GOLD Deploy User's Guide

Created November 2025

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Table of Contents

GOLDDeploy User's Guide 6
Setting Up Security 8
GOLDDeploy Agent 9
Setting Up Deployment Options 10
Non-Editable Information 11
Available Options 11
GOLDDeploy Management Screen 13
Subscriptions tab 14
Institution 16
Subscription Selection Filters field group 17
By Product 17
By Tag 17
How to Install field group 17
When to Install field group 17
Subscriptions list view 17
Create New Subscription / Update Subscription field group 19
Select a Product 19
How to Install field group 19
When to Install field group 19
Tags 20
Schedules tab 21
Institution 23
Schedule Selection Filters field group 23
By Package 23
By Tag 23
By Target 23
Release Start 23
Release End 23
When to Install field group 24
All 24
At Night 24
Immediately 24

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Subscription # 24
Status 24
Show Manual Release 24
Show Automatic Release 25
Include Deleted 25
Schedules list view 25
Target Machines tab 27
Institution 32
Target Selection Filters field group 32
By Unique Token 33
By Location ID 33
By Tag 33
Include Deleted 33
Target Machines list view 33
Schedule an Emergency Install 35
Tags and Settings tab 37
Common Tags 38
Tag Name 38
Institution Tags 38
Email Notification Addresses 38
Installation Parameters tab 39
Institution 40
Parameter drop-down list 40
Product 40
Default Value 40
Parameter list view 40
Assign by field group 40
Tag 41
Target 41
Override Value 41
Target Override list view 41
Candidates tab 42
Institution 42
Candidate Selection Filters field group 43
By Product 43
By Version 43

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Build Start 43
Build End 43
Release Candidates list view 43
Release Control tab 45
Settings tab 46
Institution 47
Deploy Objects Work Paths field group 47
Deployment Candidates Folder 48
Release Packages Folder 48
Release Packages Base URI 48
Deploy Log File Folder 48
Parameters field group 48
Valid Parameter Key Names 49
Parameter Key Names List 49
Stand Alone Transfer IDs field group 49
Products field group 49
Products List 50
Deploy Log tab 51
Institution 53
Log Selection Filters field group 53
Start 53
End 53
Who 53
What 53
Component 53
Action 54
Type of Detail Text 54
Show All Fields 54
Changed fields only 54
Deploy Log list view 54
Products that Require Special Setup 56
CORelP 56
GOLDTeller 58
Platform 60

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GOLDDeploy User's Guide

Introduction

GOLDDeploy makes it easy to install FPS GOLD software updates as soon as they become available. Your institution can specify certain instructions for the installations, such as the schedule and whether you want to start the installation manually or automatically. After setup is complete, GOLDDeploy can install software updates according to your specifications.

Some FPS GOLD products require special procedures in order to install them with GOLDDeploy. For details, see the section on the Products that Require Special Setup at the end of this guide.

This section gives an overview of how GOLDDeploy works. See the sections on the GOLDDeploy Agent and on the GOLDDeploy Management Screen for details on setup.

GOLDDeploy includes the following features to ensure installation accuracy and security:

- All actions are logged at all levels. The GOLDDeploy log lists the functions and updates that were attempted and performed. The log is also reported to FPS GOLD so that we can provide help, if necessary, with installation problems.
- Security is enforced. No machine can receive installation packages without first being properly registered with the deploy server.
- Your institution controls who can see the system and who can approve and release packages in the system.

Once software is deployed to your computers, software updates from the FPS GOLD website should not be installed. GOLDDeploy will automatically override the version on your computers.

How GOLDDeploy Works

The steps and flow chart below give a general overview of how the system works.

1. A target machine at your institution has a GOLDDeploy agent installed on it.
2. With help from FPS GOLD, you set up GOLDDeploy options for your institution.
3. The agent talks to the FPS GOLDDeploy server to see if any updates need to be installed.
4. The server sends the agent a list of what needs to be installed.
5. The agent uses a pre-determined schedule to get the installation package from the production package repository.
6. The agent gets installation parameters from the server.
7. The agent installs the software.
8. The agent reports results to the deploy server.

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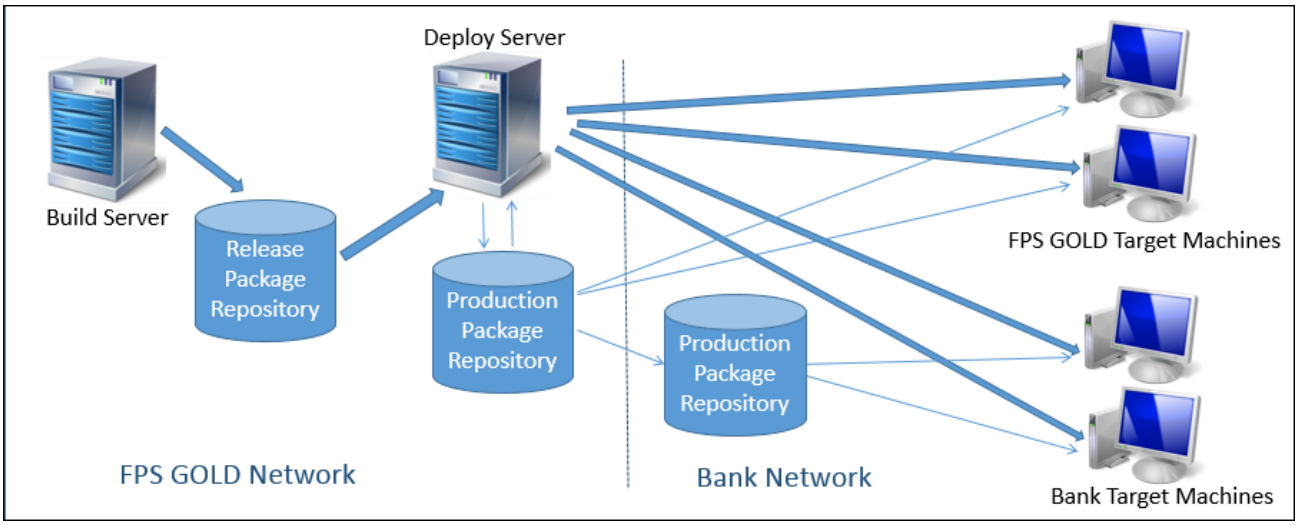

Definitions

The following definitions describe the terms used in this document and on the GOLDDeploy screens.

- **Deploy Server** – A single deploy server controls all installation services for FPS GOLD clients. Target machines register with the deploy server in order to receive packages.
- **Parent Server** – Another name for the Deploy Server.
- **Product** – This is a basic unit installed on a machine. For example, one product might be GOLDTeller Stand Alone, and another might be GOLDTeller with Platform.
- **Release Package** – When a new version of a product is ready for release, the files that make up the product and its installation instructions are bundled into a release package. When a target machine receives a release package, it uses the instructions in the package to install the new version of the product on the target machine.
- **Schedule** – A schedule links a release package to a target machine and gives the delivery date and time. Schedules also contain information about the status of the package installation.
- **Repository Server** – The deploy server links to a repository server that houses the actual installation packages. That repository server may link to one or more other repository servers. Each repository server gets a copy of the release packages. During software installation, the deploy server directs the target machine to the repository server it should access to get the installation packages.
- **Subscription** – A subscription links a product to tags.
- **Tag** – A tag is a word that describes the role of a target machine, such as Production, Test, Office3, and Teller.
- **Target or target machine** – A target is a computer that receives a release package and installs it on the machine. A target's role is described by tags.
- **User** – The user is a person given security to log on to a GOLDDeploy server. Users can be given view-only privileges, deployment privileges, or administrative privileges.

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Setting Up Security

Before you can use GOLDDeploy, three predefined System Profile security groups must be created and tied to the appropriate employees. The groups are described below. Subscribe to Mini-Applications for GOLDDeploy Management must also be set up, and you must have a GOLDDeploy Agent installed and configured.

GOLDDeploy Security Groups/Profiles

The predefined System Profiles used for GOLDDeploy should not be changed in any way. If they are, your user security functions will not work. Add employees to these profiles based on the actions they need to perform in GOLDDeploy. The actions and functions the profiles control in GOLDDeploy are explained below.

DeployAdministrator
The users in this group have access to design parameters and options for deployment of FPS GOLD® software to your users. Users in this group are administrators, deployers, and viewers. They don't need any other security settings.

Deployer
The users in this group have access to schedule and deploy FPS GOLD software releases to your users. Users in this group can also view all screens.

DeployUser
The users in this group can only view the schedules and options that are set up but cannot make changes.

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GOLDDeploy Agent

The GOLDDeploy Agent is a small program installed on each workstation that runs GOLDDeploy software. The GOLDDeploy Agent registers itself with the server. When an installation package becomes available at the server, the agent program downloads the package and runs the installation, adding or upgrading the software (such as CIM GOLD) on the workstation.

> **NOTE**
>
> The GOLDDeploy Management screen in CIM GOLD and GOLDDeploy AgentConfigurator require .NET Framework, version 4.7.

This section describes the GOLDDeploy Agent program and explains how to use it.

Agent Installation

The GOLDDeploy Agent program must be installed the first time on a workstation by someone with administrative rights on the machine. To install the program, right-click on the installation file, GoldDeployAgentInstall.exe, and choose "Run As Administrator." Windows will run the installation, which will perform the following steps:

1. Install the configurator program on your workstation.
2. Install a Windows service program that does the actual work on your workstation.
3. Add a shortcut to the programs list in the Start menu.

The installation program can be configured by FPS GOLD to install default settings specific to your institution.

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Setting Up Deployment Options

This section explains how to set up deployment options for your workstation.

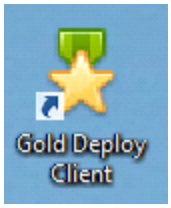
Use the GOLDDeploy Agent Configurator for the following two tasks:

- to set up your options
- to start and stop the service that does the actual downloading and installation

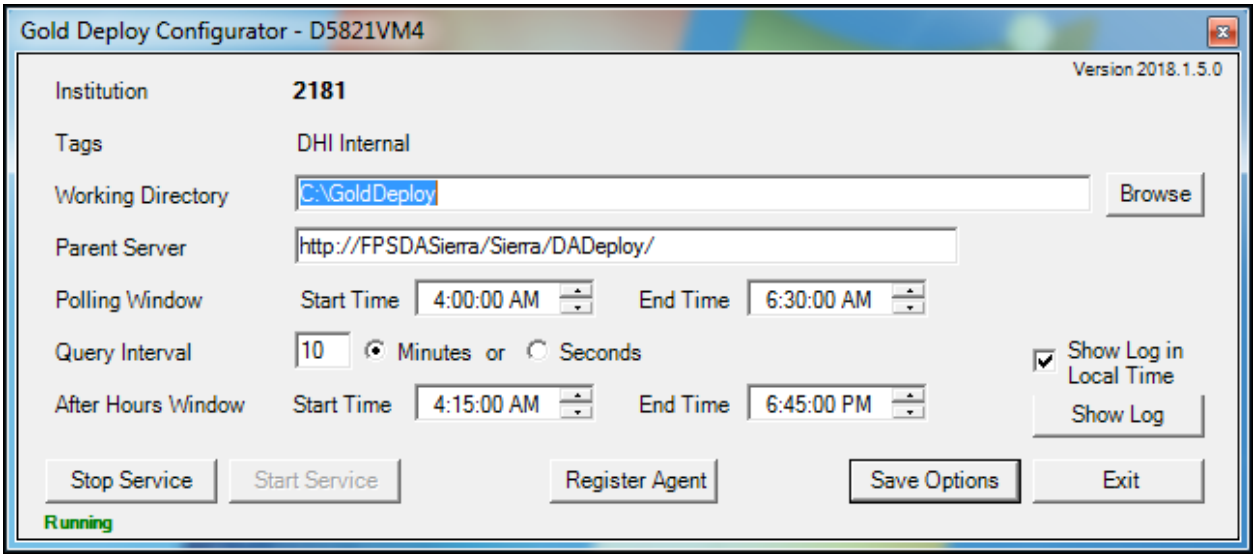
> **NOTE**
>
> The Agent Configurator will ask for Administrator rights in order to run.

To set up deployment options:

1. In the start menu, click the GOLDDeploy Client icon.



The GOLDDeploy Configurator screen opens.



2. Enter information in the fields. See Available Options below for information on the fields.
3. When you have finished, click <Save Options>.

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Non-Editable Information

The following list explains the information at the top of the GOLDDeploy Configurator screen. This information can't be changed on this screen.

- Computer's identity (on the title bar—D5821VM4 in the example above). This will be the name of your workstation as it is known to the network.
- Your Institution number.
- Tags associated with this Agent Target machine. **Note:** A system administrator can change these tags on the Target Machines tab.

Available Options

The following table explains the deployment options you can set up for your workstation.

Option or Button	Explanation
Working Directory	The GOLDDeploy process requires an empty working folder on your machine that it can use for downloading and installing programs. In this field, enter a folder name that you have read/write access to. For example, if you create a folder on the C: drive named GoldDeploy, enter "C:\GoldDeploy" in the **Working Directory** text box.
Browse button	You can click this button to find your working directory. When you select the directory from the browse window, its name will be entered in the **Working Directory** text box.
Parent Server	Enter the name of the GOLD Deploy server from which your computer will receive its installation packages. The server name will be provided to you by FPS GOLD and be similar to this: "http://D5172/Sierra/Deploy/".
Polling Window	This is the time span when the agent will poll (query) the Parent Server to determine whether new products are available to download and install. If the **End Time** is earlier than the **Start Time**, the **End Time** will be treated as the next day.
Query Interval	Use this field to specify how often your workstation will check with the server to determine whether new products are available to download and install. Enter a number in the text box, then select either **Minutes** or **Seconds**. For example, if you enter "60" in the **Query Interval** check box and select **Minutes**, the agent will test for new updates once every hour. The query will only happen within the **Polling Window** time frame.
Delay Until	When a new product has been downloaded and is ready for installation, the product will be installed according to the instructions on this screen and on the GOLDDeploy Management screen in CIM GOLD. Products that have been set for "At Night" will only be installed during the **Delay Until** time window. Each time is given as an hour from 0 to 23 and minute from 1 to 60. For example, if you want delayed installations to run between 10:30 p.m. tonight and 4:15 a.m. tomorrow, you would enter the range this way: Delay Until 22 : 30 to 4 : 15.
Show Log in Local Time	Uncheck this box if you want to show the deploy log with UTC dates rather than the current date and time zone of the machine. The log will come up faster if this box is not checked, but the dates and times will not be in regular time.
<Show Log>	When installation packages are downloaded and installed, a log file is written of the actions taken. It lists what was received and when it was received, so it can help you

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	troubleshoot any possible installation errors. Click <Show Log> to view the log file in a Notepad window. The log file is saved in your working directory.
<Stop Service> and <Start Service> buttons	A Windows service program is installed and runs on your workstation as part of the GOLDDeploy process. It is the program that communicates with the server and manages the product installations. Normally, you will just let the service run. However, if you are directed to stop the service by your support representative, click the <Stop Service> button. To start the service back up, click <Start Service. The status of the service is indicated below the buttons.
<Register Agent>	**Important:** You should only click this button if directed to do so by your GOLD Deploy administrator or by FPS GOLD personnel. Clicking this button registers the Agent with the server. Normally, the registration is done during the initial installation. Use this button when registration may be necessary again. After clicking the button, you must also stop and start the service.
<Save Settings>	Click this button if you made any changes to the fields on the screen. After clicking the button, you must also stop and start the service.
<Exit>	Click this button to close the window. If you have not saved changes, they will be lost when you exit.

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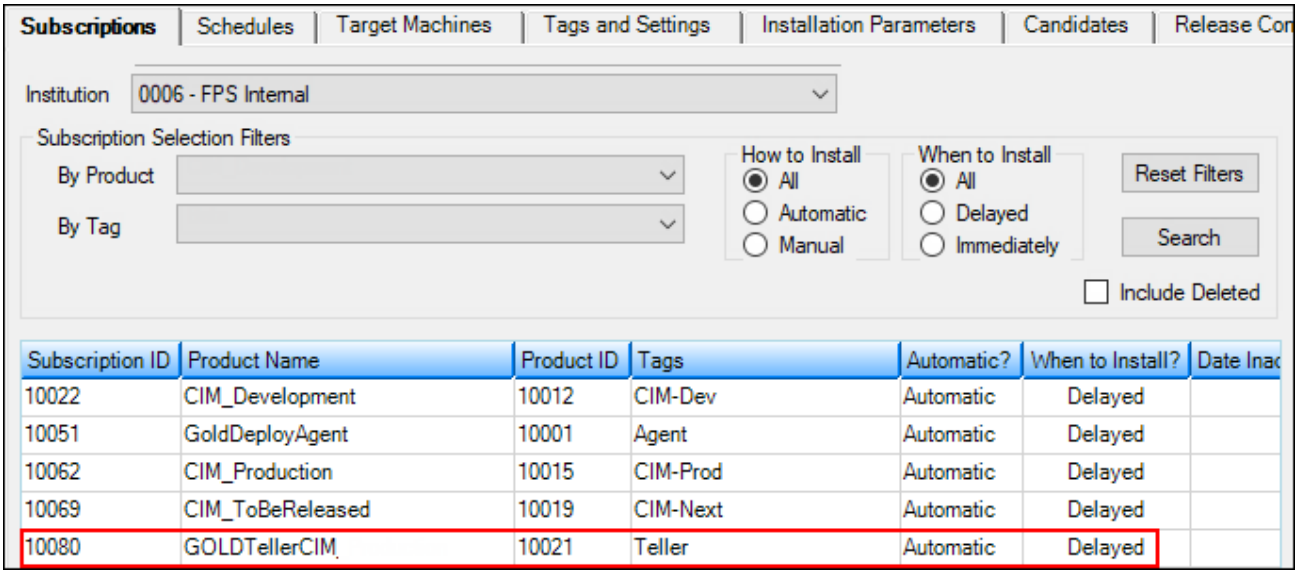
GOLDDeploy Management Screen

Use the GOLDDeploy Management screen (found under Other Applications in CIM GOLD) to set up the details of how your institution wants GOLDDeploy to work. See the example below.

Before you can use this screen, three predefined System Profile security groups must be created and tied to the appropriate employees. For details, see Setting Up Security in the GOLDDeploy User's Guide. Subscribe to Mini-Applications for GOLDDeploy Management must also be set up, and you must have a GOLDDeploy Agent installed and configured.



Other Applications > GOLD Deploy Management Screen

Tabs

The tabs on the screen handle the specific parts of the deployment process:

- Subscriptions tell the system which products should be installed on which target machines.
- Schedules determine when to install a specific product version on the target machines.
- Target Machines show the end-user machines that have registered with the server and can receive installation packages.
- Tags and Settings are used to define Common and Institution tags.
- Installation Parameters are created to allow for variations in different types of installations. Parameters can be defined at the product level and at the target machine level. You can also override the parameters at both levels.
- Candidates are programs that can be distributed with GOLDDeploy. FPS GOLD employees determine which candidates are released.
- Release Control is an FPS GOLD ONLY tab and is managed by our release manager.
- Settings are used to define various basic settings and options that control the release process.
- Deploy Log shows a history of all system changes and product installations in the system.

See the section for each tab for information on how to use it.

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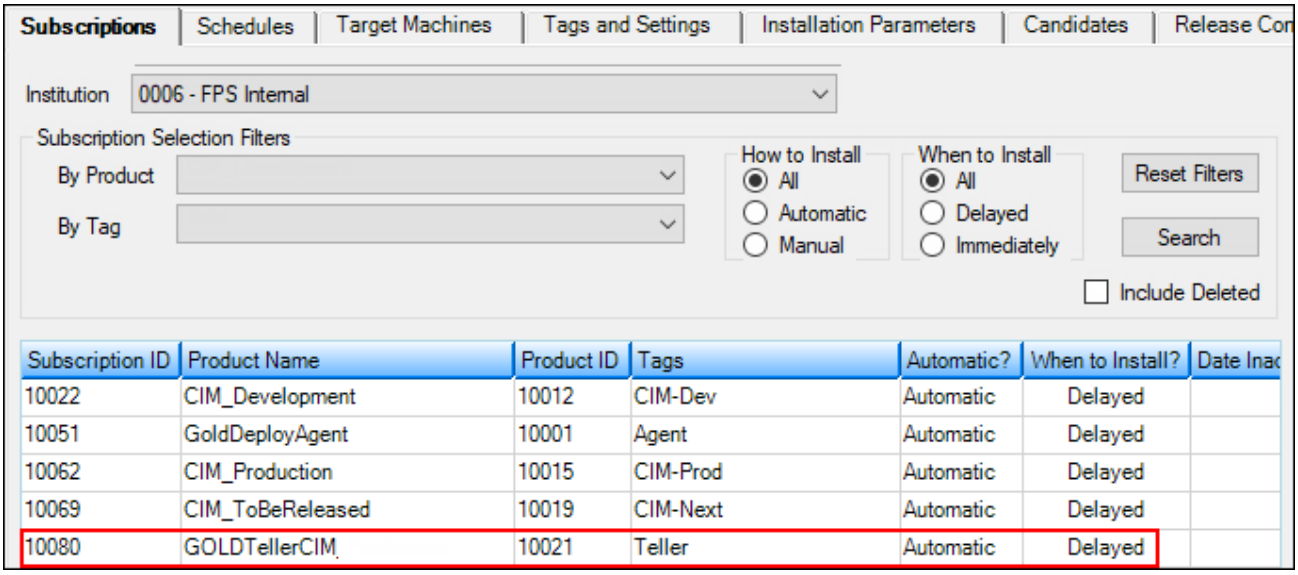
Subscriptions tab

If you have appropriate security, you can add subscriptions, add schedules to subscriptions, and delete subscriptions for products to be installed on target machines. A subscription links an FPS GOLD product to tags. Tags provide information about a target machine's location or role. For example, a beta test machine could be assigned the tag "Beta."

Use the filters at the top of the screen to search for specific subscriptions and display their details in the list view. Right-click on the screen to open a pop-up menu.



Add a Subscription

When a product is released to the system, the system automatically finds all subscriptions to the product and schedules them for release according to subscription instructions. Once a package is available for release, your bank may want to add a new subscription for the release package. However, adding a subscription will not automatically schedule packages. See the section below for information on how to add a schedule.

To add a subscription:

1. In the Create New Subscription field group at the right of the screen, select a product from the drop-down list.
2. Select a radio button for How to Install and When to Install.
3. Check one or more of the boxes that describe where this product should be deployed.
4. Click <Subscribe>.

See the example below.

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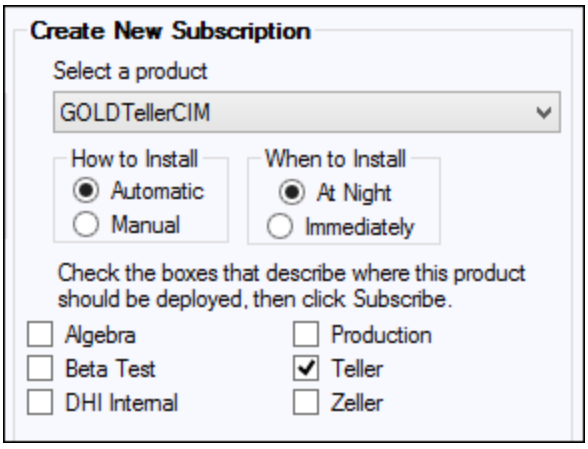
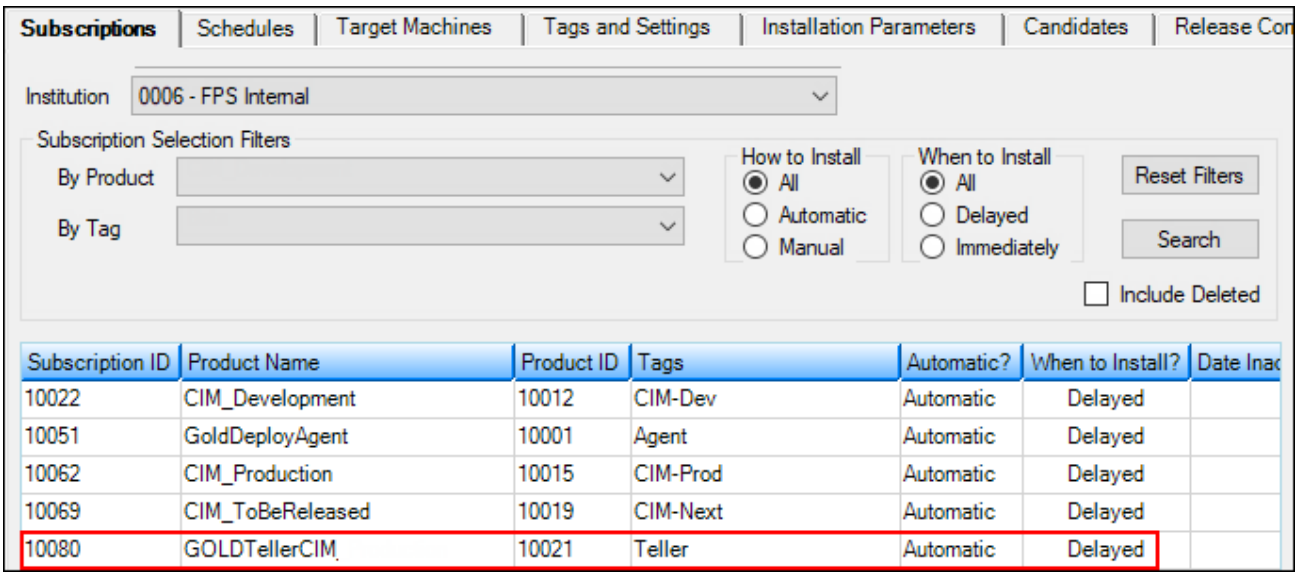


If the subscription succeeded, you will see a confirmation message.

5. Click <OK> to close the message.

The new subscription is added to the list view, as shown below.



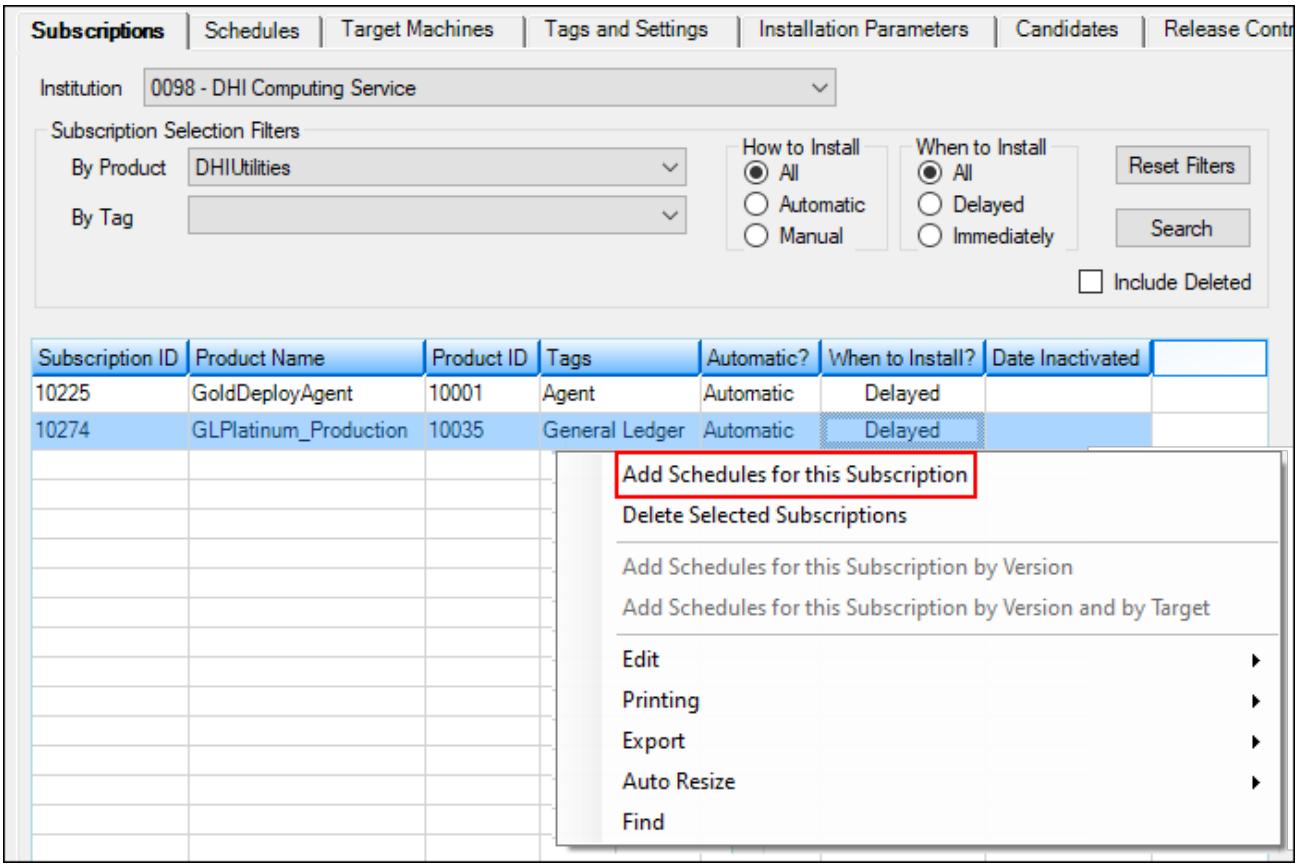
Add Schedules

After a subscription has been added, you can schedule the release.

To add schedules to a subscription:

You can add a schedule to a subscription on this tab. To change or delete a subscription, use the Schedules tab.

1. In the list view, select the subscription that you want to schedule.
2. Change any of the fields in the Update Subscription field group at the right of the screen.
3. Right-click on an item in the list view. A pop-up menu opens. See the example below.
4. Click "Add Schedules for this Subscription."



Delete Subscriptions

You can delete one or more subscriptions at a time.

When you click <Delete>, the selected items are deleted immediately. There is no confirmation dialog. However, you can add a subscription again if you accidentally delete it.

To delete subscriptions:

1. Select one or more subscriptions in the list view.
2. Click <Delete>.

Fields on This Tab

Institution
Subscription Selection Filters field group
Subscriptions list view
Create New Subscription / Update Subscription field group

Institution

FPS GOLD employees can change the institution they are working with by selecting an institution from the drop-down list. Banks have access only to their own institution data.

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Subscription Selection Filters field group

Use these fields to select which subscriptions are displayed in the Subscriptions list view. See the following topics for more information on the fields.

By Product
By Tag
How to Install field group
When to Install field group

Buttons

- <Reset Filter> – Click this button to set all search filters back to original settings.
- <Search> – Click this button to refresh the data on the screen using the currently selected filters.

By Product

If you leave this field blank, all products are selected to display in the Subscriptions list view when you click <Search>. Selecting a single product changes the list views to show only the subscriptions for that product.

By Tag

If you leave this field blank, subscriptions with all tags will display in the Subscriptions list view. Selecting a single tag will show only the subscriptions with the selected tag when you click <Search>.

How to Install field group

Select the appropriate radio button to limit your search based on whether you want to see the subscriptions install automatically, manually, or both.

When to Install field group

Select the appropriate radio button to limit your search based on whether you want to see the subscriptions install at night, immediately, or both.

Subscriptions list view

The table below describes the columns in the Subscriptions list view. You can find and display specific types of subscriptions using the Subscription Selection Filters above the list.

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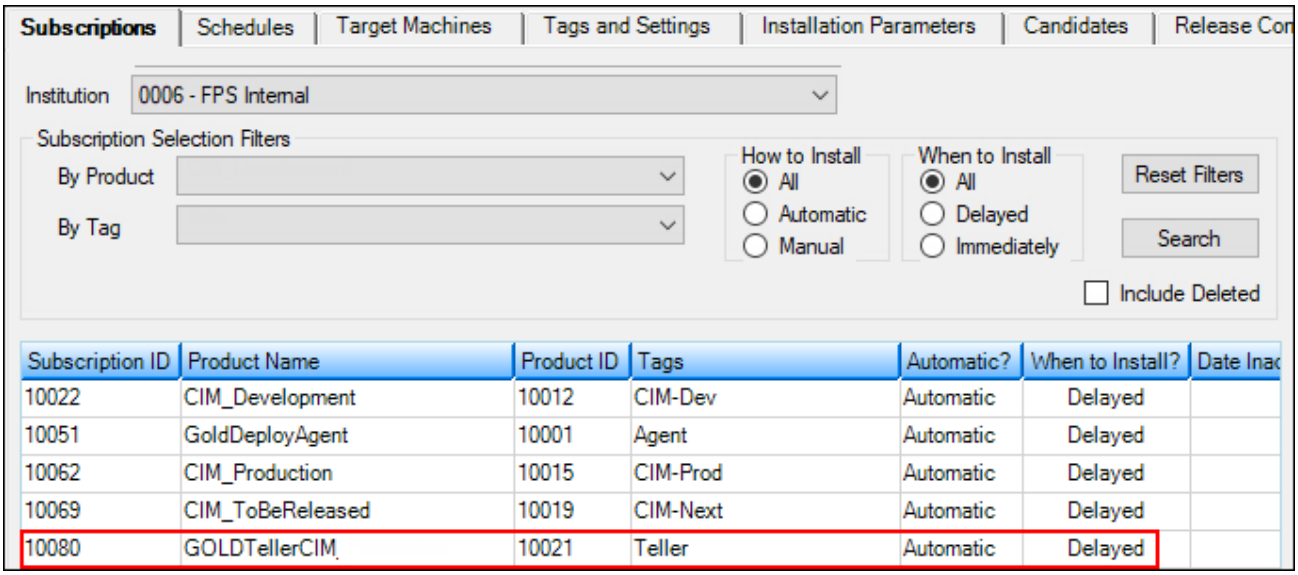

Column	Explanation
Subscription ID	This column shows the unique number assigned to the subscription.
Product Name	This column shows the name of the product for the subscription.
Product ID	This column shows the unique number assigned to the product.
Tags	This column lists the tags attached to the subscriptions that describe the roles of the target machines that receive the subscribed product.
Automatic?	An automatic subscription means that, when a new version of this product is received, it is scheduled for delivery to the subscribed targets without human intervention. You can specify how often to check for new versions. See Available Options in the GOLDDeploy Agent section for more information. A manual subscription means that when a new version of the product is received, a schedule is created, but no release date is assigned. A user must schedule the installation. For example, a bank may want any new versions of a product to be immediately installed on a beta test machine (automatic) but may choose to wait until testing has been completed before manually scheduling the update to be installed on teller machines (manual).
When to Install?	Delayed means release package schedules for this subscription will automatically install during the Delayed Installation Window time, which is set in the GOLDDeploy Configurator. Immediate releases will happen on the target machine as soon as it successfully receives the installation package.

See Also:
How to Install field group
When to Install field group

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Create New Subscription / Update Subscription field group

Use the fields in this group to set up or change the details of subscriptions.

Create New Subscription

When no subscription in the list view is selected, this field group is labeled "Create New Subscription" and allows you to enter the information required to make a new subscription. For steps on creating a subscription, see "Add a Subscription" in the Subscriptions tab section.

Update Subscription

When a subscription is selected in the list view, this field group is labeled "Update Subscription." It shows the values of the selected subscription so you can update them or delete the subscription using the <Delete> button.

Select a Product
How to Install field group
When to Install field group
Tags

Select a Product

When creating a new subscription, use this field to select the product you want to install. If you want to change the details for an existing subscription, select it in the Subscriptions list view

For steps on creating a subscription, see "Add a Subscription" in the Subscriptions tab section.

How to Install field group

Select the radio button that describes how you expect the installation to take place.

- An **Automatic** subscription means that, when a new version of this product is received, it is automatically scheduled for delivery to the subscribed targets without requiring any intervention.
- A **Manual** subscription means that,when a new version of the product is received, a schedule is created, but no release date is assigned. It waits for a user to schedule the installation.

For example, a bank may want any new versions of a product to be immediately installed on a beta test machine (automatic) but may choose to wait until testing has been completed before manually scheduling the update to be installed on production machines (manual).

Automatic
Manual

When to Install field group

Select the radio button that describes when you expect the installation to take place. Target machines have the option to install packages received during the day immediately or to delay the installation to afterhours processing time.

- **At Night:** Release package schedules created from this subscription will automatically be set to install during the afterhours processing on client machines.

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- **Immediate** releases will happen on the target machine as soon as it successfully receives the installation package.

At Night
Immediately

Tags

Check all tags that describe the roles of the target machines that should have this package installed.

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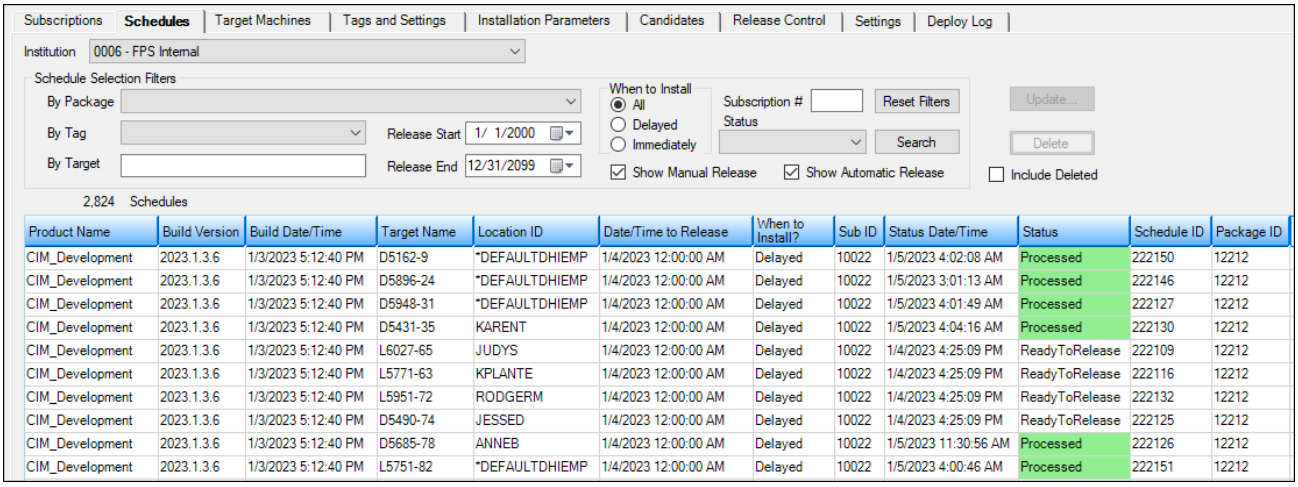
Schedules tab

Use this tab to specify when release packages will be installed on target machines or to view existing schedules. Filters at the top of the screen control the data displayed on the screen when you click <Search>. Right-click on the screen to open a menu of screen actions.

Most of the columns correspond to the fields at the top of the screen. See the field help or the table in the Schedules list view section for an explanation of the columns.



Product Name	Build Version	Build Date/Time	Target Name	Location ID	Date/Time to Release	When to Install?	Sub ID	Status Date/Time	Status	Schedule ID	Package ID
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5162-9	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:02:08 AM	Processed	222150	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5896-24	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 3:01:13 AM	Processed	222146	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5948-31	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:01:49 AM	Processed	222127	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5431-35	KARENT	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:04:16 AM	Processed	222130	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L6027-65	JUDYS	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222109	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5771-63	KPLANTE	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222116	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5951-72	RODGERM	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222132	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5490-74	JESSED	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222125	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5685-78	ANNEB	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 11:30:56 AM	Processed	222126	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5751-82	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:00:46 AM	Processed	222151	12212

Show Detail Log, Delete Schedules, and Update Schedules

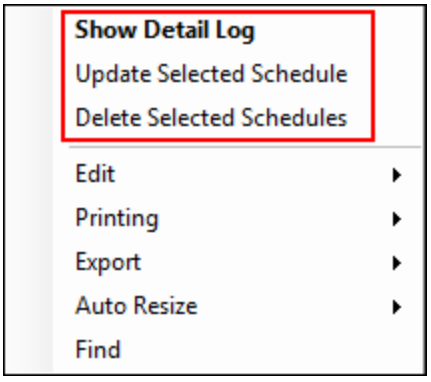
If you have the appropriate security, you can view the detail log and delete or update selected schedules.

The detail log shows information associated with a schedule when the status of the schedule is either Processed or Failed.

To show the detail log:

1. In the list view, right-click on a schedule that you want to view the details for.

   The menu below opens.



2. Select "Show Detail Log."

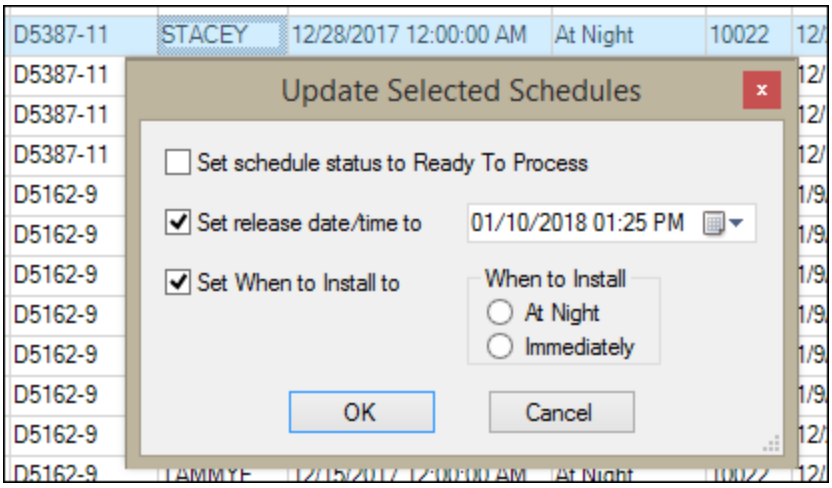
To delete schedules:

1. In the list view, select the schedules that you want to delete.
2. Click <Delete> in the upper-right corner of the screen.
   or
   Right-click to open the menu shown above and click "Delete Selected Schedules."

To update schedules:

1. Select a schedule that has the ReadyToRelease status.
2. Click <Update> in the upper-right corner of the screen.
   or
   Right-click to open the menu shown above and click "Update Selected Schedules."

   The dialog box shown below opens.



3. Select the appropriate fields (explained below), then click <OK>.

- **Set schedule status to Ready To Process** – Check this field to reset the status of a Processed schedule to ReadyToRelease.
- **Set release date/time to** – Check this field to change the selected schedule's release date and time, then enter a new date and/or time in the field to the right. It defaults to the current date and time, but you can change it to any date and time. The scheduled package will be released on or after this date. You can also specify how often to check for new versions using the Agent Configurator. See Available Options in the GOLDDeploy Agent section for more information.
- **Set When to Install to** – Check this field to install all selected schedules either at night or immediately, depending on which radio button you select.

Fields on This Tab

Institution
Schedule Selection Filters field group
Include Deleted
Schedules list view

See Also
Schedule an Emergency Install

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Institution

FPS GOLD employees can change the institution they are working with by selecting the desired institution from the drop-down list. Banks have access only to their own institution data.

Schedule Selection Filters field group

Use these fields to enter search criteria that determine which items display in the list view. See the following topics for more information on how to use these fields.

By Package
By Tag
By Target
Release Start
Release End
When to Install field group
Subscription #
Status
Show Manual Release
Show Automatic Release

Buttons

- <Reset Filters> – Click this button to set the selection filters back to their default values.
- <Search> – Click this button to display schedules in the list view based on the values in the selection filters.

By Package

If you leave this field blank, all release schedules are selected. Selecting a single package from the drop-down list will change the list view to show only schedules for the single package when you click <Search>.

By Tag

If you leave this field blank, all tags are selected. Selecting a single tag from the drop-down list will change the list view to show only schedules with that tag.

By Target

If you leave this field blank, all targets are selected. Any text entered will display only schedules linked to targets that contain the text in the unique token or in the location ID.

Release Start

Enter a date to display schedules that are scheduled to be released on or after this date. You can type the date or click the drop-down arrow to select a date.

Release End

Enter a date to display schedules that are scheduled to be released on or before this date. You can type the date or click the drop-down arrow to select a date.

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When to Install field group

Select the appropriate radio button to determine which subscriptions to show in the list view, based on when they install.

Target machines have the option to install packages received during the day immediately or to delay the installation to afterhours processing time. If the value in this column is **At Night**, release package schedules created for this subscription will automatically be set to install during the afterhours processing on client machines. **Immediate** releases will happen on the target machine as soon as it successfully receives the installation package.

All
At Night
Immediately

All

Select this radio button to show subscriptions in the list view that are scheduled to install both at night and immediately.

See Also:
When to Install field group

At Night

Select this radio button to show both subscriptions in the list view that are scheduled to install at night.

See Also:
When to Install field group

Immediately

Select this radio button to show both subscriptions in the list view that are scheduled to immediately.

See Also:
When to Install field group

Subscription

Enter a subscription number in this box to show only those schedules that came from a specific subscription.

Status

If you leave this field blank, all subscriptions are selected. Selecting a single status from the drop-down list will change the list view to show only schedules that are at the selected status.

Show Manual Release

When this field is checked, schedules that require the user to set the date and time for release are included in the search. If it is not checked, manual intervention schedules are not included.

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Show Automatic Release

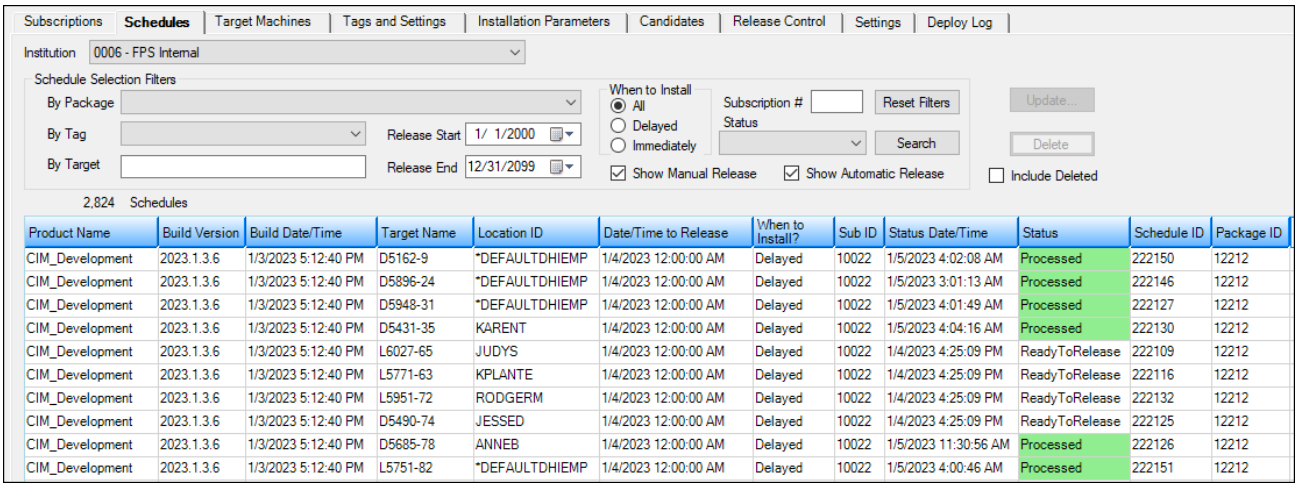
When this field is checked, schedules that are released automatically are included in the search.

Include Deleted

When this field is checked, schedules that have previously been deleted will show on this screen with a pink background when you click <Search>. You can reactivate a deleted schedule by updating its fields. You would do this to resubmit an installation to a target machine.

Schedules list view

The Schedules list view shows details of schedules already created and allows you to change or delete them. You can find and display specific types of subscriptions using the Schedule Selection Filters above the list.



Product Name	Build Version	Build Date/Time	Target Name	Location ID	Date/Time to Release	When to Install?	Sub ID	Status Date/Time	Status	Schedule ID	Package ID
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5162-9	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:02:08 AM	Processed	222150	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5896-24	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 3:01:13 AM	Processed	222146	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5948-31	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:01:49 AM	Processed	222127	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5431-35	KARENT	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:04:16 AM	Processed	222130	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L6027-65	JUDYS	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222109	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5771-63	KPLANTE	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222116	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5951-72	RODGERM	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222132	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5490-74	JESSED	1/4/2023 12:00:00 AM	Delayed	10022	1/4/2023 4:25:09 PM	ReadyToRelease	222125	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	D5685-78	ANNEB	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 11:30:56 AM	Processed	222126	12212
CIM_Development	2023.1.3.6	1/3/2023 5:12:40 PM	L5751-82	*DEFAULTDHIEMP	1/4/2023 12:00:00 AM	Delayed	10022	1/5/2023 4:00:46 AM	Processed	222151	12212

The table below describes the columns.

Column	Explanation
Product Name	This column shows the FPS GOLD product to be released with this schedule, such as CIM GOLD, GOLDTellerCIM, or CIM_November2017Release.
Build Version	This column shows the specific version of the release package for this schedule, such as 2017.12.15.2.
Build Date/Time	This column shows the exact date and time of the release package for this schedule.
Target Name	This column shows the unique token of the scheduled target machine.
Location ID	This column shows identifying information about the location where the installation will occur.
Date/Time to Release	This column shows the exact date and time when the installation will occur.

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When to Install?	This column shows either " Immediately" or " Delayed." "Immediately" means as soon as the package arrives at the target machine; "Delayed" means it will install during the Delayed Installation Window time, which is set in the GOLDDeploy Configurator.
Sub ID	This column shows which subscription number was used to create this schedule.
Status Date/Time	This column shows the date and time when the status last changed.
Status	This column shows whether the package is ReadyToRelease (installation pending), Sent, Processed (installed), or the installation Failed.
Schedule ID	This column shows a unique identifier that identifies this individual schedule.
Package ID	This column shows a unique identifier that identifies this individual release package.

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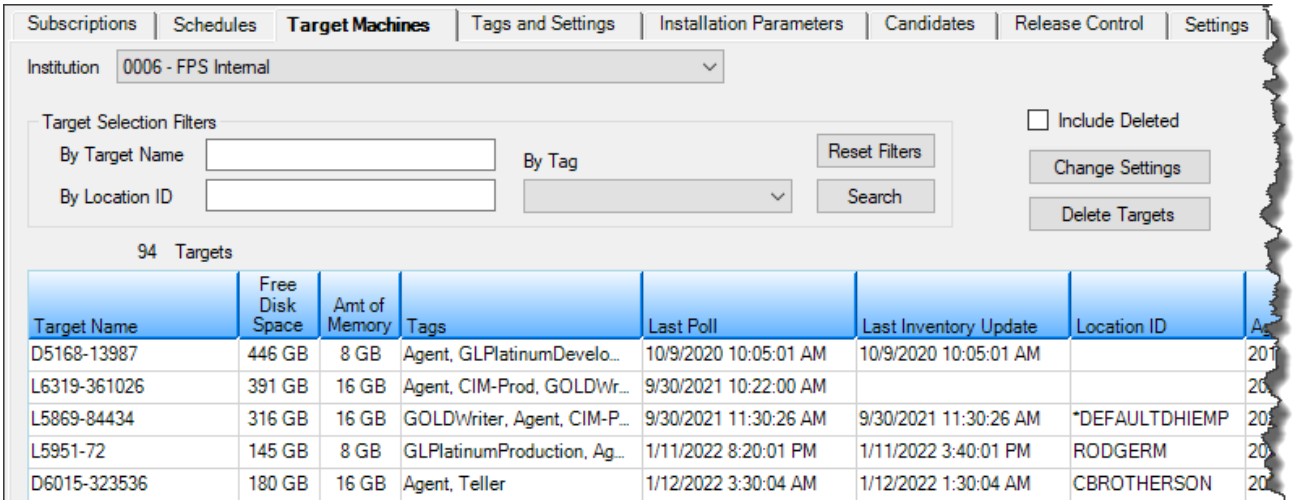
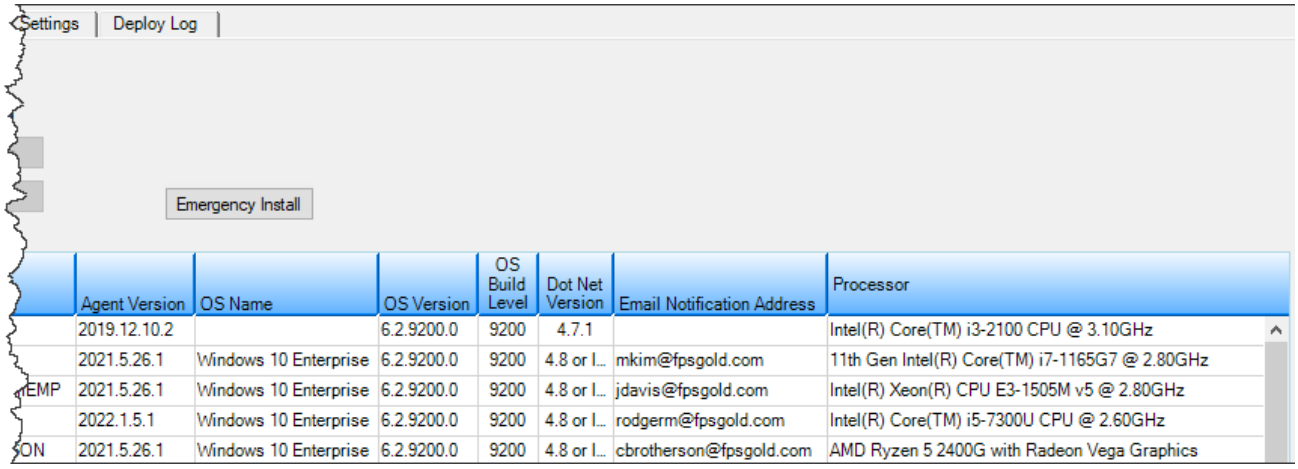
Target Machines tab

Use the Target Machines tab to change and display information about the target machines registered with the server to receive installation packages. When a machine is registered, several attributes of the machine that have to do with installation conditions are saved on the server. Each time the target machine polls the server, it sends updated attributes so that FPS GOLD will have a good summary of the machine at the server.

For information on the columns, see Target Machines list view.



Target Machines Tab (left side)



Target Machines Tab (right side)

Change Settings

If you have the appropriate security, you can change the settings for a selected target machine.

To change settings:

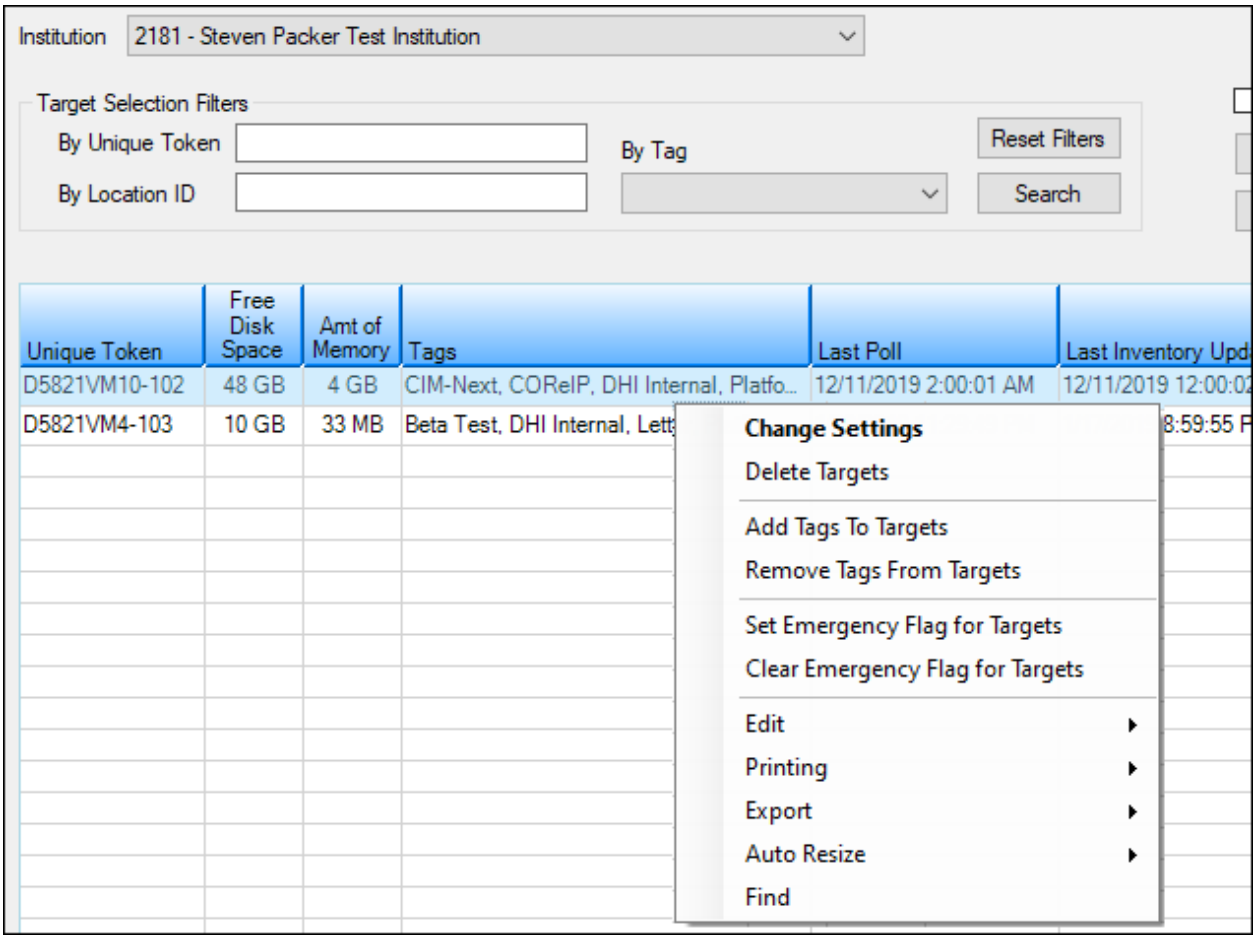
1. Select an item in the list, then click <Change Settings>.

   or

Right-click on an item in the list view and click <Change Settings> on the pop-up menu.

or

Double-click on an item in the list.



Right-Click Menu

The dialog box below opens.

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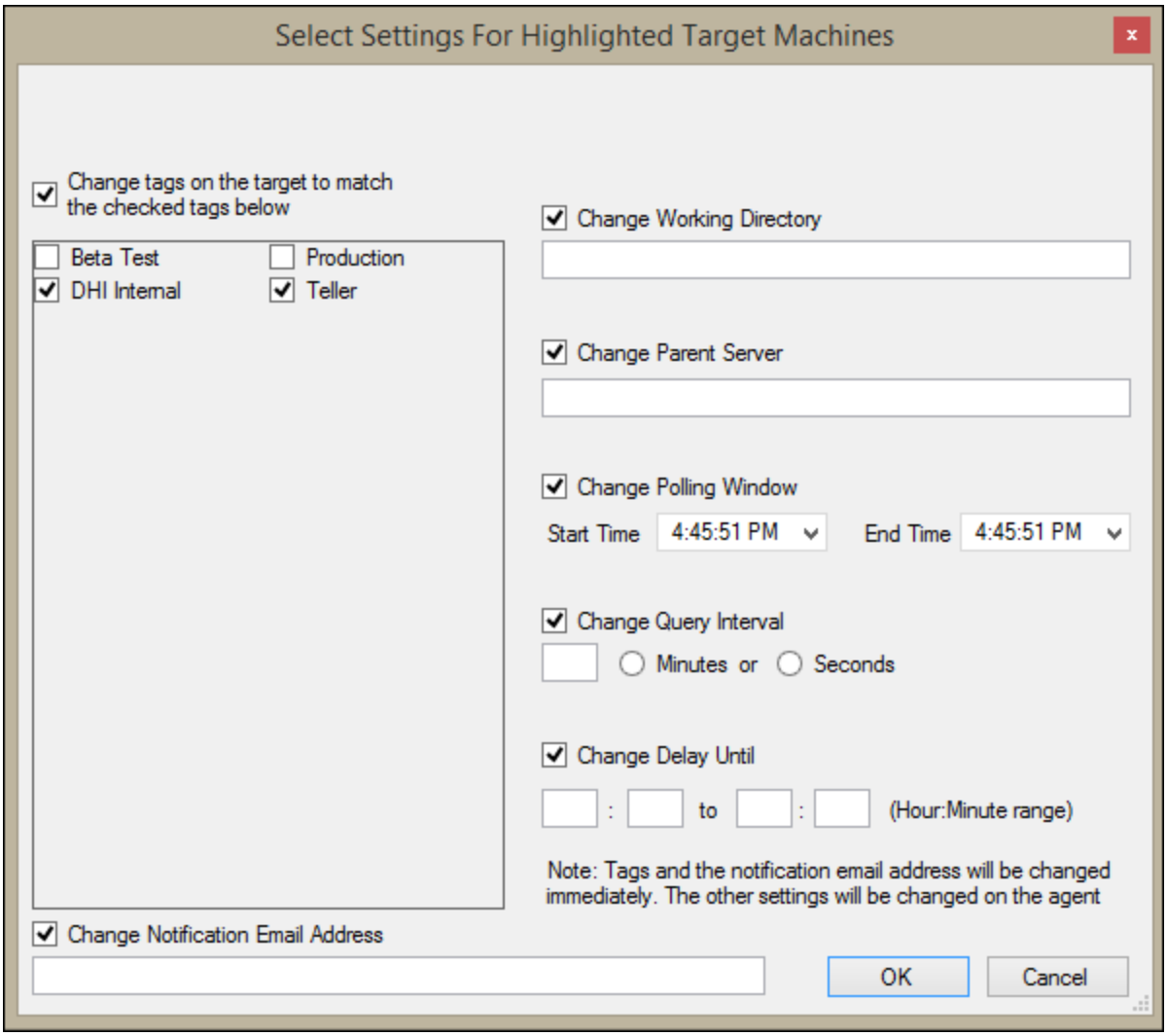

2. Change the settings on the dialog box using the information in the "Select Settings For Highlighted Target Machines" list below.
3. When you have finished changing settings, click <OK>.

Select Settings For Highlighted Target Machines

The following list explains how to use the fields in the dialog box.

- **Change the tags on the target to match the checked tags below** – Check this box to change tags, then check each tag that should be assigned to the target machine.
- **Change Notification Email Address** – When a package is installed on a target machine, an email is sent to this notification address (if not blank) to notify of either a failed or a successful installation. Check this box to change or set this email address, then enter the email address in the text box.
- **Change Working Directory** – Each target machine must provide the GOLDDeploy Agent a working directory with full security that it can use in doing its installations. Check this box to change or assign the directory, then enter the full path on the target machine of the working directory GOLDDeploy Agent will use.
- **Change Parent Server** – The parent server is the address of the GOLDDeploy Server at FPS GOLD. It is provided to the bank by FPS GOLD. Check this field to update or set the server address, then enter the correct address in the text box.

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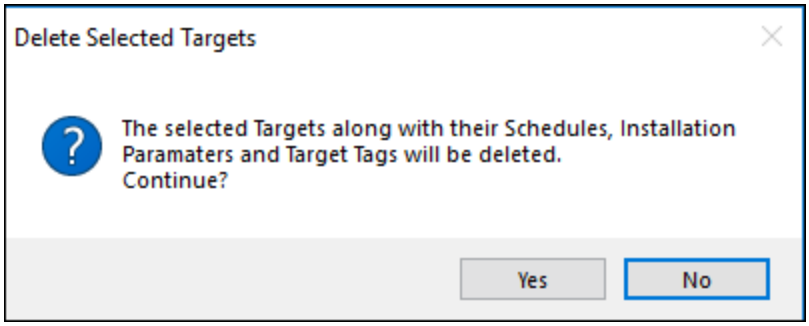
- **Change Polling Window** – Each target machine can be given a daily time period during which it checks the server to see if any software upgrades are prepared for it. Check this box to update or set the polling window, then enter the beginning time and ending times when you want this machine to search for updates.
- **Change Query Interval** – During the polling window times, the target machine uses this interval to check again for updates. The minimum is every second and the maximum is 4 hours (240 minutes). Check this box to change the query interval. Enter the number of minutes or seconds you want the machine to use for its query interval. FPS GOLD recommends every 15 minutes for usual circumstances.
- **Change Delay Until** – Each target machine defines what "afterhours" or "at night" means to the machine. The first hour and minute range is the beginning of the night time, and the second hour and minute range is the end of the night time. Hours and minutes are given in 24-hour times (for example, "17:30" means 5:30 p.m.). Check this box to change the afterhours range, then enter the start and end times in the boxes. When the Install **At Night** option is selected on the schedule, installations will only be performed in the time range specified here.

Delete Targets, Add Tags, or Remove Tags

If you have the appropriate security, you can delete targets, add tags, and remove tags.

To delete targets:

1. Select one or more items in the list.
2. Right-click to open the pop-up menu (shown above).
3. Select <Delete Targets>.
4. Click <Yes> in the dialog box that displays (shown below).



To add tags:

1. Select one or more items in the list.
2. Right-click to open the pop-up menu (shown above).
3. Select <Add Tags To Targets>.
4. In the dialog box that displays (shown below), select the tags you want to add.
5. Click <OK>.

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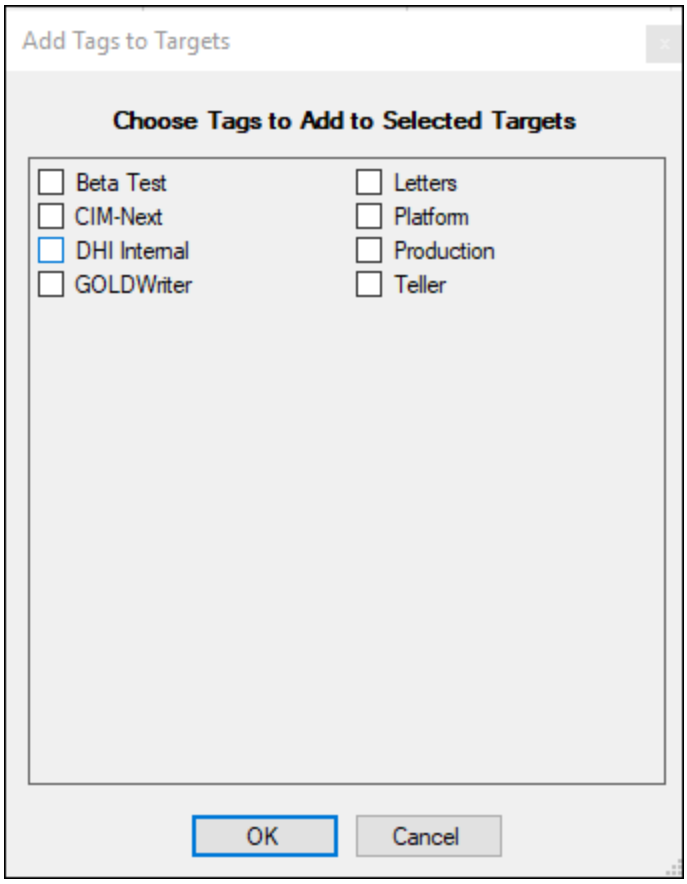

To remove tags:

1. Select one or more items in the list.
2. Right-click to open the pop-up menu (shown above).
3. Select <Remove Tags From Targets>.
4. In the dialog box that displays (shown below), select the tags you want to remove.
5. Click <OK>.

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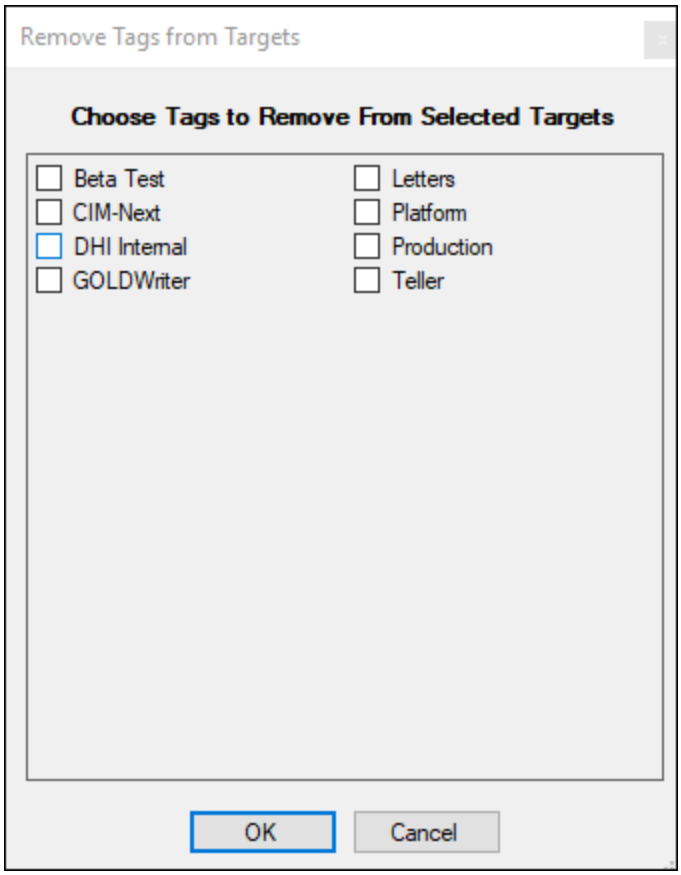

Fields on This Tab

Institution
Target Selection Filters field group
Include Deleted
Target Machines list view

See Also

Schedule an Emergency Install

Institution

FPS GOLD employees can change the institution they are working with by selecting an institution from the drop-down list. Banks have access only to their own institution data.

Target Selection Filters field group

Use the fields in this group to specify which target machines to show in the list view when you click <Search>.

By Unique Token
By Location ID
By Tag

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Buttons

- <Reset Filters> – Click this button to set the controls back to their default values.
- <Search> – Click this button to list the targets that match the values in the selection filters.

By Unique Token

If you leave this field blank, all target machines will display in the **Target Machines list view**. If any text is in this box, only targets that contain that text are displayed.

By Location ID

If you leave this field blank, all target machines will display in the **Target Machines list view**. If any text is in this box, only targets with a location ID that contain that text are displayed.

By Tag

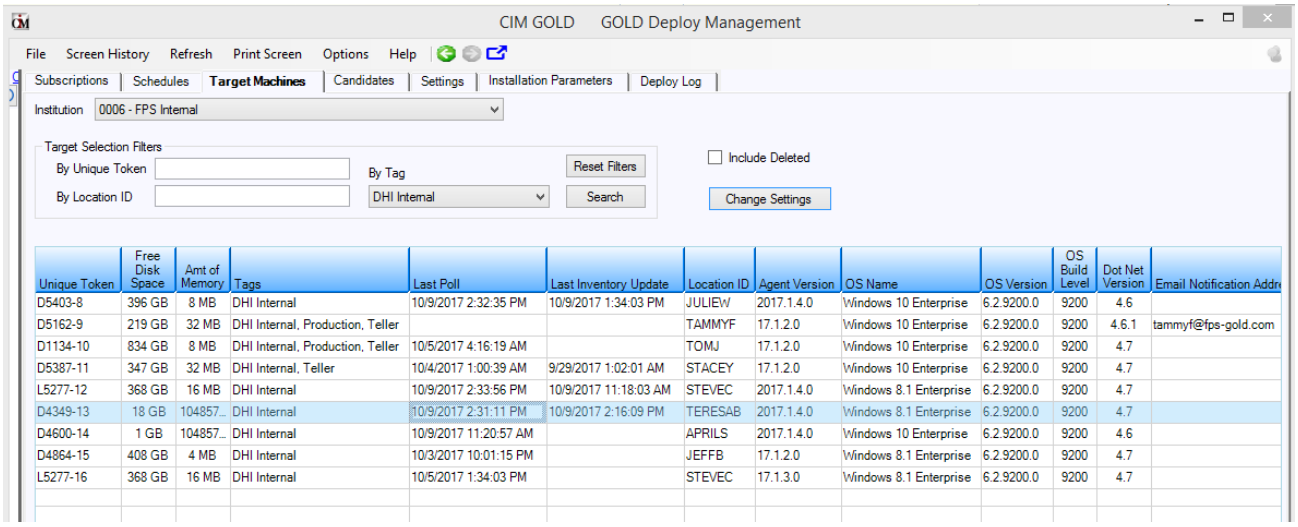
If you leave this field blank, all target machines will display in the **Target Machines list view**. If a tag is selected, only targets with that tag are displayed.

Include Deleted

If this field is checked, all target machines are displayed, including target machines that have been deleted (inactivated), which display in the list view with a pink background. If this field is not checked, only active target machines display.

Target Machines list view

This list view shows the target machines that have been set up with subscriptions. You can find and display specific types of subscriptions using the Target Selection Filters above the list.



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The following table describes the columns in the Target Machines list view.

Column	Explanation
Unique Token	Each target machine is assigned a unique token when it registers itself with the Deploy Server. The token is made up of the user computer name and a system-defined identifier.
Free Disk Space	The target machine reports the amount of free disk space available to the server to verify that there is room for the installation.
Amt of Memory	The target machine reports the amount of memory it has available to determine whether there is adequate memory to run the installed product.
Tags	This column shows the tags attached to the target machine.
Last Poll	This column shows the date and time the target machine last polled the server to determine whether there were available updates.
Last Inventory Update	This column shows the date and time the inventory items, such as free disk space or amount of memory, changed on the target machine.
Location ID	This column shows the ID this target machine uses to communicate with FPS GOLD.
Agent Version	This column shows which version of Deploy Agent software is running on the target machine.
OS Name	This column shows which Windows operating system is running on the target machine.
OS Version	This column shows the version number of the Windows operating system running on the target machine.
OS Build Level	This column shows which build level of the Windows operating system is running on the target machine.
Dot Net Version	This column shows which version of the Dot Net Framework is running on the target machine.
Email Notification Address	This column shows the email address that should receive an automatic notification when software is successfully installed or when software fails to install on the target machine. You can change this email address. See Change Settings in the Target Machines tab overview.
CPU ID	This big number provides a unique internal ID from the target machine so that the server can make sure the same machine does not register twice on the system. It is possible for two computers to have the same computer name, but this ID will not be the same for them, so the server will be able to recognize the difference between them using this ID.
Date Inactivated	If the target machine has been inactivated, this column shows the date of inactivation.

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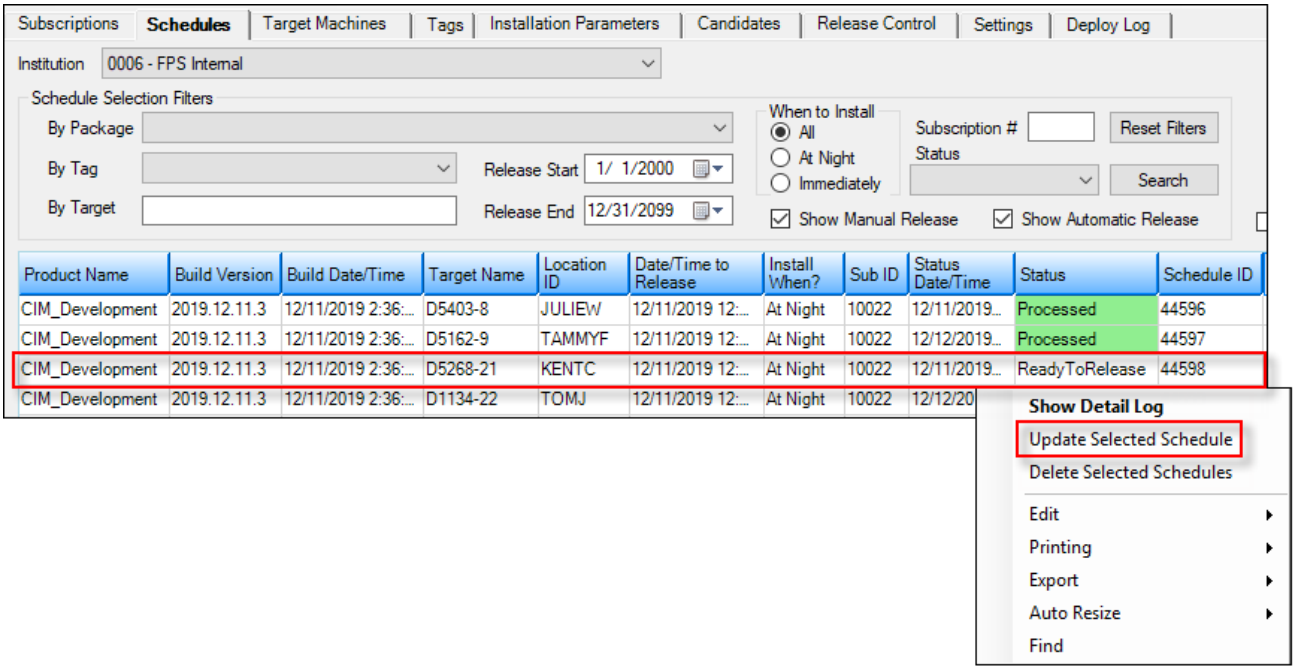
Schedule an Emergency Install

In rare cases, when there is an emergency release created and your institution needs to get it right away, your administrator can use Emergency Install to have GOLDDeploy install it now, instead of waiting for the evening to install it. This function can be used at any time to make a deployment to revert back to an older version of software and deploy the fixed version when it is available.

When the current GOLDDeploy agent is installed on every machine, select the appropriate ReadyToRelease software in the Schedules tab list, set the emergency flag, and set the schedule Ready to Process. The software will be deployed to the target machines within five minutes. A poll will be processed every five minutes until the software is deployed.

To schedule an emergency install:

1. On the Schedules tab, select the ReadyToRelease software you want to install.
2. Right-click on the selected item and select "Update Selected Schedule." See the example below.



CIM GOLD > Other Applications > GOLD Deploy Management Screen, Schedules Tab

3. On the dialog box that opens, select "Set schedule status to Ready to Process."
4. On the Target Machine tab, select the targets you want to set up.
5. Right-click and select "Set Emergency Flag," or click <Emergency Install> on the top of the screen to mark all of them.

Only the software that has been marked for release will be deployed, and only those with security will be able to click the button.

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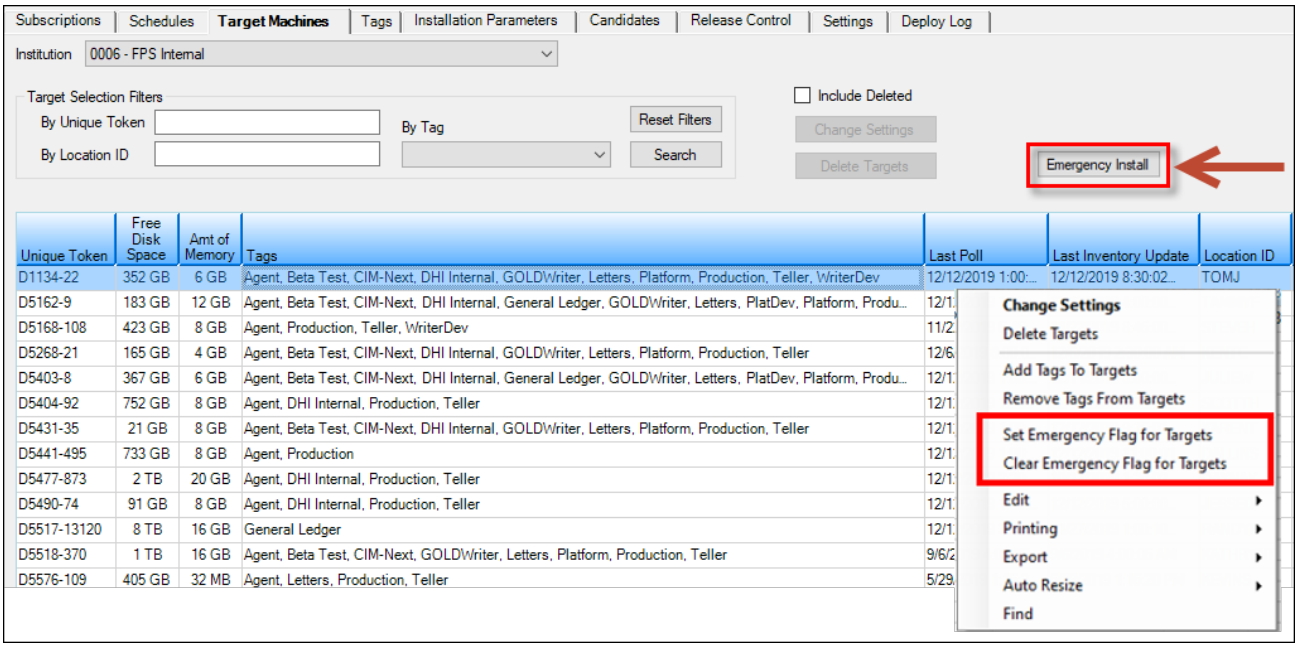
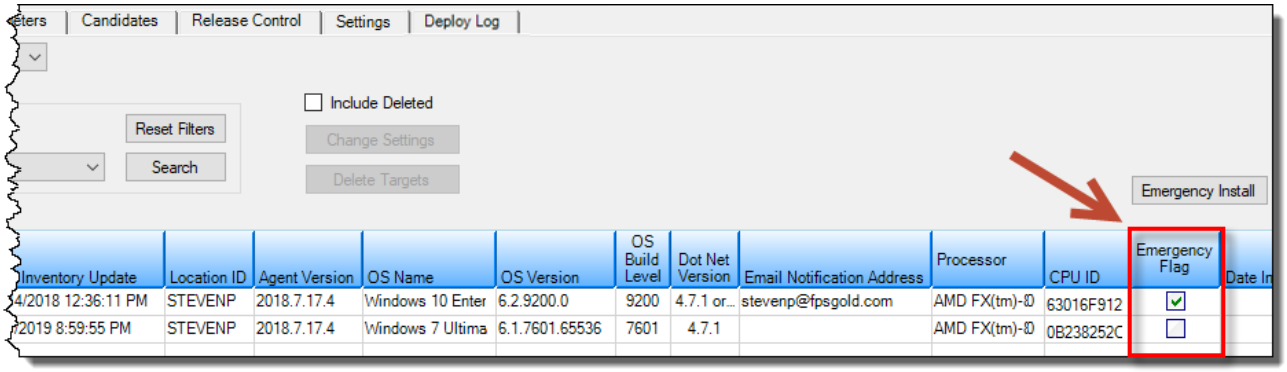


Target Machines Tab

Once the Emergency Flag is set, you can see it in the list view.



Target Machines Tab

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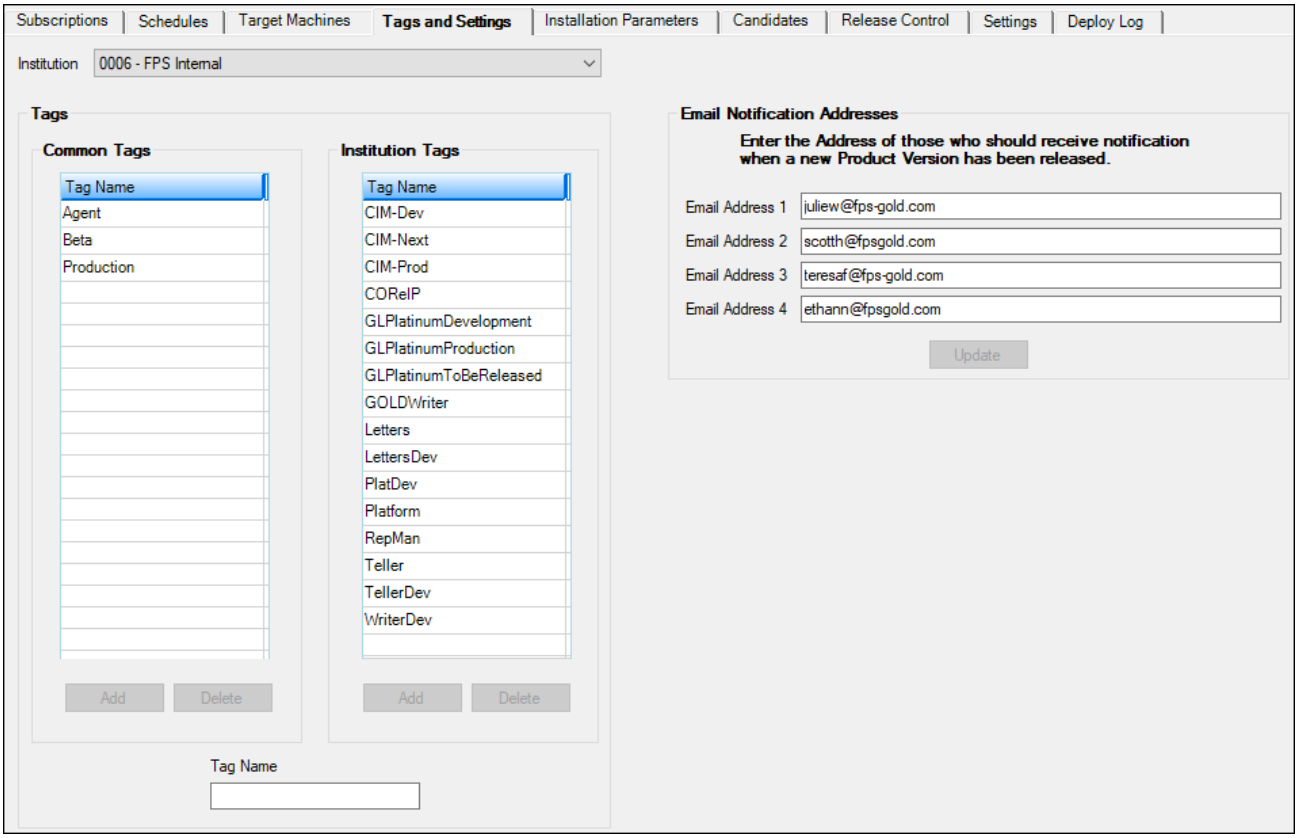
Tags and Settings tab

Use the Tags and Settings tab to define Common and Institution tags. Common tags are defined by FPS GOLD and can be used by all banks. Institution tags are tags that each bank can assign for their own use. Bank employees can see but not change the common tags, but they can add and delete tags for their own use.

You can also add up to four email addresses to designate who will receive notifications when a new product version has been released.



WARNING

Deleting a tag also removes the tag from all target machines and from all subscriptions.

Tags are attached to subscriptions to determine what the subscription package should be scheduled to, and they are attached to target machines to describe attributes of the machine that should be scheduled to receive the subscribed product installation. The common tags list and the institution tags list each has its own <Add> and <Delete> buttons, but the text box between them works for either list.

To add a tag to either tag list:

1. Click on a blank line in either the Common Tags or the Institution Tags list, depending on where you want to add the tag.
2. Enter the tag text into the Tag Name below the Common Tags list.

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3. Click <Add> at the bottom of the appropriate list.

To remove a tag from the system:

1. Select the tag you want to delete.
   or
   Right-click on the tag to open a pop-up menu.
2. Click <Delete>.
3. Click <Yes> on the Verify Delete dialog box.

To change the label for a tag:

1. Select the tag you want to rename.
2. In the **Tag Name** field**,** change the text.
3. Click <Update>.

Common Tags
Tag Name
Institution Tags
Email Notification Addresses

Common Tags

Common tags are defined by FPS GOLD and can be used by all banks. Bank employees can see but not change the common tags. However, they can add and delete tags for their own use.

See the Tags tab for information on how to add, update, and delete tags.

Tag Name

This text box works for both the Common Tags and the Institution Tags list. Enter text in this field that will become the label for a new or updated tag.

See the Tags tab for information on how to add, update, and delete tags.

Institution Tags

Institution tags are tags that each bank can create for their own use.

See the Tags tab for information on how to add, update, and delete tags.

Email Notification Addresses

Use these fields to add up to four email addresses per institution. This allows administrators to designate who will receive notifications when a new product version has been released.

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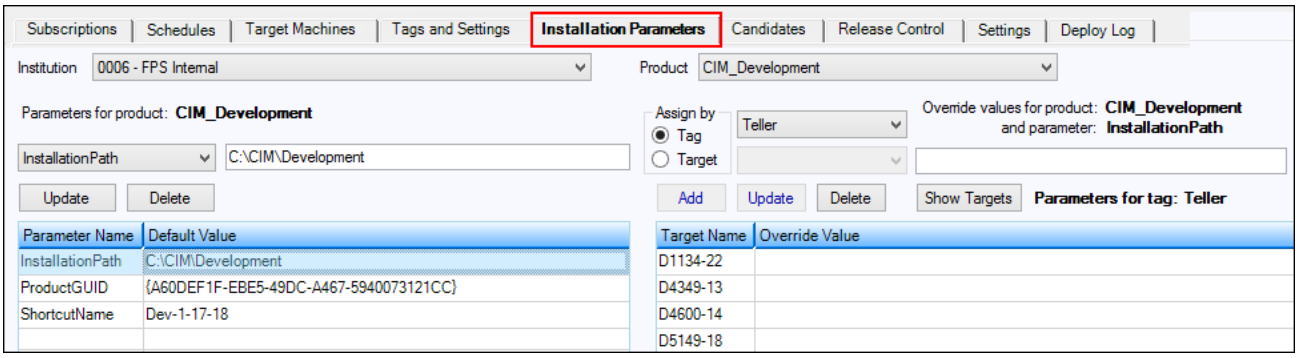
Installation Parameters tab

Use the Installation Parameters tab to set the values of the parameters for product installations. Default values are defined for each product. Override values may be assigned to each target machine. The installation uses the override value if one exists and the default value if there is no override value.



Adding, Updating, and Deleting Parameters

WARNING

As soon as you click <Delete> for a parameter, it is deleted. There is no confirmation dialog box. Deletion cannot be undone. However, you can add the parameter again if needed.

To add a parameter to a product:

1. Select the product from the **Product** drop-down list.
2. Select the parameter you want to work on from the drop-down list.
3. Enter the default value for the parameter in the box next to the drop-down list.
4. Click <Add>.

To delete a parameter from a product:

1. Select the parameter you want to delete.
   or
   Right-click on the tag to open a pop-up menu.
2. Click <Delete>.

To change the default value for a parameter:

1. Open the drop-down list and select the parameter you want to rename.
2. Enter a new default value for the parameter in the box next to the drop-down list.
3. Click <Update>.

Fields on This Tab

Institution
Product
Default Value
Parameter drop-down list

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Assign by field group
Override Value

Institution

FPS GOLD employees can change the institution they are working with by selecting the desired institution from the drop-down list. Banks have access only to their own institution data.

Parameter drop-down list

This drop-down list shows which parameters are available for the selected product.

Product

Click on this field to open the drop-down list, then select the product for which you want to add, update, or modify parameters.

Each product can use one or more parameters as part of its installation. When you have selected a product, the screen displays it next to the **Parameters for product:** label, and the fields on the left side of the screen are enabled. Only FPS GOLD employees can make changes to the fields on the left side of the screen.

Default Value

The default value for the selected parameter shows in this field. If you are adding or changing a value for the parameter, enter it here.

Parameter list view

The following list describes the columns in this list view:

- **Parameter Name** – This column shows the name of all established parameters for the selected product.
- **Default Value** – This column shows the default value for the parameter shown in the column to the left.

Assign by field group

You can look at override parameters either by tag, which assigns the override value to all target machines with the tag, or by target, which lets you see and adjust override values for each individual target machine. Select the **Tag** radio button if you are working with tags and the **Target** radio button to work with target machines.

Buttons

- <Show Targets> – When you are working with tags, if you select a tag from the tag list and click this button, all targets linked to the selected tag will be displayed. These are the target machines that will be affected if you add, update, or delete by tag.
- <Add> – Select either the tag or the target you want to work on from the drop-down list. Enter the value for the tag or target in the box next to the drop-down list. Click the add button to add the override value for the selected tag or target.
- <Delete> – Select the tag or target you want to delete, then click the <Delete> button. You can also click right-click on the target you want to delete, then click on "Delete Target Parameter" in the pop-up menu.

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WARNING

Deleting a tag will delete the parameter from all targets tagged with the tag.

- <Update> – Select the target parameter you want to change. It will show above in the target drop-down list and text box. Enter the text you want and click this button.

Tag

Select this radio button to work with tags. The top drop-down list at the right shows tags available for the product and parameter.

Target

Select this radio button to work with target machines. Then click on the bottom drop-down list at the right and select a target unique token for this institution.

Override Value

The default value for the tag or target shows in this field. If you are adding or changing a value for the tag or target, enter it here.

Target Override list view

The following list describes the columns in this list view:

- **Target Name** – This column shows the name of all established parameters for the selected product.
- **Override Value** – This column shows the default value for the parameter shown in the column to the left.

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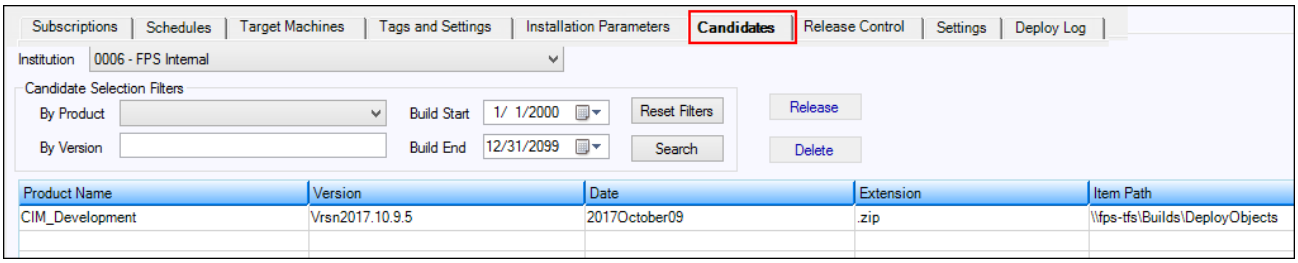
Candidates tab

The Candidates tab is available only to FPS GOLD employees and is used to introduce new release packages to be installed. The list view on the screen displays release packages that have been compiled and may be ready to release to production. Right-clicking pops up a menu that lists actions that can be taken on the release candidates.



Buttons

- <Release> – to release selected candidates to production. You can also use the right-click menu. See below for more on releasing candidates.
- <Delete> – Click this button to delete candidates that are selected in the list view. You can also delete candidates using the right-click menu. See below for more on deleting candidates.

Release or Delete Selected Candidates

If you have appropriate security, you can release or delete candidates.

To release or delete candidates:

1. Right-click on an item in the list view.

   A pop-up menu opens.

2. Select one of the menu items described below:
   - Release Selected Candidates – Adds all selected release packages to the list of release packages to be released on the server and then removes the selected packages from the release candidates list.
   - Delete Selected Candidates – Removes all selected release packages from the release candidates list.

Fields on This Tab

Institution
Candidate Selection Filters field group
Release Candidates list view

Institution

FPS GOLD employees can change the institution they are working with by selecting the desired institution from the drop-down list. Banks will have access to their own institution data.

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Candidate Selection Filters field group

Use the fields in this group to select the candidates to view in the list below when you click <Search>. See the Candidates tab section for more information, as well as the following topics:

By Product
By Version
Build Start
Build End

Buttons

- <Reset Filters> – Click this button to set the controls back to their default values.
- <Search> – Click this button to reload the candidates in the list view based on the values in the selection filters.

By Product

If you leave this field blank, all release candidates will display in the **Target Machines list view**. Selecting a single product from the drop-down list will display only candidates for the single product.

By Version

If you leave this field blank, all release candidates will display in the **Target Machines list view**. Any text entered will display only candidates with versions that contain the text.

Build Start

Enter a date to display candidates that were built on or after this date. You can type the date or click the drop-down arrow to select a date.

Build End

Enter a date to display candidates that were built on or before this date. You can type the date or click the drop-down arrow to select a date.

Release Candidates list view

The following table describes the columns in this list view.

Column	Explanation
Product Name	This column shows the name of the product to possibly be released.
Version	This column shows the version of the product to possibly be released.
Date	This column shows the date the product release package was built.
Extension	This column shows the release package file extension.

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Item Path	This column shows the folder that contains the release candidate.

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Release Control tab

This tab is an FPS GOLD ONLY tab and is managed by our release manager. Packages for GOLDDeploy and for Stand Alone Installers are released, updated, and deleted from this tab. There are two grid views on the screen for this purpose.

When an institution can't use our GOLDDeploy product because of certain network environments, we need to set the institution up with a Stand Alone Transfer ID. Sysops can create a transmission manager transfer that gets the FPS GOLD software, sends it to go anywhere, and puts it in a folder at the institution for them to download. The release manager will get the software into the proper place on releases for each product being released.

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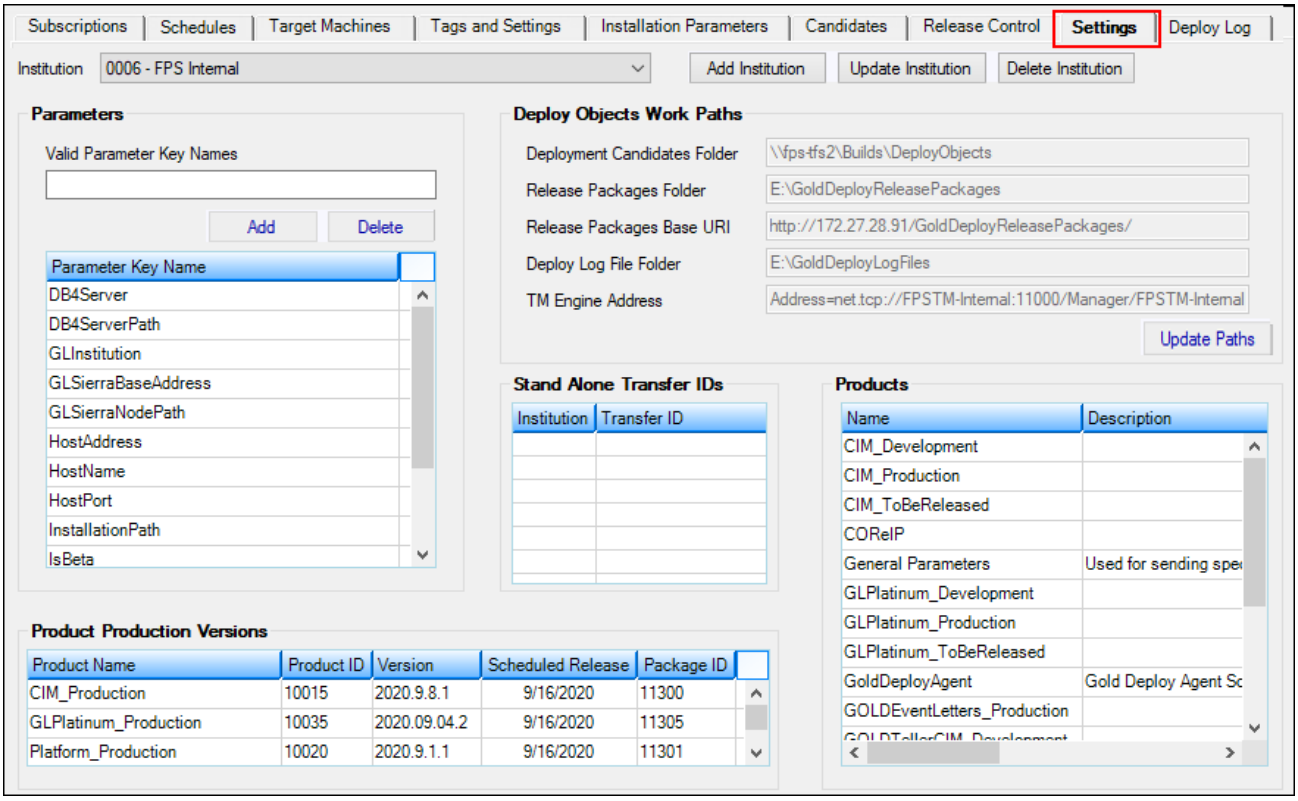
Settings tab

The Settings tab is used to enter settings and options used by the system.



Adding, Updating, and Deleting Institutions

Use the buttons at the top right of the tab to add, change, or delete institutions.

> **WARNING**
>
> Deleting an institution removes all items on the Deploy server for that institution. Deletion cannot be undone.

To add an institution to the deploy server:

1. Click <Add Institution>.

   The following dialog box opens.

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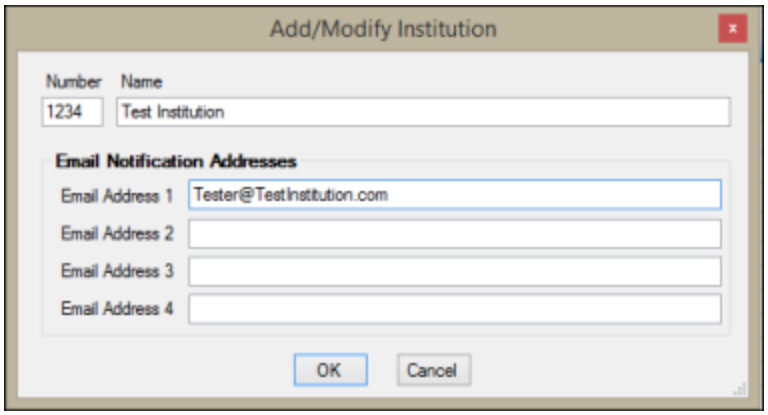

2. Enter the institution number in the **Number** field.
3. Enter the institution name in the **Name** field.
4. Enter one or more email addresses. These addresses are used to notify the bank whenever a new package has been released.
5. Click <OK>.

To change the details for an existing institution:

1. Open the **Institution** drop-down list and select the institution you want to change.
2. Click <Update Institution>.
3. Change one or more details in the Add/Modify Institution dialog box. You can't change the institution number.
4. Click <OK>.

To delete an institution:

5. Open the **Institution** drop-down list and select the institution you want to delete.
1. Click <Delete Institution>. A confirmation dialog box opens.
2. Click <OK>.

Fields on This Tab

Institution
Deploy Objects Work Paths field group
Parameters field group
Stand Alone Transfer IDs field group
Products field group

Institution

FPS GOLD employees can change the institution they are working with by selecting an institution from the drop-down list. Banks have access to their own institution data.

Deploy Objects Work Paths field group

These paths tell the server where to find specific data for the installation process. Only FPS GOLD employees can change these fields.

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Deployment Candidates Folder
Release Packages Folder
Release Packages Base URI
Deploy Log File Folder

<Update Paths> – Enter new path information in any of the fields, then click this button to save the changes.

Deployment Candidates Folder

When a production build is run, this is the folder where the build server places the prospective release packages. Only FPS GOLD employees can change this field.

Release Packages Folder

When the FPS GOLD release manager releases a deploy candidate, the release package is moved to the this folder to be made available to the proxy servers. Only FPS GOLD employees can change this field.

Release Packages Base URI

This is the address of the release package folders as referenced by the proxy server.

Deploy Log File Folder

This is the folder on the Deploy Server where log files from the target machines are saved as they report success or failure of installations.

Parameters field group

Parameters are defined by FPS GOLD employees and used in installations to control where and how installations occur based on the product being installed and the target machine they are installed to. Only parameters defined on this screen can be used by the build server in creating release packages. The list shows the allowable parameter names.

To add a parameter:

1. Enter the text in the text box.
2. Click <Add>.

To remove a parameter from the system:

1. Select the parameter you want to delete.
2. Click <Delete>.
   or
   Right-click on a parameter and select "Delete Parameter" from the menu.

WARNING

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> Deleting a parameter also removes the parameter from all target machines and from all products.

To change a parameter:

1. Select the parameter you want to change.
2. In the **Valid Parameter Key Names**, enter the changes.
3. Click <Update>.

Valid Parameter Key Names

Use this field to enter new parameter names or to change existing names.

See Also:
Parameters field group

Parameter Key Names List

Parameters created for the selected Institution display in this list. You can click on a parameter in this list to change or delete it.

See Also:
Parameters field group

Stand Alone Transfer IDs field group

This tab is an FPS GOLD ONLY tab.

When an institution can't use our GOLDDeploy product because of certain network environments, we need to set the institution up with a Stand Alone Transfer ID. Sysops can create a transmission manager transfer that gets the FPS GOLD software, sends it to go anywhere, and puts it in a folder at the institution for them to download. The release manager will get the software into the proper place on releases for each product being released.

Products field group

The products are defined by the system when a new build package is released to production. The Products list on the Settings tab is used to update attributes about the product. There is no add feature.

To remove a product from the system:

1. Right-click on the product.
2. Select "Delete Selected Products" from the pop-up menu.
3. Click <Yes> on the Verify Delete dialog box.

To change details for a product:

1. Right-click on the product.
2. Select "Update Selected Product" from the pop-up menu.

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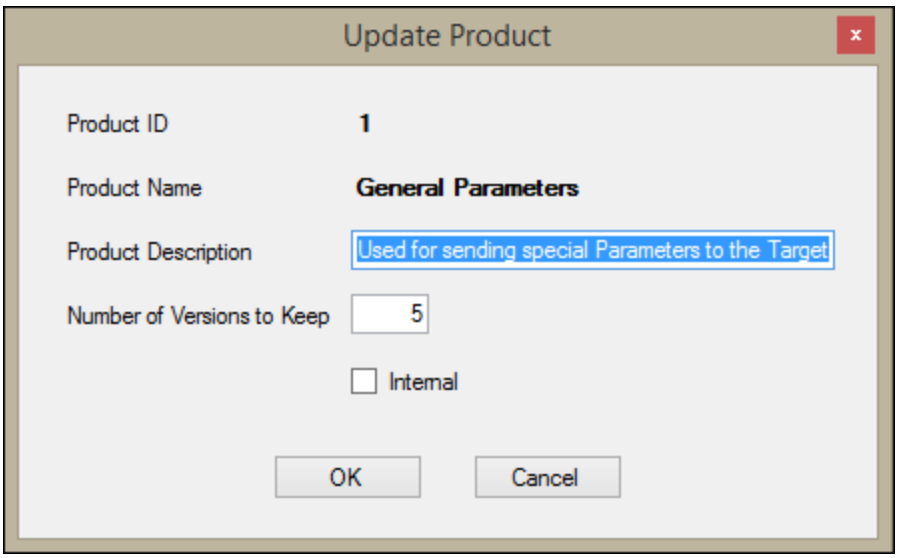
The Update Product dialog box opens.



3. Enter new information in the editable fields:
   - **Product ID** and **Product Name** cannot be changed.
   - **Product Description** – Enter an optional description of the product here.
   - **Number of Versions to Keep** – This tells the system how many back versions of the product to keep on file before automatically removing them.
   - **Internal** – If this field is checked, this product is only released to FPS GOLD employees.
4. When you have finished making changes, click <OK>.

Products List

This list view displays all the products that have been added for the selected institution.

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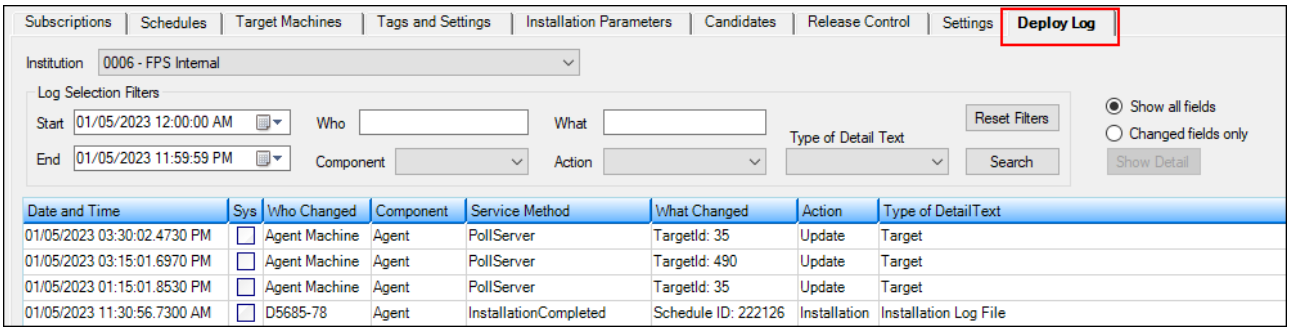
Deploy Log tab

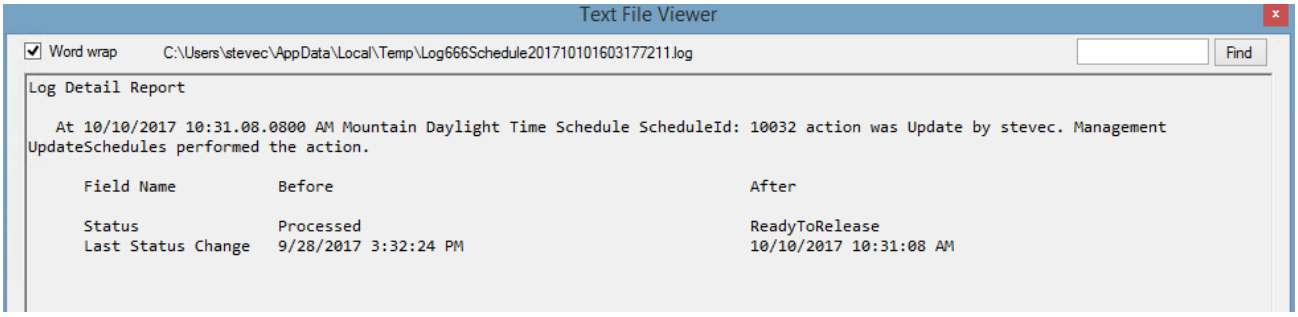
The Deploy Log tab displays the history of changes to the system and logs of both failed and successful installations on target machines. Use the Log Selection Filters at the top of the screen to search for specific details and limit what shows in the list. You can also display a detailed report for any item in the list.



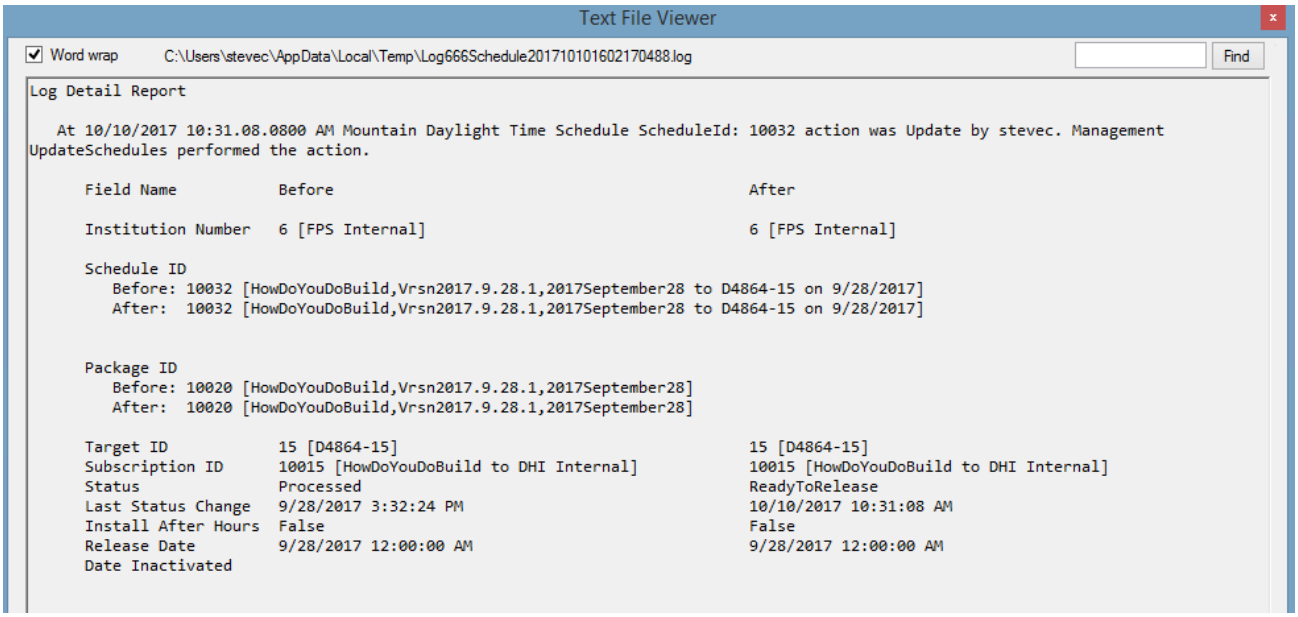
- <Show Detail> – Click this button after selecting an entry in the list view to see details about the selected item. You can also double-click the item for the detail report. For items that have been changed, the fields of the record before and after the change are displayed. Either all fields or changed fields only display, depending on the radio button setting. For items that are reporting actions at a target machine, the log of the installation is shown.

Examples of Detail Reports

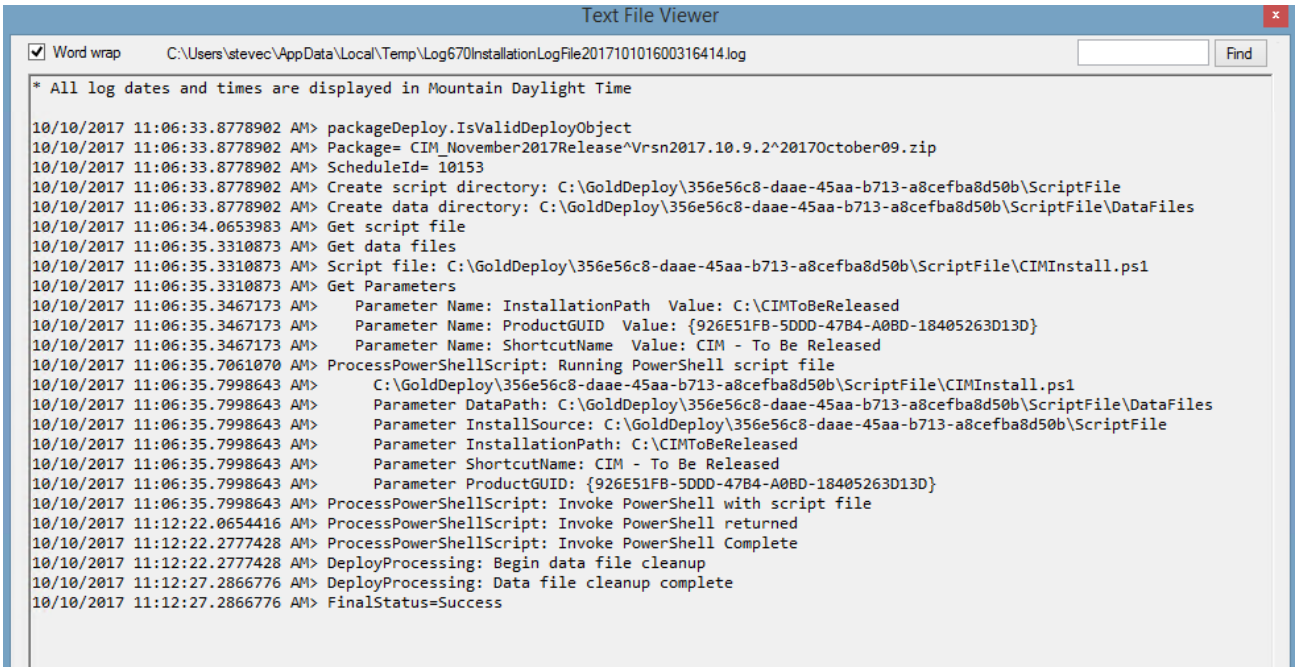
Three examples of detail reports are shown below.



Changed Fields Only Maintenance Report



All Fields Maintenance Report



Installation Log File

Fields on This Tab

Institution
Log Selection Filters field group
Show All Fields
Changed fields only

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Institution

FPS GOLD employees can change the institution they are working with by selecting an institution from the drop-down list. Banks have access only to their own institution data.

Log Selection Filters field group

Use these fields to enter search criteria that determine which items display in the list view. See the following topics for more information on how to use these fields.

Start
End
Who
What
Component
Action
Type of Detail Text

Buttons

<Reset Filters> – Click this button to set the controls back to their default values.
<Search> – Click this button to display the log entries in the list view that match the values in the selection filters.

Start

.
Enter the beginning date to show log entries that occurred on or after this date and time. You can type the date or click the drop-down arrow to select a date.

End

Enter the end date to show log entries that occurred on or before this date and time. You can type the date or click the drop-down arrow to select a date.

Who

If you leave this field blank, all log entries are selected. If any text is entered in this field, the "Who Changed" column will display only log entries that contain that text.

What

If you leave this field blank, all log entries are selected. If any text is entered in this field, the "What Changed" column will display only log entries that contain that text.

Component

If you leave this field blank, all log entries are selected. If a component is selected from the drop-down list, only log entries originated by that component will display in the list.

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Action

If you leave this field blank, all log entries are selected. If an action is selected from the drop-down list, only log entries performed by that action will display in the list.

Type of Detail Text

If you leave this field blank, all log entries are selected. If a type of detail text is selected from the drop-down list, only log entries performed on that type of detail text will display in the list.

Show All Fields

Select this radio button to see all fields in the detail report when it is displayed.

Changed fields only

Select this radio button to see only changed fields in the detail report when it is displayed.

Deploy Log list view

The following table explains the column in this list.

Column	Explanation
Date and Time	This is the date and time the log entry was written. The time is always shown in the viewer's time zone. That way, logs that were created in different time zones are displayed on the screen in the actual order that they appeared. For example, a log that was created at 11:00 a.m. MST and a log that was created at 1:01 p.m. EST would appear to a viewer in CST as a log at noon (the one originated in MST) and a log 12:01 pm (the one originated in CST).
Sys	Some elements affect, and are viewable to, all institutions on the system. Other elements pertain only to one institution. The elements that affect all institutions on the system have this check box checked.
Who Changed	This is the name of the user or the unique token of the target machine that originated the logged change.
Component	This is the system component that originated the log. The Management Component handles the requested screen changes from the GOLDDeploy Management screen. The Agent Component handles requests from the target machines.
Service Method	This column shows the specific component method that originated the log. This helps developers resolve any problems that may be reported in the log.
What Changed	This column shows which specific type of data (and its unique ID) that is being reported in the log.
Action	This column shows the action that was taken, such as Add, Delete, Update, Install, and so forth.

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Type of Detail Text	This column shows what type of data should be reported in the detail report.

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Products that Require Special Setup

Some of our products require special procedures in order to install them with GOLDDeploy. The following sections explain how to use Tags and Installation Parameters to install these products.

CORelP

This section explains how to use Tags and Installation Parameters to install CORelP.

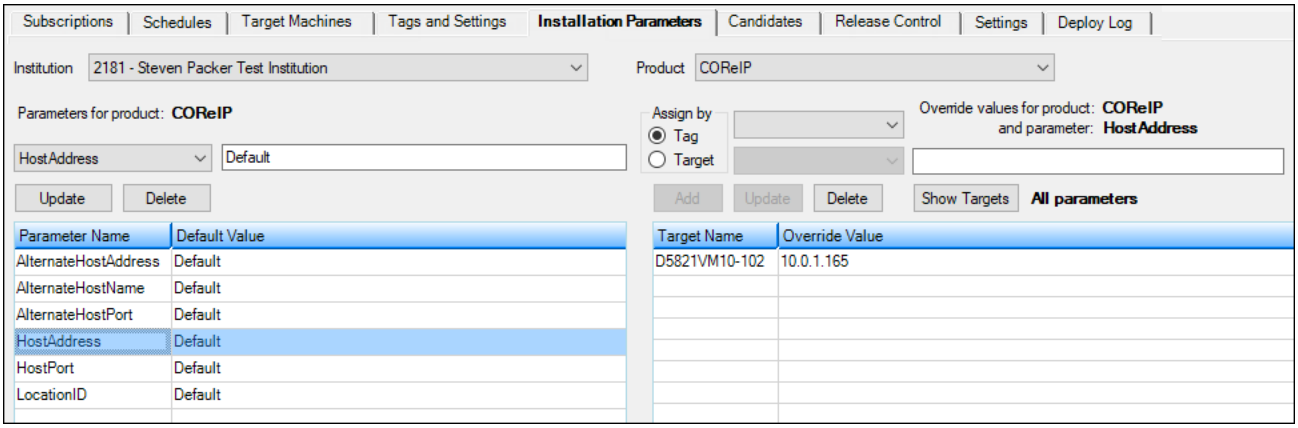
To set up CORelP installation parameters:

1. Open the GOLDDeploy Management screen in CIM GOLD.
2. Click on the Installation Parameters tab.
3. From the **Product** drop-down list, choose the CORelP product.
4. Set up the desired parameters. (See the examples below.)

LocationID is always assigned by **Target** because it is unique to each target machine. The other parameters could be set up using a Tag unique to the CORelP product.

Valid Installation Parameters:

- LocationID
- HostAddress
- HostPort
- AlternateHostName
- AlternateHostAddress
- AlternateHostPort



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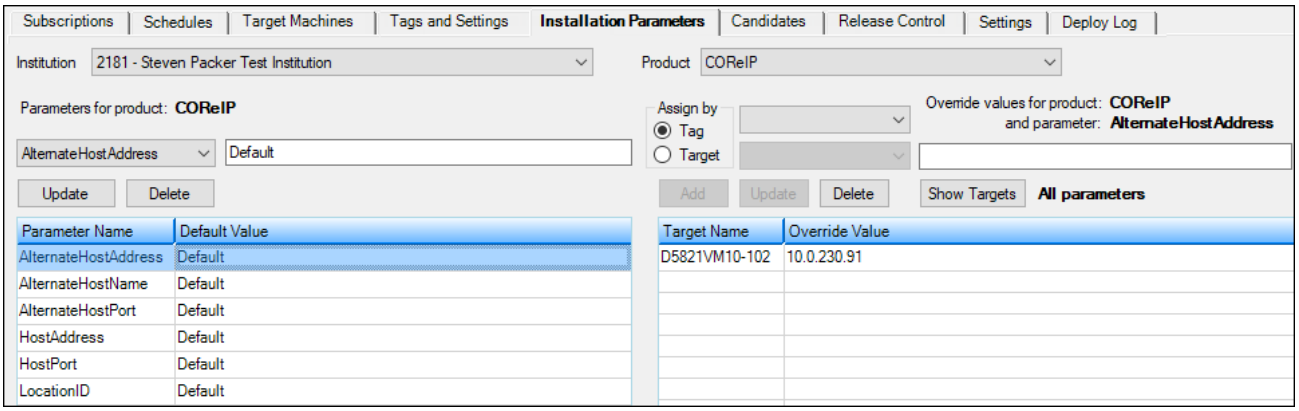
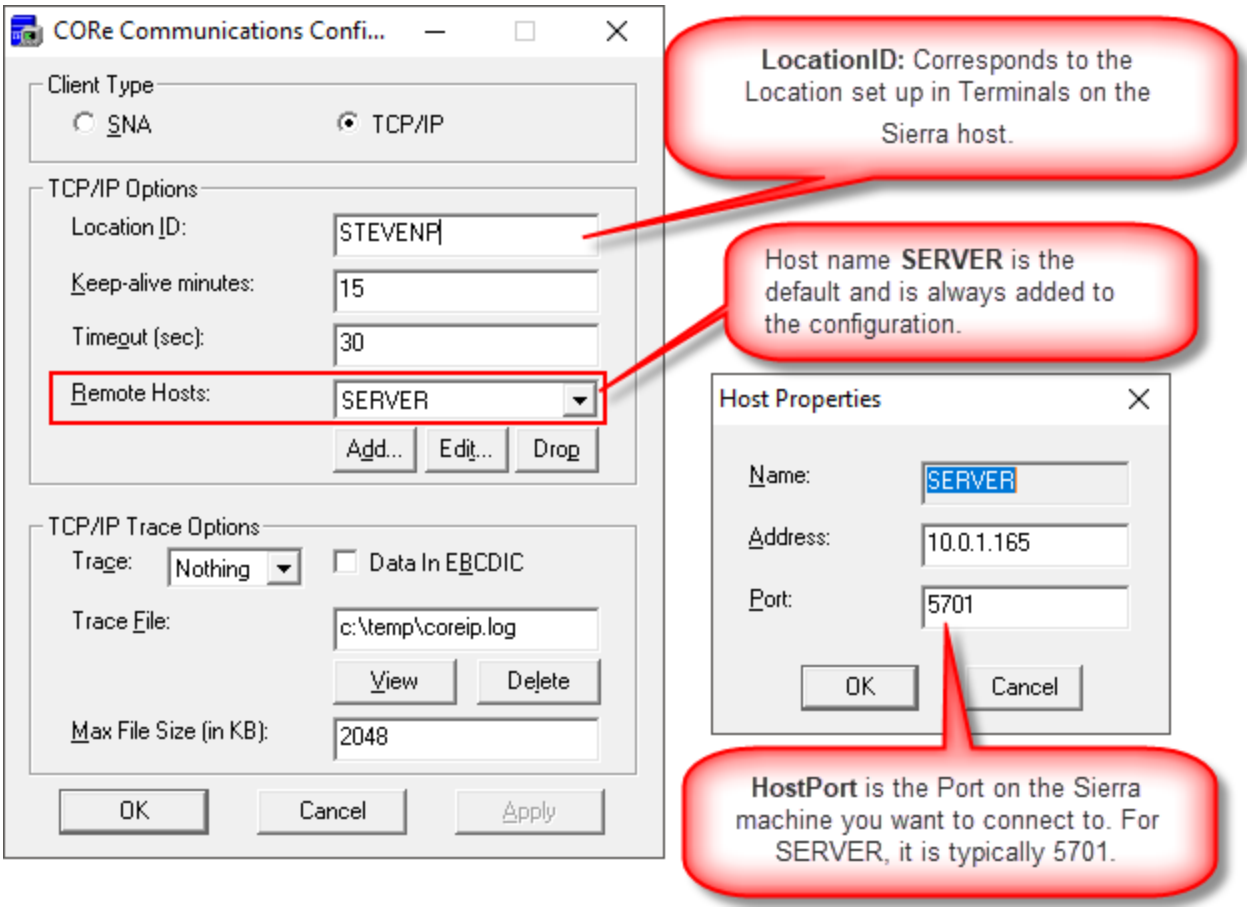
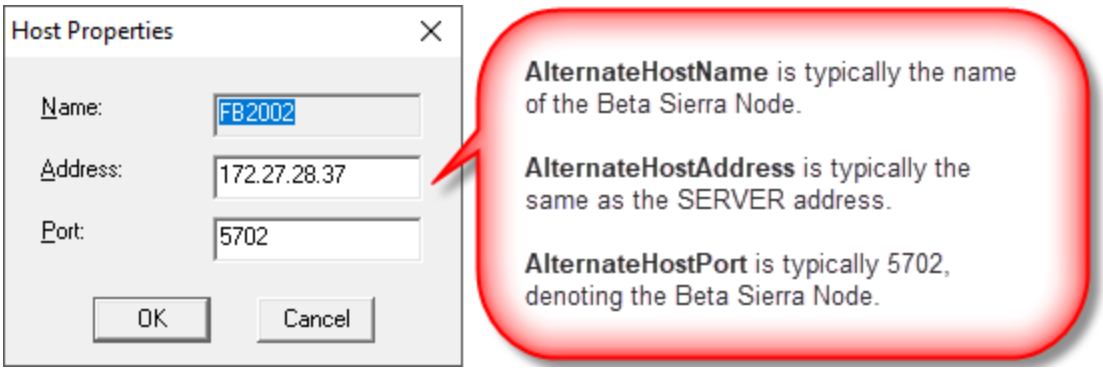


The Parameters correspond to the CORe Communications as shown below.



If you need an alternate Remote Host, use the Alternate parameters, as shown below.



GOLDTeller

This section explains how to use Tags and Installation Parameters to install GOLDTellerCIM.

GOLDTellerCIM and Platform both point to a DB4 Server to have access to their data files. For GOLDDeploy to install these products, it must have this information.

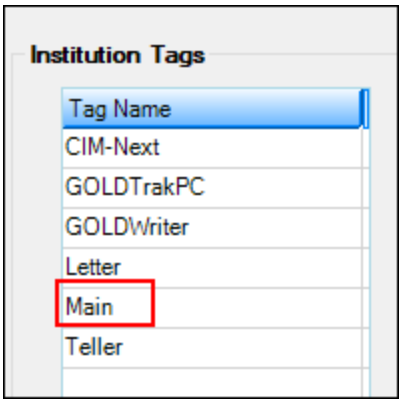
To set up GOLDTellerCIM for GOLDDeploy installation, first set up a Tag, and then set up Installation Parameters. These procedures are explained below.

To set up tags GOLDTellerCIM installation by GOLDDeploy:

1. Open the GOLDDeploy Management screen in CIM GOLD.
2. Click on the Tags tab.
3. Add a tag name to Institution Tags.
4. Open the Target Machines tab.
5. Add the new tag to all target machines.

Example:

Say you have an office identified as "Main." In the GOLDDeployment Management screens, you could add a tag of "Main" and then add that tag to all Target machines in the Main office.



Create a tag called "Main."

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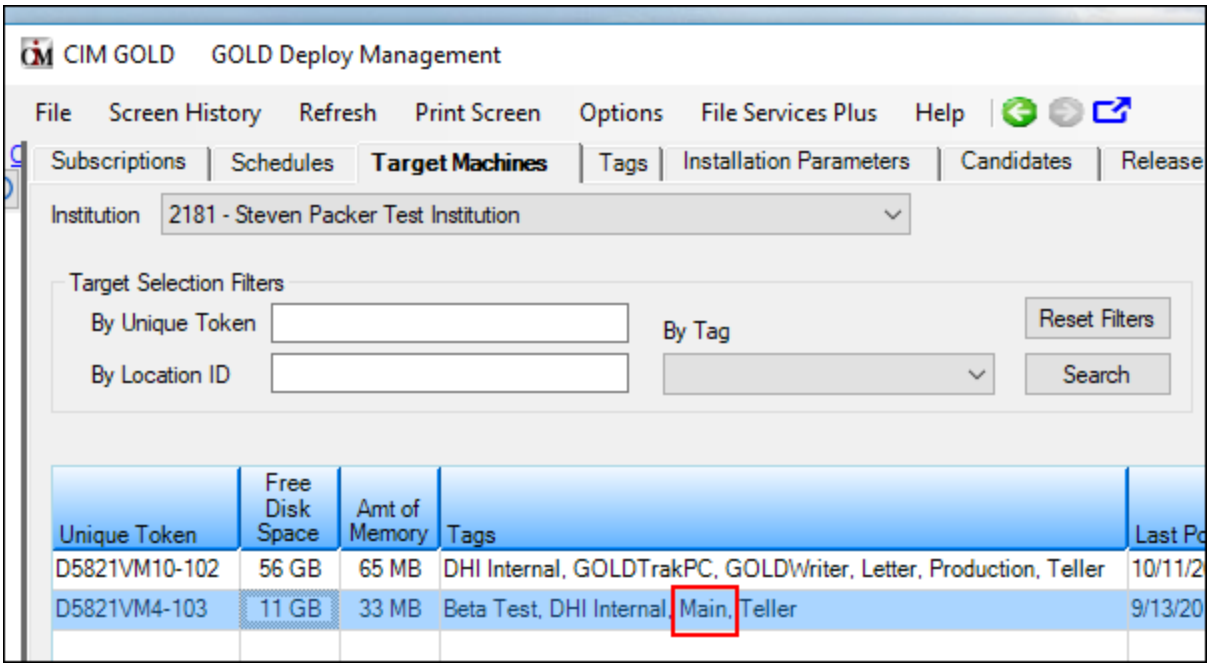
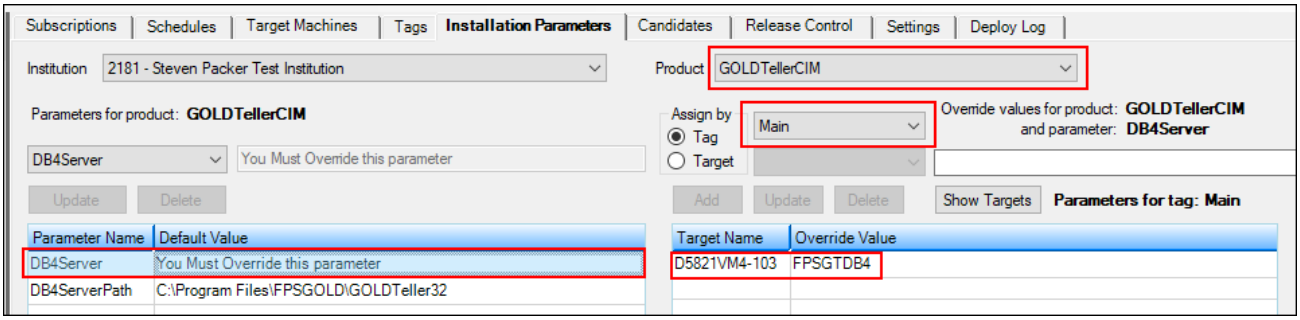


Add "Main" to the Target machines.

After you have added the tag to the appropriate target machines, you would then go to the Installation Parameters tab and add the parameters for the GOLDTellerCIM product.

To add the parameters for GOLDTellerCIM:

1. On the Installation Parameters tab, select "GOLDTellerCIM" from the **Product** drop-down list.
2. Click on "DB4Server" in the Parameter Name column at the left of the screen.
3. On the right side of the screen, click on the **Tag** radio button, then select the "Main" tag from the **Tag** drop-down list.
4. Click on the **Target** radio button, then enter the DB4Server name for the Main office and click <Add>. This will add the DB4Server parameter for all targets with a tag of "Main." The target name displays in the list below the <Add> button.
5. Click on "DB4ServerPath" in the Parameter Name column at the left of the screen, then repeat steps 3 and 4 above for the path. The DB4ServerPath is the path on the DB4 Server where the data files for GOLDTellerCIM are located.



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Platform

To set up Platform for GOLDDeploy installation, follow the steps in the **GOLDTeller** section above.

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