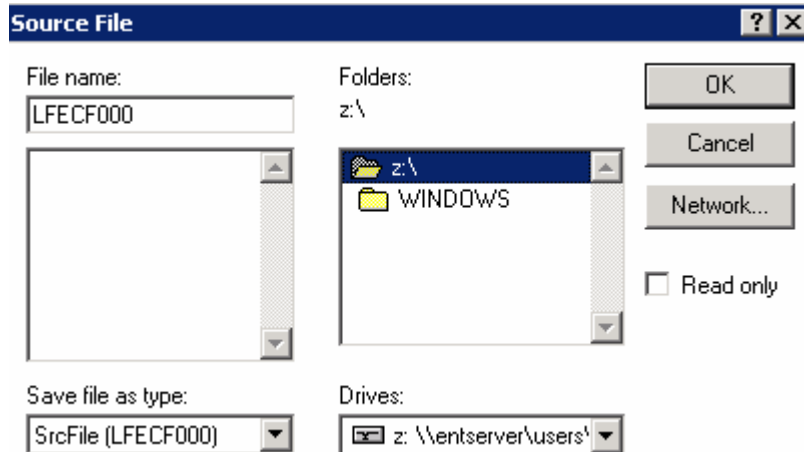
  

Workstation Settings (Drives and Paths should be on LOCAL drive)	
Source File	C:\LFECF000
Dest File	C:\DESTFILE.000
Last File	C:\LASTFILE.000
MICR Aligned Printers:	

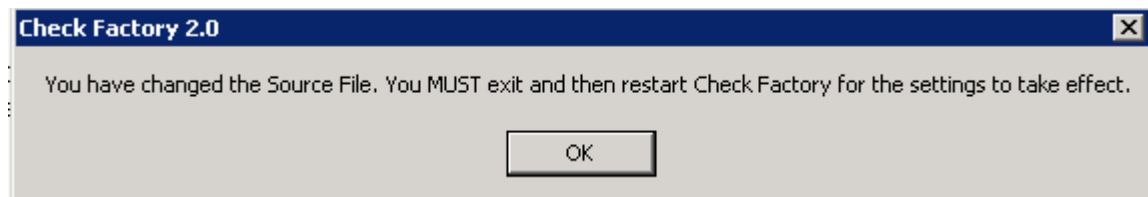
Buttons: Display Station Info, DestPrt AutoOk, Default Printer Font, Show Trigger Codes, OK

In the Drives: drop down list box choose the Z: \\... drive

In the Folders: list box double click on z:\. Your window should look exactly like the one below. If you are using Quick Books or BusinessWorks Gold, the File name: will have a .SPL extension. Click OK to close.



You will be notified that you must close Check Factory. Click OK



Click OK to close the Settings window. Click Close to close the Check Factory program.

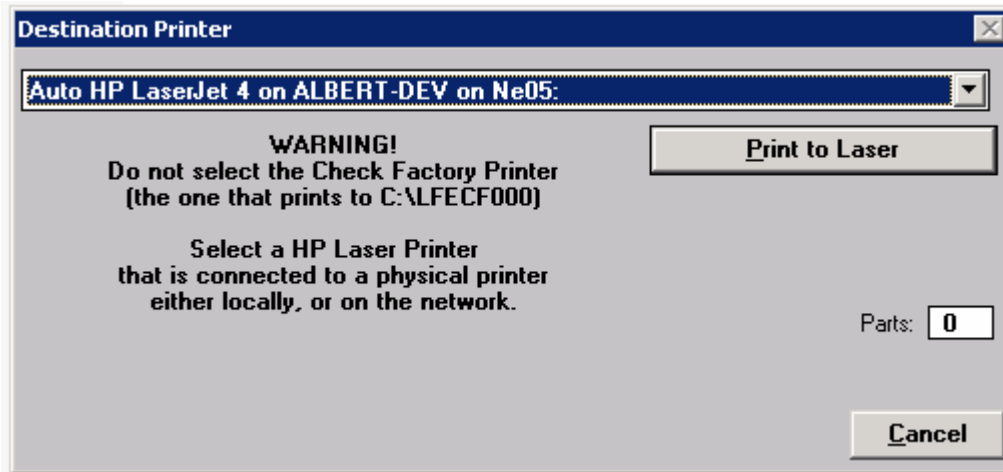
Finally restart Check Factory.

## Testing the printer connections.

We are going to test the printer connection between Check Factory and the physical printer. This printer is different than the virtual Check Factory printer previously set up.

**Click on the Print Menu, Define/Align New Printer**

Choose the printer that you would like your pages to be printed on. Click Print To Laser.



Choose the Check Format that you will be using for testing. Click OK

This window will be different for every version of Check Factory. Quick Books is shown.

**Select Check Format**

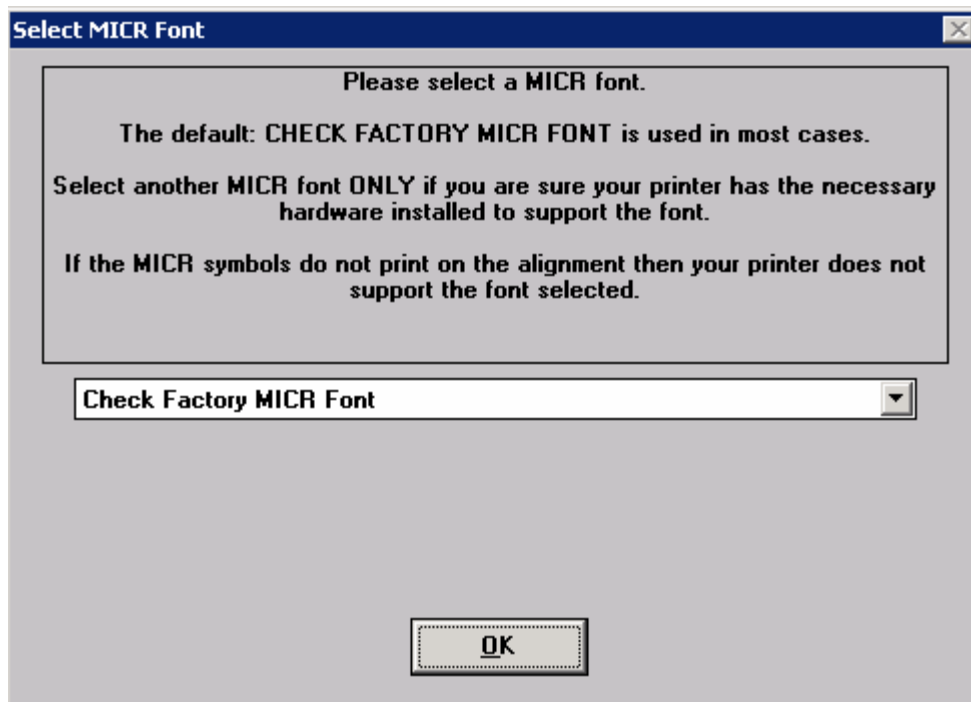
DEPTOP	Voucher Format - Check At Bottom
PRSSCCND	Standard Check Format - 3 Checks Per Page
STANDARD-3UP	Standard Check Format - 3 Checks Per Page
<b>VOUCHER</b>	<b>Voucher Check Format - Check At Top</b>
VOUCHER-BOTTOM	Voucher Format - Check At Bottom
VOUCHER-MID	Voucher Format - Check In Middle
VOUCHER-TOP	Voucher Check Format - Check At Top
WALLET	Wallet Checks

**Voucher Check Format - Check At Top**

Rec#: 2

Cancel OK

Choose the Check Factory MICR font. Click OK



Click the Align button. When the page comes out of the printer please use the clear plastic MICR Calibration Overlay to verify the position of the MICR characters. Use the Up/Down and Left/Right arrows to move the MICR line in to the correct position. The units are 720 units per inch so it will take increments of 30 or more to move the MICR line appreciably.

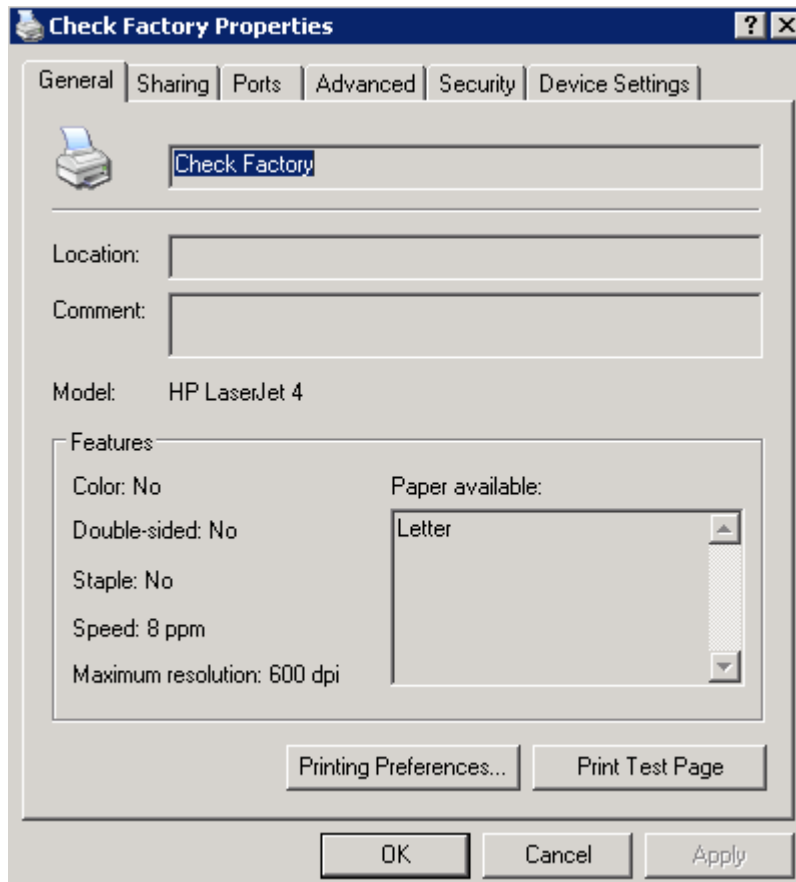
After the line is aligned please press OK. The alignment settings are now stored for this printer in this session. Repeat if you will be using more than one printer for this remote session.

This concludes testing the output or destination printer. Finally we will test the complete connection, from Source Printer to Destination printer.

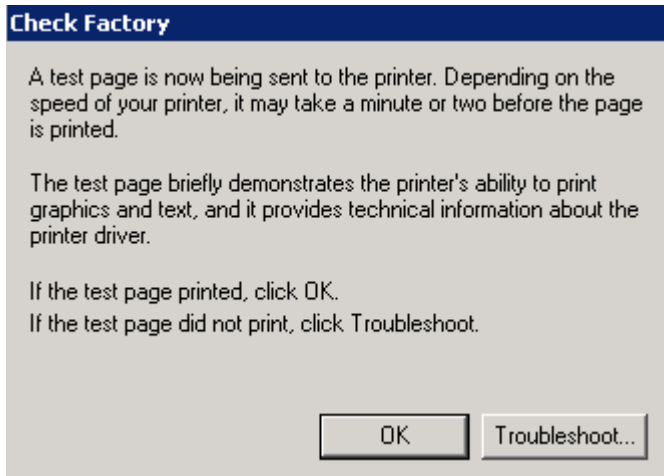
## Final Printer Connection Test.

Start Check Factory and Minimize. If you are running Quick Books or BusinessWorks please make sure that the CFSpooler window is running and minimized as well.

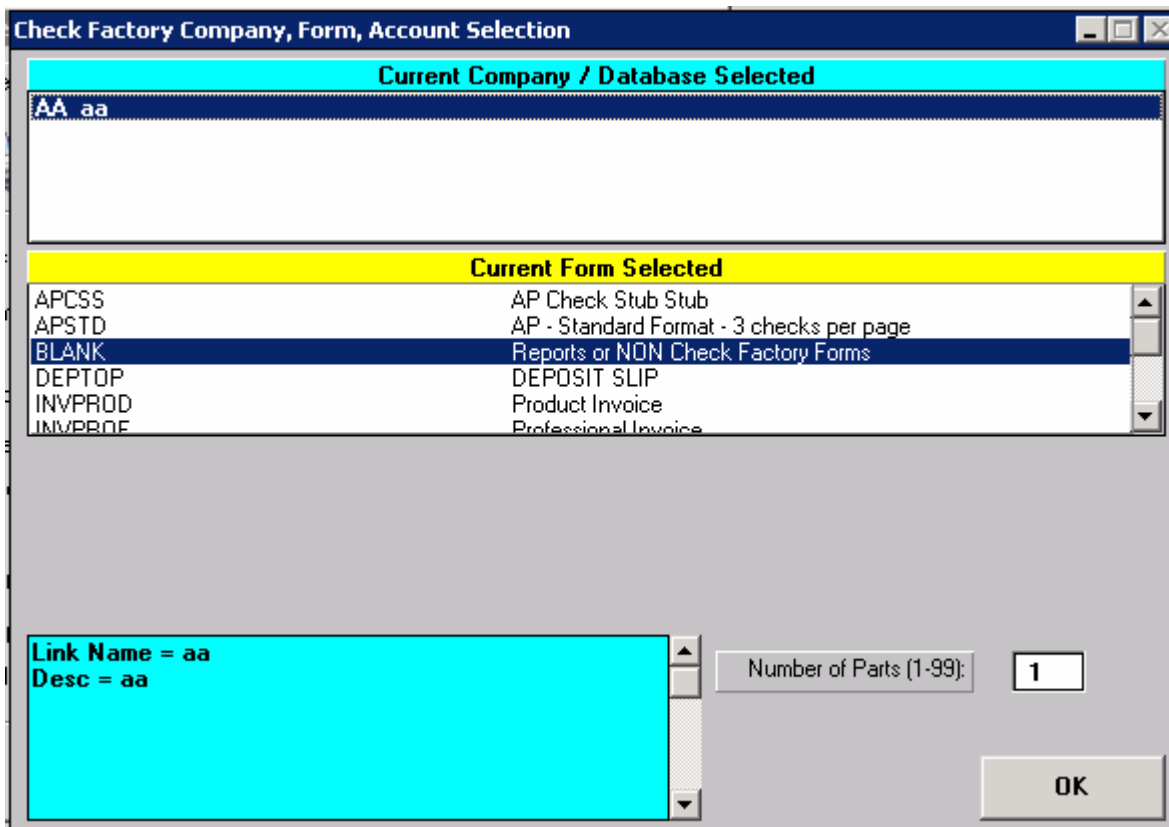
Click on Start, Settings, Printers and Faxes. Locate the Check Factory printer. Right click on it and open the Properties.



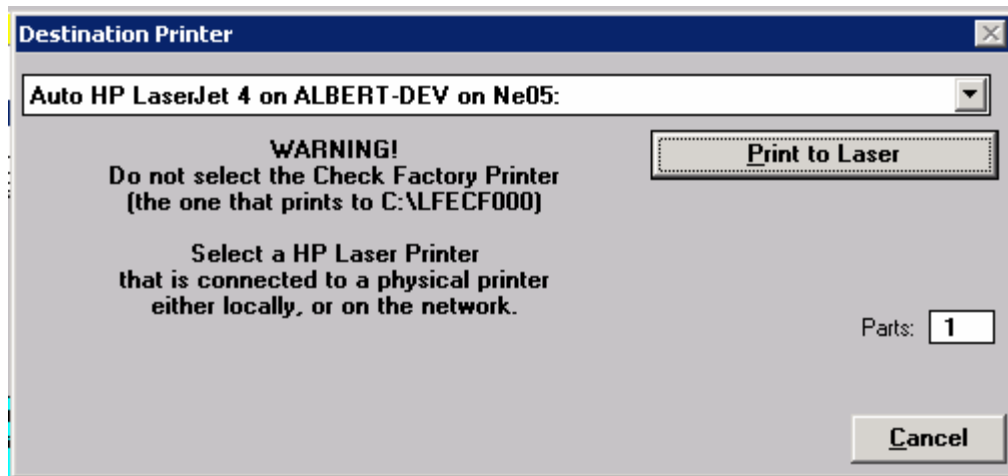
Click on Print Test Page. Click OK on the following window.



In about 10 seconds the Check Factory program will pop up with the multi colored window. Choose a company. Choose BLANK for the form since we are only printing a Windows test page and do not need an actual form overlay.



Finally choose your printer and click Print To Laser. Your test page should come out of the printer.



*You should perform the above Remote Session Test for EACH user on the system that will use Check Factory.*

## Performance Issues:

Check Factory uses a polling method to look for the LFECF000 file generated by the accounting application and the windows print driver. On a PC workstation the polling interval of every 1 millisecond is not an issue. However the interval on a Citrix/Terminal Server may be an issue and can slow down the server considerably. The interval may be adjusted by adding the line:

```
TimerInterval=xxxx
```

to the [Startup] section of the CFMASTER.INI file in the CFACTORY folder on the server where xxxx = the polling interval in milliseconds ( 1000ms = 1 second). The recommended value is 2000 - 3000.

```
CFACTORY\CFMASTER.INI
```

```
[Startup]
```

```
TimerInterval=2000
```

The timer interval is displayed in the Check Factory, Settings window next to the Timer Event check box.