



# Ocularis 5

## Getting Started Guide

For Existing Ocularis Legacy Users

## Ocularis 5 Getting Started

This quick reference is for customers who have a legacy version of Ocularis and need to add new camera licenses. You must first upgrade Ocularis Base and Client(s) to v5, then install an Ocularis 5 recorder and add the new cameras to that recorder. Keep your existing recorder(s) in place.

Use these steps when installing Ocularis Professional, Enterprise or Ultimate on a single computer. Refer to the *Ocularis Installation and Licensing Guide* or the *Upgrading to Ocularis* document for more detailed installation instructions. A recommended process flow to add a v5 recorder to an existing system is listed below. Each numbered step is described in detail following this list.

1. Download and Extract the Ocularis 5 installation file.
2. Upgrade and license the Ocularis Base software.
3. Access the Ocularis Component Downloads web page.
4. Upgrade *Ocularis Administrator*.
5. Upgrade *Ocularis Client*.
6. Verify the success of the upgrade.
7. Install the Ocularis 5 recording component software.
8. Add Cameras to the Recorder.
9. Apply Basic Configuration of Ocularis Base using *Ocularis Administrator*.
10. License the Ocularis 5 Recording Component.

See the *Release Notes* for the current Ocularis version for known issues, feature changes and fixes.

### 1. Download and Extract the Ocularis Installation File

1. Download the Ocularis installation file from <http://onssi.com/software-downloads/>.
2. On the Ocularis Base machine, launch the file downloaded in the prior step.
3. An *Installer Extraction* wizard appears. Click **Next** throughout this wizard to extract the installation files (making changes where you deem necessary).
4. At the end of the wizard, you are given the option to 'Install Ocularis Base'. Make sure this checkbox is selected and click **Finish**.
5. Proceed to step 2 Upgrade and License Ocularis Base below.

### 2. Upgrade and License Ocularis Base

Be sure you have your new Ocularis 5 SLC handy when installing or upgrading Ocularis Base.

1. (continued from prior section). If a previous version is detected, you'll be asked to install as an upgrade. Click **Yes**.
2. For upgrades from Ocularis 4.x or earlier, a message stating that the SLC is not supported will appear. Deactivate the old SLC and insert the new one. Click the **Deactivate** button in the *Ocularis License Activation* application.
3. At the warning message, click **Yes** to confirm the deactivation. Click **OK** to close the 'License successfully deactivated' pop-up.
4. Enter the new SLC starting with '905' (found in the email you received with your purchase) into the **Step 1: Enter SLC** box (or paste it from Windows clipboard). Click **Activate License**.
5. Click **OK** at the 'License activation successful' pop-up.
6. Click **Close** to continue with the installation of Ocularis Base.
7. Follow the wizard prompts for the remainder of Ocularis Base installation.
8. Read and accept the EULA. Click **Next**.
9. Choose **Typical** or **Custom** installation and click **Next**. 'Typical' installs files in default locations for new installations. 'Custom' allows you to modify file locations and database settings. 'Typical' is the recommended selection.  
The Ocularis Base files are installed to the specified directory. Accept defaults if prompted.
10. An informational message regarding the installation of dependencies may appear. Click **OK**. Dependencies are installed. This may take several minutes. A new installer website is also created.
11. A *Setup Wizard Complete* screen appears. Click **Finish**.

### 3. Access the Ocularis Component Downloads Webpage from the Base

During the installation of Ocularis Base, the files required to install other Ocularis components were also installed on the Base computer. These installation files may be accessed from other computers on the network via a local webpage. On each satellite PC, access the webpage on the Base to download and install Ocularis components.

1. Access the Ocularis installation webpage through a browser using the following URL:

`http://[Base_IP]:[port]/OcularisService`

where **[Base\_IP]** is either the IP Address or computer name of the Ocularis Base machine and **[port]** is the IIS port number. In most cases, the default port 80 is used and it is not necessary to enter it here. If you are located at the Base machine use:  
**http://localhost/OcularisService**

2. Click 'Download' next to each component you wish to install locally.

#### 4. Upgrade Ocularis Administrator

If you haven't already upgraded Ocularis Administrator to v5, use these steps. Install the *Ocularis Administrator* on the Base or any PC with connectivity to the Base. This component may be installed in as many places as you like.

1. From the 'Ocularis Component Downloads' webpage, click the **Download** button adjacent to *Ocularis Administrator*.
2. The file 'Ocularis Admin.exe' is downloaded. Click the file to run the installation wizard.
3. Follow the on-screen prompts in the wizard. It is recommended to use all defaults. The system will detect an existing installation and prompt you to uninstall the old and reinstall the new. Click **Yes**.
4. Click **Finish** when Setup Wizard is complete.
5. Continue with step 5 Upgrade Ocularis Client below.

#### 5. Upgrade Ocularis Client

If you haven't already upgraded Ocularis Client(s) to v5, use these steps on each client PC. *Ocularis Client* may be installed in as many places as you like.

1. From the 'Ocularis Component Downloads' webpage, click the **Download** button adjacent to *Ocularis Client*.
2. The file 'Ocularis Client.exe' is downloaded. Click the file to run the installation wizard. The system will detect an existing installation and prompt you to uninstall the old and reinstall the new. Click **Yes**.
3. Follow the on-screen prompts. Click **Yes** to save your existing Ocularis Client settings and accept the EULA. It is recommended to use all defaults. Click **Finish** at the completion of the wizard.
4. Continue with step 6 Verify the Upgrade before Proceeding below.

#### 6. Verify the Upgrade before Proceeding

1. Log into Ocularis Base with your new Ocularis Client and confirm that you can view video from cameras on your existing 4.x recorders.
2. If everything is working correctly, continue with step 7 Install Recording Component Software below.

#### 7. Install Ocularis 5 Recording Component Software

The v5 recorder may be installed on the same computer as your existing recorder (pending [hardware resources](#)) or on any computer with access to Ocularis Base. If you are unsure, please contact [OnSSI Technical Support](#).

1. From the 'Ocularis Component Downloads' webpage, click the **Download** button adjacent to *Ocularis Recorder*.
2. The executable file for this component is downloaded. Click the file to launch the installation wrapper to extract files.
3. Click **Next** throughout the wizard screens and when the *Extraction Complete* screen appears, ensure that the checkbox for 'Install Ocularis Recorder' is checked. Click **Finish**.
4. Select the language you wish to use for the installation and click **OK**.
5. A *Welcome to the InstallShield Wizard for Ocularis 5* screen appears. Click **Next**.
6. On the *End User License Agreement* screen, click 'I accept...' and then **Next**.
7. On the *Setup Type* selection screen, select the option for what you'd like to install. If you are installing all components on the current computer (recommended), select the option Manager & Server and click **Next**. For alternate installation options, refer to the *Ocularis Installation and Licensing Guide* or contact OnSSI Technical Support.

**NOTE: with Ocularis Professional ONLY you must install a Master Core along with a DM on each recorder. This requires a recorder SLC for each server, available from OnSSI. With Ocularis Enterprise or Ultimate there should be only one Master Core and optionally one or more Slave Cores in the entire environment. Only one SLC is needed in these models.**

8. On the *Server Services* screen, click the drop-down for *IP Addresses/host names found* and select the IP address for the current computer. **DO NOT SKIP THIS STEP**. Keep default values for the *Update Service* section.
9. On the *Multimedia Setting* screen, we recommend changing the default value (C:\VideoDatabase) to another drive. This is where you want the recorded video to be stored. You may add multiple zones or paths for video storage. If you add additional zones, be sure to delete the default location of c:\VideoDatabase. If you are unsure, do not add any paths for storage at this time. Keep default values. Storage locations can always be added later. Click **Next**.
10. Click **Install**.
11. When prompted to accept the EULA for Microsoft DirectX, click **Yes**. Note that this window may be behind the regular installation window.

12. When installation is complete, click **Finish**. A desktop icon, 'Ocularis Recorder Manager', appears on the desktop.
13. Continue with step 8 Add Cameras to the Recorder below.

## 8. Add Cameras to the Recorder

These are the bare minimum steps required to get Ocularis Recorder up and running. Additional configuration such as configuring storage, motion detection and other camera settings can be done at a later time.

1. Launch the *Ocularis Recorder Manager* from the desktop icon from step 12 above.
  2. On the login screen, enter the IP Address of the PC where the recorder is installed in the **Server** field. (If it is on the same machine you may use **localhost**.)
  3. Enter the username **admin** in the *User* field.
  4. Enter the password **admin** in the *Password* field.
  5. The very first time you launch this application, you will be forced to change the 'admin' password. You may change it to anything you like and if you select 'secure password' you must follow the rules of a secure password. It is not necessary nor recommended to use a second password for this application.
  6. If the computer you are on is also on the same network as your cameras, click **Find Devices** to add cameras using this tool. If not, click **Create Camera** to add each camera manually.
    - a. **Find Devices** will present you with a list of cameras found. You may modify several fields including the camera's username and password in this list if you have changed them from the default. When ready, click **Add**.
    - b. **Create camera** presents you with a dialog for you to enter a name for the camera, the manufacturer, the device driver, the username and password, and the IP address and port number. Leave the *DeviceManager* field as is for now. Click **OK** to add the camera.
    - c. You may also import cameras from a .CSV file or from a v4.x configuration.xml file. Refer to the document *Ocularis 5 Migration Tools* for more information.
- For more information on configuring camera settings, refer to the *Ocularis Recorder Configuration Manual*.
7. Close the *Ocularis Recorder Manager*.
  8. Continue with step 9 Basic Configuration of Ocularis below.

## 9. Basic Configuration of Ocularis

These are the bare minimum steps used to get the new cameras up and running in Ocularis. Additional configuration such as configuring alerts, maps and other behavior can be done at a later time.

1. Launch the *Ocularis Administrator* application.
  - a. Enter User name: **admin**
  - b. Enter Password: **admin** (or whatever password you have configured for the *Ocularis Administrator* 'admin' account)
  - c. Use the IP address of the Base computer in the 'Server' field
  - d. Select 'Authentication' type **Basic**
  - e. Check the box to 'Remember Login'
  - f. Click **Login**.
2. Import the Recording Component.
  - a. On the left of the 'Servers / Events' tab, click **Add**.
  - b. Enter the IP Address of the recorder computer in the **Host** field.
  - c. If you want to customize the label used to display the server, enter the text in the 'Alternate Label' field.
  - d. Select 'Login Type' of **Basic**
  - e. Enter the user name for the recorder account: **admin**
  - f. Enter the password for the recorder's admin user account.
  - g. Click **Add**.
3. Select the 'Users / Privileges' tab and assign Camera Privileges for the newly configured cameras to non-Administrator groups.
  - a. In the left panel, expand a user group name and select 'Camera Privileges'.
  - b. New cameras appear in the group titled 'Unprivileged'. Assign cameras to one or more camera groups as needed. Either drag-and-drop the camera name from the 'Unprivileged Cameras' group to another camera group or right-click the camera and assign to a camera group. Multi-select is supported (use **SHIFT** or **CTRL** to select multiple)
4. Select the 'Views' tab.

Either create a new view for the new cameras or populate existing views with the new cameras.

  - a. New View:
    - i. Select the Group name for which you will create a view.
    - ii. Click the **New Group** button at the top left toolbar.
    - iii. Click the **New View** button to create a basic view.
    - iv. Select the layout for the view (1x1, 2x2, 3x3, etc).

- b. Populate view panes with cameras.
  - i. Select the 'Cameras' tab in the lower left panel.
  - ii. Expand the folder labeled 'All' to see a list of all privileged cameras for this group.
  - iii. Drag and drop camera names from the left pane directly onto the desired pane displayed on the right.
5. Close *Ocularis Administrator* and continue with step 10.

## 10. License the new Recording Component

When the Ocularis 5 recording components are installed, the software defaults to a 30-day free trial mode. You must license the software within the 30 day period. There is no need to register camera licenses or MAC addresses. Once the software is licensed, no further licensing steps are required (unless you purchase additional camera licenses). Use the SLC you receive when you purchased the product. Licensing can be done online or offline.

### Licensing Online

Use these steps if the PC with *Ocularis Recorder Manager* has internet connectivity.

1. Launch the *Ocularis Recorder Manager*.
2. Select the *Info* menu and click **Activate License**.
3. Click **OK** to confirm that you have an internet connection.
4. Verify that the *Personalize License* radio button is selected (this is the default selection).
5. Enter the recorder SLC in the first field. This SLC should contain seven digits starting with '500'.
6. Fill out the remainder of the form.
7. Click **OK**.

The software connects to the OnSSI registration server, obtains and downloads the license. You are done! To view your licensing information, select **Show License** from the *Info* menu.

### Licensing Offline

Use these steps if the PC with *Ocularis Recorder Manager* does not have internet connectivity.

1. Launch the *Ocularis Recorder Manager*.
2. From the *Info* menu, select **Request Product ID**.
3. Click **Copy** to copy the Product ID to the Windows clipboard.
4. Click **OK** to close the Product ID pop-up.
5. Paste the contents of the clipboard into a Notepad or other text file. Save the file to portable media and bring it to a PC that does have internet connectivity.
6. From a browser, go to the URL: <http://onssi.com/ocularis-recorder-licensing/>
7. At the top of the page in the section *Initial installation: New license code*, you'll see a form. Enter your SLC (i.e. the 7 digit SLC with the prefix '500') and fill out the remainder of the form. In the **Product-ID**, field, paste the contents of the text file that you created from the *Ocularis Recorder Manager* in step 2.
8. When done, click **Submit**.

The SLC is verified with the OnSSI licensing server. A license key file is emailed as an attachment to the email account specified on the form. There may be a delay of up to ten minutes to receive the email from the licensing server.
9. Detach the license key file from the email and bring the file back to the offline computer running the *Ocularis Recorder Manager*.
10. In the *Ocularis Recorder Manager*, select **Import license file** from the *Info* menu.
11. Click **Select** to navigate to the license file. Select the file and then click **Open**.
12. Click **Import** to apply the license key. You are done! To view your licensing information, select **Show License** from the *Info* menu.
13. Continue to step 11.

## 11. Install and Configure the Ocularis Recorder Event Proxy

If you use events with Ocularis, multiple live streams or Ocularis Web or Mobile you will need to install and configure the new recorder's proxy. To configure individual events, refer to the *Ocularis Administrator User Manual*.

1. From the 'Ocularis Component Downloads' webpage, click the **Download** button adjacent to *Ocularis Recorder Event Proxy*.
2. The executable file is downloaded. Click the file to run the installation wizard.
3. Follow the on-screen prompts in the wizard. It is recommended to use all defaults. The system will detect an existing installation and prompt you to uninstall the old and reinstall the new. Click **Yes**.
4. Click **Finish** when Setup Wizard is complete.
5. Open the Event Proxy. Click **Recorder Settings**.
6. Enter the IP Address for the recorder's master core. This is the same address you used to login with *Ocularis Recorder Manager*.
7. Provide a username and password for an administrative account on the master core. (Recommend the 'admin' account).

8. Suggest bypassing the 'Recorder Name' field at this time. It may be modified later.
9. Click **Test Connection**. Assume a successful test, the 'OK' button is enabled. Click **OK**.
10. Click **Base Settings** and enter the IP address of Ocularis Base in the 'Base IP Address' field. Then click, **Add Base**.
11. Click **OK**.
12. If you will be doing event monitoring, click Event Filters. Select the events you wish to monitor and then click **OK**.
13. If the Event Proxy Service is stopped, click the **Start Service** button.

For additional help using Ocularis, refer to the library of [documentation](#) on the [OnSSI.com](#) website.

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