



INSTALLATION MANUAL (organiseit V5.4.x)

organise*it* v5.4.X INSTALLATION MANUAL

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
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HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

Keys

The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the [Enter] key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as [Back] or [Next].

Key Operations




Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the [Ctrl] key on the keyboard and at the same time press the letter [C].

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

ABC When procedures require an action such as entering text, the text you are to type is represented in the type face you see to the left.

ABC When procedures require an action such as selecting an item (perhaps from a list) or ticking/un-ticking an option, then the label against such an option is represented in the type face you see on the left.

Buttons

The buttons will be shown as an image. For example the [Next] button will be indicated by . If a button has a shortcut key then the letter of the button is underlined. For example, the letter N in the [Next] button is underlined, indicating that the button can be invoked by pressing  + .

Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

CAUTION: Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

NOTE: *Please read. A note is a hint or advice that helps you make best use of the software and/or it may* also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.

INTRODUCTION: **INSTALLING *organiseit***

(NOTE: *organiseit* is NO LONGER SUPPORTED on Windows XP and Windows 2003)

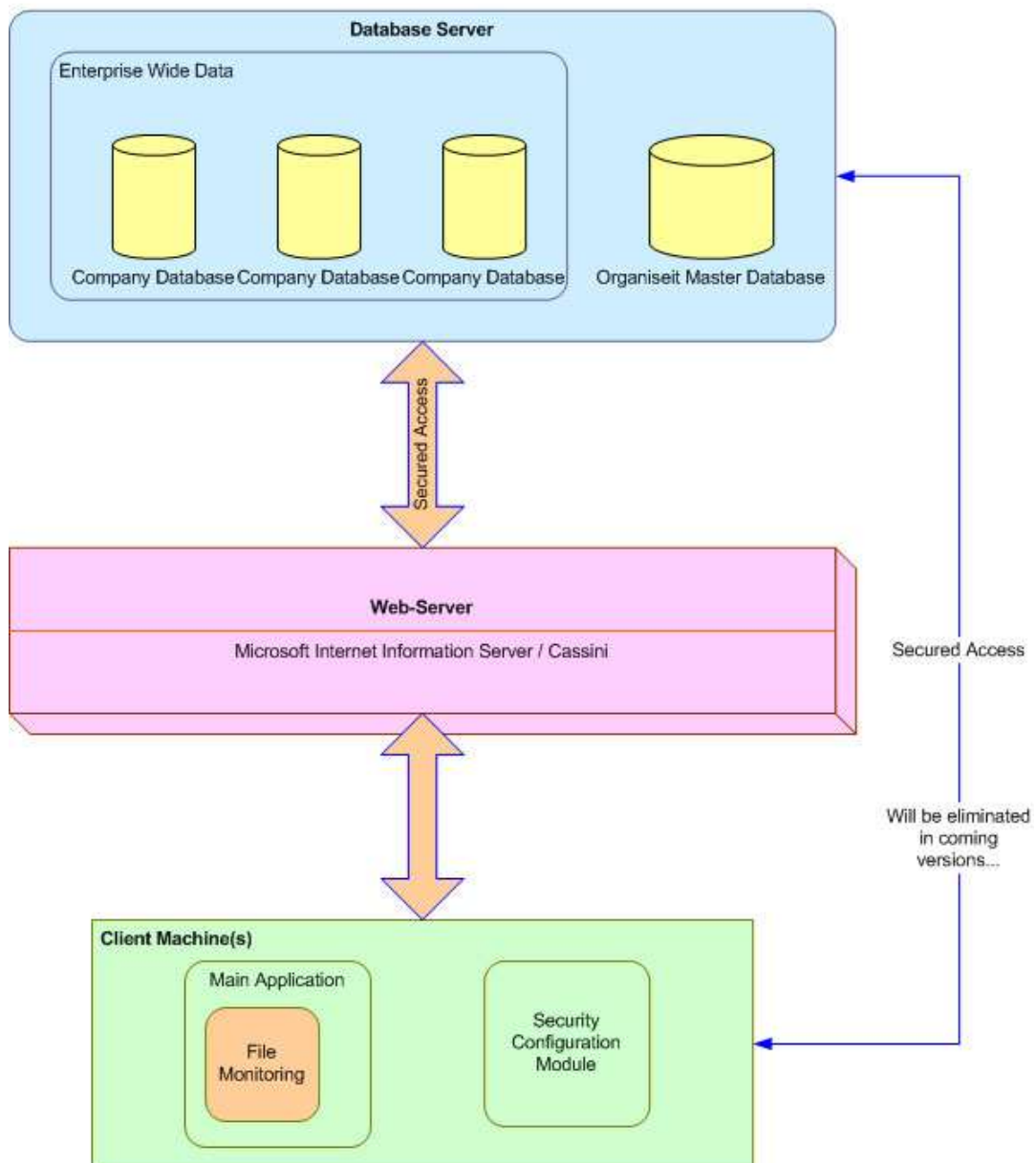
organiseit runs on:

- Windows 8 (Standard, Pro, Enterprise) (32 and 64 bit)
- Windows 7 (Professional, Ultimate, Enterprise) (32 and 64 Bit)
- Windows 2008 Server (32 Bit and 64 bit x64 Editions)
- Windows 2012 Server
- Windows Terminal Services and also as a Remote Application on Windows 2008 Server, Windows 2012
- Citrix

CHAPTER 1: PLANNING THE INSTALLATION

organise*it* is a three tier application. The three layers are:

- Client Application
- Web Service
- Database



1.1 PLANNING INSTALLATION

PRE-REQUISITES:

Before you actually start upgrading your organiseit database to the newer version make sure that you have backed up all the organiseit databases (including oit_master and training database - if any).

Once the databases have been backed up, make sure you have all the latest updates/fixes/service packs for your Windows Operating System, Microsoft Office (if you are using Word, Excel and/or Outlook), SQL Server and .NET Framework. An important Windows Components that is required is .NET Framework 2.0 (SP1 and above). **In case of Microsoft Office, 2010 & 2013, 64 bit Edition, .NET Framework 4.0 (and above) is required.**

PLANNING:

The system is designed to have all the three tiers on the same machine, though Microsoft advises to have Web Service and Database on separate machines. There are performance implications from site to site based on the number of users using the application and the load on SQL Server.

The application has to be installed by an Account having Full Administration Rights on the Network or machine. During installation, organiseit creates:

an OS User called **oitWebUser** - in the case of Domain-Network mode, this is in the Active Directory; in WorkGroup mode or Peer-Peer mode it is created as a Local Account

AND

a Group called **oitDmnGroup**

The organiseit web service runs under the context of **oitWebUser**. **oitDmnGroup** will be used if the user prefers connecting to SQL Server using Windows Authentication.

If an organization prefers that the Client Application connects to SQL Server using Windows Authentication then all the user accounts are to be added to the **oitDmnGroup** (in Network-Domain mode only. In WorkGroup Mode or Peer-Peer mode, the client application will connect to SQL Server using SQL Authentication. The Web Service will however always connect to SQL Server using Windows Authentication).

On the machine where the Web-Services is installed, **oitWebUser** will be added to local Windows Group called IIS_IUSRS Group (in case of Windows 8, Windows 7, Windows Vista, Windows 2008 Server, Windows 2012 Server) or to IIS_WPG Group (in case of Windows 2003).

1.1.1 organiseit Components

Server

- Database
- Web Service (and Monitoring Service, Archiving Service)

Client

- organiseit Client (Main Module, oitNew Module, Administration Module, Import Wizard Module)
- PDF Printer
- Scanner

1.1.2 organiseit Topology

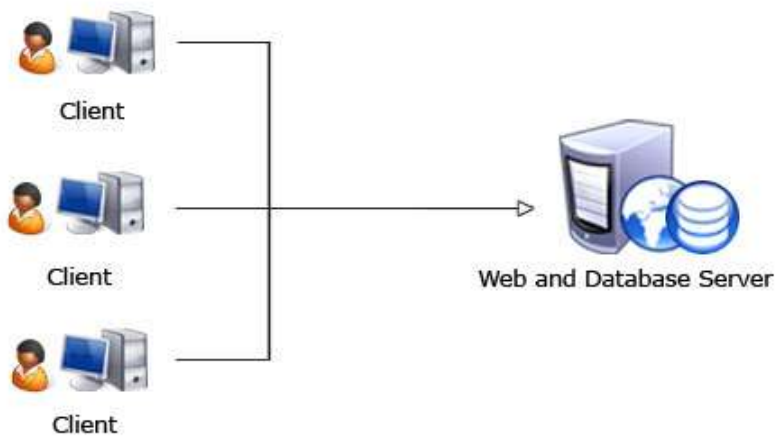
The organiseit application is a Three-Tier application and supports the following topologies:

- 1 Client (Client Component, Scanner and PDF Printer) and Server (Database and Web Services) installed on a single machine

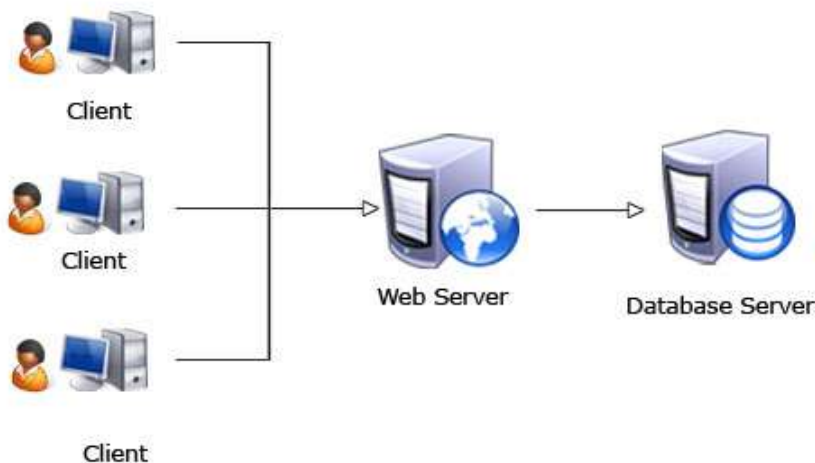


Client, Web and Database Server

- 2 Client (Client Component, Scanner and PDF Printer) and Server (Database and Web Services) installed on separate machines



- 3 Client (Client Component, Scanner and PDF Printer), Web Services and Database each installed on a separate machine



The topology that could be used will be based on the:

- number of concurrent Users using the organise*it* application
- number of applications sharing the SQL Database Instance; and
- number of Web Sites or Web Applications hosted by the Web Server.

You can also change the topology as you grow.

1.1.3 Order of Installation

The order of installation is:

- Database
- Web Service
- Client Component (including Scanner and Printer)

CHAPTER 2: INSTALLING ORGANISEIT SERVER COMPONENTS

(NOTE: organiseit is NO LONGER SUPPORTED on SQL 2005)

Installing *organiseit* server components includes both the *Database* and *Web Service*.

2.1 DATABASE

PRE-REQUISITES

SOFTWARE

Operating System

- Windows 8 Standard / Professional / Enterprise (32 & 64 Bit)
- Windows 7 Professional / Ultimate / Enterprise (32 & 64 Bit)
- Microsoft Windows 2008 Server (32 & 64 bit)
- Microsoft Windows 2012 Server

WDAC

- DAC or Windows DAC - Vista, Windows 7, Windows 8, Windows 2008 Server & Windows 2012 Server

Database (RDBMS)

- Microsoft SQL Server 2008 (32 and 64 Bit) (R1 and R2) RTM and above (Editions - Workgroup, Standard, and Enterprise) If you want to use the Pull Technology to interface with third-party applications then the Full Integration Service Component is also required. Alternatively you can also install SQL 2005 Backward Compatibility and 2000 DTS Designer Components. However there is an issue with the DTS in x64 editions.
NOTE: If SQL Express Edition is used then *organiseit* application's Pull Interface will not be available. Also there might be a performance issue as the number of users using the application increases.
- Microsoft SQL Server 2012 (32 & 64 Bit) RTM and above (Editions - Standard, Business Intelligence and Enterprise). If you want to use the Pull Technology to interface with third-party applications then the Full Integration Service Component is also required.
NOTE: If SQL Express Edition is used then *organiseit* application's Pull Interface will not be available. Also there might be a performance issue as the number of users using the application increases.
- Microsoft SQL Server 2014 (32 & 64 Bit) RTM and above (Editions - Standard, Business Intelligence and Enterprise). If you want to use the Pull Technology to interface with third-party applications then the Full Integration Service Component is also required.
NOTE: If SQL Express Edition is used then *organiseit* application's Pull Interface will not be available. Also there might be a performance issue as the number of users using the application increases.

Microsoft .NET Framework

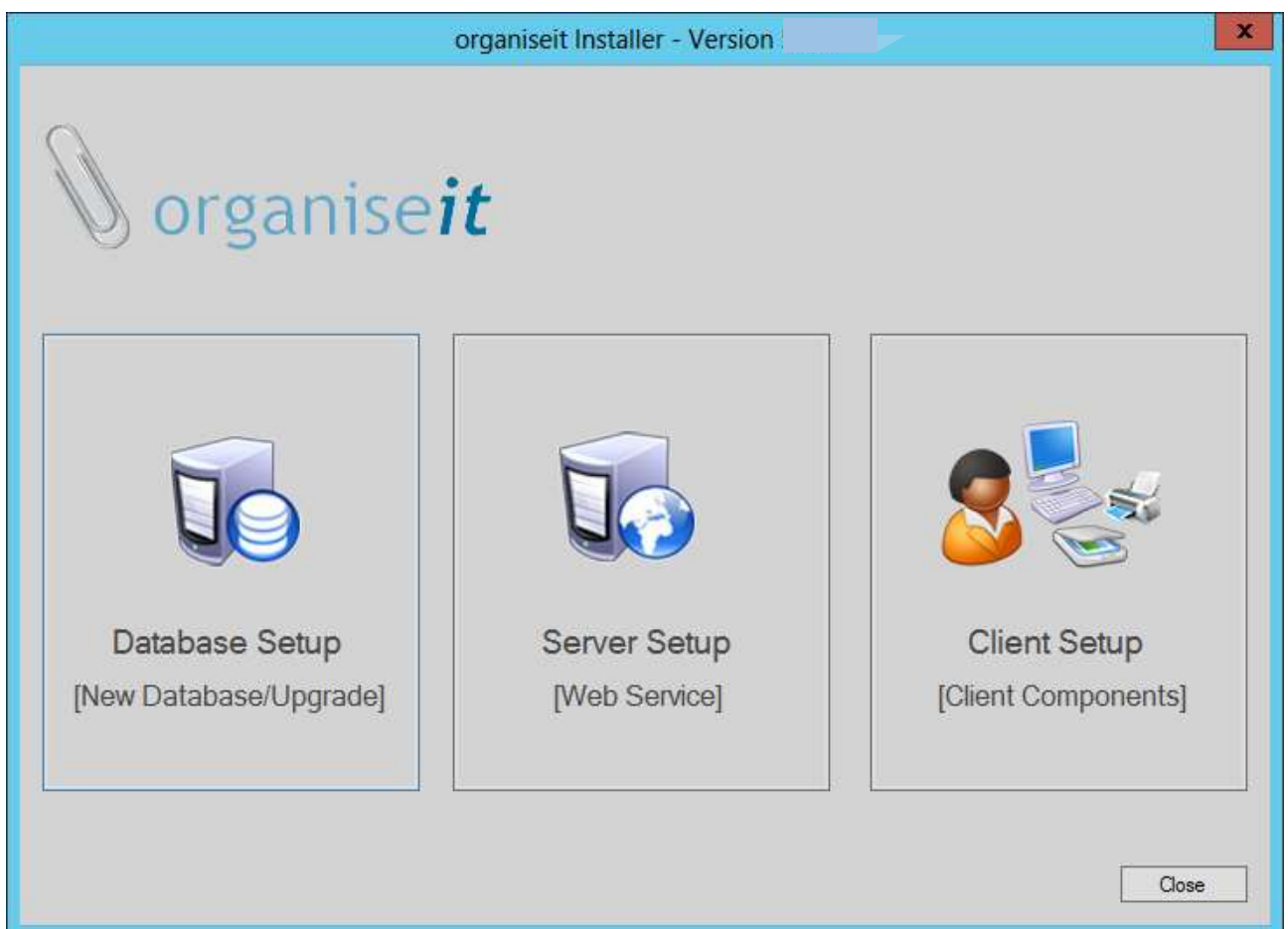
- V2.0 SP1 and above (with all its Hot-Fixes and Service Packs)

HARDWARE

- The recommended Hardware as specified by Microsoft for hosting the above Operating System and Database Server. Organise IT advises that the

recommended Hardware Requirement as specified by above Software Vendors are met

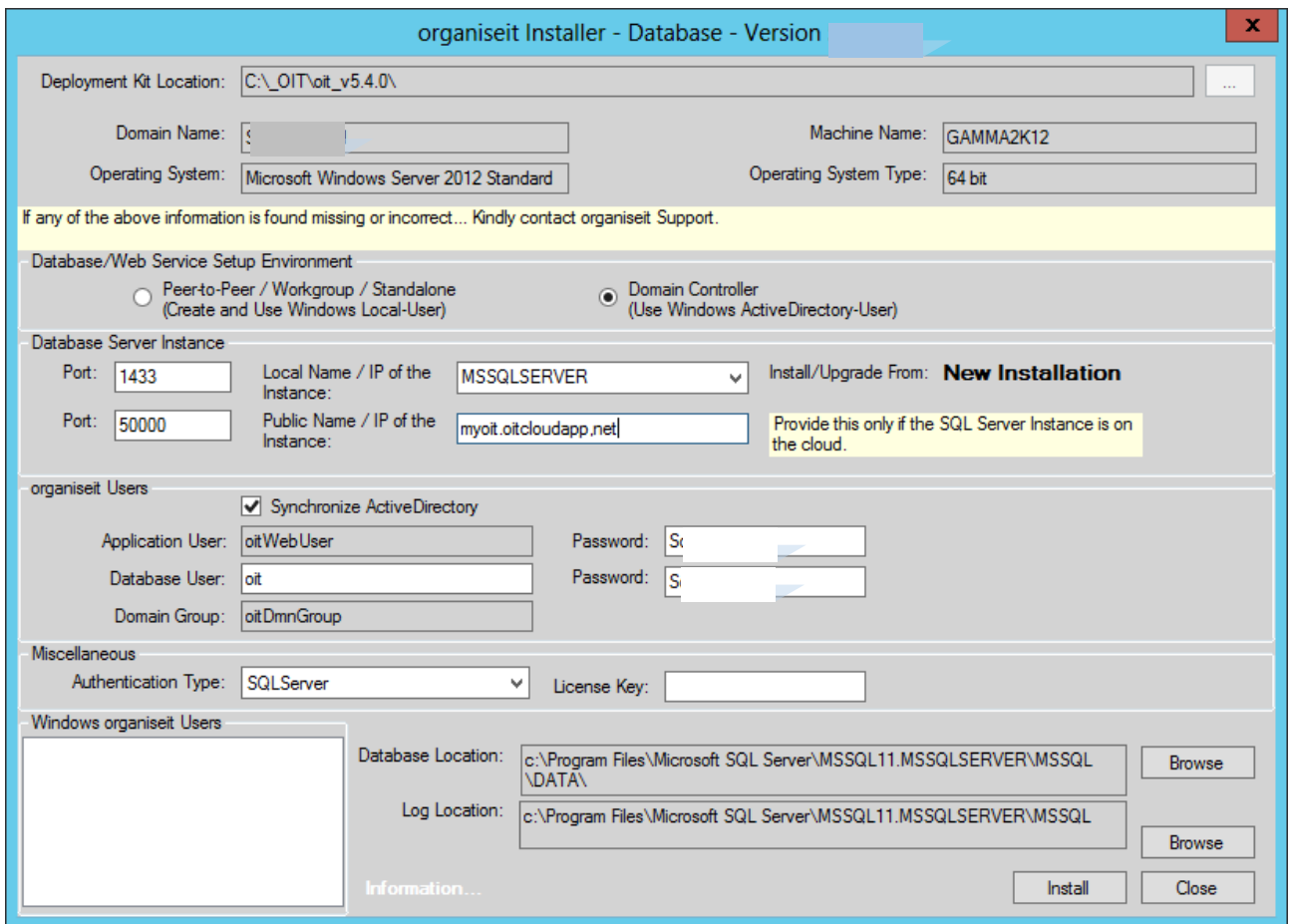
- 1 If you are Upgrading organiseit then before proceeding with the Upgrade:
 - a. Make sure all Users have logged out of the Application. Kill all the Active Sessions, if any by Logging onto the Administration Module.
 - b. Switch off both the “oit Windows Monitoring” and “oit Archiving” Services. “oit Archiving” service will be available if you are on v5.1.0 or above.
 - c. Stop and Disable all the Import Jobs (Pull Interface), if any. (These are SQL Jobs).
 - d. Backup all the organiseit databases.
- 2 Once the steps mentioned in (1) is taken care of, Run **Setup.exe** to display the **organiseit Installer** window



- 3 Click on **Database Setup** to install a new instance of organiseit or to perform an upgrade of organiseit from V2.5.x or above.

At any point during installation, you can click on to proceed to the next step. You can also click on to cancel the installation process...


Installing the Database



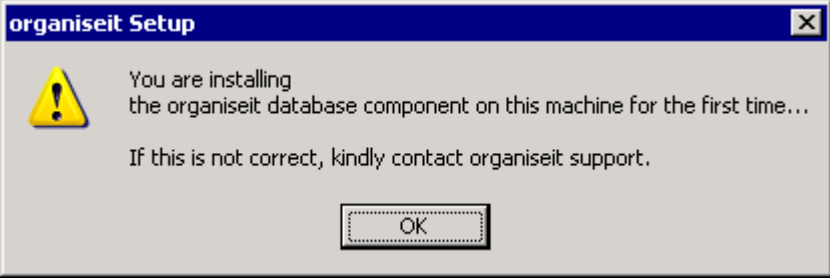
4 Clicking on Database Setup will bring up the above Screen, organiseit Installation Wizard - Database

5 The table below explains the top section in the above screen:

Deployment Kit Location	This shows the path of the installation file, i.e., from which folder you are currently executing the Setup file.
Domain Name	This will show the Name of the Domain if your Server/PC is on a Domain else it will show the name of your PC.
Machine Name	This will show the name of your PC.
Operating System	This will show the Windows Operating System installed on your PC
Operating System Type	This will indicate whether it is a 32 Bit Operating System or a 64 Bit Operating System.

6 If any of the above details is not correct then click  to abort the Installation and contact Organise IT Support.

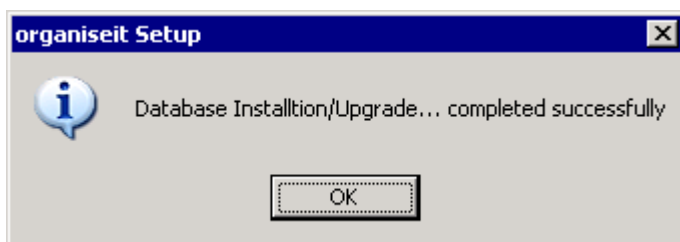
7 Complete the Screen Parameters as below:

<p>Database Setup Environment</p>	<p>Select “Peer-to-Peer” if one of the below is true:</p> <ul style="list-style-type: none"> a) you are going to use organiseit in a Stand-Alone mode, b) you are using a Workgroup Network c) you are in a Domain Network but you would be using organiseit application locally (E.g., your Laptop/PC is connected to your Office Domain but you would like to use organiseit application locally - all components of organiseit including database to be hosted locally) d) you are in a Domain Network all/most of the users of the network are going to use organiseit but for Security reasons you would not like to create organiseit Application User (oitWebUser) in the Active Directory (i.e., where all the Users Accounts of your Network being managed) instead you would like to create organiseit Application User as a local User of the Machine on which organiseit Database is being created. <p>Select “Domain Controller” in the following is true:</p> <ul style="list-style-type: none"> a) your PC/Server is connected to your Office Domain and you would like to create organiseit Application User (oitWebUser) in the Active Directory.
<p>Port (Local Port)</p>	<p>The Port Number on which the SQL Instance is actually running.</p>
<p>Local Name or IP Address of the Instance</p>	<p>Select the SQL Instance on which you would like to install organiseit. If you are upgrading organiseit, select the Instance in which you have an existing version of organiseit installed. The default SQL Instance will be listed as MSSQLSERVER. You will receive the following alert when you select a SQL Server Instance if you are installing organiseit for the first time on that Instance:</p>  <p>Select the Instance Name or enter the IP Address of the SQL Instance. This is the name by which the SQL Instance can be accessed on the Local Network.</p>
<p>Port (Cloud End-Point)</p>	<p>The port number which is setup as an Endpoint on the Cloud Server for this SQL Instance. Key in the port number in this field ONLY if the SQL Instance is hosted on Cloud / is made accessible over the internet.</p>
<p>Public Name or IP Address</p>	<p>The name by which the SQL Instance can be accessed from outside/Internet. Key in the name in this field ONLY if the SQL Instance is hosted on Cloud / is made accessible over the Internet.</p>
<p>Install/Upgrade From</p>	<p>This will display “New Installation” if this is a first time installation of organiseit on the select SQL Server Instance, else it will display the existing version of organiseit application that is installed on that SQL Server Instance</p>

<p>Synchronize Active Directory</p>	<p>This option will be applicable only when Database Setup Environment is selected as “Domain Controller”.</p> <ul style="list-style-type: none"> ● Synchronize with Active Directory set to “Yes” – The setup program will go ahead with Creation of oitWebUser Account and oitDmnGroup Group in the Active Directory, if they do not Exist. If the oitWebUser Account exists then the password will be reset to the password specified in the password field the “Password Never Expires” property is set to “True/Yes”. ● Synchronize with Active Directory set to “No” – The setup program will not update the Active Directory. This option can be used when the User does not have permissions to Write to the Active Directory. The User has to make sure of the following: <ul style="list-style-type: none"> ▪ oitWebUser account is created, ▪ the “Password Never Expires” is set to “True/Yes” ▪ the Password is known (this will be required at the later stage of installation), ▪ the oitDmnGroup is created <p>If any of the above is not taken care of the installation will fail. Please note that the User HAS to be AWARE of oitWebUser Account’s PASSWORD as it will be needed during the Installation of the Web Service.</p>
<p>Application User</p>	<p>This displays the name of the organiseit Application User, oitWebUser, that will be created locally on the Server where the Database is to be installed or in the Active Directory based on the setting you have selected for Database Setup Environment. You cannot the change the name of the Application User.</p>
<p>Application User Password</p>	<p>This shows the default password for the Application User, oitWebUser. If this password does not meet the password policy of your network then you can change it to meet the password policy and the account will be created with that password. During Upgrade the existing password of this Account will be reset to the one that is specified here.</p>
<p>Database User</p>	<p>This is the user with which the organiseit client components will connect to SQL Database when the Authentication Type is SQLServer. oit is the default value. The system will create this User in the SQL Server Instance selected for installing organiseit database. You can change the name of the Database User.</p>
<p>Database User Password</p>	<p>This is the password for Database User which the organiseit client components will use to connect to SQL Database when the Authentication Type is SQLServer. The default value for the Password is oit01. If this password does not match your password policy setting in SQL Server then you can change it to meet your password policy. During Upgrades the existing password will be reset to one that is specified here.</p>

Domain Group	This is the name of the Application Group (oitDmnGroup) that will be created locally on the Server where the Database is to be installed or in the Active Directory based on the setting you have selected for Database Setup Environment. You cannot change the name of the Application Group. This has no effect during Upgrade.
Licence Key	Type in the License Key provided to you by Organise IT. If you are upgrading the system will display the existing License Key.
Authentication Type	This is the Authentication mode for the client components to connect to SQL Server. Select SQLServer if you want the client components to connect using SQL Authentication. Select Windows if you want the client components to connect using Windows Authentication. NOTE: Use the Windows option only when your network is in Domain Mode (i.e. the machine on which the organiseit Database is being installed, is on Domain Controller and also the Work-Stations or the Terminal Server on which the client is to be installed are on the same Domain.).
Domain Users	If the Authentication Type is Windows and your machine is on a Domain then this will list the users of your Active Directory. Select the users from this list who are going to use the organiseit application.
Database Location <input type="button" value="Browse..."/>	Click on this option to select the path (Path) where you would like to create the Database file for the organiseit Master Database (oit_master). This is applicable ONLY for NEW INSTALLATION.
Log Location <input type="button" value="Browse..."/>	By Default the Log Location will be same as the Database Location. If you would like to store the Transaction Log file on a separate path then click "Browse" and select a different path. This is applicable ONLY for NEW INSTALLATION.

- 8 Click on to begin installation / Upgrade.
- 9 On Successful Installation you will receive the following alert and the program returns to the main screen.

**NOTES:**

On Successful Installation the following process has been carried out:

- I. The Setup Program will now create a text file called **oitDatabaseServer.ini** in the Root Directory of the C: Drive on your system as well as in the **Deployment Kit Location**. If the Setup program is unable to save the "ini" file in either of this location then it will prompt the user to select a path to store that file. This "ini" file contains the settings you have entered in the Database Parameters screen and will be referred during the installation of the Web Service Component...

- II. User **oitWebUser** is created. If you have selected “Domain Controller” as your Setup Environment, then **oitWebUser** will be created in your Active Directory else it will be created as a Local Account. If **oitWebUser** already exists prior to installation then the system will refer that account.

CAUTION: DO NOT DELETE THIS USER ACCOUNT after installation of the organiseit application. Deletion of this User Account will STOP the organiseit application from functioning.

- III. Group **oitDmnGroup** is created. If you have selected “Domain Controller” as your Setup Environment, then **oitDmnGroup** will be created in your Active Directory else it will be created as a Local Group. If **oitDmnGroup** already exists prior to installation then the system will refer that group.

CAUTION: DO NOT DELETE THIS GROUP after installation of the organiseit application. Deletion of this Group will STOP the organiseit application from functioning.

- IV. If **Windows** is selected as the **Authentication Type** then the **Users** selected from the **Domain Users** list will be added to **oitDmnGroup**.

CAUTION: If a User Account is removed from the **oitDmnGroup** and the **Authentication Type** is **Windows** then that User will not be able to login to the organiseit application until the User is added back to that Group.

- V. The **oit_master** database is created in the selected **SQLServer Instance** at the **Database Location Path** selected by you.

- VI. Database user **oit** (or any such **Database User** that you have specified) is created in the selected **SQLServer Instance**.

- VII. User **oitWebUser** and Group **oitDmnGroup** is granted Access to the selected **SQLServer Instance**.

- VIII. **oitWebUser** is made owner of the **oit_master** database. **oitDmnGroup** and **oit** (or any such **Database User** that you have specified) are given the following roles on **oit_master**:

- a. db_datareader
- b. db_datawriter
- c. oit_ExecSP_role (Execute Permissions on Stored Procedures have been assigned to this role)

- IX. **oitWebUser**, **oitDmnGroup** and **oit** (or any such **Database User** that you specified) are granted access to SQL Server’s master and msdb database of the selected **SQLServer Instance**.

- X. An extended stored procedure (**xp_returnenc**) is added to the SQL Server’s master database of the selected **SQLServer Instance** and the execution permission on it given to **oitWebUser**, **oitDmnGroup** and **oit** (or any such **Database User** that you have specified).

- XI. If organiseit Database and Web Service are installed on different machine and the Setup Environment is selected as “Peer-to-Peer /Workgroup/ Standalone” and the password of **oitWebUser** is changed on one of the machines (i.e. on Database Server or Web Server) then it must be changed on the other machine also.

2.2 WEB SERVICES

PRE-REQUISITES SOFTWARE

Operating System

- Windows 8 Standard / Professional / Enterprise (32 & 64 Bit)
- Windows 7 Professional / Ultimate / Enterprise (32 & 64 Bit)
- Microsoft Windows 2008 Server (32 & 64 Bit)
- Microsoft Windows 2012 Server

WDAC

- DAC or Windows DAC - Vista, Windows 7, Windows 8, Windows 2008 Server & Windows 2012 Server

Web Server – Microsoft Internet Information Services

- IIS 6.0 or above (with all its Hot-Fixes)
- World Wide Web Services
- Security - Basic & Windows Authentication
- ASP.NET and above with all its hot-fixes (In Windows 2003 it is also known as Application Server. Install IIS and ASP.Net from Application Server)
- On Windows 7, Windows 8, Windows 2008 and Windows 2012 – IIS 6 Management Compatibility Roles /Features

Microsoft .NET Framework

- V2.0 SP1 and above(with all its Hot-Fixes and Service Packs)

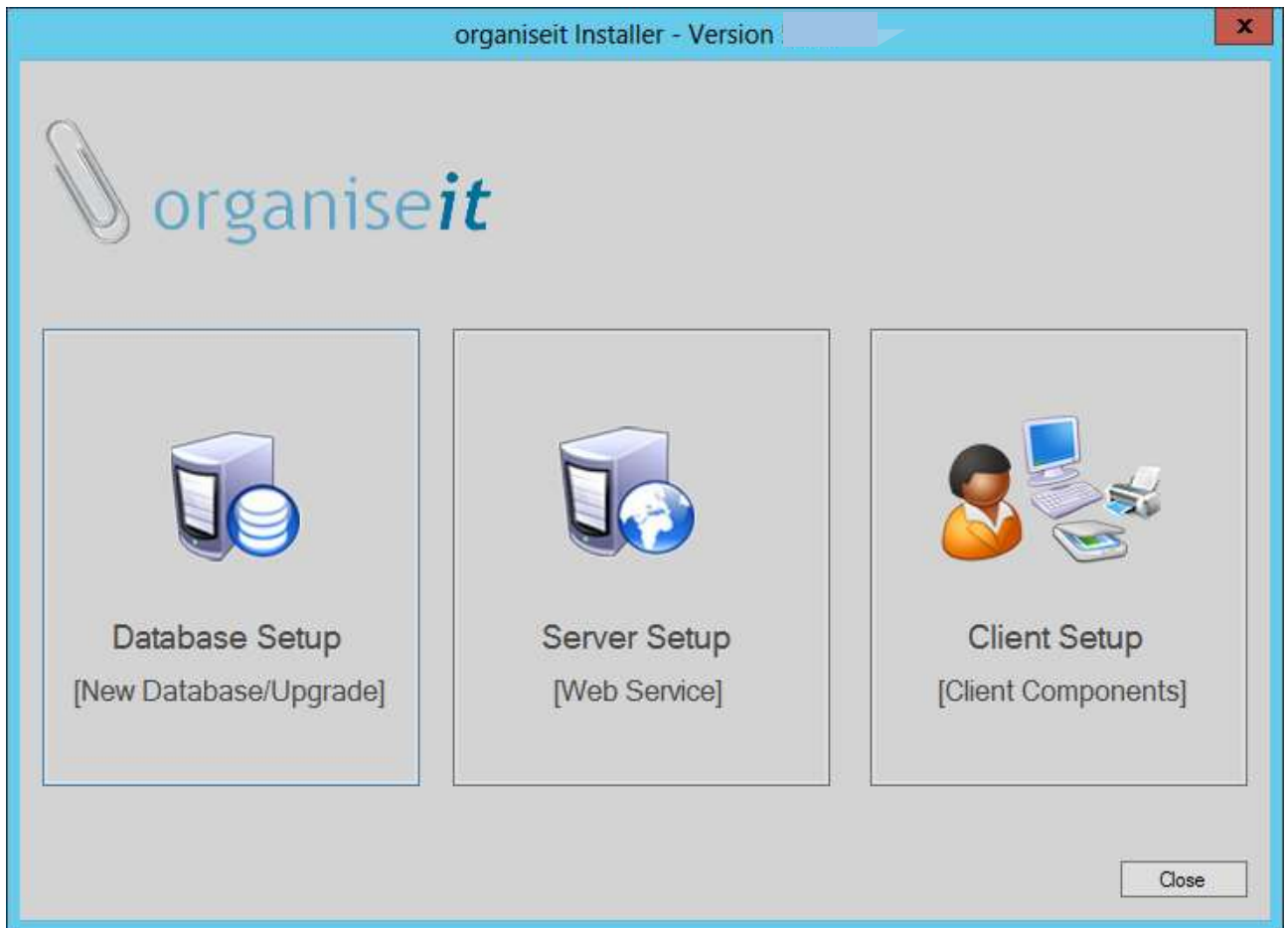
HARDWARE

- The recommended Hardware as specified by Microsoft for hosting the above Operating System and Web Server. Organise IT advises that the recommended Hardware Requirement as specified by above Software Vendors are met

NOTE: Kindly refer to the respective vendor's documentation for Installation/Configuration/Trouble Shooting information for the above hardware or software.

Installing the Web Services

- 1 If you are Upgrading organiseit then before proceeding with the Upgrade:
 - a. Make sure all Users have logged out of the Application. Kill all the Active Sessions, if any by Logging onto the Administration Module.
 - b. Switch off both the “oit Windows Monitoring” and “oit Archiving” Services. “oit Archiving” service will be available if you are on v5.1.0 or above.
- 2 Run **Setup.exe**, to display the **organiseit Installer** window

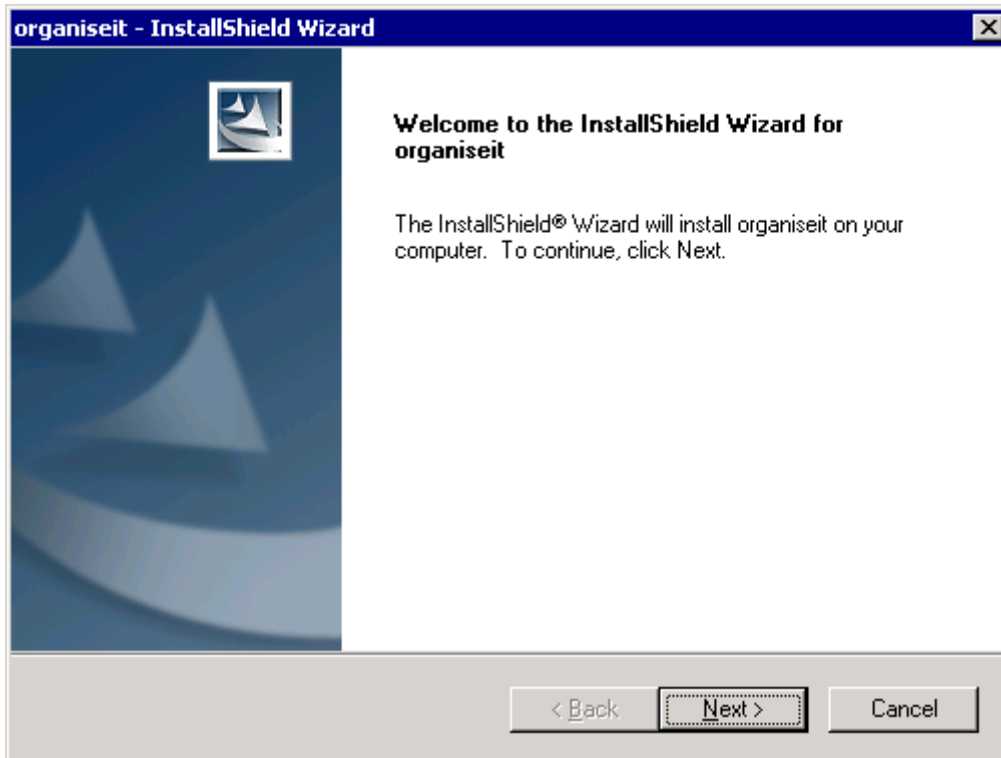


- 3 Click on **Server Setup** to install Web Service.

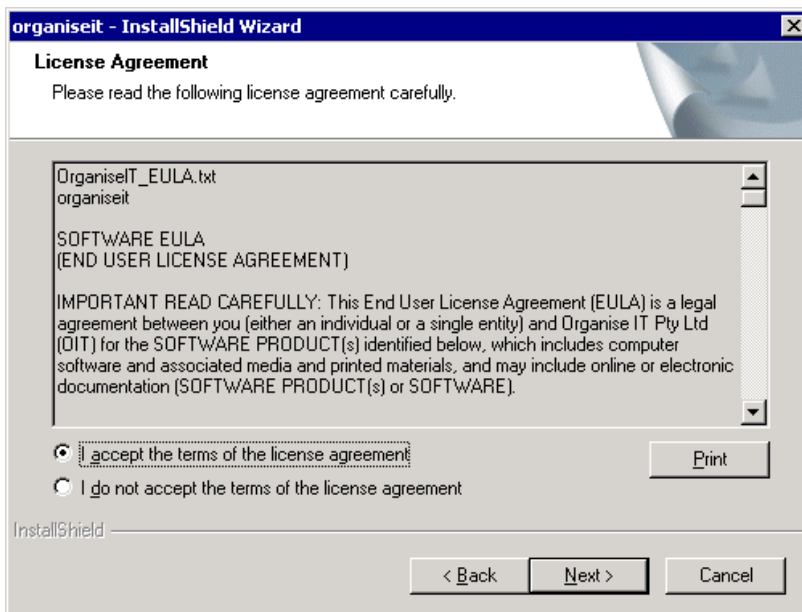
At any point during installation, you can click on to proceed to the next step. You can also click on to cancel the installation process...

- 4 If you are Upgrading organiseit then you will be Warned that the Installer will **Un-Install ALL THE COMPONENTS** of the Earlier Version. Click to continue with the Upgrade else Click to abort the Installation.

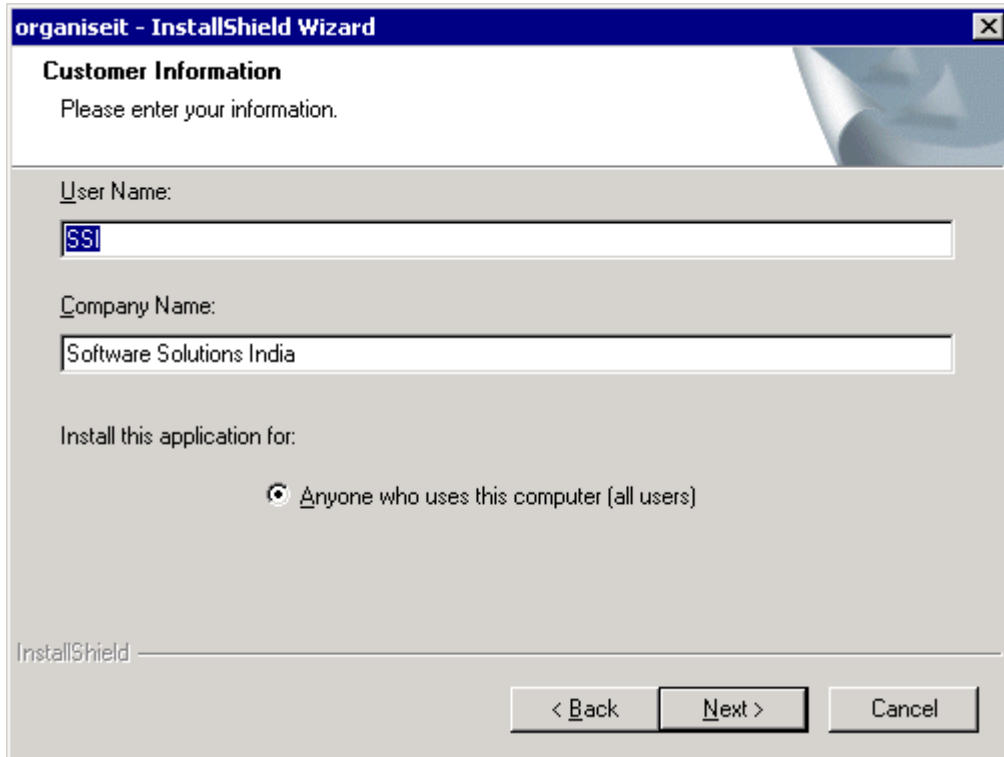
- 5 If you are Installing Components for the first time on this machine then you will see the below screen. Click on to continue




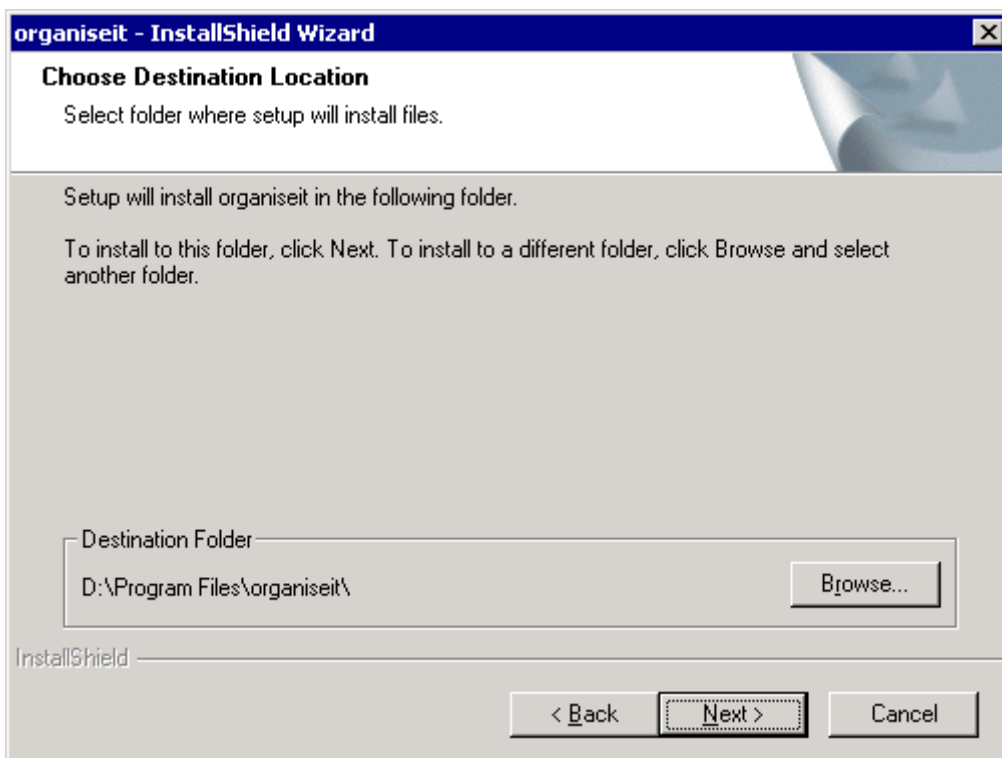
- 6 Click on *I accept the terms of the licence agreement* until it appears selected




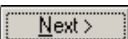
- 7 Click on **Next >** to continue
- 8 Click in **User Name** and type the name of the person who has purchased the Licence from Organise IT Pty Ltd
- 9 Press **Tab** to move to **Company Name** and type the name of the company for the person in step 15

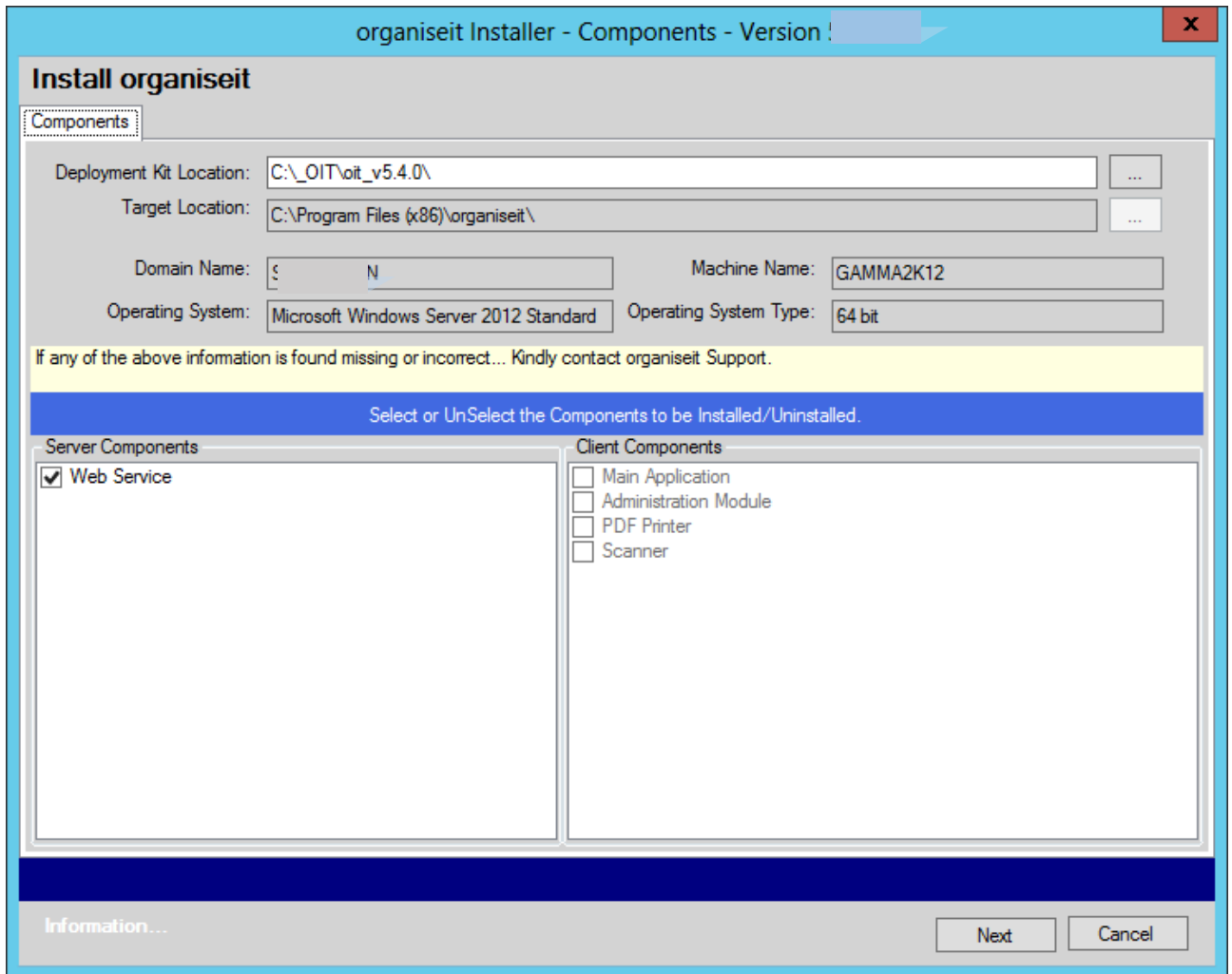


10 Click on  to continue



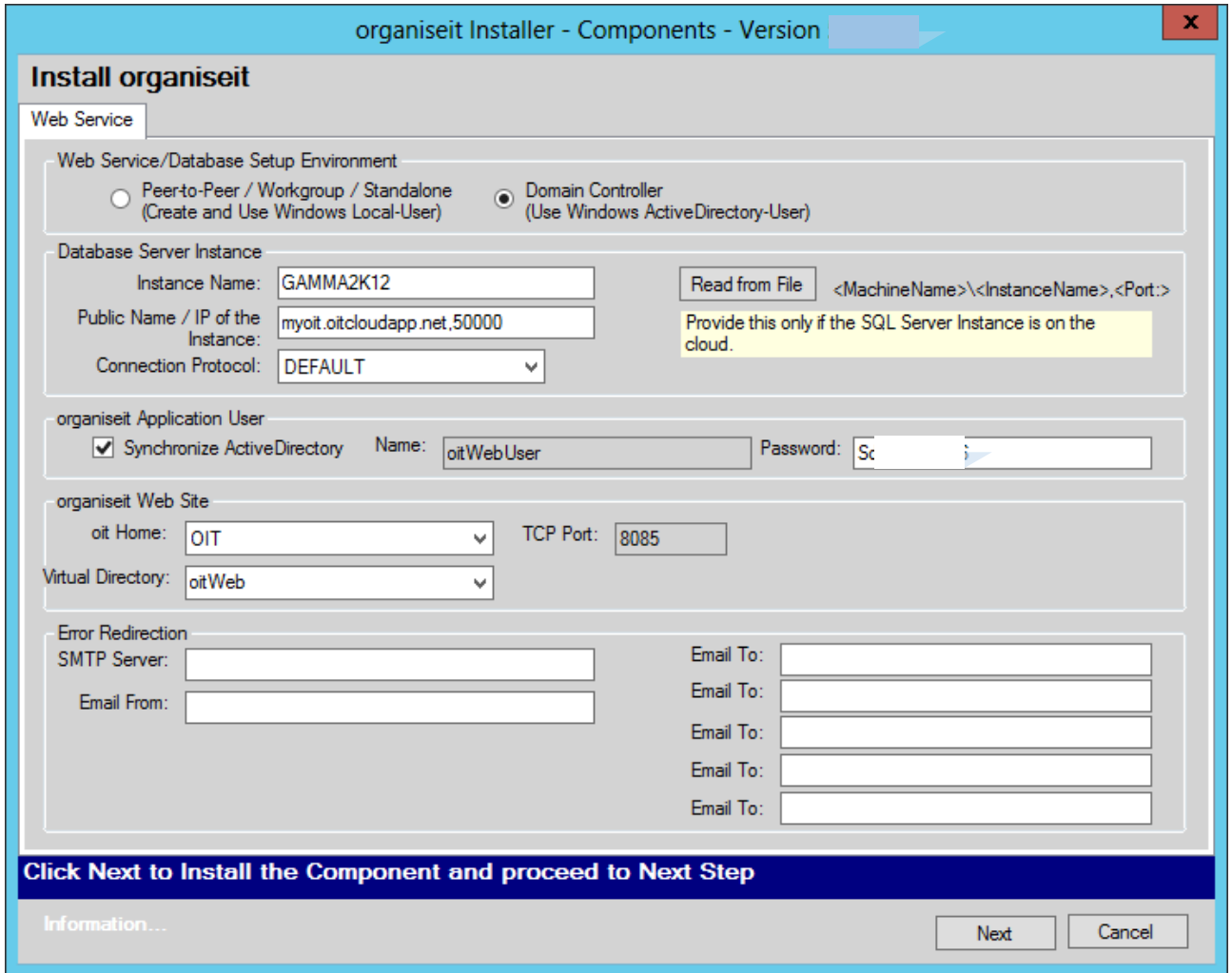
11 Click on  to select the path for installing the organiseit application
The default path is the Programs directory on your system...

12 Click on  to continue
The next page enables you to select the Web Service component.



13 Click on **Web Service** until it appears with a tick.

14 Click on to continue




15 Complete the *Web Service Parameters*, as follows:

<p>Web Service Setup Environment</p>	<p>By Default the Program will select the Environment selected during the Install/Upgrade of the Database.</p> <p>Select “Peer-to-Peer” if one of the below is true:</p> <ol style="list-style-type: none"> you are going to use organiseit in a Stand-Alone mode, you are using a Workgroup Network you are in a Domain Network but you would be using organiseit application locally (E.g., your Laptop/PC is connected to your Office Domain but you would like to use organiseit application locally - all components of organiseit including database to be hosted locally) you are in a Domain Network all/most of the users of the network are going to use organiseit but for Security reasons you would not like to create organiseit Application User (oitWebUser) in the Active Directory (i.e., where all the Users Accounts of your Network being managed) instead you would like to create organiseit Application User as a local User of the Machine on which organiseit Database is being created. <p>Select “Domain Controller” if the following is true:</p> <ol style="list-style-type: none"> your PC/Server is connected to your Office Domain and you would like to create organiseit Application User (oitWebUser) in the Active Directory. <p>NOTE: It is suggested to use the same option as that specified during the Installation/Upgrade of the Database.</p>
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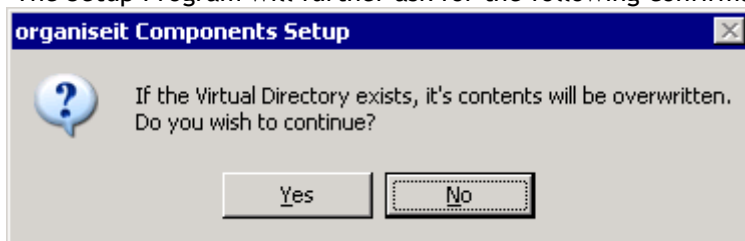
<p>Database Server Instance</p>	<p>Enter the organiseit Database Server Details. By Default the Installation Program will read from “oitDatabaseServer.ini” which was created during Installation of organiseit database. If the system is not able to locate the file, you can click the Browse button and locate the file manually. Once it is located, the program can read the contents and display it to you.</p> <ol style="list-style-type: none"> a) If the organiseit database is installed on a default SQL Server Instance on a machine then specify that Machine Name over here. b) If the organiseit database is installed on a Named Instance on a machine then specify it in the format – <Machine Name>\<Instance Name> i.e., Machine Name followed by a Back Slash (\) followed by the Instance Name. E.g., SSIBRD06\OIT c) If the SQL Server Instance on which organiseit database is installed is listening on a port other than the default port then specify the same over here. The format is – <Machine Name>\<Instance Name>, <Port> i.e., Machine Name followed by a Slash and Instance Name (if installed on a named instance) followed by Comma followed by Port Number. E.g., SSIBRD06\OIT,1000 d) If the Database Instance is hosted on the Cloud then enter the name /IP Address by which it can be accessed over the Internet followed by the port number that is opened for that Instance.
<p>Connection Protocol</p>	<p>Select the protocol that the organiseit component will use to Connect to the SQL Instance. This is a machine level setting so if additional components of organiseit are installed on the same machine, each of them will use the same setting to connect to that SQL Instance. The values are:</p> <ol style="list-style-type: none"> a) Default - When this setting is used then the application will connect to the SQL Database using a protocol that is set as Default in that SQL Instance. b) TCP/IP - When this setting is used the application will connect to the SQL Database using the TCP/IP Protocol. Use this protocol when the SQL Database is on a remote server / on Cloud. (E.g., the client is connecting to the SQL Database using a VPN Connection). Using this protocol on slow networks can lead to performance gain. To use this setting make sure that the TCP/IP Protocol is enabled on this SQL Instance. c) Named Pipe - When this setting is used the application connects to the SQL Database using the Named Pipe Protocol. Use this protocol if the SQL Instance and the clients are on the same Local Area Network. To use this setting make sure that the Named Pipe Protocol is enabled on the SQL Instance.
<p>Synchronize Active Directory</p>	<p>This option will be applicable only when Web Service Setup Environment is selected as “Domain Controller”.</p> <ul style="list-style-type: none"> ● Synchronize with Active Directory set to “Yes” – The setup program will go ahead with Creation of oitWebUser Account and oitDmnGroup Group in the Active Directory, if they do not Exist. If the oitWebUser Account exists then the password will be reset to the password specified in the password field the “Password Never Expires” property is set to “True/Yes”. ● Synchronize with Active Directory set to “No” – The setup program will not update

	<p>the Active Directory. This option can be used when the User does not have permissions to Write to the Active Directory. The User has to make sure of the following:</p> <ul style="list-style-type: none"> ▪ oitWebUser account is created, ▪ the “Password Never Expires” is set to “True/Yes” ▪ the Password is known (this will be required at the later stage of installation), ▪ the oitDmnGroup is created <p>If any of the above is not taken care of the installation will fail. Please note that the User HAS to be AWARE of oitWebUser Account’s PASSWORD as it will be needed during the Installation of the Web Service.</p>
Application User	<p>This displays the name of the organiseit Application User, oitWebUser, that will be created locally on the Server where the Database is to be installed or in the Active Directory based on the setting you have selected for Database Setup Environment. You cannot the change the name of the Application User.</p>
Application User Password	<p>This shows the default password for the Application User, oitWebUser. If this password does not meet the password policy of your network then you can change it to meet the password policy and the account will be created with that password. During Upgrade the existing password of this Account will be reset to the one that is specified here.</p> <p>NOTES: The password for oitWebUser specified over here must be same as that specified for the same during organiseit Database Installation.</p>
Web Site	<p>Select the Web Site under which you would like to host the organiseit Web Services. The “Default Web Site” is selected by Default. If you would like to host it under a different Web Site then select the same from the list. Make sure that you select a Web Site that does not host other applications as it might affect either of the applications. If you would like to Install organiseit under a new Web Site, then it must be first created manually by opening IIS Manager and then selecting that Site in this step.</p>
Port Number	<p>This displays the port number of the selected Web Site. If you have firewall on, then you will need to open up this port in the firewall so that the organiseit Client Components installed on your LAN/Intranet can access organiseit Web Services.</p>
Virtual Directory	<p>This is the name of the Virtual Directory that is going to host the Web Service under the selected Web Site. The default is “oitWeb”. You can enter a different name or select an existing one from the list. You are advised not to change the Default unless this Virtual Directory is hosting other applications.</p>
SMTP Server	<p>(THIS FEATURE IS CURRENTLY UNAVAILABLE) If you are going to use the organiseit Monitoring Service for XML or Data Files, then specify the SMTP server over here. The Monitoring Services will write all the errors that are encountered during Processing of XML or Data files into an eventlog called “oitEventLog”, at the same time it will also send emails to the end-user with the details of the error. In</p>

	order to send emails, the SMTP server details will be required. If you are not sure / not decided about this feature, you can leave it blank and later on configure using the oitStartup.
Email From	(THIS FEATURE IS CURRENTLY UNAVAILABLE) This is the “From Address” that will be specified in the Emails when the Monitoring Service will email the Error Details. If you are not sure / not decided about this feature, you can leave it blank and later on configure using the oitStartup.
Email To	(THIS FEATURE IS CURRENTLY UNAVAILABLE) You can specify upto 5 different Email Accounts to which you would like the Monitoring Service to send Emails in case it encounters an error during processing of XMLs or Data Files. If you are not sure / not decided about this feature, you can leave it blank and later on configure using the oitStartup.

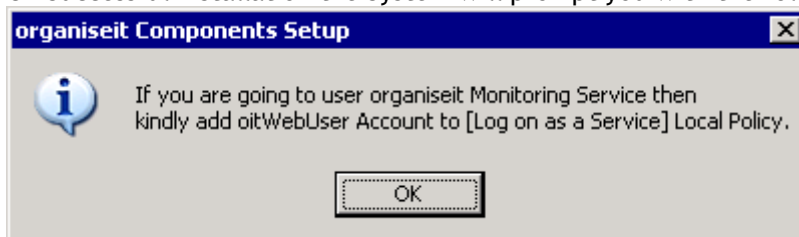
16 Click on  to start Installation of the Web Services.

17 The Setup Program will further ask for the following confirmation:

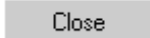


18 Click to Continue Installation.

19 On Successful Installation the System will prompt you with the following message:



20 Whenever you start using the organiseit Monitoring Feature you will have to add the oitWebUser Account to “Log on as a Service” Local Policy for the Service to function.

21 Click on  twice to close the installation program.

NOTES:

On successful installation/upgrade the following process has been carried out:

- I. The Setup Program will now create a text file called **oitWebServer.ini** in the Root Directory of the “C” Drive on your system as well as in the **Deployment Kit Location**. If the Setup program is unable to save the “ini” file in either of this location then it will prompt the user to select a path to store that file. This “ini” file contains the settings you have entered in the Web Service Parameters screen and will be referred during the installation of the Client Components...
- II. User **oitWebUser**, if not existing, is created. If you have selected “Domain Controller” as your Setup Environment, then **oitWebUser** will be created in your Active Directory else it will be created as a

Local Account. If *oitWebUser* already exists prior to installation then the system will refer that account.

CAUTION: DO NOT DELETE THIS USER ACCOUNT after installation of the *organiseit* application. Deletion of this User Account will STOP the *organiseit* application from functioning.

- III. An Application Pool called “oitAppPool”, if not existing, is created which will run under the Context of “oitWebUser”.
- IV. A Virtual Directory by the name *oitWeb* (or any such name that is specified during the installation of the Web Service) will be created under the selected **Web Site** and will host the *organiseit* Web Services. The Web Service used the Application Pool “oitAppPool”.
- V. Monitoring Service called “oit Windows Folder Monitoring Service” is installed and along with it a Configuration Module to configure the Monitoring Process and “HereToThere” is also installed. The Monitoring Service will run under the context of *oitWebUser*.
- VI. Archiving Service called “oit Archiving Service” is installed. This service will run under the context of *oitWebUser*.
- VII. *oitWebUser* will also be added to local Windows Group called IIS_IUSRS Group (in case of Windows 8, Windows 7, Windows Vista, Windows 2008 Server, Windows 2012 Server) or to IIS_WPG Group (in case of Windows 2003).
- VIII. An EventLog called “oitEventLog” is created. Any errors/warnings that are encountered while monitoring XML or Data folders will be written to this Event Log.
- IX. The HereToThere (“oitStartup” is now merged into “HereToThere”) program will start when a User Logs onto the Machine and it resides in the System Tray.

NOTE: If at anytime the password of *oitWebUser* is changed, then the New Password **MUST** also be applied to:

- a. oitAppPool (in IIS)
- b. *organiseit* Web Service (in IIS) (Under Anonymous Authentication)
- c. oit Windows Folder Monitoring Service
- d. oit Archiving Service

Once the Passwords are applied then Restart the Application Pool, the Website under which the *organiseit* Web Service is installed, the “oit Windows Folder Monitoring” and “oit Archiving” Services.

- X. If *organiseit* Database and Web Service are installed on different machine and the Setup Environment is selected as “Peer-to-Peer /Workgroup/ Standalone” and the password of *oitWebUser* is changed on one of the machines (i.e. on Database Server or Web Server) then it must be changed on the other machine also.
- XI. If you have installed the Web Service on a machine which has the Local Policy - “Allow Log on Locally” defined only for certain users, then you would be required to add “oitWebUser” to that policy for the Web Service to function.

CHAPTER 3: INSTALLING ORGANISEIT CLIENT COMPONENTS

PRE-REQUISITES SOFTWARE

Operating System

- Windows 7 Professional / Ultimate / Enterprise (32 & 64 Bit)
- Windows 8 Standard / Professional / Enterprise (32 & 64 Bit)
- Microsoft Windows 2008 Server (32 and 64 bit)
- Microsoft Windows 2012 Server

MDAC / WDAC

- DAC or Windows DAC - Vista, Windows 7, Windows 8, Windows 2008 Server, Windows 2012 Server

Microsoft .NET Framework

- V2.0 SP1 and above (with all its Hot-Fixes and Service Packs)
- V4.0 and above (if a 64 bit Version of Office 2010/2013 is being used)

Microsoft Office (Add-ins for Word, Excel and Outlook)

- Office 2010 (32 & 64 Bit)
- Office 2013 (32 & 64 Bit)

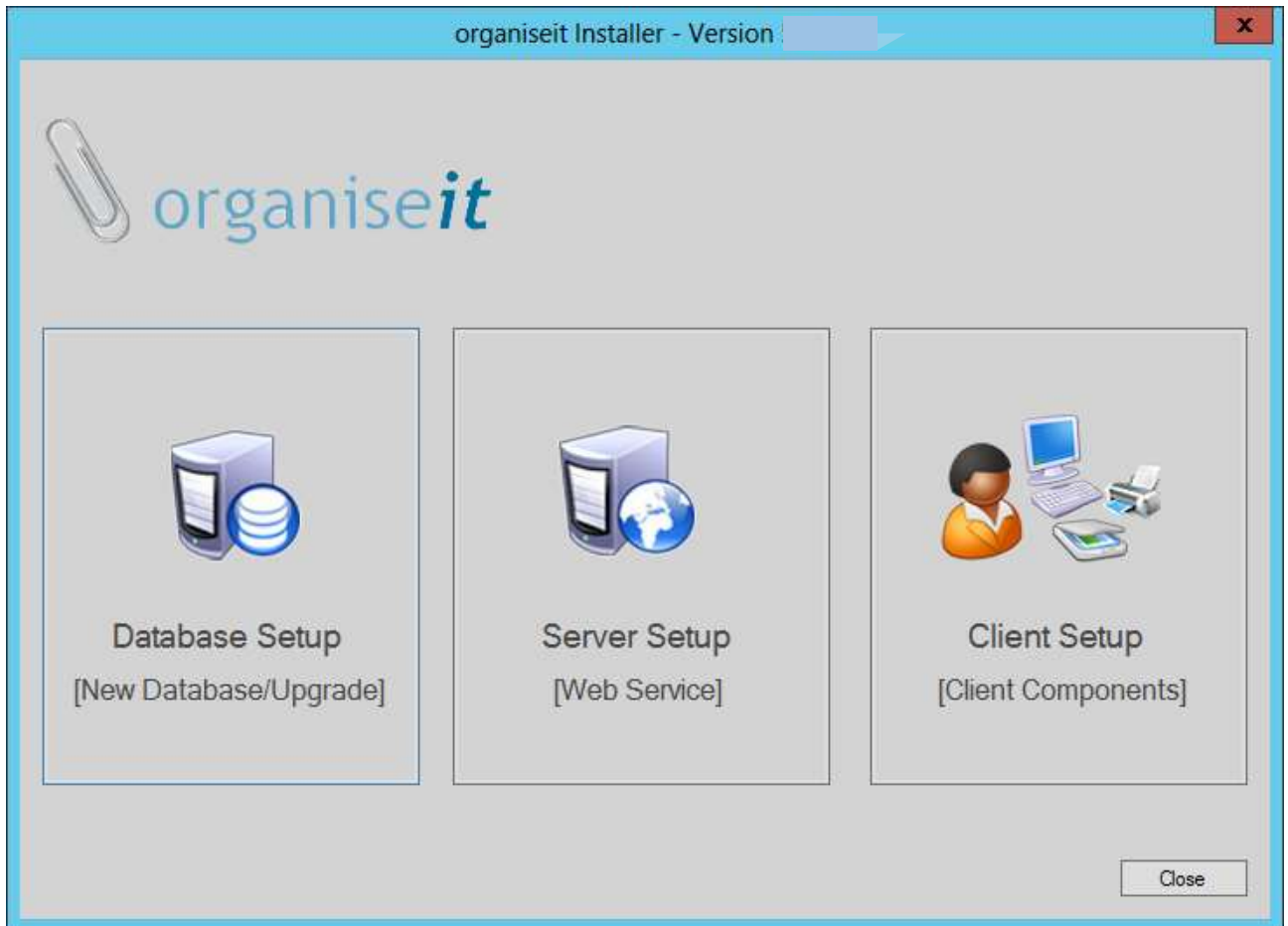
HARDWARE

- The recommended Hardware as specified by Microsoft for hosting the above Operating System and Database Server. Organise IT advises that the recommended Hardware Requirement as specified by above Software Vendors are met

NOTE: Kindly refer to the respective vendor's documentation for Installation/Configuration/Trouble Shooting information for the above hardware or software.

Installing Client Components

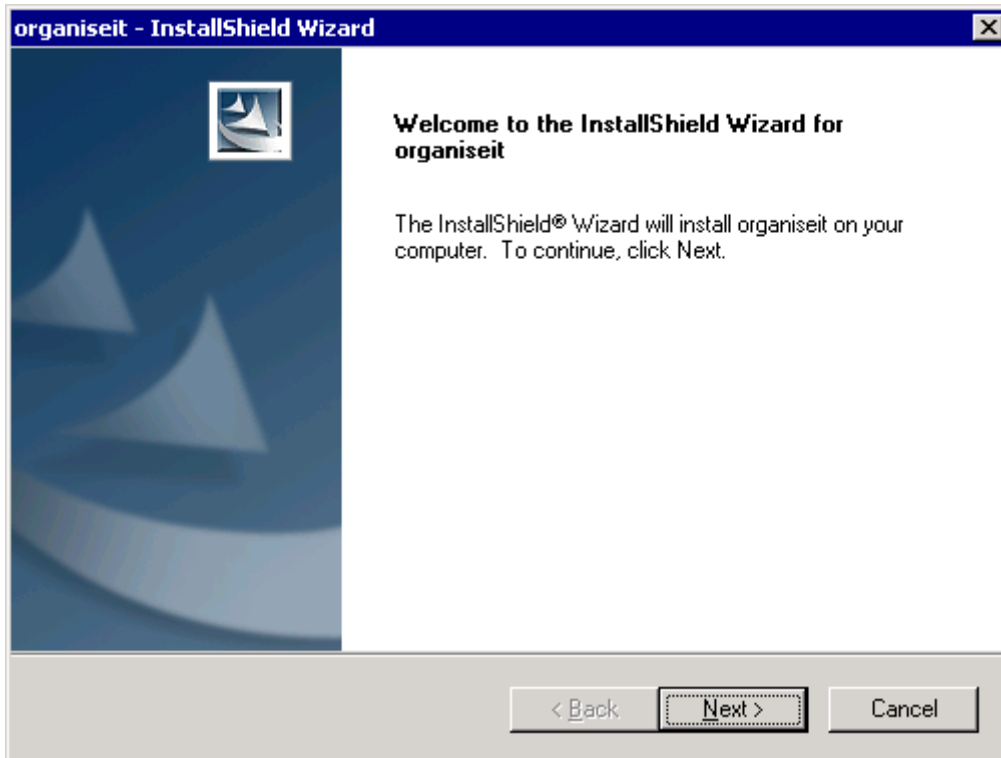
- 1 Close all Microsoft applications (e.g. Word, Excel, Outlook, PowerPoint etc.) and also all the organiseit components (in case of upgrade) on this machine.
- 2 Run **Setup.exe** to display the **organiseit Installer** window. If you are going to carry out a Silent Installation then Run **Setup.exe** with the “/silent” switch. Silent Installation will install those components that have a value “1” for the “action” element in the “OITInit.XML” file in the Setup folder. If you are using any Anti-Virus then make an Exception Rule to allow organiseit and components and to allow them to access the Web Service.



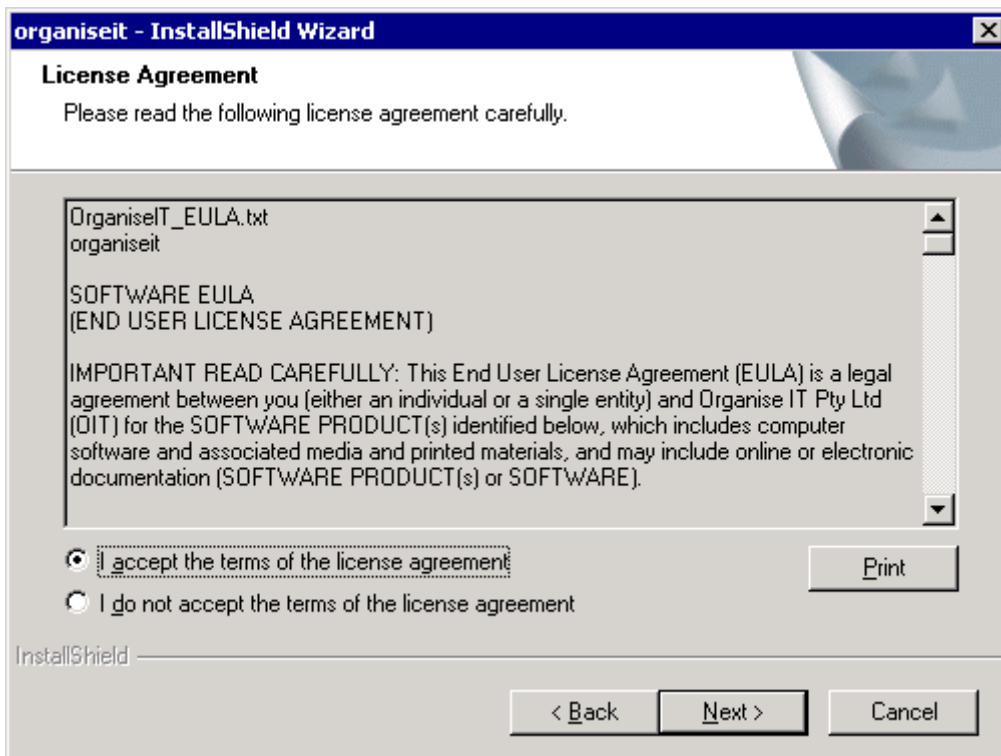
- 3 Click on **Client Setup** to install the Client Components.

At any point during installation, you can click on to proceed to the next step. You can also click on to cancel the installation process...

- 4 If you are Upgrading organiseit then you will be Warned that the Installer will **Un-Install ALL THE COMPONENTS** of the Earlier Version. Click to continue with the Upgrade else Click to abort the Installation.
- 5 If you are Installing Components for the first time on this machine then you will see the below screen. Click on to continue



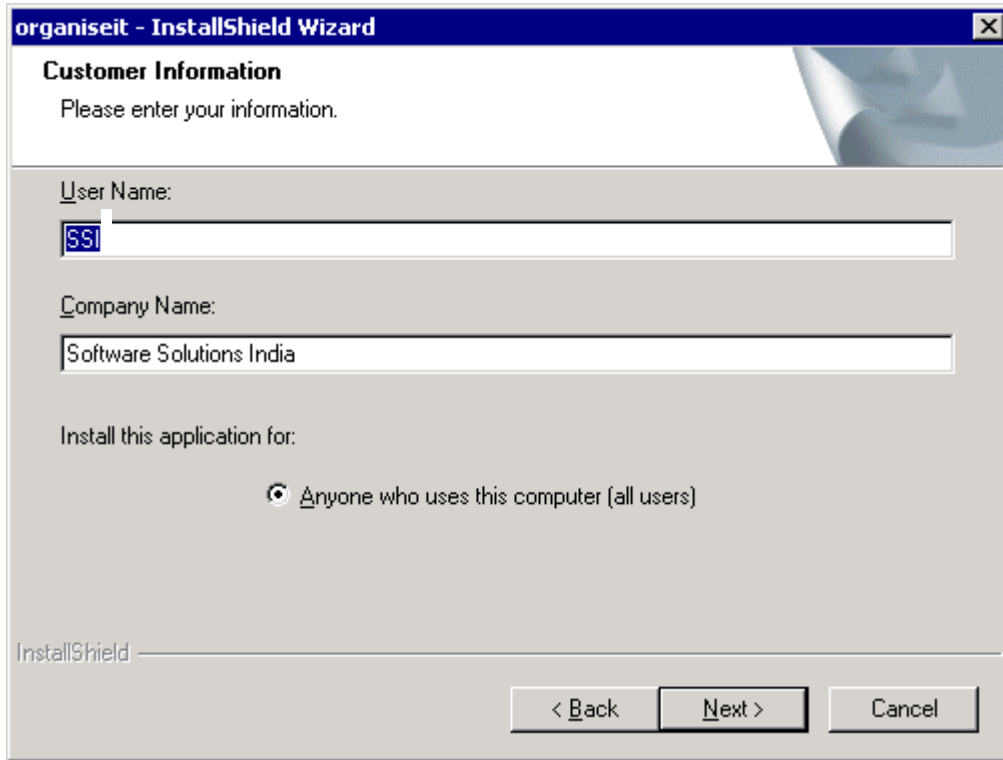
- 6 Click on *I accept the terms of the licence agreement* until it appears selected



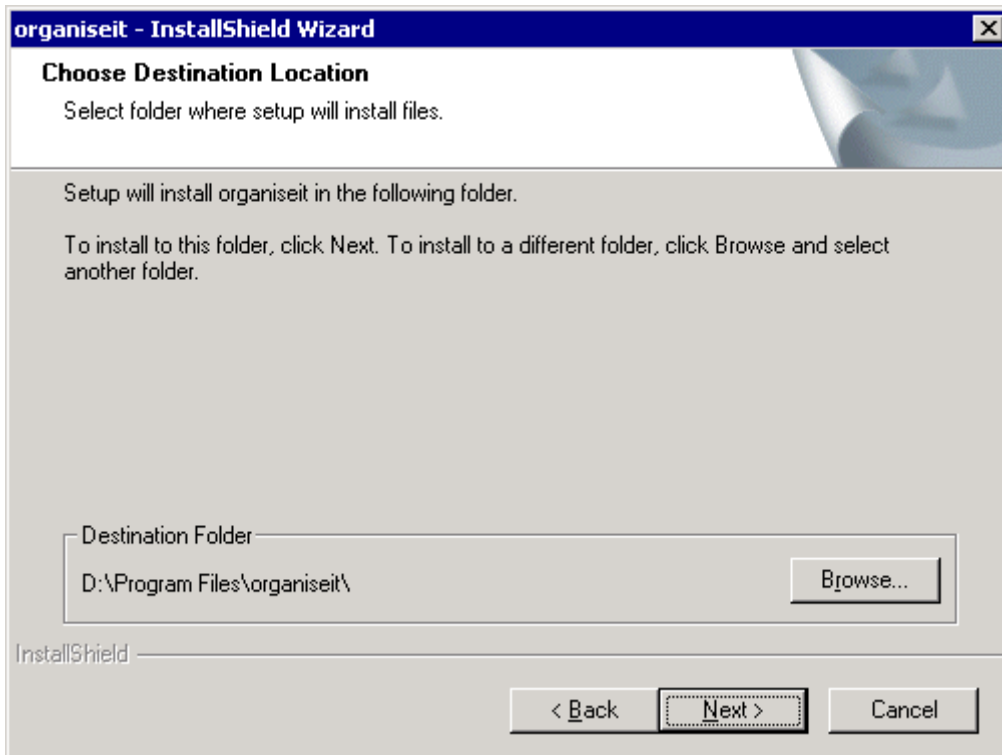
- 7 Click on **Next >** to continue

- 8 Click in **User Name** and type the name of the person who has purchased the Licence from Organise IT Pty Ltd

- 9 Press **Tab** to move to **Company Name** and type the name of the company for the person in step 9



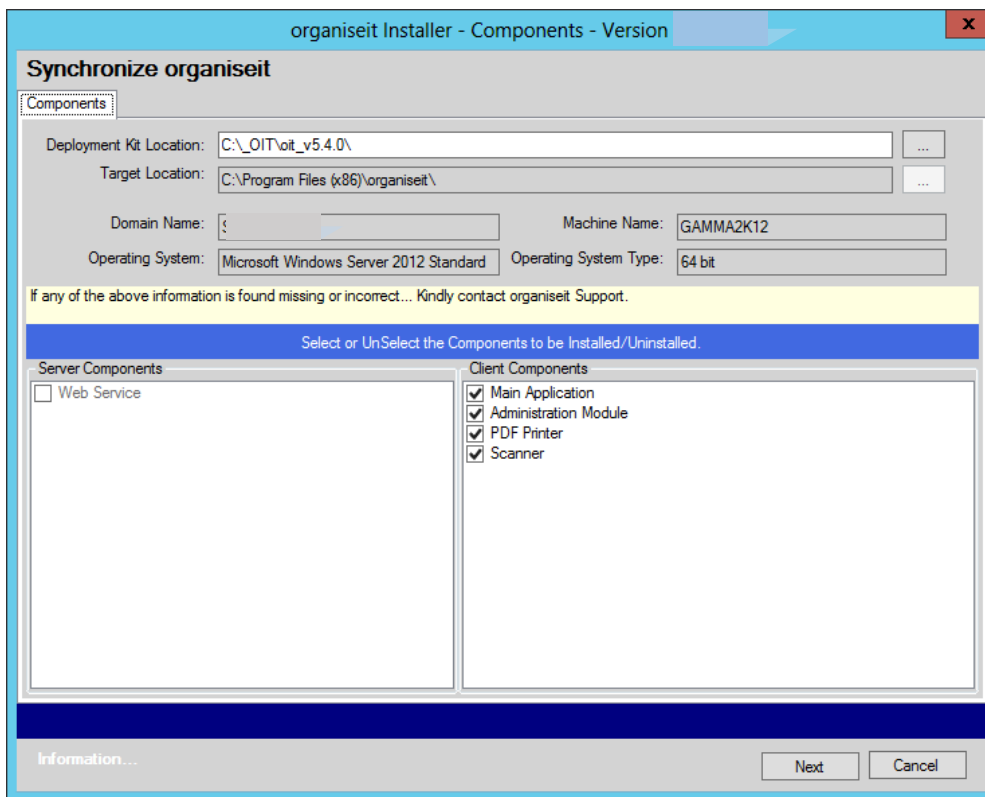
- 10 Click on **Next >** to continue



- 11 Click on **Browse...** to select the path for installing the organiseit application
The default path is the Programs directory on your system...

- 12 Click on  to continue

The next page enables you to select the components that you want to install.



- 13 Click on **Client Components** that you would like to install until it appears with a tick. If you are Upgrading then the system will pickup the details of the Components installed in the earlier version and tick the components accordingly. You can change this to either install additional components or remove the existing ones.
- 14 When the “Main Application” is selected, “PDF Printer” and “Scanner” also get selected by default. You can un-tick them if you do not want to install these along with the “Main Application”.

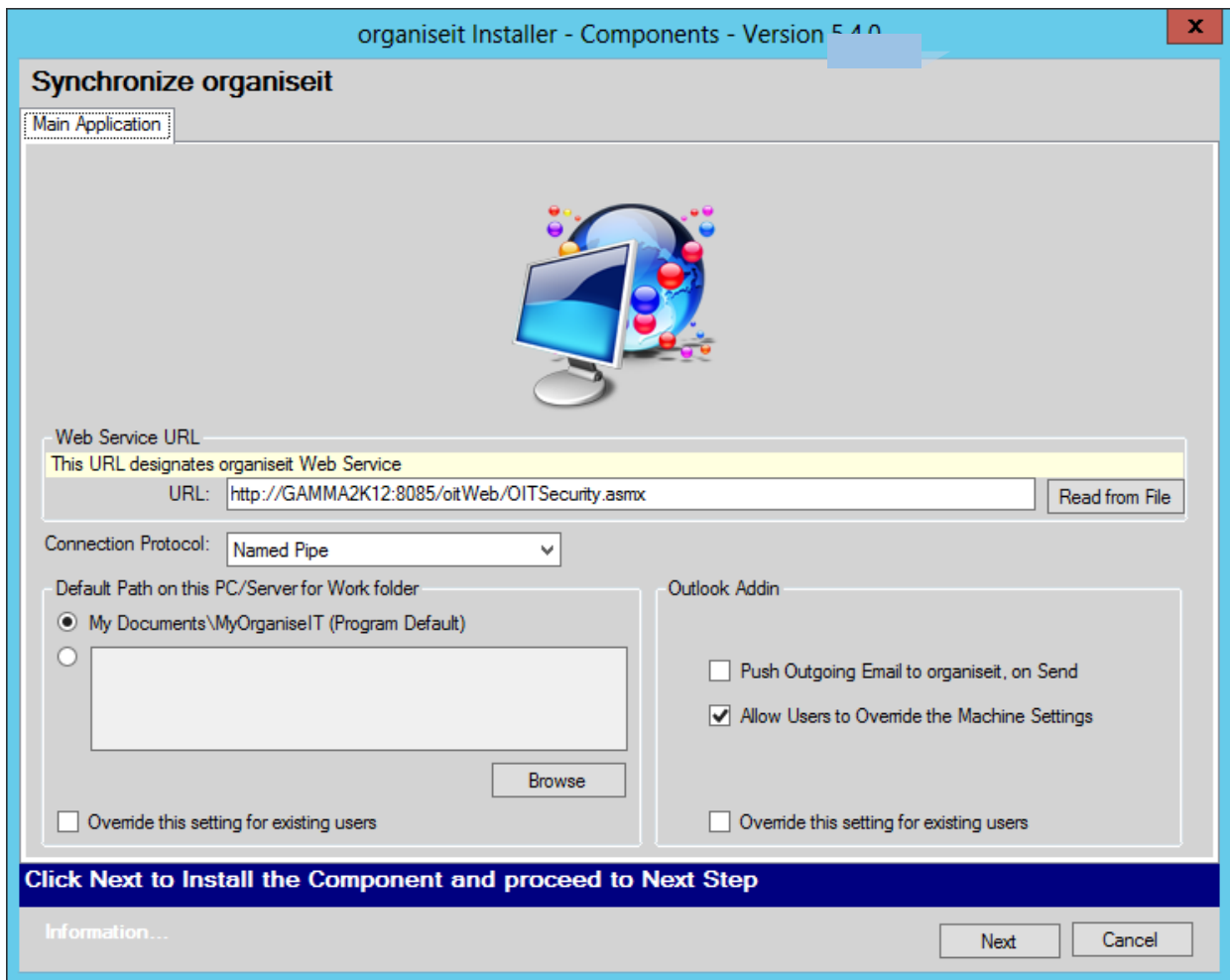
For the “PDF Printer” to function all the users who will be using this feature need “Full Permission” on the System’s *Temp* and *Tmp* folders.

NOTE:

- i. For the **organiseit PDF Printer** to function you will need “Full Control” permission on “TMP” and “TEMP” directories of your System. Contact your System Administrator to find out the location of these directories.
Alternatively
 - i. Right-click My Computer Icon and select Properties → Advanced → Click on “Environment Variables” button
 - ii. Look for values for the System variables “TMP” and “TEMP”. These variables store the location of these directories.
 - iii. Locate these folders, right-click on it and select Properties → Security → Select “Everyone” and assign “Full Control” and click “OK”.

- 15 Click on  to begin installation


- 16 Based on the **Client Components** selected, system will navigate to the Installation screen for each of these components.

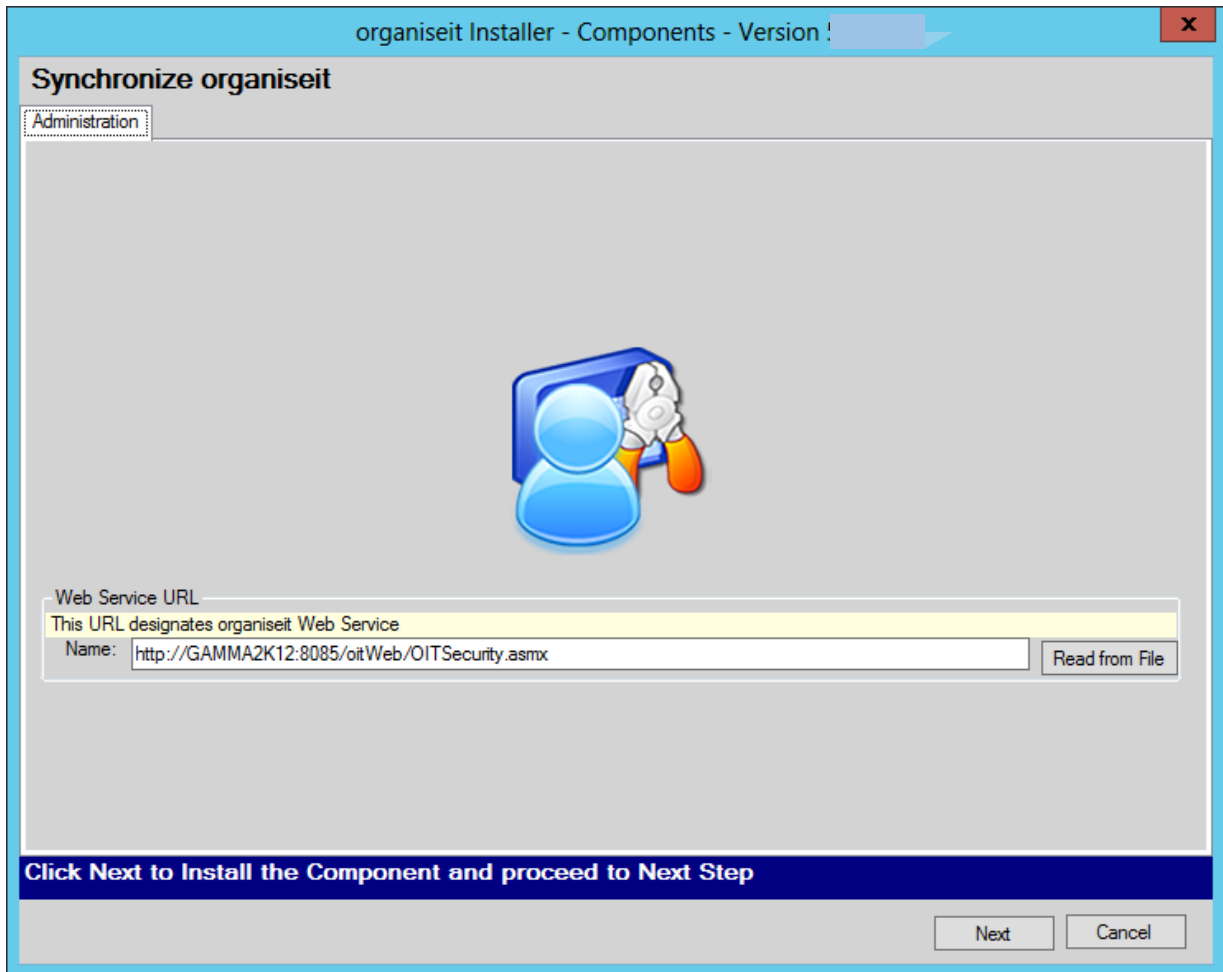


17 Complete the *Main Application Parameters*, as follows:

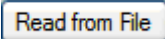
<p>Name</p>	<p>Enter the organiseit Web Service URL. By Default the Installation Program will read from “oitWebServer.ini” which was created during Installation of organiseit Web Service. If the system is not able to locate the file, you can either type in the URL or click Read from File and locate the file manually. Once it is located, the program can read the contents and display it to you. If the Web Service is hosted on the Cloud then the URL which can be used over the Internet to Access the Web Service.</p>
<p>Connection Protocol</p>	<p>Select the protocol that the organiseit component will use to Connect to the SQL Instance. This is a machine level setting so if additional components of organiseit are installed on the same machine, each of them will use the same setting to connect to that SQL Instance. The values are:</p> <ul style="list-style-type: none"> a) Default - When this setting is used then the application will connect to the SQL Database using a protocol that is set as Default in that SQL Instance. b) TCP/IP - When this setting is used the application will connect to the SQL Database using the TCP/IP Protocol. Use this protocol when the SQL Database is on a remote server / on Cloud. (E.g., the client is connecting to the SQL Database using a VPN Connection). Using this protocol on slow networks can lead to performance gain. To use this setting make sure that


	<p>the TCP/IP Protocol is enabled on this SQL Instance.</p> <p>c) Named Pipe - When this setting is used the application connects to the SQL Database using the Named Pipe Protocol. Use this protocol if the SQL Instance and the clients are on the same Local Area Network. To use this setting make sure that the Named Pipe Protocol is enabled on the SQL Instance.</p>
<p>Default Path (On this PC/Server for the Work Folder)</p>	<p>a) In the earlier version when the My Documents folder is re-directed to a network path which is deeply nested users were not able to add documents to / open documents from organiseit due to the long path issue. Even if the deeply nested path was mapped to a drive Windows would always return the long UNC path instead of the mapped drive.</p> <p>b) To overcome this issue the system now allows the user to specify a path for the organiseit Work Directory which is unique to that Windows User (which means NO TWO USERS MUST use the same directory as the Work Directory). It can be a path to a folder on the local drives, a UNC path or a mapped drive. organiseit will then create its various work folders under that specified path for that Windows User.</p> <p>c) organiseit also allows the Administrator to setup a Default Path for the Work Directory for all the users of a Machine (particularly useful in Terminal Server Environment). Once the Administrator sets the Work Directory, each Window's user can then:</p> <p>d) Use that Path for the work directory OR</p> <p>e) Override the path specified by the Administrator and select a different Path OR</p> <p>f) Use the Application's default Path (i.e., My Documents\Myorganiseit)</p> <p>g) The Administrator also has the option of "Resetting" the path of all the Users of that machine or only for those Users who are yet to logon to organiseit for the first time.</p> <p>h) The path can be set by right-clicking the paperclip icon (HereToThere) in the systray and selecting the "Working Folder" tab in the "Preferences".</p> <p>i) This path can be changed at any point of time during Installation or Post Installation and can be changed any number of times.</p> <p>j) NOTE: THE ISSUE MAY STILL OCCUR IF THE FILE DESCRIPTION IS TOO LONG. IT IS DUE TO HOW MICROSOFT WINDOWS HANDLES LONG FILENAMES.</p> <p>k) During Installation if the Administrator Selects "Override the Setting of Existing Users" then the Path Chosen over here becomes the Default Path for all the Users. (However Post-Installation the User can always reset it to a different path).</p>
<p>Outlook Add-in</p>	<p>a) The setting is used by the Outlook Add-in to identify whether a copy of outgoing email is to be pushed to organiseit.</p> <p>b) A tick on "Push outgoing Email to organiseit" indicates "Yes". This is a machine level setting which means all the Users, who are going to use Outlook, of this machine will be affected.</p> <p>c) "Allow Users to Override the Machine Settings" - A tick (Yes) on this option will allow the Users to override the settings carried out by the Administrator (post-installation).</p> <p>d) "Override the settings for existing Users" - A tick on this would reset whatever settings individual Users had for "Push Outgoing Email to organiseit".</p>

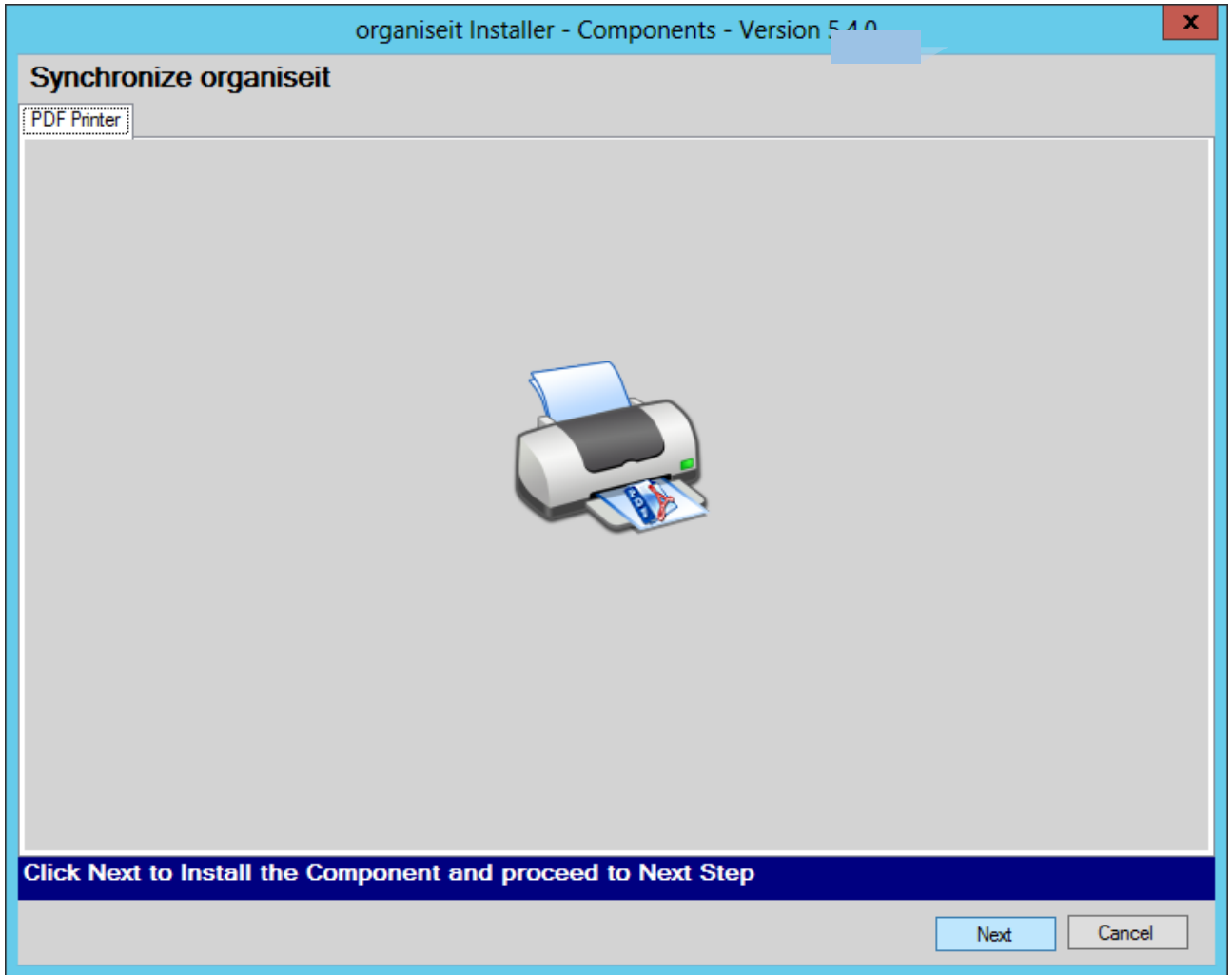
18 Click on  to install “Main Application” Component.



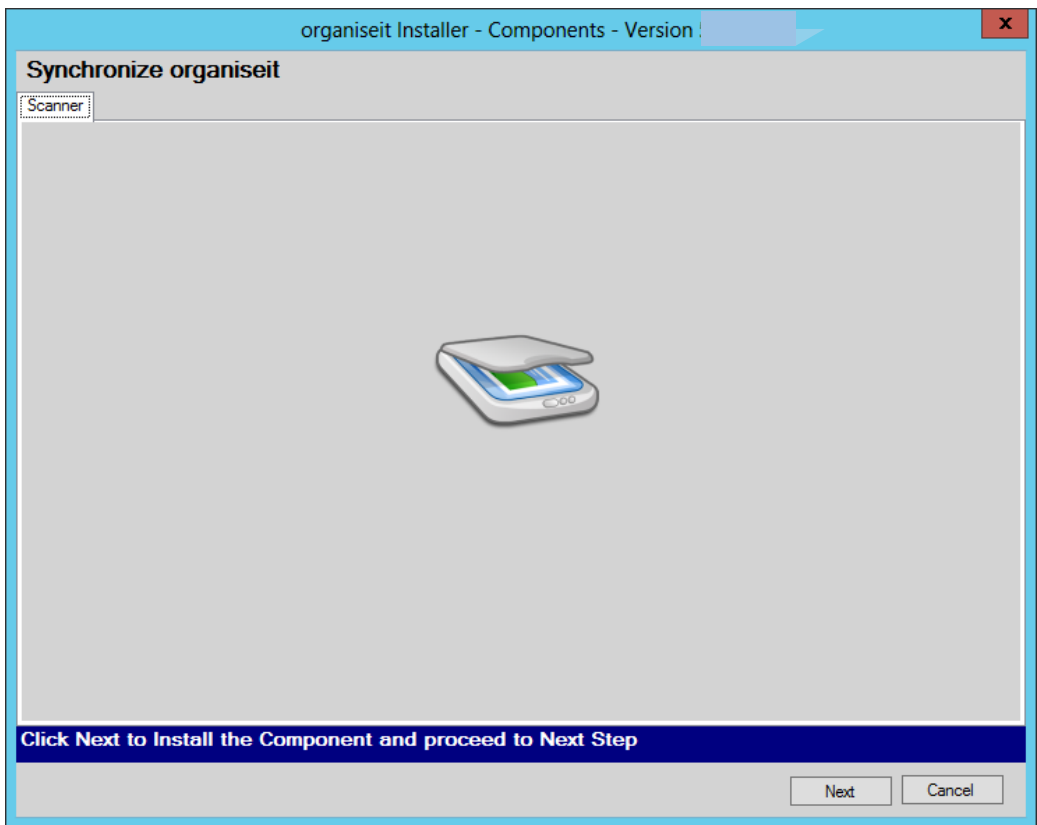
19 Complete the *Administration Component Parameters*, as follows:

Name	Enter the organiseit Web Service URL. By Default the Installation Program will read from “oitWebServer.ini” which was created during Installation of organiseit Web Service. If the system is not able to locate the file, you can either type in the URL or click  and locate the file manually. Once it is located, the program can read the contents and display it to you.
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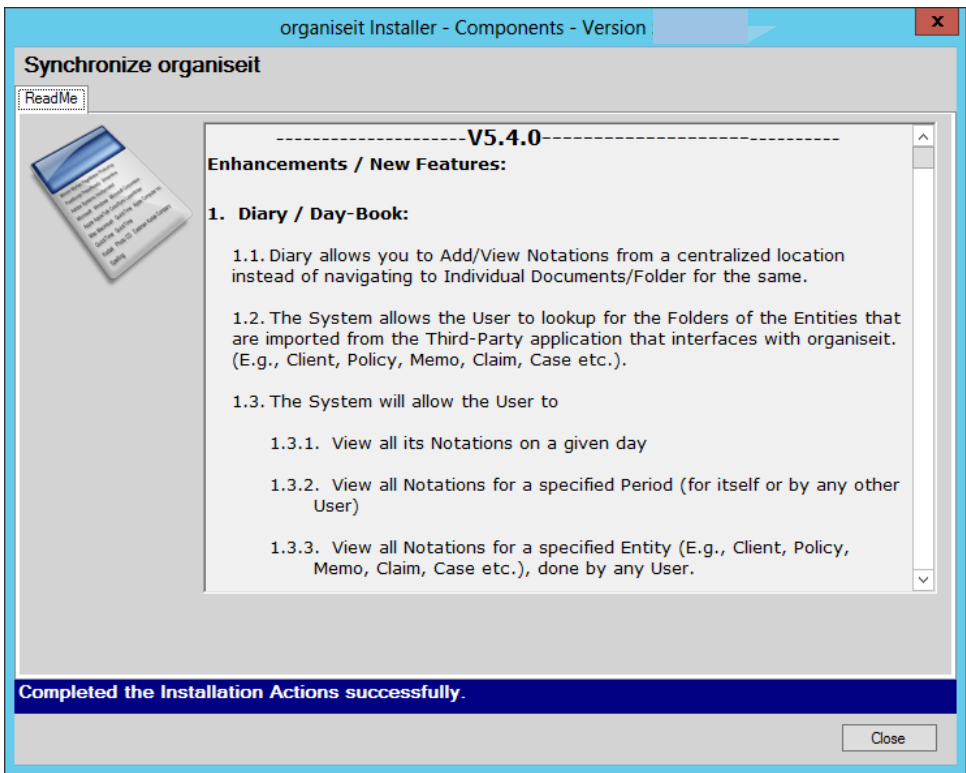
20 Click on  to install the “Administration” Component.

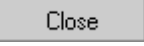


21 In the “PDF Printer” Installation screen, Click to install the Printer.



22 In the “Scanner” Installation screen, Click  to install the “Scanner” component.



23 In the “ReadMe” Screen Click on  to close the Installation Program.

NOTES:

- I. If the systems in your network are on different subnets (particularly machines on which *organiseit* client and *organiseit* Web-Service is installed) then the **UDP Port 137 (File and Print Sharing)** is to be opened and configured for different subnets. (In certain cases when a user's system connects to the Server using VPN connection, it is configured to generate an IP which is on a different subnet to the Web Server /SQL Server. When this happens and the firewall is active, the NetBIOS service name which uses UDP 137 is unable to resolve the names resulting into an error. Under such circumstance include both all the involved subnets in the rule.)

- II. It is important that the machines on which the **Client Components** are installed point to the proper DNS Server on the network. At times you will be required to specify the IP address of the DNS Server explicitly in the network settings. (i.e., in Internet Protocol (TCP/IP) Properties, see that "Use the following DNS Server" is selected instead of "Obtain DNS Server Address Automatically"). Also make sure that the NETBIOS Settings in Internet Protocol (TCP/IP) Properties window is either set to "Default" or "Enable NETBIOS over TCP/IP".

- III. PDF Printer: To use PDF Printer you will need "Full Control" permission on "TMP" and "TEMP" directories of your System. Contact your System Administrator to find out the location of these directories.
Alternatively
 - i. Right-click My Computer Icon and select Properties → Advanced → Click on "Environment Variables" button
 - ii. Look for values for the System variables "TMP" and "TEMP". These variables store the location of these directories.
 - iii. Locate these folders, right-click on it and select Properties → Security → Select "Everyone" and assign "Full Control" and click "OK".