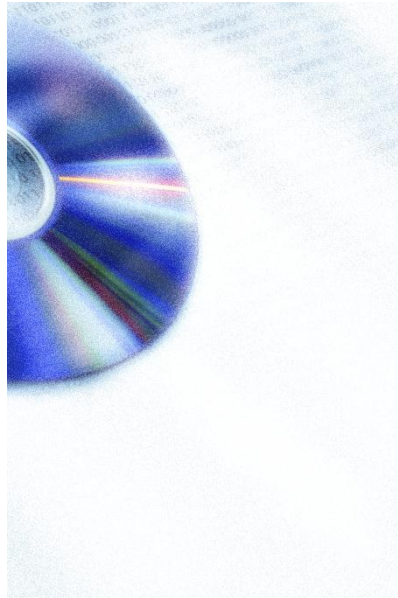


# EmployeeVu Installation Guide

employee**Vu**  
software



Version 2012

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## BEFORE INSTALLATION

# system requirements

### Supported operating systems

- Windows Server 2008 (not supported on Server Core Role)
- Windows Server 2008 R2 (not supported on Server Core Role)
- x86 or x64

### Hardware requirements

- Pentium 2 GHz or higher with 2 GB of RAM
- 200 MB of disk space (for application and application database)

### Prerequisites

- Microsoft .NET Framework 4
- Internet Information Services (IIS) 7.0 or later must be installed
- Microsoft SQL Server 2008 Service Pack 2 (SP2) or later (SQL Server 2008 R2 Express is provided)
- Access to Active Directory
- Access to an SMTP compliant email server is required for email alerts

### Supported browsers

- Microsoft Internet Explorer 7.0+ (8.0+ recommended)
- Mozilla Firefox 3.0+
- Google Chrome 6.0+
- Apple Safari 5.0+

### Other client requirements

- Cookies and JavaScript must be enabled
- Screen size of 1024x768 or higher

### Not supported

- Web farms or multiple web application servers / instances

## BEFORE INSTALLATION

# overview

### Installation stages

1. Install prerequisites
2. Install the EmployeeVu Configuration Manager
3. Configure the database installation
4. Configure the web application installation

### Environment options

- Install database and web application components on a single server
- Install database and web application components on two servers (separate database server and web server)

### Database options

The instructions in this guide describe the installation of prerequisites using the Microsoft Web Platform Installer, which includes Microsoft SQL Server 2008 R2 Express.



If you wish to use your own installation of SQL Server, please ensure SQL Server Authentication is enabled (mixed authentication mode). Please consult your SQL Server documentation for detailed instructions on managing authentication settings.

## INSTALLATION

# prerequisites

### About prerequisites

The Microsoft Web Platform Installer is a free tool that makes it easy to get and install all of the latest server components required to run EmployeeVu.

Follow the steps in this section to install the required prerequisites using the Microsoft Web Platform Installer before you install or run the EmployeeVu Configuration Manager.

### Installing on two servers

You can install the EmployeeVu web application and database on the same server, or you can install the database and web server components on two separate servers.

When using two servers, there are prerequisites for both servers.



Web farms or multiple web application servers / instances are not supported

## Installing prerequisites step-by-step

The instructions below are for version 3.0 of the Web Platform Installer.

1. **Download and run** the Microsoft Web Platform Installer from <http://www.microsoft.com/web/downloads/platform.aspx>
2. Once the installer has started, click the **Products** heading at the top of the window
3. Click the **Name** header to sort alphabetically
4. For single server installations or for the web server
  - a. Click the **Add** button for
    - i. **IIS 7 Recommended Configuration**
    - ii. **Microsoft .NET Framework 4**
    - iii. **IIS: Windows Authentication**
5. For single server installations or for the database server – if you do not have an existing instance of Microsoft SQL Server 2008, or you do not want to use it, follow these steps to install SQL Server Express 2008 R2
  - a. Click the **Add** button for
    - i. **SQL Server Express 2008 R2**
    - ii. If you want to use advanced SQL Server management features, add **SQL Server 2008 R2 Management Studio Express**
6. Click the **Install** button
7. Review the installation options and licensing terms and then click **I Accept** when you are ready to continue
8. If you chose to install SQL Server Express 2008 R2, you will be prompted to select an authentication mode
  - a. Select **Mixed Mode Authentication**
  - b. Enter and confirm a password for the SQL Server administrator account
  - c. Click **Continue**
9. Wait for the installation to complete (installation time varies depending on the options you've selected and the software updates that are already installed)
10. When the installation is complete, click **Finish** and then click **Exit**

## INSTALLATION

# remote access

### About two-server installations

If you are installing the database and web application on separate servers, some additional configuration steps must be taken to enable communications between the servers:

- If you're using Microsoft SQL Server Express, you must enable remote access to the SQL Server Express database instance
- You must configure firewall exceptions on the database server
- You must enable network access for Microsoft Distributed Transaction Coordinator (MS-DTC) on both servers



Web farms or multiple web application servers / instances are not supported

### Two-server setup: Enabling SQL Server Express remote access

Enabling remote access to Microsoft SQL Server Express:

1. Start **SQL Server Configuration Manager** from the **Configuration Tools** folder beneath the **Microsoft SQL Server** folder on your server's Start menu
2. In SQL Server Configuration Manager, expand **SQL Server Services**
3. Right-click on **SQL Server Browser**, then click **Properties**
4. Click **Start**
5. Click the **Service** tab
6. Change the **Start Mode** to **Automatic**
7. Click **OK**
8. Expand **SQL Server Network Configuration**
9. Click **Protocols for SQLEXPRESS**
10. Right-click on **TCP/IP**, then click **Enable**
11. You may need to restart the SQL Server service for changes to take effect



## Two-server setup: Enabling SQL Server Express firewall exceptions

If you're using Windows Firewall on the database server, follow these steps to configure necessary exceptions for Microsoft SQL Server Express when using two servers (if you're using different firewall software, configure the equivalent exceptions following the firewall vendor's instructions):

1. In the Windows Control Panel, open the **Windows Firewall**
2. Click **Allow a program or feature through Windows Firewall**
3. Click **Allow another program**
4. Click **Browse**
5. Locate and select **sqlservr.exe\*** on your server, then click **Open**
6. Click **Add**
7. Click **Allow another program**
8. Click **Browse**
9. Locate and select **sqlbrowser.exe\*\*** on your server, then click **Open**
10. Click **Add**
11. Click **OK**
12. You may need to restart the SQL Server and SQL Server Browser services for changes to take effect

\*For example, **sqlservr.exe** may be located at:

C:\Program Files\Microsoft SQL Server\MSSQL10\_50.SQLEXPRESS\MSSQL\Binn

\*\*For example, **sqlbrowser.exe** may be located at:

C:\Program Files\Microsoft SQL Server\90\Shared

File paths may be different depending on your installation options, SQL Server edition and version.

## Two-server setup: Enabling network access for MS-DTC

To enable network access for Microsoft Distributed Transaction Coordinator when using two servers, follow the steps at the URL below on **both** the web server and the database server:

[http://technet.microsoft.com/en-us/library/cc753510\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc753510(WS.10).aspx)

## INSTALLATION

# configuration manager

## About the Configuration Manager

The Configuration Manager allows you to install, configure and maintain the EmployeeVu database and web application components. It also supports optimization and backup, including a simple, schedulable command line database backup feature.

You must first install the Configuration Manager on the server(s) that will be running EmployeeVu before you can set it up.

## Step-by-step

1. **Download and save** the EmployeeVu installer (Setup.exe) from <http://www.employeevu.com>
2. Run **Setup.exe**
3. Click **Next**
4. Read the license agreement and click **I accept the terms in the license agreement** and then click **Next**
5. Accept or change the default path and then click **Next**
6. Review the installation options and then click **Install**
7. Select **Launch Config Manager** to immediately begin configuring EmployeeVu
8. Click **Finish**

## Running the Configuration Manager

A shortcut to the Configuration Manager will appear in the **EmployeeVu** folder within your Start menu.



You must run the Configuration Manager as a member of the **Administrators** group on the server.

## CONFIGURATION

# database installation

## Required information

- You will need the database server name or IP address
- Pick a password for the 'employeevu' database user login; this login password will be used by the web application to access the database

## Step-by-step

1. Start the Configuration Manager
2. In the **Roles** panel, ensure **Database server** is selected
3. Under **Database Tasks**, click **Install new database**
4. If you're using the default installation of SQL Server Express, select **SQL Server Express on local machine**, otherwise enter the server name in the **Server** box
5. Enter a name for your new database in the **Database** box
6. To specify a custom folder where database files should be created, click **Specify path**, click **Browse**, and then select the desired folder location, otherwise the default path is determined by SQL Server
7. Click **Test** to ensure the connection information is valid (invalid connection information may result in a 30 second pause and timeout)
8. Click **OK**
9. Enter and confirm the password that will be used by the 'employeevu' database user login, then click **OK**
10. Review the installation options and click **Proceed** to create the new database



You must be a member of the 'sysadmin' role in SQL Server to install the application database. See page 16 to manually add yourself as a 'sysadmin'.

## CONFIGURATION

# web application installation

**Required information**

- Pick a virtual directory name
  - For example, if the server name is 'someserver' and the virtual directory is entered as 'EmployeeVu', then the URL might become 'http://someserver/EmployeeVu' depending on the site port selection, DNS settings, and other factors)
- You will need the password for the 'employeevu' database user login

**Select a database (for a standalone web server)**

Skip this step for single-server installations; if you're installing the web application on a separate server, you must configure a database connection before installing the web application.

1. Start the **Configuration Manager**
2. In the **Roles** panel, ensure **Database server** is not selected
3. In the **Roles** panel, ensure **Web application server** is selected
4. Under **Database Tasks**, click **Select existing database**
5. Enter the password that you chose for the 'employeevu' database user login when installing the database
6. Click **OK**
7. If you're using the default installation of SQL Server Express on the local server, select **SQL Server Express on local machine**, otherwise enter the server name in the **Server** box
8. Click **Refresh** to update the **Database** list and then select the existing EmployeeVu database from the list
9. Click **Test** to ensure the connection information is valid (invalid connection information may result in a 30 second pause and timeout)
10. Click **OK**

## Step-by-step

To install the web application:

1. Start the Configuration Manager
2. In the **Roles** panel, ensure **Web application server** is selected
3. Under **Web Application Tasks**, click **Install application**
4. In the **Site** list, select the site under which you would like to install EmployeeVu
5. To change the **Physical Path** where the application files will be installed, click **Browse** and then select the desired folder location
6. Enter a **Virtual Directory Name** or accept the default
7. Click **OK**
8. Enter and confirm the password that you chose for the 'employeevu' database user login when installing the database, then click **OK**
9. Review the installation options and click **Proceed** to install the web application

## Starting EmployeeVu

After the web application is successfully installed, the **Local URL** link will be populated with the expected URL.

1. Click the **Local URL** link
2. If you are prompted for credentials, enter your current credentials again; by default the current user account is added as an administrator when the database is created (see page 18 to manually add the current user as an administrator)
3. Read the license agreement. If you agree, click **Yes, I accept**
4. You may begin configuring the system and adding employees, or you may designate one or more domain identities as administrators to begin the administrative configuration
5. To configure additional administrators
  - a. From System Options, click **System Administrators**
  - b. Click **Add**
  - c. Enter the full domain login identity in the form of Domain\User
  - d. Click **Save**



The current user must be added as an application administrator to complete this initial configuration. See page 18 for details.

For the best experience, it is recommended that you enable intranet security settings in your client browser so that it sends your credentials automatically.

## CONFIGURATION

# application configuration

**About the default System Administrator**

When you first log into EmployeeVu, you will be logged in as the default System Administrator. This is a special built-in account used when an administrator does not yet have a personal employee account defined in the system.

The System Administrator account can only access administrative functions. For example, it cannot be used to view or submit leave requests. You will notice a number of the main menus are disabled when logged in using this account.

**About EmployeeVu configuration**

The EmployeeVu Administrator Guide addresses configuration of the application and is primarily designed for HR administrators. However, the Administrator Guide covers several management features likely of interest to technical administrators, including:

- SMTP settings for email alerts
- License management
- Managing application availability ("application state")
- The application event log
- The application alert log
- Monitoring user activity

Please refer to the Administrator Guide for information about these features.

## CONFIGURATION

# database maintenance

## Reset the database user password

You can reset the password used by the 'employeevu' database user login

1. Start the Configuration Manager
2. Under **Database Tasks**, click **Reset database user password**
3. Enter and confirm the password that will be used by the 'employeevu' database user login
4. Click **OK**

## Optimize the database

You can perform a quick optimization of the database indexes

1. Start the Configuration Manager
2. Under **Database Tasks**, click **Optimize database**
3. Click **Proceed** to perform the optimization

## Backup the database

You can perform a full backup of the database to a file on your hard disk

1. Start the Configuration Manager
2. Under **Database Tasks**, click **Backup database**
3. Enter or select the backup file that will be created
4. Click **OK**
5. Click **Proceed** to perform the backup



Backups can be safely performed even when the database is being used.

For more advanced backup options, you can use SQL Server Management Studio (installable via the Microsoft Web Platform Installer)

## Command line backup

If you would prefer to use a simple command-line backup that can be scripted or run using Task Scheduler, a backup utility (EmployeeVuBackup.exe) is included in the Configuration Manager installation folder.

usage: EmployeeVuBackup [/O] file

file: Full path to the backup file that will be created (drive:\path\filename)

/O: Overwrite the file, if it already exists.

The process identity that the SQL Server service is using must have write permissions to the specified path.

## Restore the database

You can restore a full backup of the database from a file on your hard disk.

1. Start the Configuration Manager
2. Under **Database Tasks**, click **Restore database**
3. Read and accept the warning by clicking **OK**
4. Enter or select the backup file that will be restored
5. Click **OK**
6. Click **Proceed** to restore the database



Restoring a database overwrites all data in the existing database



Restoring a database requires exclusive access to the database. If you receive an error about exclusive access, ensure all users are logged out and try shutting down or resetting IIS on the web application server to close any open connections.

## Add the current user as a 'sysadmin' in SQL Server

If SQL Server was installed by another user or the SA password has been lost, you may not have the necessary permissions even if you are a member of the 'Administrators' group on the server. It is necessary for your user account to be in the 'sysadmin' role in SQL server.



To add the current user account as a member of the 'sysadmin' role in SQL Server:

1. Start the Configuration Manager
2. Under **Database Tasks**, click **Add current user as 'sysadmin'** (this command will only be available if the current user does not have the necessary permissions)
3. Read and accept the warning by clicking **OK**
4. The Configuration Manager will exit and a command window will open and you may be prompted to confirm the action
5. Start the Configuration Manager again to confirm that you now have the correct permissions



This action will restart the SQL Server instance and any applications using it, including EmployeeVu, will be briefly interrupted

## CONFIGURATION

# web application maintenance

## Reset the database connection

If you change the database user account or password, it may be necessary to reset the credentials used by the web application:

1. Start the Configuration Manager
2. Under **Web Application Tasks**, click **Reset database connection**
3. Enter the password that you chose for the 'employeervu' database user login when installing the database
4. Click **OK**

## Add the current user as an application administrator

When a new EmployeeVu database is created, by default the current user account is added as an application administrator, which will allow you to log in to EmployeeVu and begin configuring it.

If another user created the database and an existing EmployeeVu administrator is not available, it may be necessary to add your account as an administrator in order to gain access to administrative functionality.

To add the current user as an application administrator:

1. Start the Configuration Manager
2. Under **Web Application Tasks**, click **Add current user as admin**
3. Click **OK** to confirm

## Uninstall the web application

To uninstall the web application components:

1. Start the Configuration Manager
2. Under **Web Application Tasks**, click **Uninstall application**
3. Click **Proceed** to remove the web application components

## UPGRADES & SUPPORT

# upgrades

### About upgrades

Please see the Release Notes included with the application update for instructions on upgrading.

# getting help

### Additional support and assistance

The EmployeeVu web site is your number one resource when you have questions or problems.

- Find additional information and news
- Get the latest software updates and documentation
- Submit requests for assistance using online forms or email

<http://www.employeevu.com>