# Qognify

# Ocularis Quick Start Guide

## Version 6.1

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# Revision History

| Revision | Purpose for Change | Date |
|---|---|---|
| 00 | GA | August 2021 |

# Contents

# 1       About This Guide

This quick reference will lead you through a typical new Ocularis installation. Use these steps when installing Ocularis Professional, Enterprise or Ultimate on a single computer. Refer to the *Ocularis Installation and Licensing Guide* for more detailed installation instructions or the *Upgrading to Ocularis* document if performing an upgrade.  A recommended process flow to prepare the video management environment with Ocularis on a new system is listed below. Each numbered step is described in detail following this list.

1.  Download and Extract the Ocularis installation file.

2.  Install and license the Ocularis Base software.

3.  Access the Ocularis Component Downloads web page.

4.  Install the *Ocularis Administrator* application on a workstation with network connectivity to the Ocularis Base.

5.  Install the *Ocularis Client* on at least one workstation.

6.  Install the Ocularis recording component software.

7.  Add Cameras to the Recorder.

8.  Configure Ocularis Base using *Ocularis Administrator*.

9.  Install and configure the *Ocularis Recorder Proxy*.

10. Get Started with *Ocualris Client*.

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

# 2         Download & Extract the Ocularis Installation File

1. Download the Ocularis installation file from  https://www.qognify.com/support-training/software-downloads/. Select the latest 'full release'.

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 section 2 Install and License Ocularis Base below.

# 3          Install & License Ocularis Base

Be sure you have your Ocularis SLC handy when installing Ocularis Base.

1.  (continued from prior section). You are prompted to activate your Ocularis SLC. Click **Yes** to launch the Ocularis License Activation application.

2.  Enter (or paste) your Ocularis SLC (starting with '905') into the field labeled 'Step 1: Enter SLC' and click **Activate License**. The 'License Status' section should update to reflect licenses purchased. If the Ocularis Base computer is offline, see the document Ocularis Installation and Licensing Guide for detailed instructions on how to perform offline licensing.

3.  When licensing is successful, click **OK** and then click **Close**.

4.  The Ocularis Base Setup Wizard appears. Click **Next**.

5.  Read and accept the EULA. Click **Next**.

6.  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.

7.  An informational message regarding the installation of dependencies appears. Click **OK**. Dependencies are installed including SQL Express 2019. This may take several minutes. A new installer website is also created.

8. A Setup Wizard Complete screen appears. Click **Finish**.

# 4     Access the Ocularis Component Downloads Webpage from the Base

During the installation of Ocularis Base, the files required to install 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 this webpage 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.

# 5      Install Ocularis Administrator

This component configures settings on Ocularis Base. It is automatically installed on the Base computer. You may also install *Ocularis Administrator* on any PC with connectivity to the Base.

1. From the Ocularis Component Downloads webpage, click the **Download** button adjacent to *Ocularis Administrator*.

2. The file 'Ocularis Administrator x64.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.

4. When promoted, enter in the IP Address for the Update Server.

5. Click **Finish** when Setup Wizard is complete.

6. Continue with section 5 Install Ocularis Client below.

# 6        Install Ocularis Client

This component is used by operators to display video from surveillance cameras, view maps, and receive alerts. Install it on any PC with connectivity to the Base. *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 x64.exe' is downloaded. Click the file to run the installation wizard.

7. Follow the on-screen prompts, including the acceptance of the EULA in the wizard. It is recommended to use all defaults. When prompted, enter in the IP Address for the Update Server. Click **Finish** at the completion of the wizard.

3. Continue with section 7, Install Recording Component Software below.

# 7      Install Recording Component Software

This component configures surveillance cameras (among other things). Install it on any PC with connectivity to the Base or on the Base PC itself.

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 click **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, select the option *Manager & Server* and click **Next**.

    **NOTE: with Ocularis Professional ONLY you must install a Main Core along with a DM on each server. This requires a recorder SLC for each server, available from Qognify. With Ocularis Enterprise or Ultimate there should be only one Main 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/hostnames found* and select the IP address for the current machine. **DO NOT SKIP THIS STEP**. Keep default values for the Update Service section.

9.  On the Multimedia Setting screen, do not add any paths for storage at this time. They 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**.

13. Continue with section VII Add Cameras to the Recorder below.

# 8      Add Cameras to the Recorder

These are the bare minimum steps used to get Ocularis up and running. Additional configuration such as configuring storage, motion sensitivity, and other camera settings can be done later.

1. On the recorder computer, launch the *Ocularis Recorder Manager* from the Windows Start menu. (*Start→All Programs→Qognify→Ocularis Recorder→Ocularis Recorder Manager (64 or 32 bit)* based on your operating system).

2. 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 is it recommended to use a second password for this application. **DO NOT FORGET THIS PASSWORD.**

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. Select each camera you wish to add. You may modify 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 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.

    For more information on configuring camera settings, see the *Ocularis Recorder Configuration Manual*.

7. Close the *Ocularis Recorder Manager*.

8. Continue with section 8 Basic Configuration of Ocularis below.

# 9        Basic Configuration of Ocularis

These are the bare minimum steps used to get Ocularis up and running. 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**

     c.   Use the IP address of the Base computer in the 'Server' field

     d.   Select 'Authentication' type **Basic**

     e.   Click **Login**. You will be prompted to change the password for this account upon first login for security reasons.

2.   Import the Recording Component.

     a.   On the left of the 'Servers / Events' tab, click **Add**.

     b.   Enter the Hostname or IP address of the main core recorder component. This is the same address as in step 2 in section VII above.

     c.   (Optional) Enter an Alternate Label for this recorder. This is an optional description of the recorder.

     d.   Leave default 'Login Type' as **Basic**

     e.   Enter the user name and password for the recorder account: **admin** (this is the same as step 3 and 5 in section VII above).

     f.   Click **Add**.

3.   Select the 'Users / Privileges' tab and create at least one user group.

     a.   Click the **New Group** button at the top left toolbar.

     b.   Type in a name for the group and press the **[ENTER]** key.

4.   Add at least one user for this group.

     a.   Click the **New User** button at the top left toolbar.

     b.   Enter a 'User Name' for the user account. (minimum of 4 characters)

     c.   Leave 'User type' as **Basic**.

     d.   Enter a password for the account (twice).

     e.   Click **Add**. Repeat for other user accounts.

5.   Assign Camera Privileges to the User Group.

     a.   In the left panel, under the group name, select 'Camera Privileges'.

     b.   Create at least one camera privilege group.

          i.    Click the **Create Group** button in the upper right portion of the window.

          ii.   Double-click the text 'New Group'. Enter a more description name for this group and press **[ENTER]**.

          iii.  Repeat to add multiple camera groups.

     c.   Assign cameras to one or more camera groups as needed.

          i.    Either drag-and-drop the camera name from the 'Unprivileged Cameras' group to another group or right-click the camera and assign the group. Multi-select is supported (use **SHIFT** or **CTRL** to select multiple cameras)

6. Create at least one view.

   a. Select the 'Views' tab.

   b. Select the Group name for which you will create a view.

   c. Click the **New Group** button at the top left toolbar.

   d. Click the **New View** button to create a basic view.

   e. Select the layout for the view (1x1, 2x2, 3x3, etc).

7. Populate the view panes with cameras.

   a. Select the 'Cameras' tab in the lower-left panel.

   b. Expand the folder labeled 'All' to see a list of all privileged cameras for this group.

   c. Drag and drop camera names from the left pane directly onto the desired pane displayed on the right.

8. Close *Ocularis Administrator* and continue with section 9.

# 10      Proxy Configuration for Ocularis Recorders

The Ocularis Recorder Proxy manages camera events, streams and PTZ presets. It is also required if using Ocularis Web or Ocularis Mobile. Install the Recorder Proxy on the same computer as the recorder's main core service. Initial configuration steps are as follows:

1.   Download and install the recorder proxy software on the same computer as the main core service. From the Ocularis Component Downloads webpage click the **Download** button adjacent to *Ocularis Recorder Proxy*.

2.   The file 'Ocularis Event Proxy x64.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.

4.   Click **Finish** when Setup Wizard is complete.

5.   Open the *Ocularis Recorder Proxy*.

6.   Click the **Recorder Settings** button. Enter the IP Address of the Ocularis Recorder main core as well as the recorder admin account credentials. Click **Test Connection** to proceed. If the credentials are correct, click **OK**.

7.   Click the **Base Settings** button. Click **Add Base**. Enter the IP address for Ocularis Base, an administrative user account, password and Authentication Type. Click **Test Connection** to proceed. If the credentials are correct, click  **Add**. Repeat this step if you are forwarding events to more than one Base or a 3$^{rd}$ party server. When done, close the pop-up.

8.   Click **Event Filters** to select which events you'd like forwarded to Ocularis Base. When done, click **OK**.

9.   If the service is stopped , click the **Start Service** button to start the proxy service.

10.  Close the Recorder Proxy window.


To configure individual events, refer to the *Ocularis Administrator User Manual*.

# 11 Basic Use of Ocularis Client

1. Launch *Ocularis Client* from the desktop icon.
2. At the login screen,
   a. Enter a 'User Name' and 'password' you created in step 4 of section VIII.
   b. Enter the server name or IP address of the PC with Ocularis Base.
   c. Make sure 'Basic' is selected.
   d. Click **Login**.
3. Move the mouse to the top of the screen to expose the menu bar.
4. In the 'Views' menu, expand the group name, then view group name to select the desired view name (created in step 6 of section 8).