

OrgPublisher 9 Installation Guide

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OrgPublisher Installation

The purpose of this document is to provide the information needed to install OrgPublisher in your facility.

Note: *If you are starting with a trial version you will use a Trial License Key until you purchase OrgPublisher. When you purchase the Retail Version of OrgPublisher an e-mail will be sent to the registered owner containing the following information:*

- A new Retail License Key
- Registered Company Name
- Download Instructions

To convert an installed trial version to the retail version see the following section:

Converting a Trial Version to a Retail Version

After your purchase of OrgPublisher is complete you will receive an e-mail confirming your Company as a Registered company. The e-mail will also include your retail license key. You have two options for converting the trial version to the retail version.

Option 1

While your trial version is in effect, each time you sign in to OrgPublisher, the *OrgPublisher Trial Version* dialog opens:

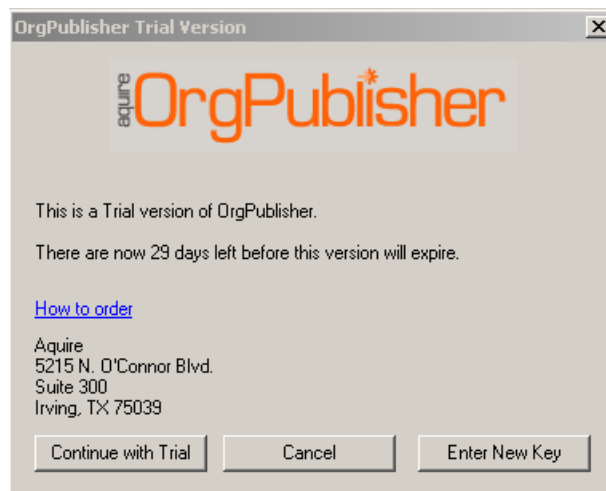


Figure 1

1. To convert your trial version to the retail version, click **Enter New Key**

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The *License Key Entry* dialog opens.

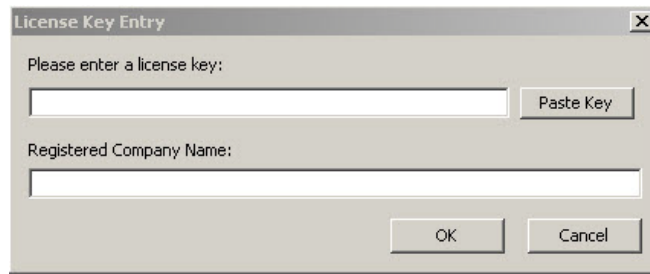


Figure 2

2. From the e-mail you received with your License Key, copy and paste the **Retail License key** and the **Registered Company Name** in the appropriate fields, and then click **OK**.

The conversion of the retail version is complete once OrgPublisher is closed and reopened.

Option 2

1. Open OrgPublisher.
2. On the **Help** menu, select **License Information**.

The *Licensing Information* dialog opens.

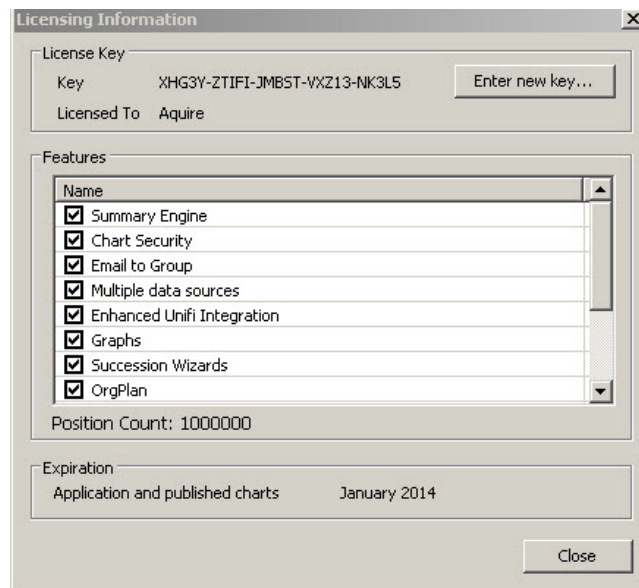


Figure 3

3. Click **Enter new key**.

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The *License Key Entry* dialog opens.

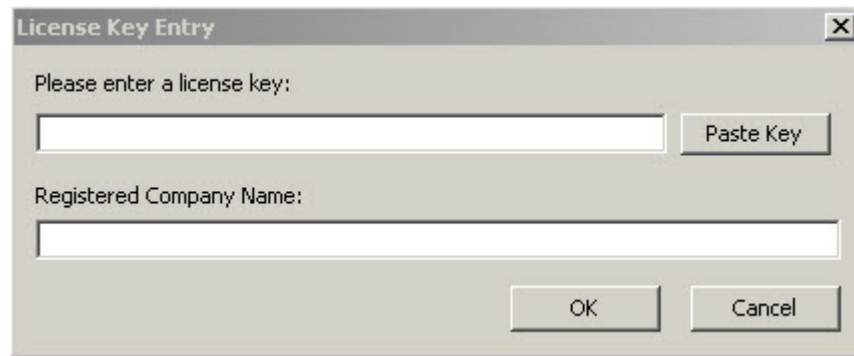


Figure 4

4. From the e-mail you received with your License Key, copy and paste the **Retail License key** and the **Registered Company Name** in the appropriate fields, and then click **OK**.

The conversion of the retail version is complete once OrgPublisher is closed and reopened.

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Install Information Check List

The following is a check list of information you will need during the install process. If you gather and record the information in the table before you start, it will speed up the install.

OrgPublisher Application Install Check List		
Issue	What is this?	Your Company Information
License key	The License key and Registered Company Name information will be provided to you via an e-mail.	
Registered Company Name	Your company name, as it appears in the above mentioned e-mail.	
Registered user's full name	The registered user's name as it appears in your communications with Aquire.	
Registered user's company name	Same as the Registered Company Name.	
Regular Install or Custom Install	<p>OrgPublisher Install is the default and should be selected if you are installing on a Windows® XP workstation, Windows® Vista® workstation, or on a Server where you do not require the installation of Web Administration Server.</p> <p>Custom Install must be selected if you are installing the Web Administration Server option.</p> <p>Go to the following Web site if you need help to decide which installation you require.</p> <p>http://www.aquire.com/support/faq/faq.aspx?dept=OrgPublisher&qid=284</p>	

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Install OrgPublisher Step-by-Step

Note: *If you fill out the Install Information Check List above before you start, you can expedite the install.*

1. From the computer where you want the OrgPublisher application to be installed, access the aquire.com Web site. <http://www.aquire.com/>

Click **Downloads**, and then select the version of OrgPublisher appropriate for your installation.

Note: *if you need assistance with this choice, contact <http://www.aquire.com/support/>.*

After the registration process is complete, select Install.

The *Activation Information* dialog box opens.



Figure 5

2. Enter the **License key** and your **Registered Company Name**, and then click **Next**.

The *Welcome!* dialog opens.

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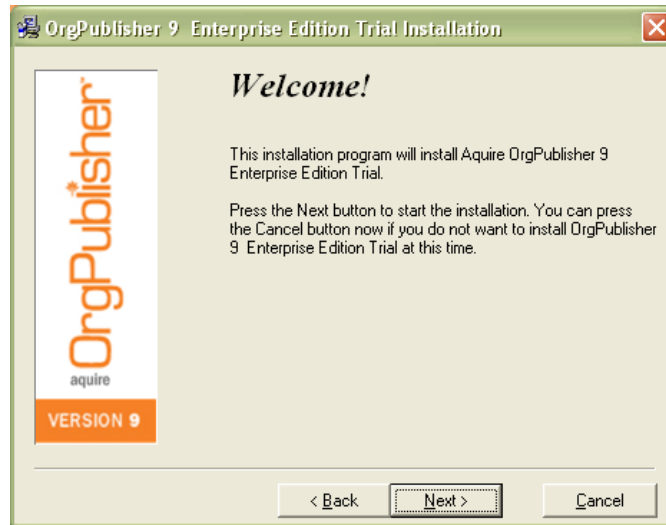


Figure 6

3. To start the install, click **Next**.

-or-

If you *do not* wish to continue the install at this time, click **Cancel**.

- If you select **Cancel**, you can access the **.exe** and start the install later.
- If you select **Next**, the *License Agreement* dialog opens.




Figure 7

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4. To read and accept the *OrgPublisher License Agreement*, click **Agree**.

The *Registration Information* dialog box opens.



The screenshot shows a dialog box titled "OrgPublisher 9 Enterprise Edition Trial Installation". On the left side, there is a vertical banner with the "OrgPublisher aquire" logo and "VERSION 9" at the bottom. The main area of the dialog is titled "Registration Information" and contains the following text: "Please enter the name and company of the registered owner of OrgPublisher 9 Enterprise Edition Trial into the fields below." Below this text are two input fields: "Registered user's full name:" and "Registered user's company name:". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

Figure 8

5. Enter the **Registered user's full name**.

-and-

Enter the **Registered user's company name**, and then click **Next**.

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The *Custom Installation Option* dialog box opens.

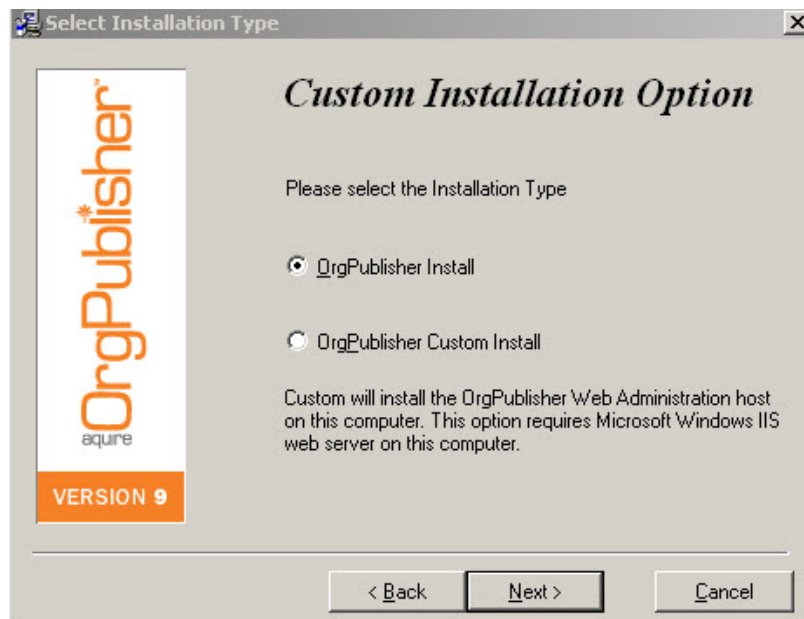


Figure 9

- Depending on the installation method that you chose in the Install Check List, select the appropriate option for the required install.

Click **Next**.

NOTE: *If you require Web Administration and you chose the OrgPublisher Custom Install option, please skip to Installing OrgPublisher Web Administration to complete your install.*

If you selected **OrgPublisher Install**, the *Select Destination Directory* dialog opens.

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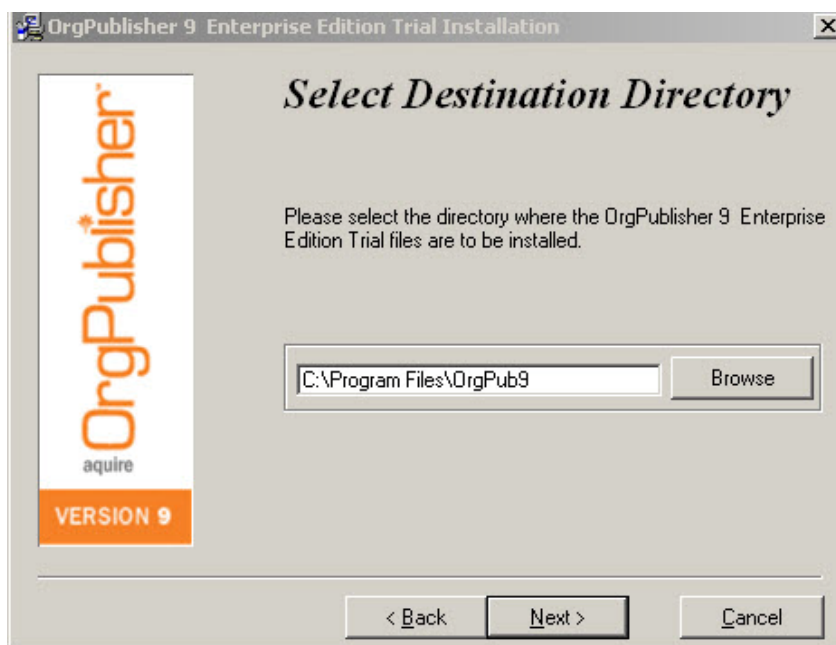


Figure 10

7. You can accept the default shown, or you can type or **Browse** to a different path for the setup program, and then click **Next**.

An *Installing* window opens and provides a progress status as OrgPublisher is installed.

When the install is complete, the *Installation Completed!* dialog box opens and confirms that OrgPublisher is successfully installed and provides preselected options for:

- Creating an OrgPublisher icon on your desktop
- Launching OrgPublisher immediately after the install
- Viewing the *Getting Started Guide*

Note: *The OrgPublisher Getting Started Guide and the User manual can be found under Start, Programs, OrgPublisher 9.*

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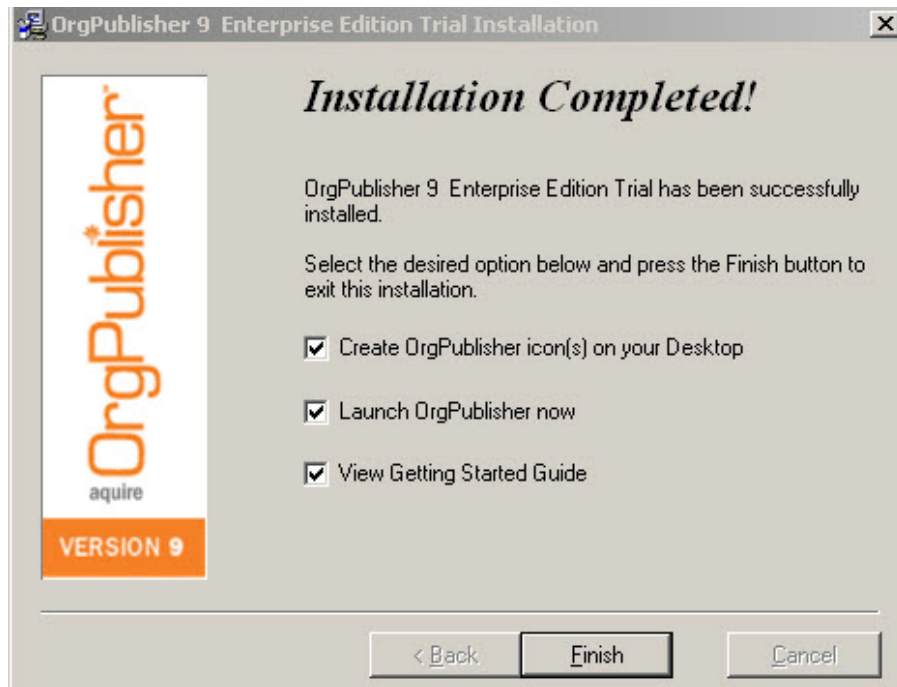


Figure 11

8. After deciding whether to clear any of the options, click **Finish**.
Your OrgPublisher installation is complete.

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Installing OrgPublisher Web Administration

Note: To install OrgPublisher Web Administration, start by following Steps 1 through 6 in the *Installing OrgPublisher Step-By-Step* in this document.

In Step 6, of the Step-by-Step process, select the **Custom Install** option, and proceed to Step 1 below.

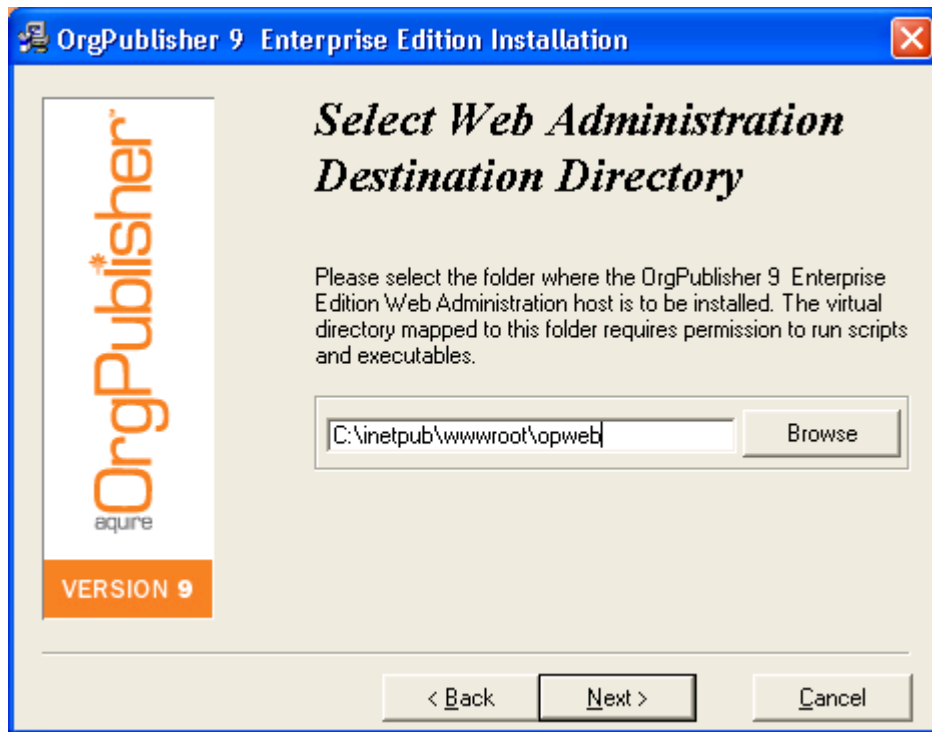


Figure 12

1. The default Web server folder is *C:\inetpub\wwwroot*. Append *\OPWEB* to the end of the path so that it looks like **C:\inetpub\wwwroot\opweb**.

Note: *This will be the physical path to the virtual directory, as described in the Web Administration setup document. The opweb folder will be created during the install.*

Click **Next**.

The *Enter The Web Administration URL* dialog opens.

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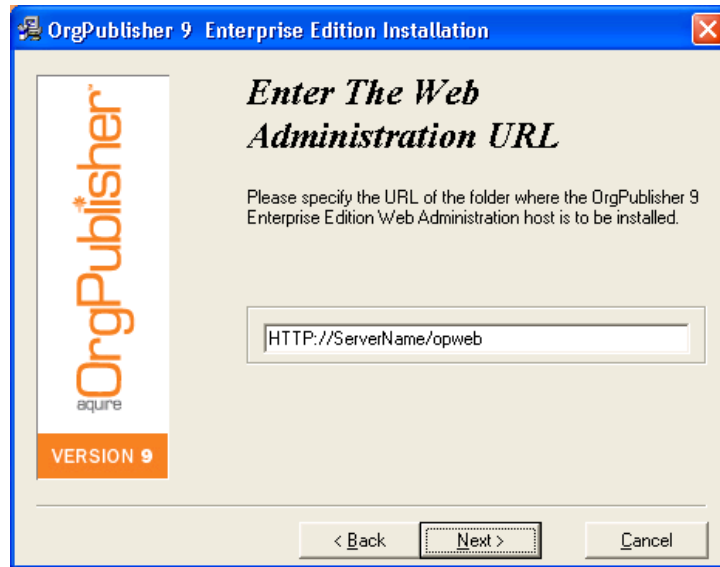


Figure 13

- If you took the suggested path above, your URL will likely be as shown. If another path is used, type the correct URL.

Click **Next**.

The *Select Destination Directory* dialog box opens.

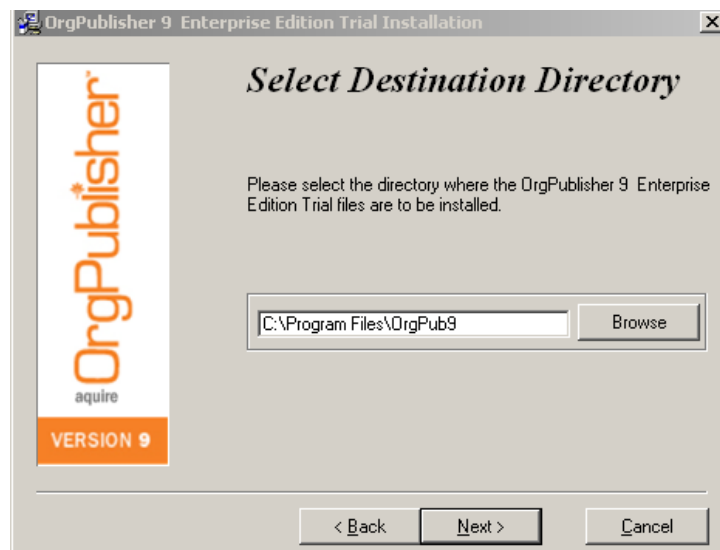


Figure 14

- Accept the default path which is **C:\Program Files\OrgPub9**, or choose the desired path for installation.

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Click **Next**.

The *Installation Complete* dialog box opens.

When the install is complete, the *Installation Completed!* dialog box opens and confirms that OrgPublisher is successfully installed and provides preselected options for:

- Creating an OrgPublisher icon on your desktop
- Launching OrgPublisher immediately after the install
- Viewing the *Getting Started Guide*

Note: *The OrgPublisher Getting Started Guide and the User manual can be found under Start, Programs, OrgPublisher 9.*

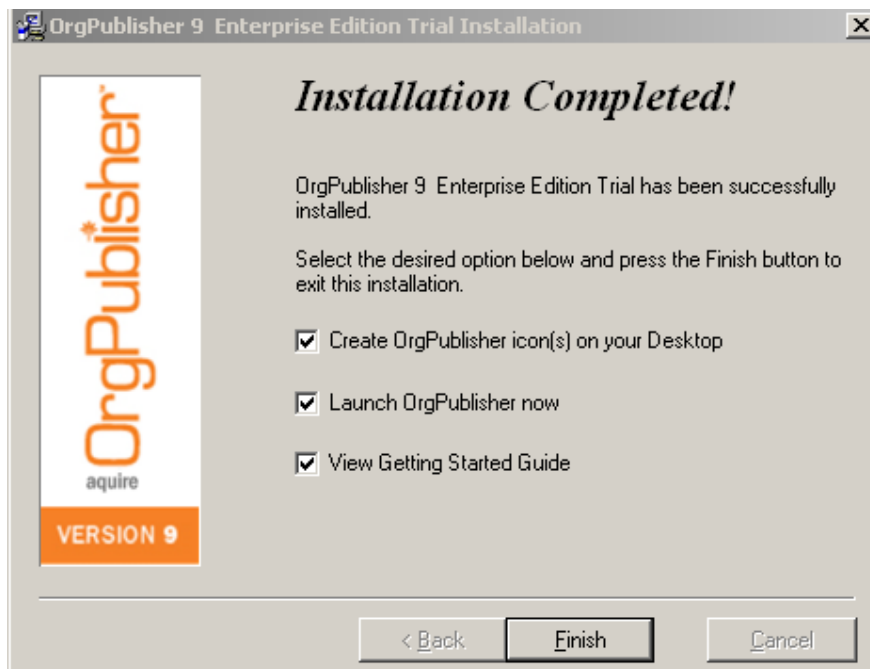


Figure 15

4. Select the desired options, and then click **Finish**.

OrgPublisher Web Administration Setup is complete.

The following graphic displays a sample of the folders and files created by the Web Administration Server.

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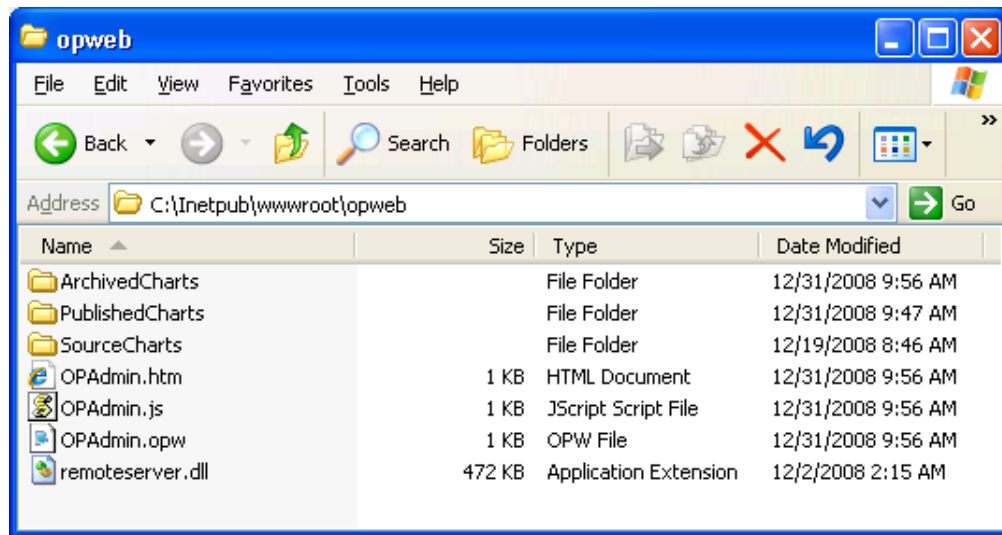


Figure 16

Note: Proceed with the following steps to set NTFS, IIS and DCOM permissions.

These steps require administrative rights to the Web server. Please consult your systems administrator to complete the next steps.

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Setting NTFS and IIS

The following graphic displays the NTFS rights, as well as the group and rights creation process.

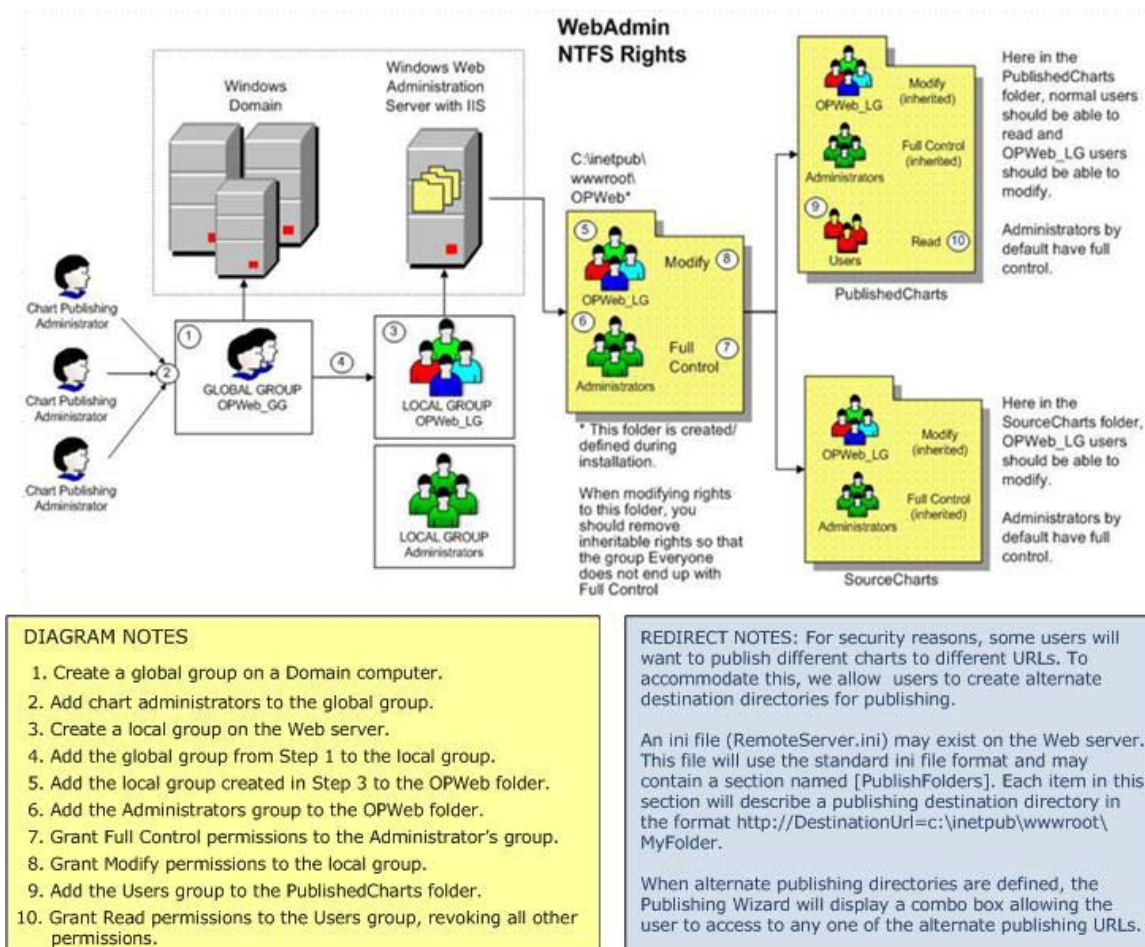


Figure 17

Please contact support@acquire.com for further assistance.

Phone: +1 214.574.5020
 Fax: +1 214.574.5014
 Toll-free: +1 888.674.2427

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Create Global and Local Groups

On the Domain Controller

Create a Global Group (**OPweb_GG**) on the Domain Controller and add the OrgPublisher Web Administrators to the global group.

On the Web Server

Create a Local Group (**OPweb_LG**) on the Web Server and add the **OPweb_GG** to the local group.

Set NTFS Permissions

NTFS (New Technology File System) is used to secure and restrict access to files and folders on the Web server. NTFS also provides the ability to encrypt files and folders to protect your sensitive data.

1. In **Windows Explorer**, browse to: **C:\inetpub\wwwroot\opweb**. Click **opweb**, choose **Properties**, and then select the **Security** tab.
2. Click **Add**, and change the **Domain** selection in the **Look in** field to the **Server** selection. Give the following NTFS permissions:
 - **Administrators Group** — Full Control
 - **OPWeb_LG** — Modify
 - **Network Service** — Read & Execute
 - **IIS_WPG** (Worker Process Group) — Read
3. Navigate to the **C:\inetpub\wwwroot\opweb\PublishedCharts** folder, right-click and choose **Properties**.
Select the **Security** tab and add the following users and permissions:
 - **Users Group** — Read
 - **Administrators** — Full control
 - **OPWeb_LG** — Modify
 - **Network Service** — Read & Execute
4. Navigate to the **C:\inetpub\wwwroot\opweb\SourceCharts** folder, right-click and choose **Properties**.

Select the **Security** tab and add the following users and permissions:

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- **Administrators** — Full control
- **OPWeb_LG** — Modify
- **Network Service** — Read & Execute

5. Navigate to the **C:\netpub\wwwroot\opweb\ArchivedCharts** folder, right-click and choose **Properties**.

Select the **Security** tab and add the following users and permissions:

- **Administrators** — Full control
- **OPWeb_LG** — Modify
- **Network Service** — Read & Execute

Configuring IIS

IIS (Internet Information Server) is a Microsoft® Windows® application that allows you to set up a Web site and control and manage it remotely through the Internet, assuming you have the necessary privileges and a Web browser.

Note: See the appropriate section for your particular server version

Configuring IIS for 2003 Server

1. Start Internet Information Services.
2. Expand the **(local computer)** entry, **Web Sites**, and **Default Web Site**.
3. Right-click **Opweb** and select **Properties**.
4. Select the **Read** check box and assign **Scripts and Executables on Execute Permissions**.
5. Select the **Directory Security** tab and select **Edit** for **Authentication and Access control**.
The *Authentication Methods* dialog opens.
6. Clear the **Enable Anonymous access** check box.
7. Verify the **Integrated Windows authentication** check box is selected.
8. Click **OK** to close the *Authentication Methods* dialog.
9. Click **OK** again to close the *Properties* dialog.
10. Right-click **PublishedCharts** and select **Properties**.

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11. Select the **Read** check box and assign **Scripts and Executables** on **Execute Permissions**.
12. Select the **Directory Security** tab and select **Edit** for **Authentication** and **Access control**.
The *Authentication Methods* dialog opens.
13. Select the **Enable Anonymous access** check box. Verify that the account is the **IUSR** account.
14. Verify the **Integrated Windows authentication** check box is selected.
15. Click **OK** to close the *Authentication Methods* dialog.
16. Select the **HTTP Headers** tab and select **MIME Types**.
17. In the MIME Types dialog box, Click **New**.
18. For the Extension and MIME type, enter **.ocp**.
19. To close the *MIME Type* dialog, click **OK** twice.
20. To close the *Properties* dialog, click **OK**.
21. Right-click **SourceCharts** and select **Properties**.
22. Select the **Read** check box and assign **Scripts and Executables** on **Execute Permissions**.
23. Select the **Directory Security** tab, and then select **Edit** for **Authentication** and **Access control**.
24. Verify the **Integrated Windows authentication** check box is selected.
25. Clear the **Enable Anonymous access** check box.
26. To close the *Authentication Methods* dialog. click **OK**
27. To close the *Properties* dialog, click **OK** again.
28. Right-click **Archived Charts** and select **Properties**.
29. Select the **Directory Security** tab, and then select **Edit** for **Authentication** and **Access control**.
30. Select the **Directory Security** tab, and then select **Edit** for **Anonymous access** and **authentication control**.

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The *Authentication Methods* dialog opens.

31. Clear the **Enable Anonymous access** check box, and then click **OK** to close the *Authentication Methods* dialog.
32. Verify the **Integrated Windows authentication** check box is selected, and then click **OK** again to close the *Properties* dialog.
33. Select the **Web Service Extensions** in the IIS Window.
34. Select **All Unknown ISAPI Extensions** and click **Allow**.

Note: *If you choose to enter each Web service extension individually, you will need to enter the `remoteserver.dll` and each `chartname.dll` by clicking **Add a new Web service extension**.*

35. Close the IIS Manger.

Configuring IIS for 2008 Server

1. Start Internet Information Services.
2. Expand the **(local computer)** entry, **Web Sites**, and **Default Web Site**.
3. Double-click **Opweb**.
4. Double-click **Handler Mappings** and click **Add Script Map**.

The *Add Script Map* dialog opens.

5. Add the following script map information for **remote server.dll** and each Echart.dll.
 - Request path: ***.dll**
 - Executable: **C:\inetpub\wwwroot\opweb\remoteserver.dll**
 - Name: **OrgPublisher Web Administration**

- Request path: ***.dll**
- Executable: **C:\inetpub\wwwroot\opweb\PublishedCharts\C hartName.dll**
- Name: **OrgPublisher Org Chart**
6. Click **Request Restrictions**, and then click the **Access** tab.

Specify the access required by the handler to **Script**.
7. Click **OK** twice, and then click **Yes** to the message; **Do you want to allow this ISAPI extension**.

The *Add Script Mapping* dialog closes.

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8. Double-click **Opweb**.
9. Double-click **Mime Types** and click **Add**.

The *Add MIME Type* dialog opens.

10. Add the following MIME Type
 - File name extension: **.ocp**
 - *MIME type*: **application/orgpublisher**
11. Click **OK** to close the *Add Mime Type dialog box*.
12. Double-click the **PublishedCharts** folder and double-click **Authentication**.
13. Highlight **Anonymous Authentication** and change the status to **Enabled**.
14. Close the *IIS Manger*.

Choosing DCOM Settings

DCOM (Microsoft® Distributed Component Object Model) is a language independent architecture that supports communication among objects on different computers—on a LAN, a WAN, or the Internet.

1. To load the application into DCOM, start OrgPublisher from the server where it is installed, and then close OrgPublisher.
2. On the **Task Bar**, click the **Start** button and select **Run**.

Type **DCOMCNFG** in the **Open** field and click **OK**.

If you receive a *CLSID Warning* message, click **Yes**

The Microsoft® Windows® 2003 and 2008 COM Properties dialog opens.

Note: *Microsoft® Windows® 2003 and 2008 DCOM settings are the same.*

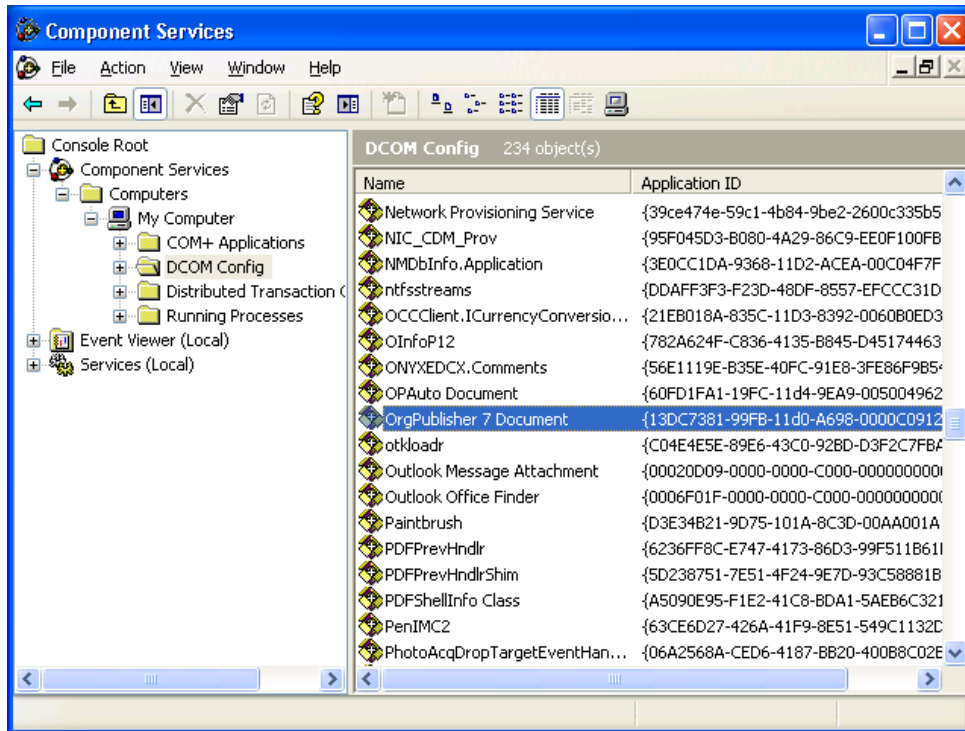


Figure 18

- In the Name column, select **OrgPublisher (X) Document**; right-click and select **Properties**.

The *OrgPublisher 9 Document Properties* dialog opens.

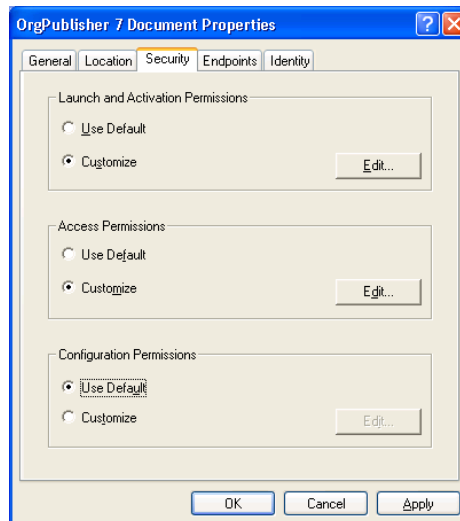


Figure 19

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4. Select the **Security** tab to set the access and launch permissions for the application.
5. In the **Launch and Activation Permissions** section select **Customize** and click the associated **Edit** button.

Note: *Make sure the users and groups are from the Web Server.*

6. Add the following **Users & Groups** - Check **Local Launch Permissions** for each of the following:
 - Administrators Group
 - Interactive Group
 - IUSR Account
 - IWAM Account
 - Network Group
 - Network Service Group
 - OPWeb_LG Group
 - System Group

Note: *For Windows® 2003 and 2008 Server, the **OPWeb LG** Group must have all four items checked; **Local Launch, Remote Launch, Local Activation and Remote Activation***

7. Repeat Steps 4. and 6. For the **Access Permissions**.

NOTE: *The Configuration Permissions do not require any customized settings.*

Test OrgPublisher Web Administration

In the browser's address bar, type the URL for OrgPublisher (for example, **http://<servername>/OPWEB/OPADMIN.HTM**, where <servername> is the name of the server where OrgPublisher is installed).

OrgPublisher Web Administration should open. If not, review the installation and permission settings. You may also need to contact your Web administrator.

Publishing an EChart thru Web Administration

When publishing ECharts thru Web Administration, you must select the Publishing Wizard Advanced Mode option.

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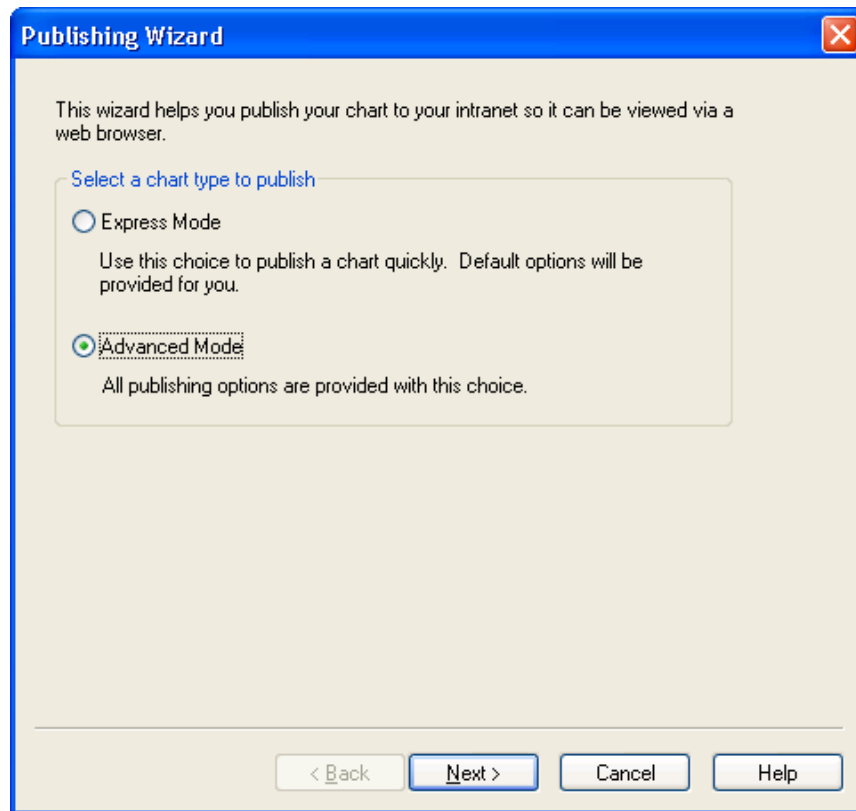


Figure 20

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Note: When you publish ECharts through Web Administration, you will be prompted for the URL of the virtual directory where the **PublishedChart** folder resides.

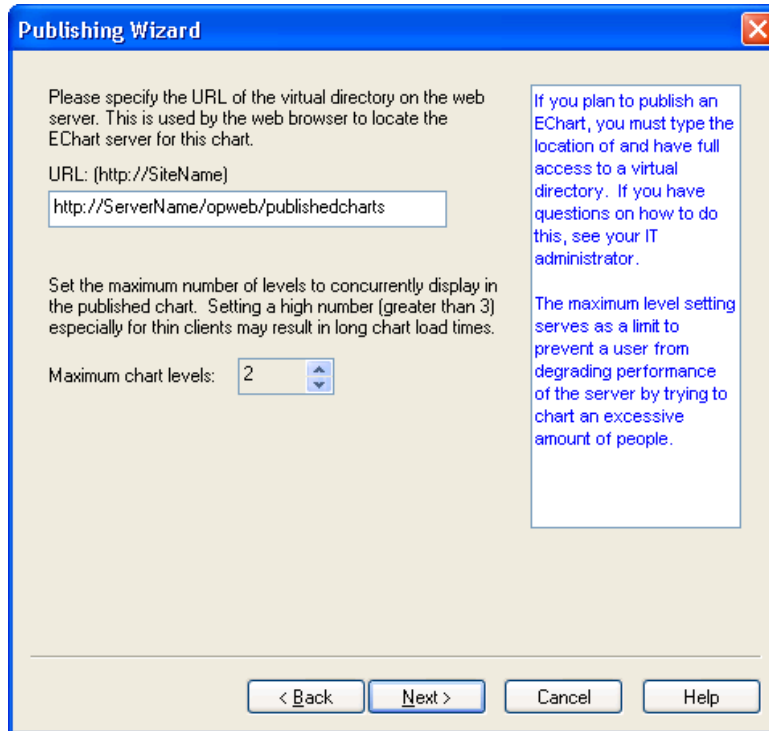


Figure 21

Note: For complete instructions on publishing charts in Web Administration, see the Online Help file topic **Publishing a Chart Using Web Administration**.

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