

INFO ORGANISER

Installation Notes
Guide for Server Express 2017 and Info Organiser Version 12



Background	3
Prerequisites	3
Installation of SQL Server 2017	4
Installation of SSMS	6
Remote Connections.....	8
Add Domain users to SQL Server	9
Workstations.....	10
Install Client Version 12	10
Creating a New Database.....	11
Database Set Up.....	13

Background

When downloading Microsoft's components please choose the appropriate versions for your workstations operating system:

If you are unsure, please check your Computer Properties or consult your IT service provider.

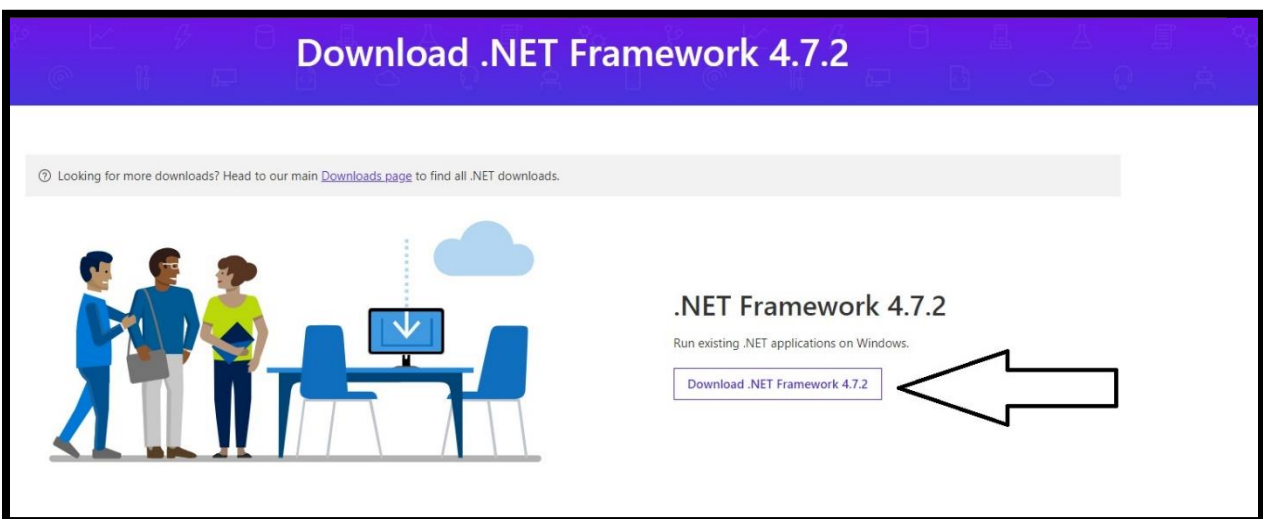
Prerequisites

Below is a link which specifies the prerequisites prior to installing SQL Server Express 2017.

- <https://www.gigxp.com/sql-server-2017-windows-system-requirements/>

As a guideline it is recommended that the following criteria is available on the database machine before installation:

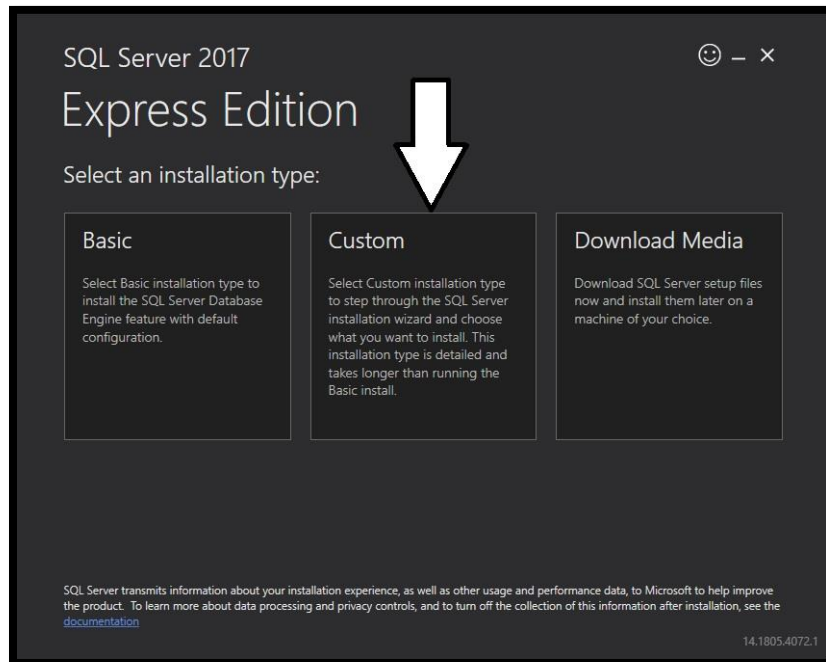
- Processor speed of 2 GHz or more (1.4 GHz minimum)
- Minimum disk space of 6 GB
- Minimum of **.NET 4.6.1** is required (download link below)



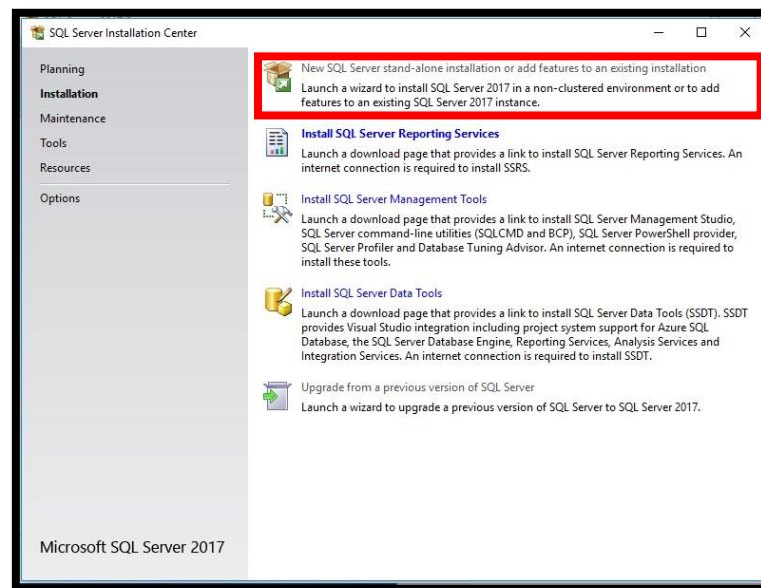
- <https://dotnet.microsoft.com/download/dotnet-framework-runtime/net472>
Image showing the above link regarding installing latest version of **.NET**

Installation of SQL Server 2017

- 1) Download SQL Server Express 2017 from the following link below.
 - <https://www.microsoft.com/en-au/sql-server/sql-server-editions-express>
- 2) When the file has downloaded, run the file from the folder in which it was downloaded to.
- 3) Once the application is running, select the installation type to be custom (as you can choose what features you'd prefer).



- 4) Select where to install SQL Server Express 2017. The following SQL Server Express Installation Centre will appear. From here select NEW SQL Server stand-alone installation link.

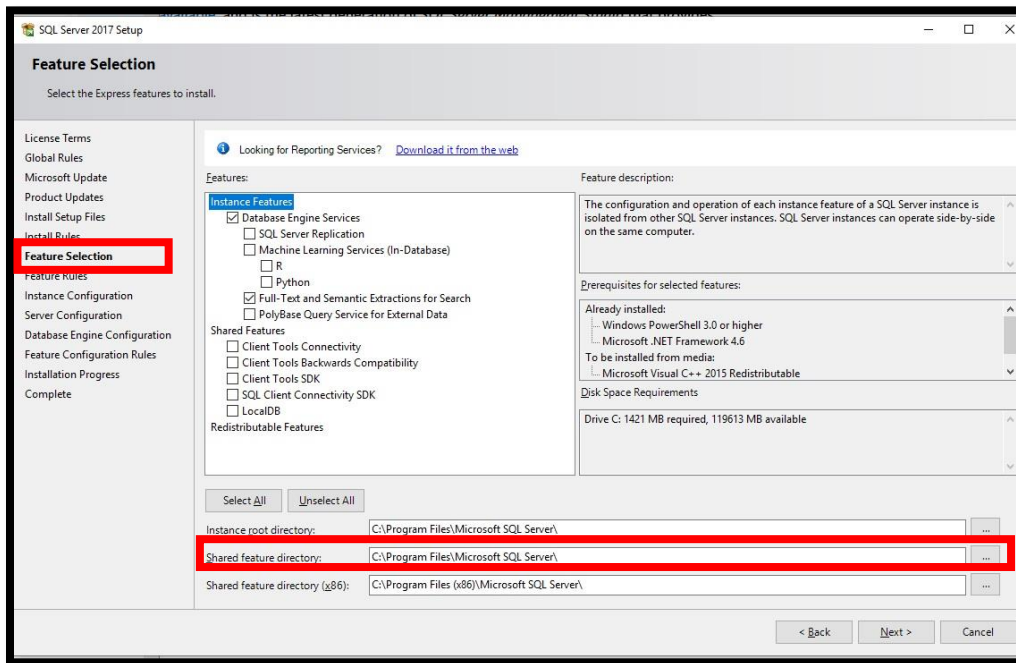


****Make sure your computer has all the latest windows updates before proceeding****

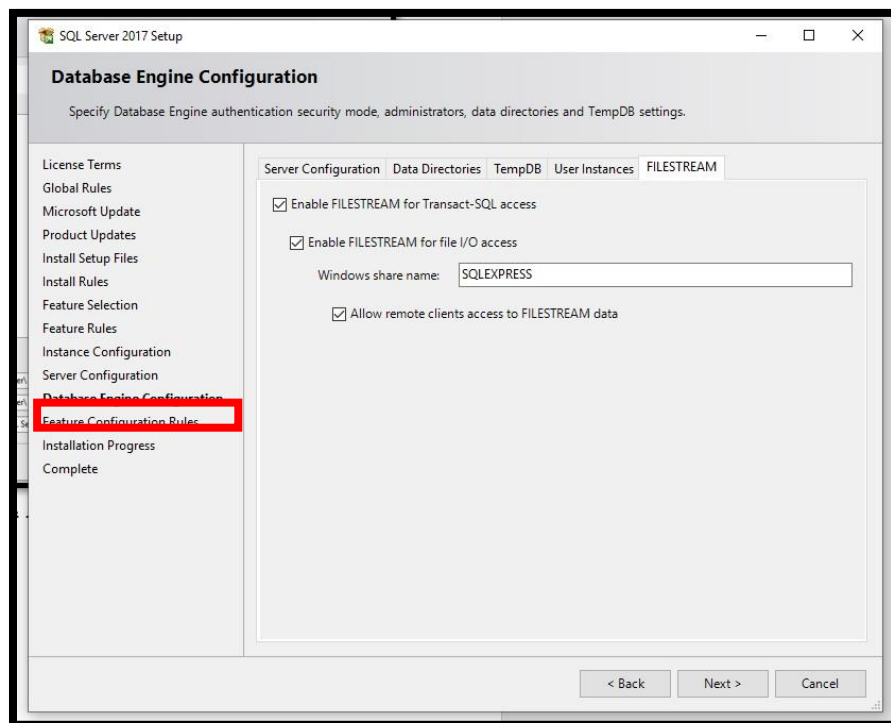
5) Once at the feature selection section, only select the options as shown in the image below.

- a. Database Engine Services
- b. Full-Text & Semantic Extractions for Search

Make sure the *Shared Feature Directory* location is as below.



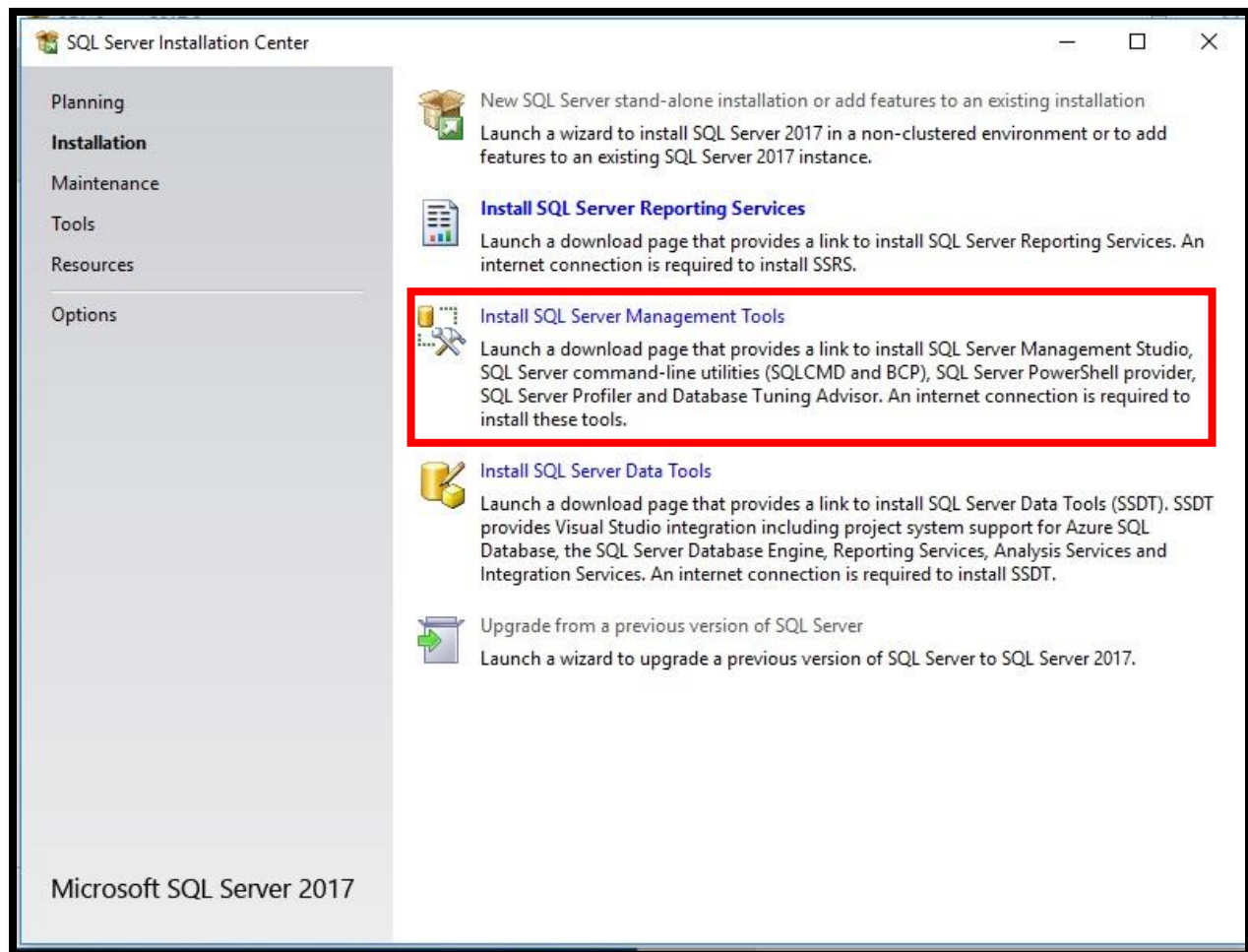
6) Once at the Database Engine Configuration section, select the FILESTREAM tab and select all options listed.



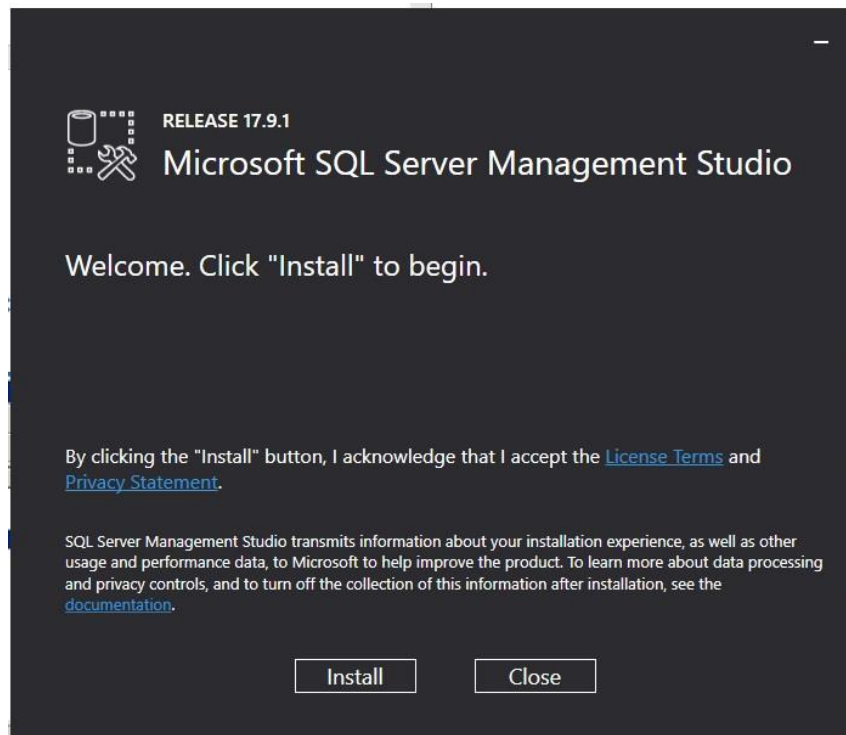
Installation of SSMS

After initial installation of SQL Server Express 2017, return to SQL Server Express Installation Centre and select the Install SQL Server Management Tools. This will take you to a webpage in which you'll need to download the file given on the webpage (link below).

<https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017>

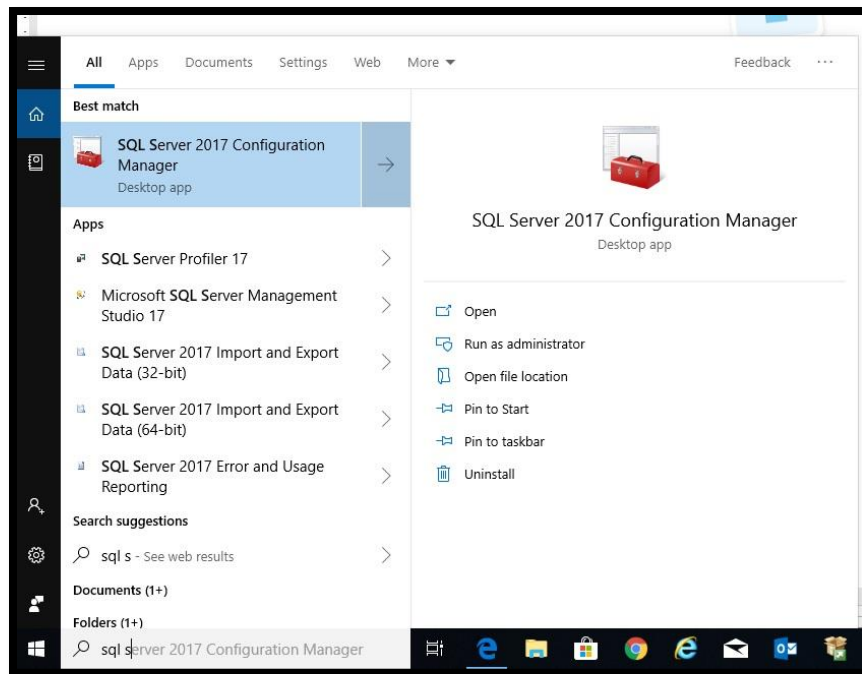


When the file is downloaded, run the file and click install. This will install and add the SQL Server Management studio to SQL Server Express automatically.



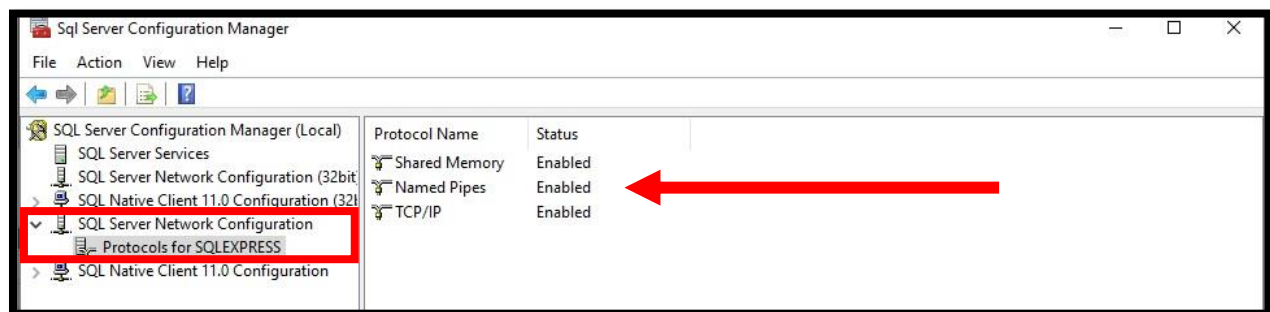
Remote Connections

Following the previous installations, open SQL Server Configuration Manager.



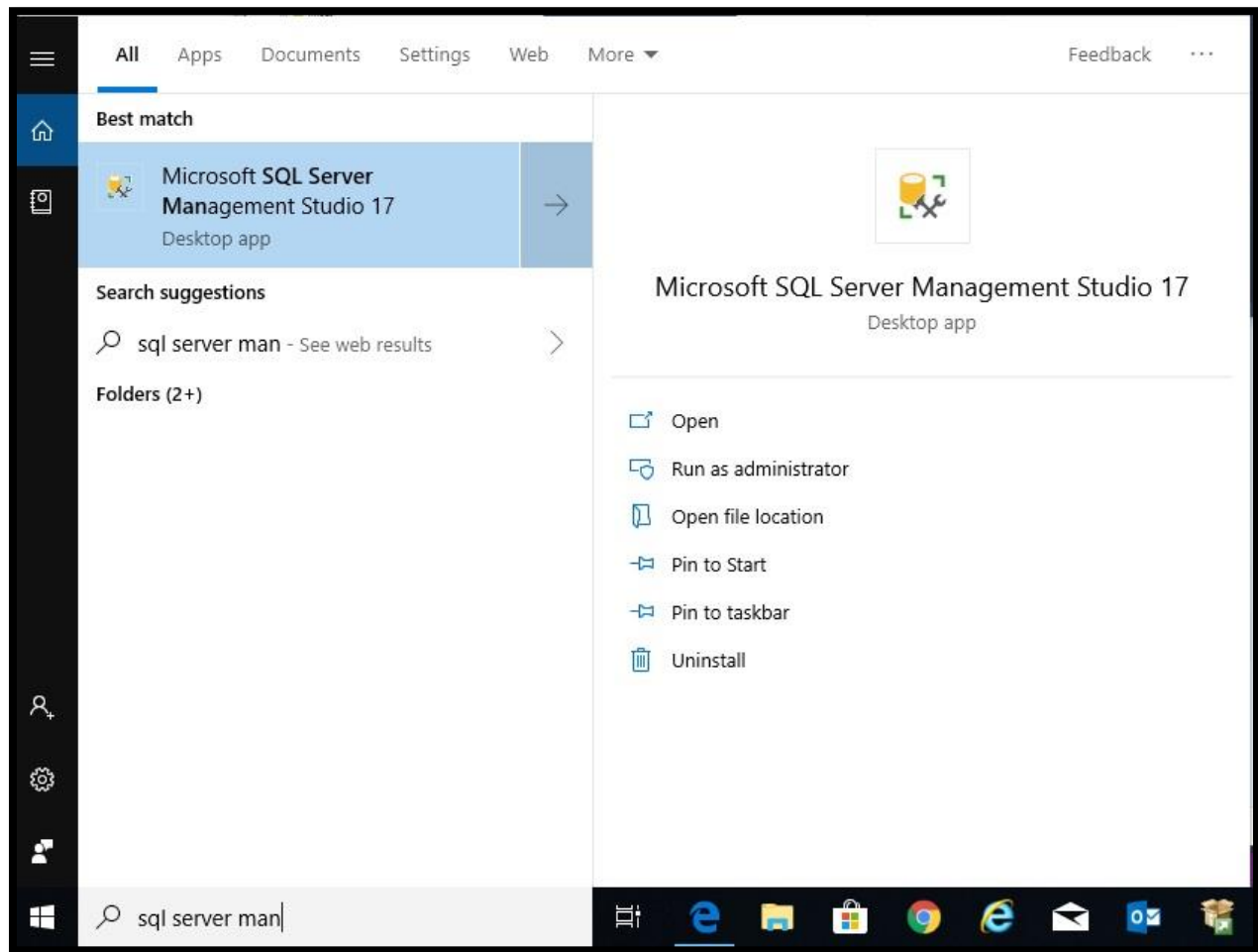
In SQL Server Configuration Manager, select SQL Server Network Configuration, then Protocols for SQLSERVER.

From here ensure that only the protocol names listed are **enabled**. Anything else remains disabled.

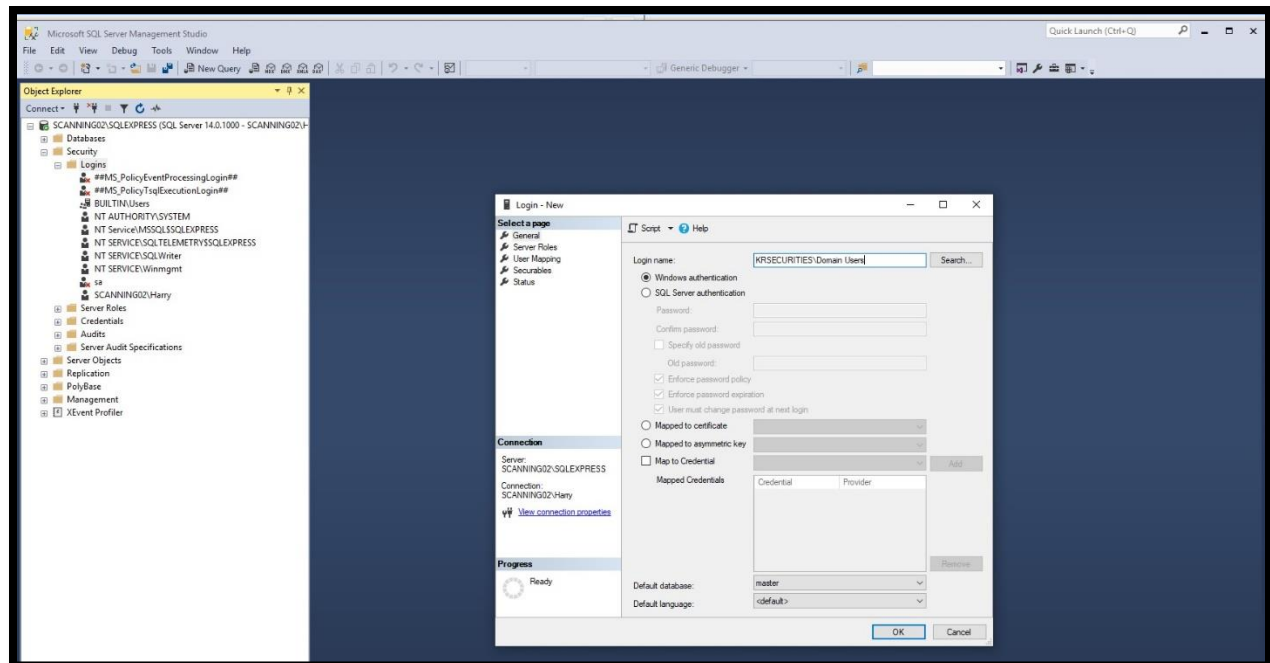


Add Domain users to SQL Server

Open SQL Server Management Studio.



Select the logins folder, then right click and select new login.



Workstations

Ensure that each workstation has the following components:

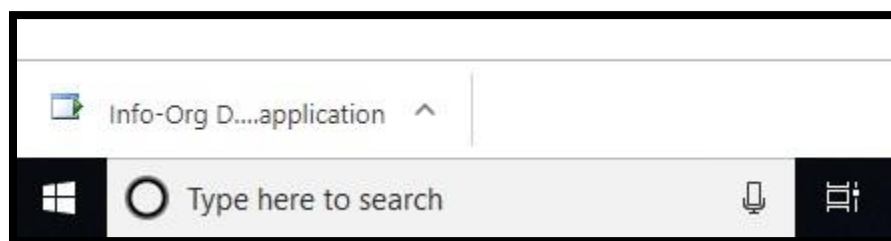
- .NET 4.5

If this does not exist, then the Info-Organiser Install will download these from the IO Installation Web Site

Install Client Version 12

<http://websites.info-organiser.com.au/io12/files.aspx>

Copy the link above and paste it into an internet browser, afterwards run the application that was just downloaded.



Creating a New Database

Once the Info-Organiser Desktop Application is loaded on screen, select settings to open the settings window.

The screenshot displays two windows from the Info-Organiser Desktop application. The left window is the 'Database Connection' settings dialog. It features a 'Database Type' dropdown set to 'MSSQL'. Under 'Connection Details', the 'Server Name' is 'SERVERNAME', 'Database Name' is 'DBNAME', and 'Use Windows Authentication' is checked with 'Username' as 'IOSAdmin' and a masked password. The 'Connection File' section is empty. At the bottom, there are buttons for 'Test', 'New Archive Database', and 'New Database' (which is highlighted with a red rectangle). A 'Use Archive Database' checkbox is also present. The right window is the 'Info-Organiser Desktop' main interface, showing a '20th Anniversary' logo, 'Active Directory' and 'IO Login' tabs, and input fields for 'Company Name', 'USERNAME' (pre-filled with '\$IOADMIN\$'), and 'PASSWORD'. It includes checkboxes for 'Remember my password' and 'Sign me in automatically', a version number '12.2.1.2', and 'Settings' and 'Login' buttons.

If you already have a previous version of Info-Organiser then the settings screen will be completed already and you should be able to login once you have entered your company name in the field provided.

If you have NEVER had Info-Organiser installed before then you will have to create a new database by clicking on the New Database button in the settings screen. (Seen highlighted above).

In the Create-Database screen choose your Database Type and enter the database name, tick the box next to *Use Windows Authentication* and then under the database folder select a place to save all the filestream data (create a new folder if need be).

Finally click *Create Database* button.

Info-Org - Create Database

Database Connection

Database Type: MSSQL

Connection Details

Server name: SCANNING02\SQLEXPRESS

Database name: TTHA_ACCOUNTS

☒ Use Windows Authentication

User name:

Password:

☒ Use filestream (Domain environment & MSSQL 2008 required)

Database Folder: C:\TTHA_ACCOUNTS

Create Database

Lastly login to Info Organiser.

INFO ORGANISER 20th ANNIVERSARY

Desktop

Active Directory IO Login

Company Name

USERNAME

PASSWORD

☐ Remember my password

☐ Sign me in automatically

12.2.1.2

Settings Login

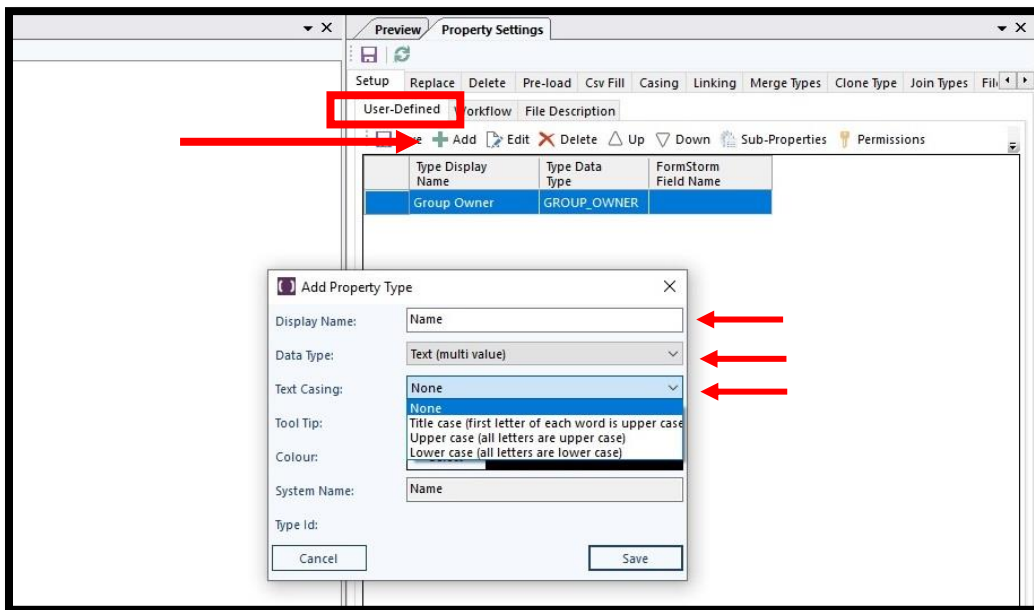
Database Set Up

Under the Admin tab, select Property Settings. This will enable your database to have User Defined Properties.

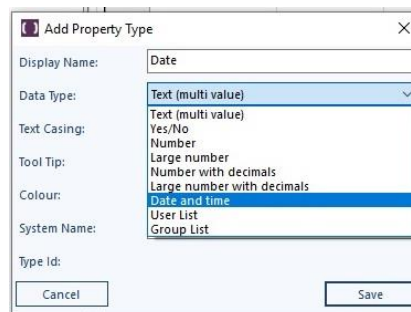


Once the properties settings window appears, select the User-Defined tab followed by the Add icon. This will enable you to add proprieties in which your data will be sorted.

To enter a property, click the add button, enter the desired field, data type as Text (multi value) and leave the text casing to none. Lastly, click Save.

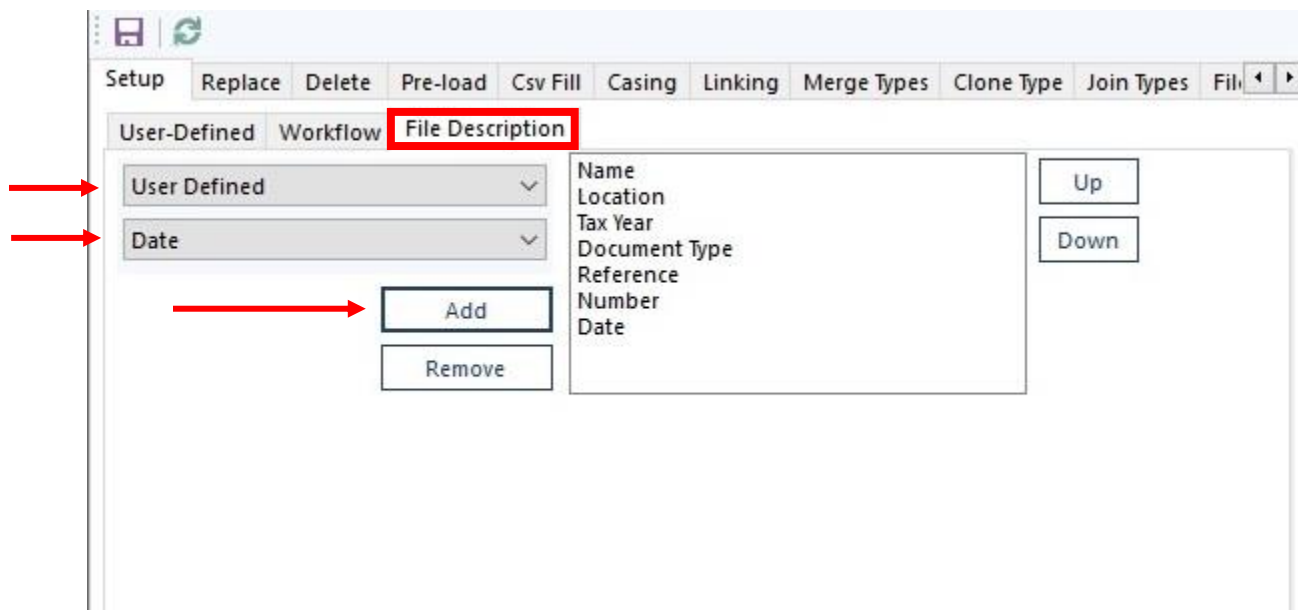


Note: For a date, select the data type to be Date and Time. Click Save.

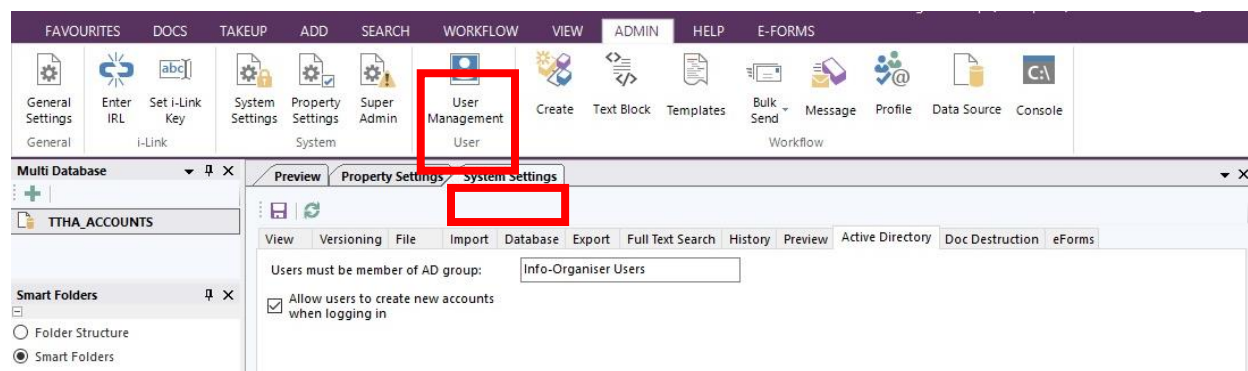


Once you've entered all the proprieties, click on the File Description Tab.

From here in the first dropdown box select User Defined. Then in the second drop down box select the property that you've made previously and click Add. The properties should appear on the right-hand side. Please note that you can only select and add your properties one at a time.



Finally, on the Admin tab select User Management, followed by the System Settings Tab. This will enable the database to keep a record of users but also assist in creating new users if they have never logged in before.



You are ready to begin using Info-Organiser for your everyday filing.