

INSTALLATION GUIDE

Workbox v 1.0.0.10

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Thank you for choosing Workbox

We hope that our product will be useful for you. If you have any comments or questions regarding Workbox please do not hesitate to contact us. Contact details are included in *Troubleshooting* section of this document.

Please find some time to read this guide, which will help you to use all of functionalities of our product.

Setup configures full version of Workbox. Workbox has 2 versions, which depend on installed license. By default free version is installed, Enterprise version requires a purchase and installation of enterprise license.

Free version includes all Enterprise features with one exception: free version allows only 5 processes to be defined and associated simultaneously on one farm. If your organization needs more than 5 process definitions please purchase Enterprise license.

More about licensing can be found in setup guide, *Licensing* chapter. Setup guide can be found in the same catalog as this guide.

Version RC0 – what does it mean?

Current version of our product is RC0 – Release Candidate 0. It is a version that is designed to be released to market with some restrictions. This version may include some hidden flaws and have limited functionality. Having that in mind, please use caution when deploying this product to live environment.

At the same time we want to assure you that our team is continuously improving Workbox and we add new functionalities regularly. We encourage you to visit our web site– www.workbox.pl. You can find there latest version of Workbox as well as latest info regarding product development.

If you encounter any problems while using our product, please refer to instructions included in *Troubleshooting* section of this document.

1 Installation requirements

1.1 Server

- Windows 2003/ Windows 2008
- WSS 3.0/MOSS 2008 with SP1
- .NET 3.5

1.2 Client

1. A web browser with Silverlight 2.0

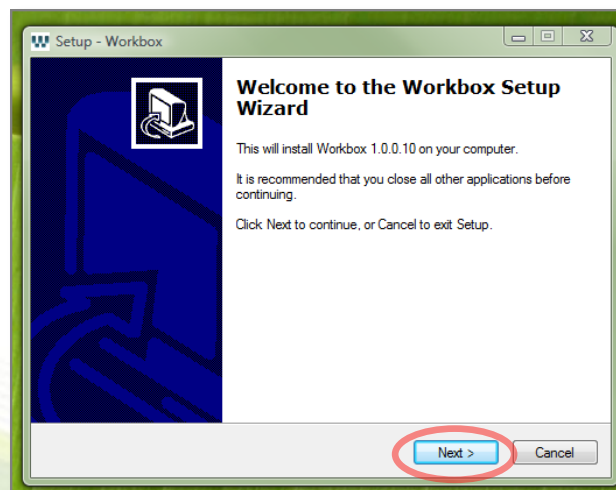
2 Installation

2.1 Workbox installation

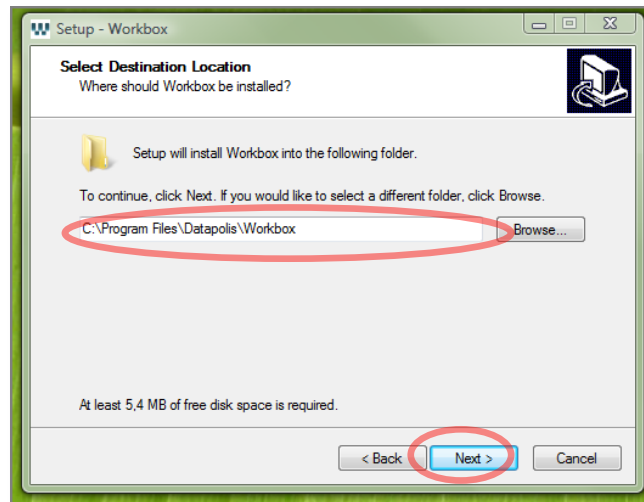
Notice: A user account used to install Workbox should have administrator privileges on both server and SharePoint farm levels.

Notice: Workbox installation needs to be run only once in the case of Sharepoint farm deployment scenario. The Workbox solution will be deployed to all the farm servers automatically.

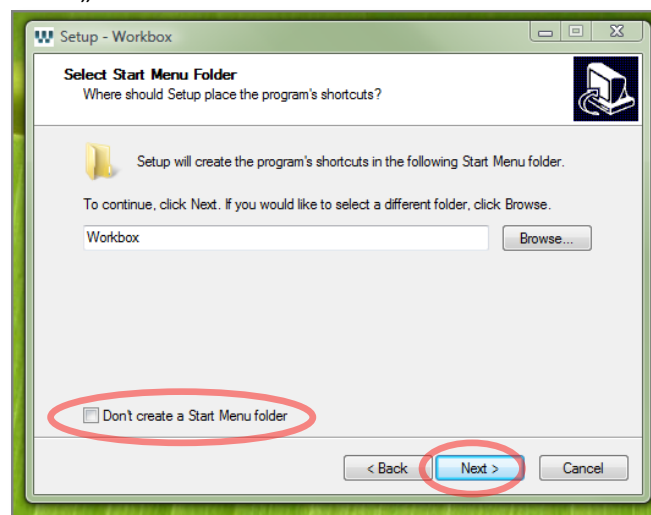
1. Open the file „setup.exe“, in order to launch installation wizard.
2. Click „Next“ on the „Welcome“ page



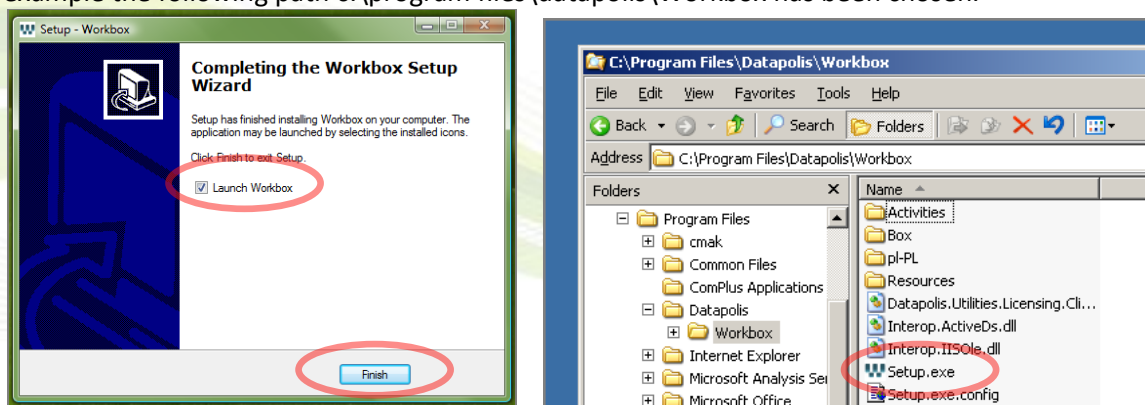
3. Select the folder where the installation files will be uncompressed. These files are useful to fixing or removing Workbox solution. Click „Next”.



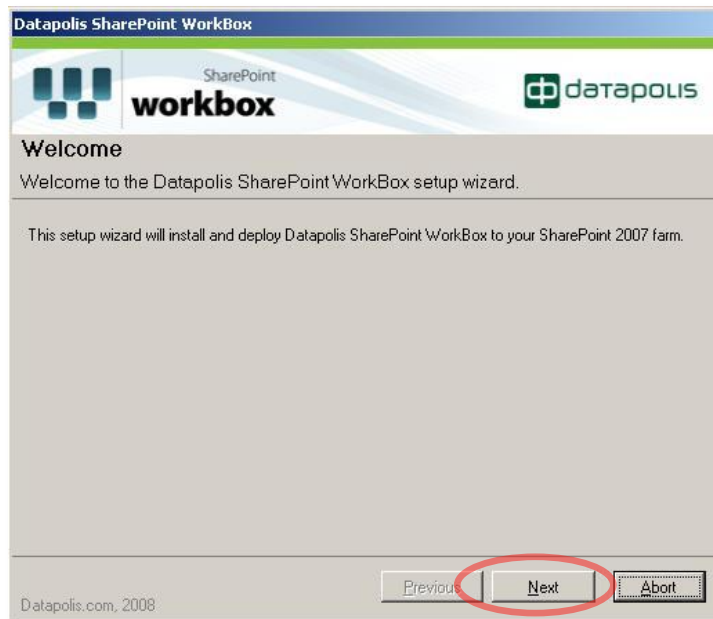
4. Uncheck „Don't create a Start Menu folder” if you would like shortcut to Workbox added to your start menu. Click „Next”.



5. When the files has been uncompressed click the „Finish” button. When the “Launch Workbox” option is selected the next phase of installation begins automatically, otherwise it’s necessary to run setup.exe from the place where the files have been unpacked. In this example the following path c:\program files\datapolis\Workbox has been chosen.



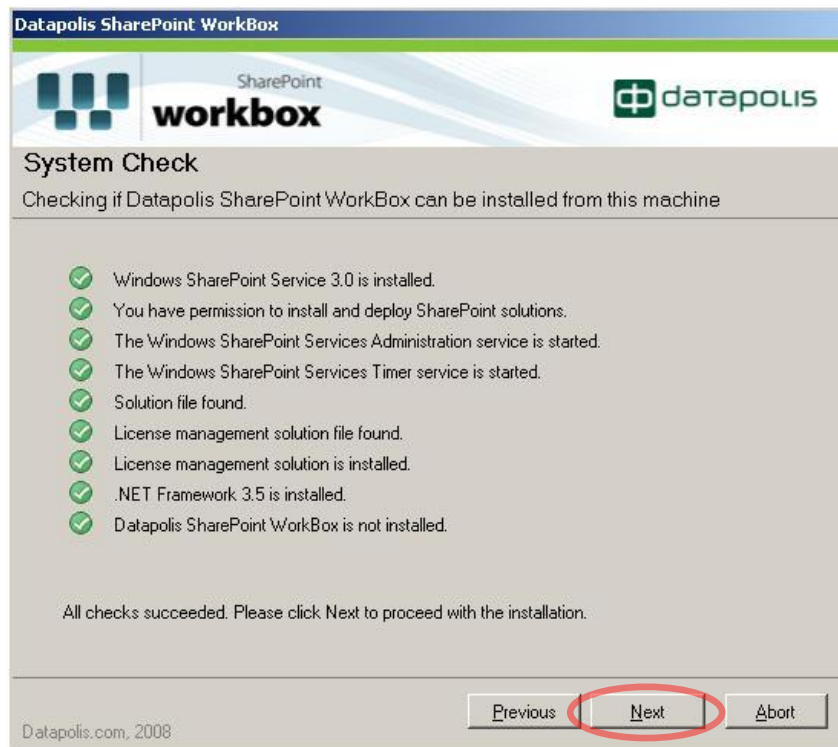
6. After setup.exe is launched click "Next" on the "Welcome" page.



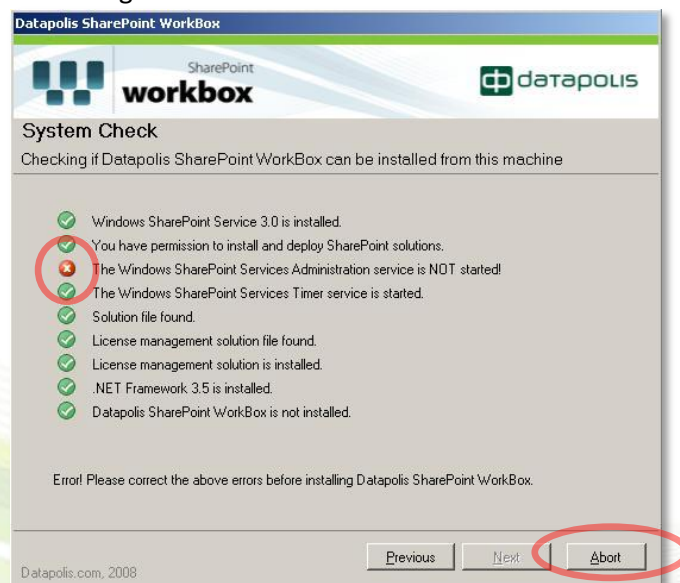
7. System requirements are verified on next page. Please wait for all the checkpoints to be verified.



8. Click "Next" if all the requirements are met.

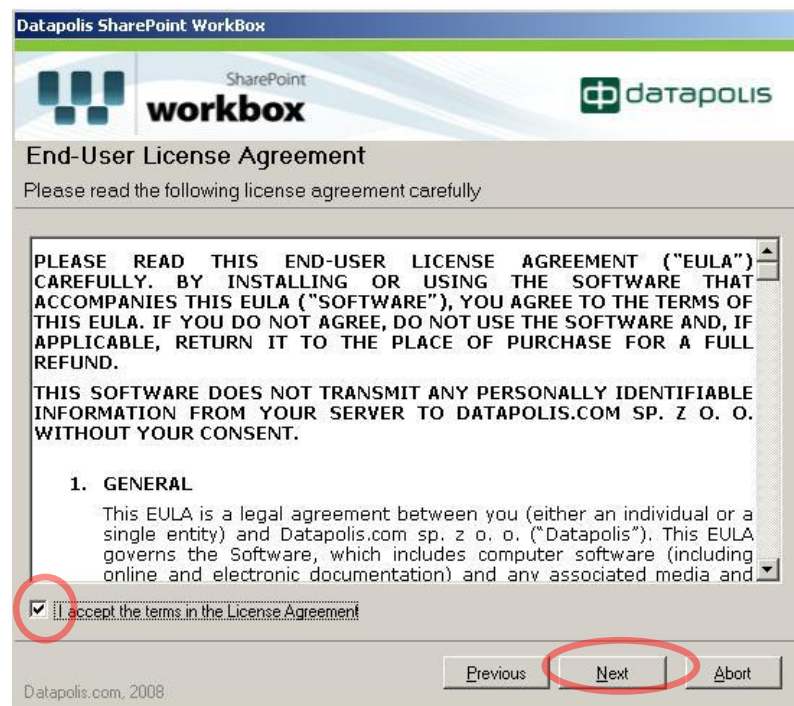


If verifying of any checkpoint fails click “Abort” button. After resolving an issue run setup.exe run. See the Troubleshooting section for more details.

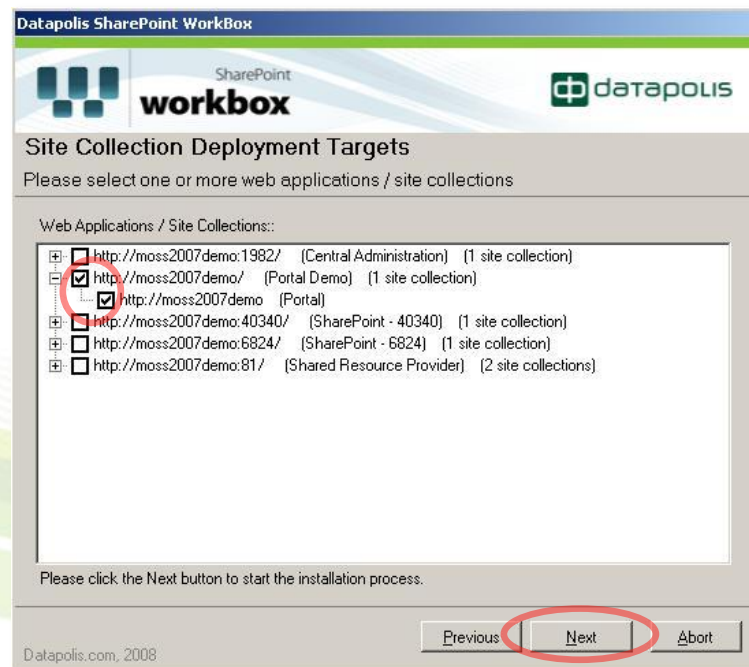


If the Workbox has been already installed, the “repair/remove” options are shown. In this case please read *Repair/remove Workbox* section .

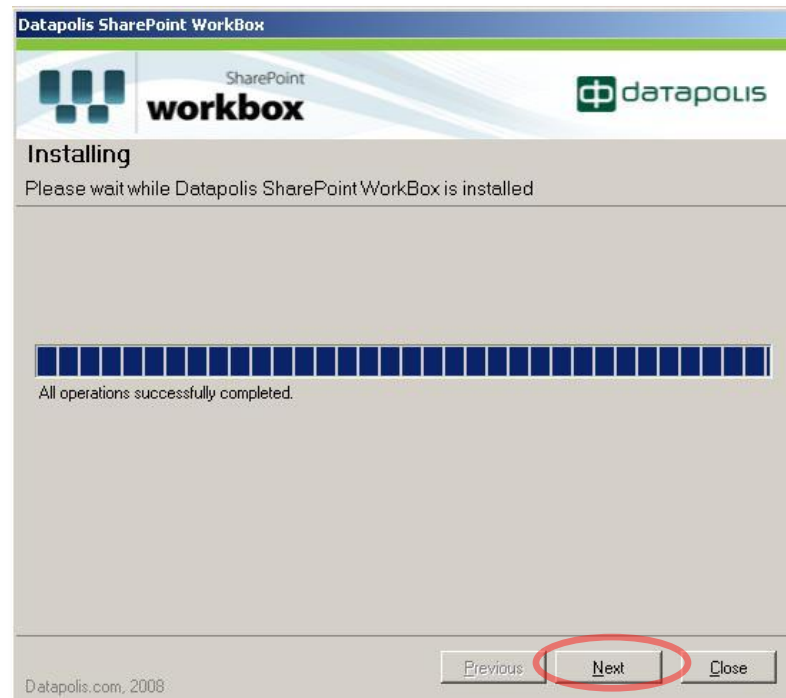
The next page shows End User License Agreement (EULA). Please read this license agreement carefully. In order to continue Workbox installation you have to agree with the statements in the license by checking the appropriate option and click “Next”.



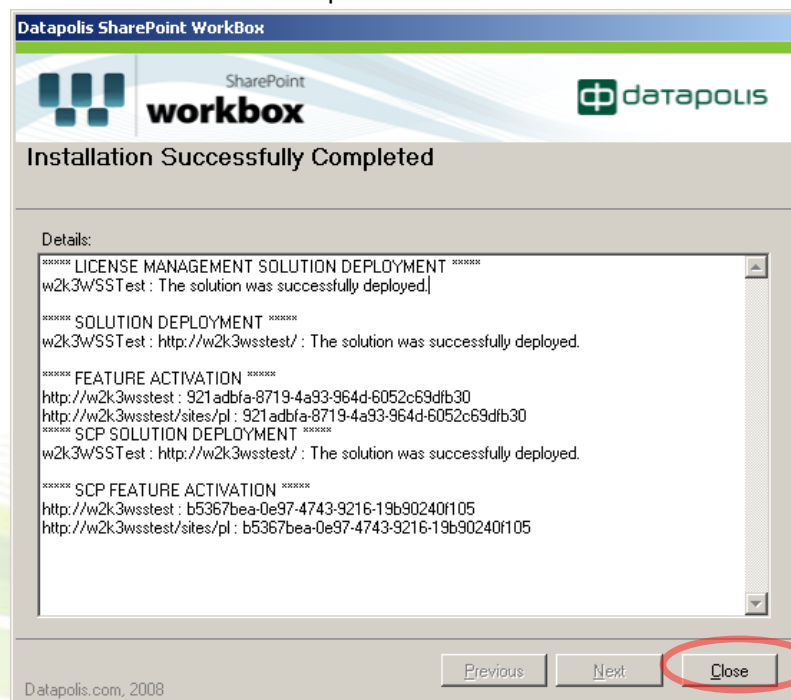
9. The next page contains web applications and site collection deployment targets. You can select more than one web application or site collection. In order to see the complete list of site collection unfold the web application node. After selecting deployment target click "Next" button.



The next page shows the progress of installation. It might take several minutes depending on SharePoint environment configuration. When the installation is completed click the "Next" button.



The last page displays the deployment details. The details indicate how deployment process has been run and on which web applications and site collections Workbox is installed. Clicking on “Close” finishes installation process.



The additional information how to work with Workbox can be found in the following guide:
Workbox – quick start.pdf

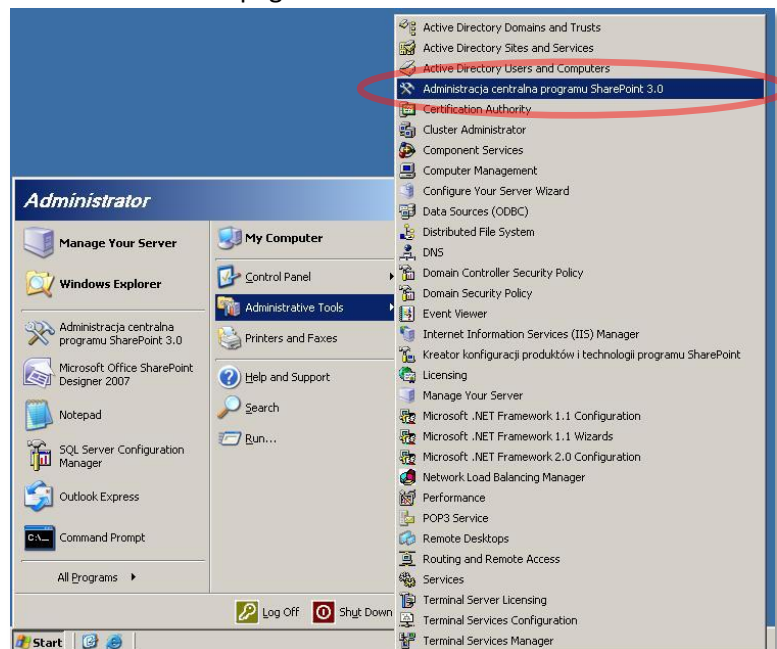
2.2 Licensing

Workbox installed as free version and offers all the functionalities as Enterprise version. The only limitation of the free version is that it allows to associate 5 workflows. In order to associate more than 5 workflows the Enterprise license is required. Purchase of the Enterprise License is available on <http://partner.datapolis.com.pl>.

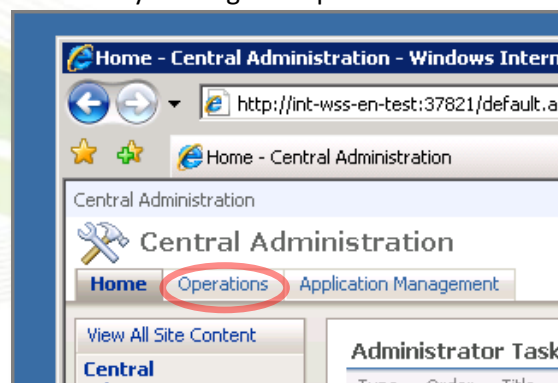
Notice: When you have installed Workbox free version and you need to associate more than 5 workflows then Workbox doesn't need to be uninstalled or specially configured. It is enough to purchase and then activate Enterprise License.

To implement Enterprise License you need to:

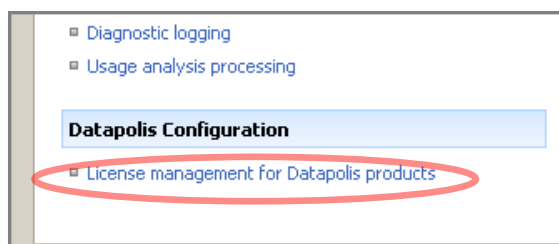
1. Purchase license for Workbox on the following website:
<http://partner.datapolis.com.pl/en/customer/pages/buy.aspx>. You can use a link provided on the license management page. **Note the order ID.**
2. Go to license management page
 - a. Go to central administration page of the server farm



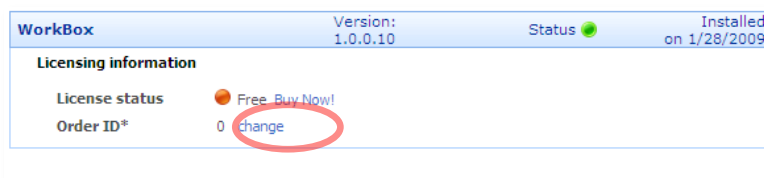
- b. Go to "Operations" section by clicking on "Operations" tab on top menu



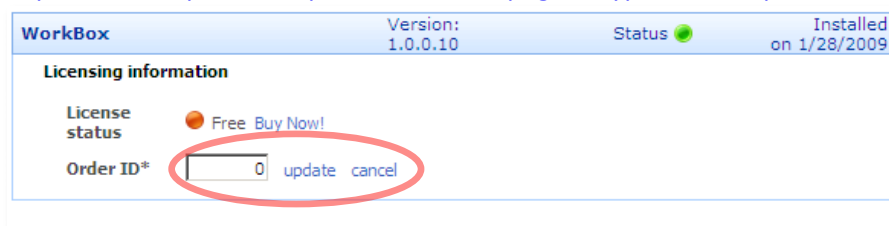
- c. On the *Operations* page click “License management for Datapolis products” link under “Datapolis Configuration” header.



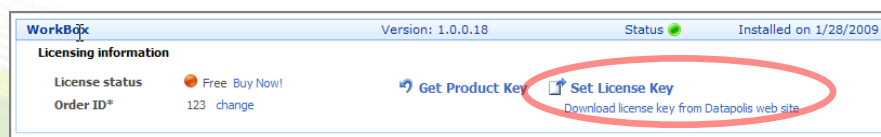
3. Generate Product Key for your Workbox installation on given farm.
 - a. On the “License management” page find Workbox and click “Change” next to “Order ID”. Note that license status is “Trial LicenseKey”.



- b. Input Order ID into the textbox and click “Update”. You can find order number on your product list on <http://partner.datapolis.com.pl/en/customer/pages/myproducts.aspx>



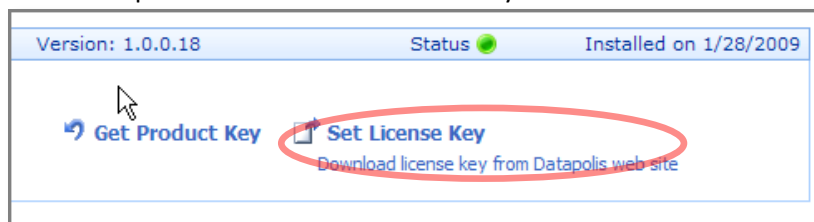
- c. After you input Order ID, screen will reload and you will have two new buttons – “Get ProductKey” and “Set LicenceKey”. Click on the “Get ProductKey” button.



- d. You will receive a file to download. Download it and save on your disk in convenient localization.
Note: If you do not receive the file, check whether it was not blocked by your browser.

4. Generate license key

- a. Go to <http://partner.datapolis.com.pl/en/customer/pages/myproducts.aspx> page. You can use a link provided below “Set LicenceKey” button.



- a. Find order with purchase of SCP where the Product Key was not submitted and upload Product Key file.

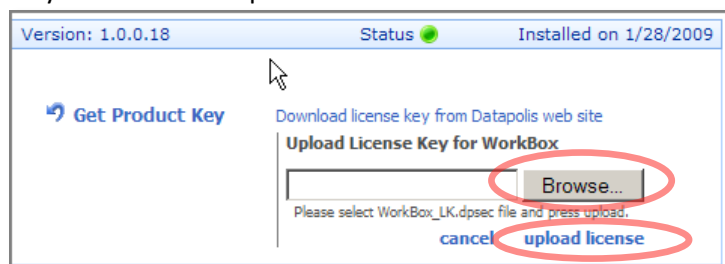
Note: You can submit product key only once for every order. Please make sure you are submitting correct product key.

- b. Click on “Download License Key”. You will receive a file to download. Download it and save on your disk in convenient localization.

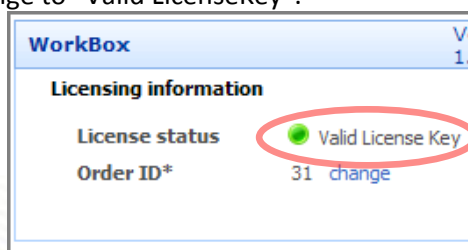
Note: If you do not receive the file, check whether it was not blocked by your browser.

5. Activate product with license key

1. Return to *License Management* page and click “Set license Key” button. Browse for the License Key file and click “Upload license” link.



2. If provided license key is valid for this product, server farm and order number, license status will change to “Valid LicenseKey”.



If provided license key is invalid – eg. product key used to generate License Key was generated from another server farm or for another order ID, license status will change to “Not valid LicenseKey” and product status will change to “not valid”.

Notice: Workbox will work with not valid license, but number of workflow associations is limited to 5.

2.3 Feature activation

Workbox feature is active after the setup, and you can use it right away..

Note: If you reinstall Workbox using “Repair” option in the setup wizard, the all feature states will be maintained – activated features will be active, deactivated will be inactive.

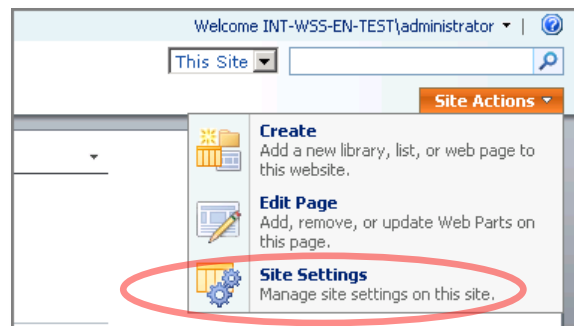
If feature was deactivated or the setup was unable to activate the feature, you need to activate SCP feature before you can use it.

If you don’t see link to SCP administration on SharePoint list settings menu, then probably you need to activate it for the site collection that hosts this list.

Note: To activate feature you need “Manage Web Site” permissions on site collection.

To activate the feature:

1. Go to site collection administration page. If you are on site collection top site, choose “Site settings” from “Site actions” menu on the top right side.



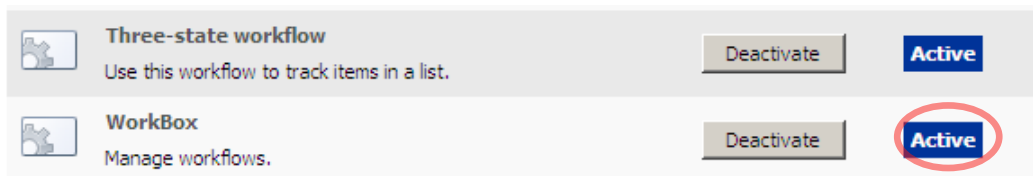
2. If you are on one of site collection subsites then go to site setting as described above, and then click “Go to top level site settings” link in the rightmost column with “Site Collection Administration” header



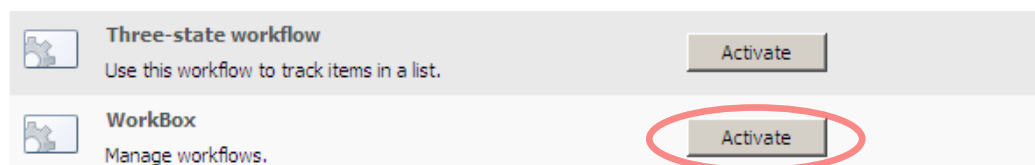
- On the site collection "Site Settings" page click "Site collection features" link in the rightmost column with "Site Collection Administration" header.



- See if the status of Workbox is "Active".



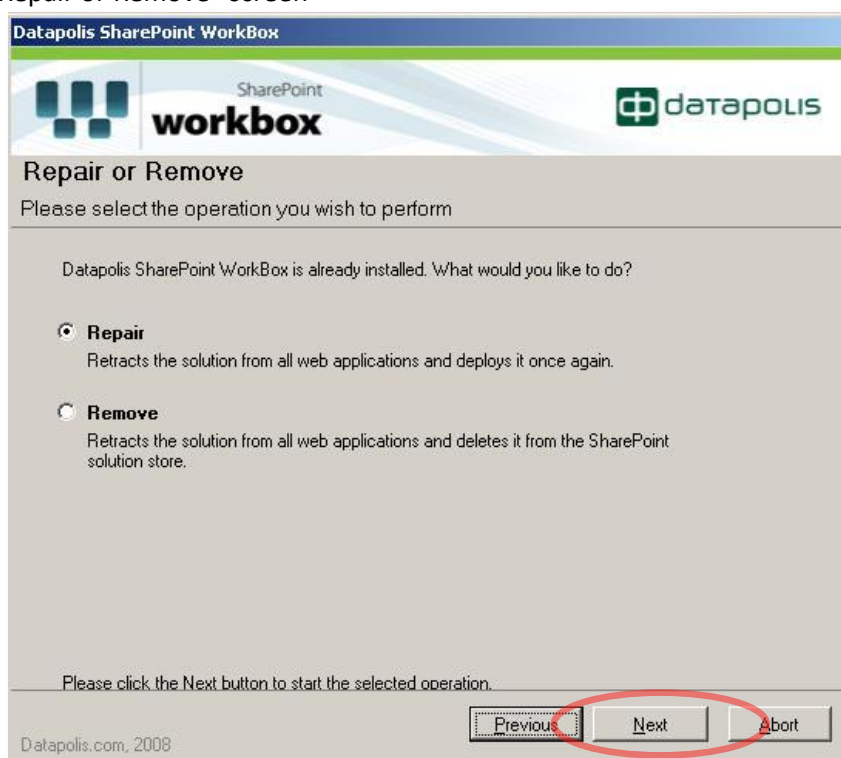
- If the feature is not active, click "Activate" button to activate the Workbox feature.



2.4 Repairing/removing Workbox

If by any reason - deleted files, version upgrade or malfunction - you want to repair SharePoint Column Protector installation, run Setup application as described in "Installation" chapter above.

1. After all configuration checks are passed (screen in point 5 in installation chapter) you will come to "Repair or Remove" screen



2. To repair Workbox installation chose "Repair" and click "Next". Workbox will be uninstalled and reinstalled. No configuration data will be lost.
3. To remove Workbox choose "Remove" and click "Next". Workbox will be removed from your SharePoint. You can install it again later.

Note: Workbox configuration files for each list will not be removed. To remove the files, you have to delete the XML file from every list catalog manually.

3 Troubleshooting

When some errors, issue or troubles are occurred please visit Workbox Team blog on <http://blogs.datapolis.com/Workbox/> The site contains the list of known bugs and solutions for common issues. There are also additional informations about Workbox new feauters and development trends.

For troubleshooting help and tips please contact our support team by mailing us support@datapolis.com.