

INSTALLATION GUIDE

Workbox v 1.7.7.272

Last modification on: **13 June 2011**

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Users upgrading from previous versions (1.4.3 or earlier) should read chapter 2.1 „Upgrading from previous versions“.

Workbox is still expanding. While its base functionality is fully tested and stable, we are constantly adding new functionalities with each release. We strongly recommend you to register on <http://partner.datapolis.com.pl>, where you will be able to easily track latest Workbox releases. Also, you will be able to get additional Workbox materials and to try our on-line demonstration environment with latest version of Workbox.

Thank you for choosing Workbox

We hope that you will find our product useful. If you have any comments or questions regarding Workbox or this guide, please feel free to contact us. Contact details are included in *Troubleshooting* section of this document. We will gladly help you solve any issues.

Please take time to read this guide. It will help you to install Workbox on your system and deal with a number of the most common problems you might encounter during the process.

Setup configures a fully functional solution. By default, a 30-day trial version is installed, this time constraint being the only limitation. In order to use Workbox after 30 days, you need to purchase and install a license.

More about licensing can be found in the [Licensing](#) chapter.

If you encounter any problems while using our product, please refer to the instructions included in [Troubleshooting](#) section.

1 Installation requirements

1.1 Server

- Windows 2003/ Windows 2008
- WSS 3.0/MOSS 2007 with SP1
- .NET 3.5

1.2 Client

1. A web browser with Silverlight 2.0 plug-in

2 Installation

2.1 Upgrading from previous versions

If you have a previously installed, earlier version of Workbox (1.4.3 or earlier), we advise you to uninstall it completely (using the old installer) before installing the new version.

Version 1.5 introduced Workbox Feature activation for each site independently. Previous versions activated the feature per site collection. Currently you don't select the site collection during installation, but only the web application on which Workbox should be installed. Additionally we have added an option to activate the Workbox feature on all sites on given site collection (see point 11 in chapter 2.2 "Workbox installation"). This option is selected by default, but you can disable it. In such case you will need to activate Workbox feature on selected sites (see chapter 2.5 "Feature activation").

WARNING: If the Workbox feature is not activated on given site, users will not be able to launch actions and define workflows. Newly created workflows will be suspended. It is advised to check on which sites Workbox is being used and verify if the Workbox feature is activated on these sites.

Additional information regarding new functionalities is available in the designer help and on the following page <http://www.datapolis.com/EN/news09.html>.

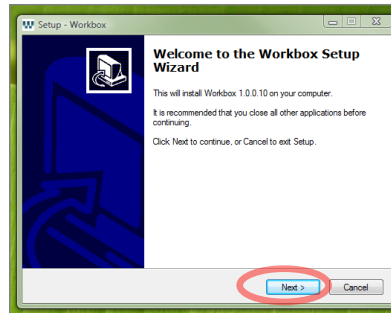
2.2 Workbox installation

To install Workbox you just need to run the attached setup application on any front-end server of your SharePoint farm. Setup will deploy Workbox on all front-end servers in a farm. You don't have to launch the setup on every server in the farm.

Note: The user account used to install Workbox should have administrative privileges on both server and SharePoint farm levels.

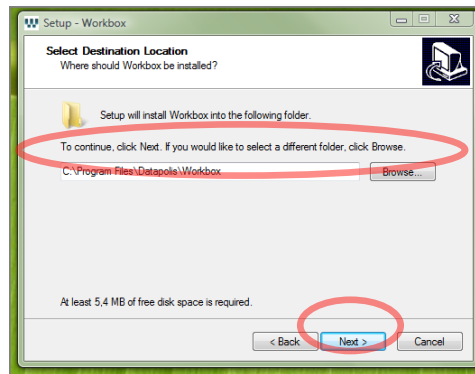
1. Run the file „InstallationPackage.exe”. This will launch extraction wizard.

2. Click „Next” on the „Welcome” page

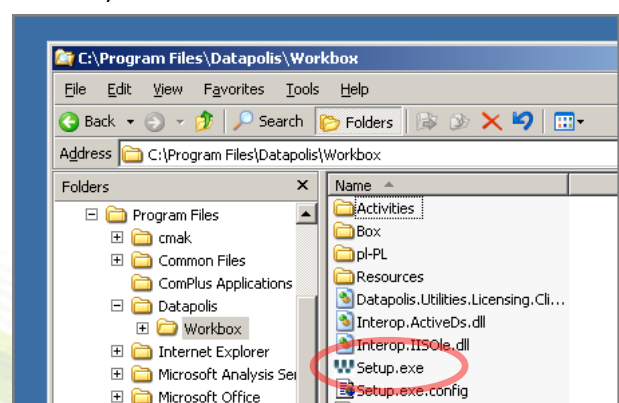
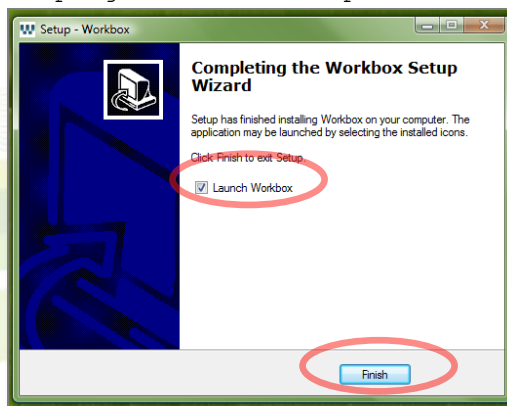


3. Select the folder where the setup files are to be extracted. We advise you to keep these files even after you complete the installation, for they are useful while fixing or removing Workbox solution.

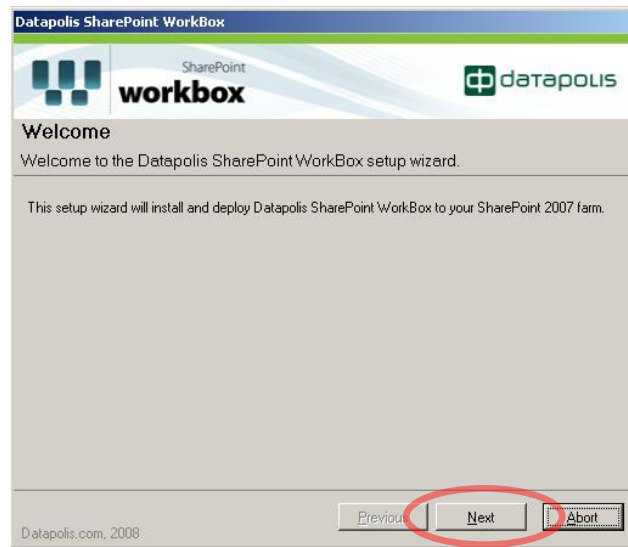
Click „Next”.



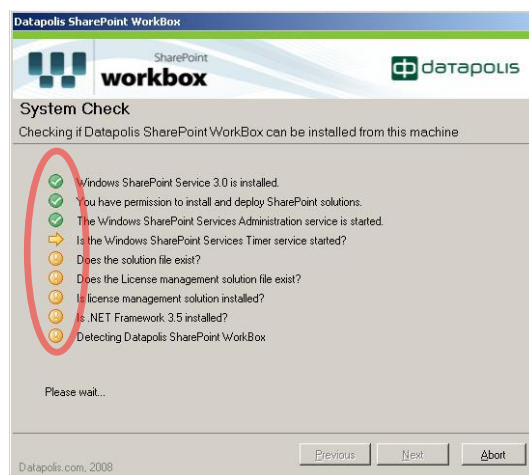
4. When the files are uncompressed, click the „Finish” button. If the “Launch Workbox” option is selected, the next phase of installation will begin automatically, otherwise it’s necessary to run setup.exe (in the folder where the files were unpacked. In this example the path `c:\program files\datapolis\Workbox` is used).



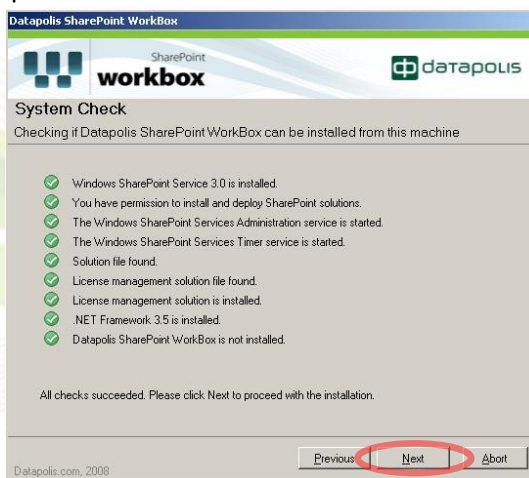
- After setup.exe is launched, click the “Next” button on the “Welcome” page.



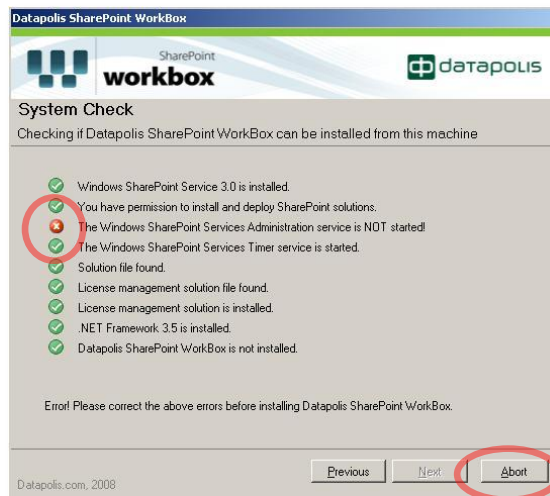
- System requirements are verified on next page. Please wait for all the checkpoints to be completed.



- Click “Next” if all the requirements are met.

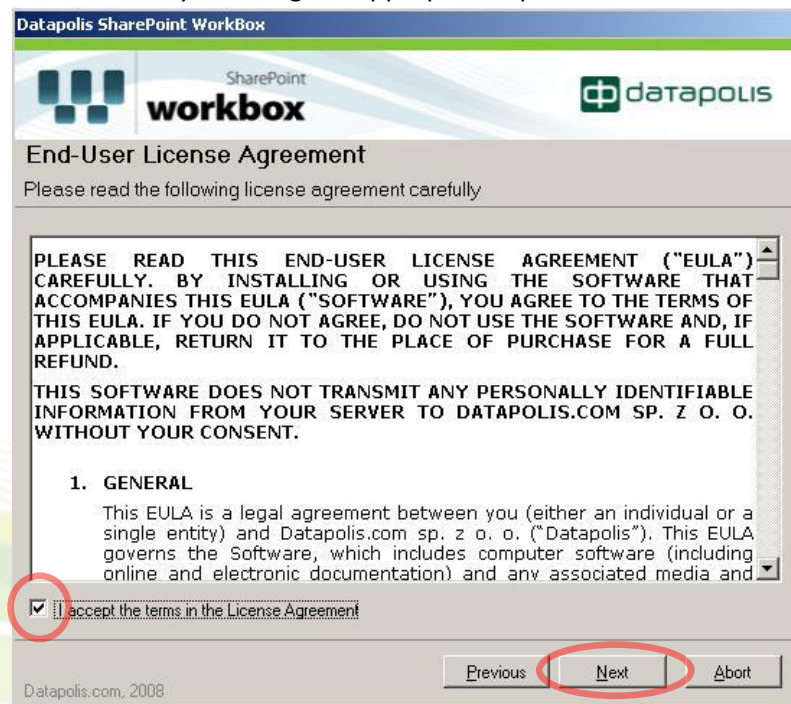


- If the verification fails on any of the checkpoints, click the “Abort” button. After resolving the issue, run setup.exe again. See the Troubleshooting section for more details.



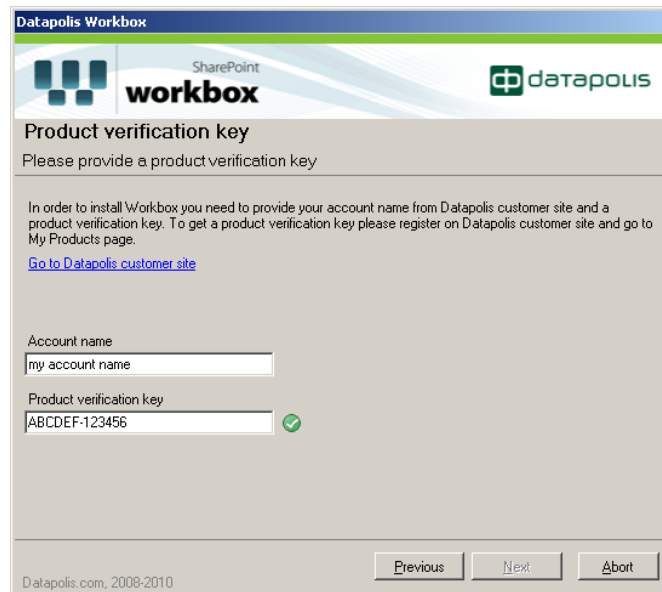
If Workbox has been already installed, the “repair/remove” options are shown. In this case please read [Repair/remove Workbox](#) section.

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



10. On the next page you will be asked for your Account Name (by which you log in to the Customer Area on Datapolis website) and the Product Verification Key (PVK). To obtain a PVK you have to log in to the Customer Area (<https://partner.datapolis.com>) and go to “My Products” page. PVKs are displayed in the section “Product verification keys”.

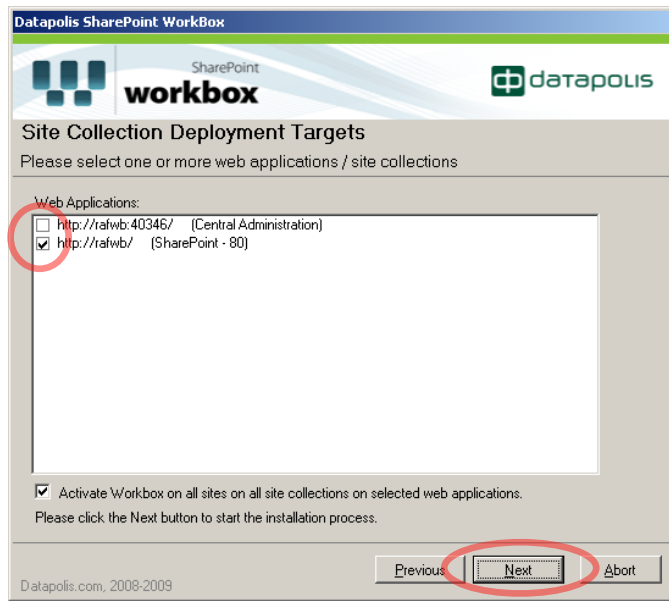
Note: If you do not have an account in the Customer Area, you cannot obtain PVK and cannot complete the setup. Please also note that you need to have an account in the Customer Area even if you want to use the Trial version.



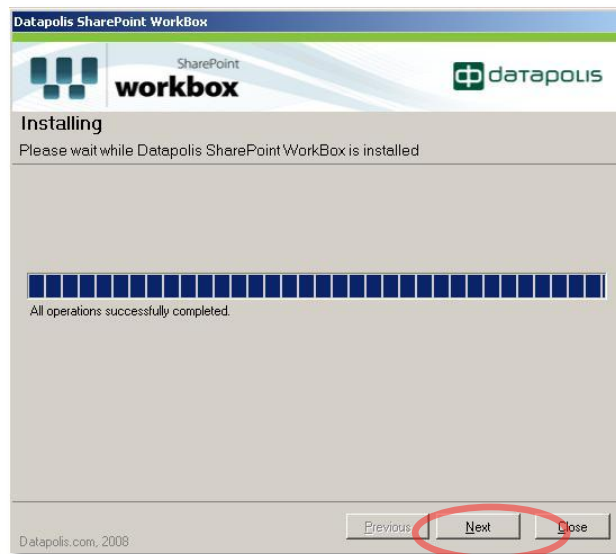
11. The next page contains web applications on which you can deploy Workbox. You can select more than one web application.
12. As stated before, Workbox is deployed as a Site Feature. In order to use Workbox (i.e. design and deploy, as well as run Workbox workflows) it is necessary to activate the feature on each site where Workbox workflows are to be run. Setup wizard gives you an option (“Activate Workbox on all sites on all site collections on selected web applications”) to automatically activate the feature on all sites in selected site applications. It’s selected by default.

Note: If your web applications contain a large number of subsites, the auto-activation can take a long time and use a significant part of server resources.

13. After selecting deployment targets, click the “Next” button.



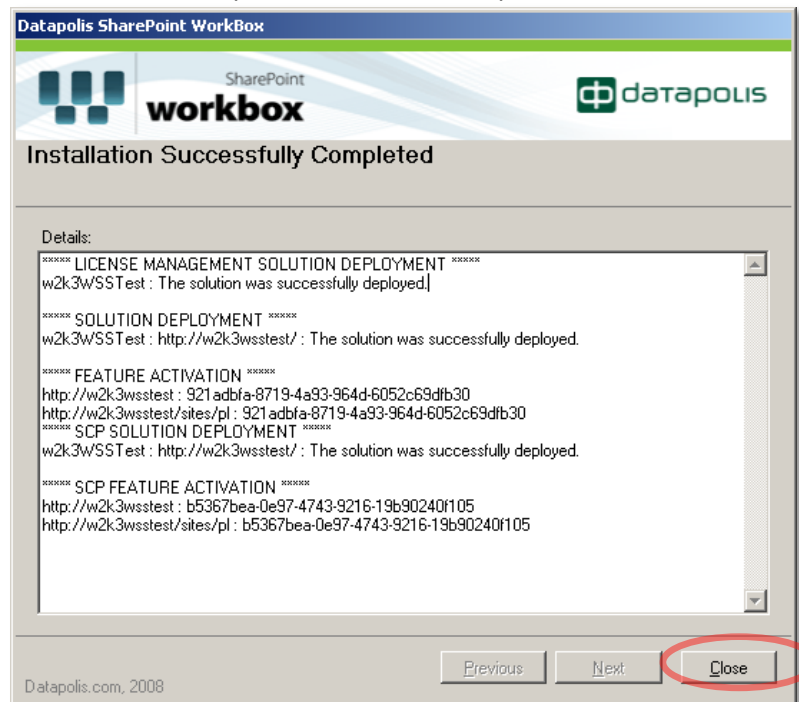
14. The next page shows progress of the installation. It might take several minutes, depending on the configuration of the SharePoint environment. When the installation is completed, click the "Next" button.



15. The last page displays the deployment summary. The details show how the deployment process was performed and on which web applications and site collections Workbox was installed.

Note: If errors occurred during the installation, they will be listed here as well. Please note them down and include them when contacting Datapolis Support.

Clicking the “Close” button completes the installation process.



Additional information on how to work with Workbox can be found in the following guide: “Workbox – quick start.pdf”.

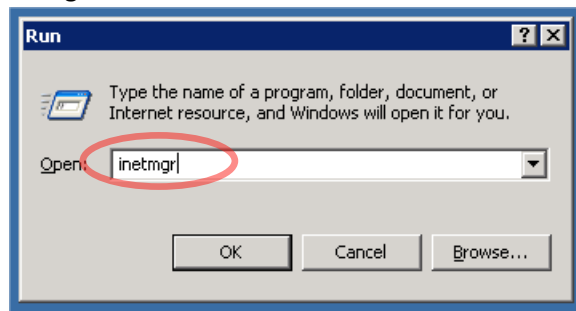
2.3 IIS settings

To work properly, Workbox requires your IIS application to have at least one website identity set on a default IP address and empty host header value.

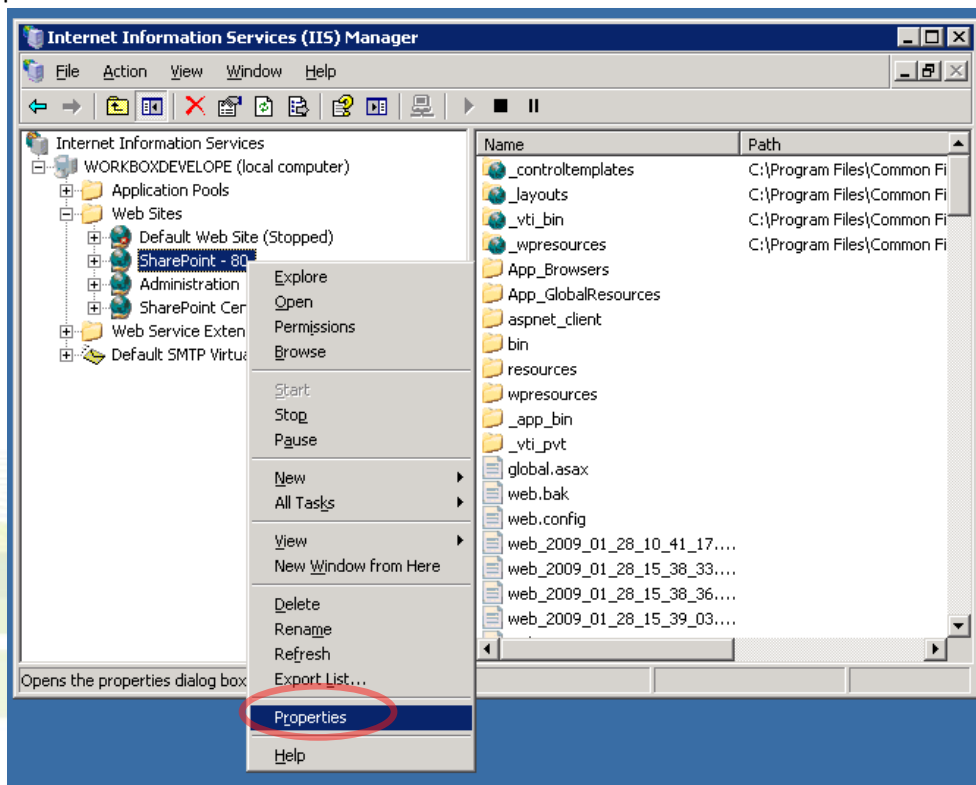
Note: Workbox cannot deploy workflows on a website application without website identity with empty host header.

To ensure your settings are correct:

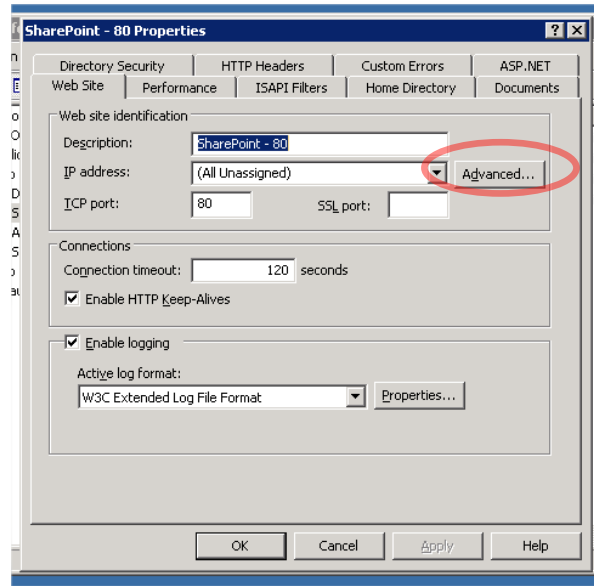
1. Click the Windows “Start” button and click “Run”.
2. In the textbox type “inetmgr” and click “OK”.



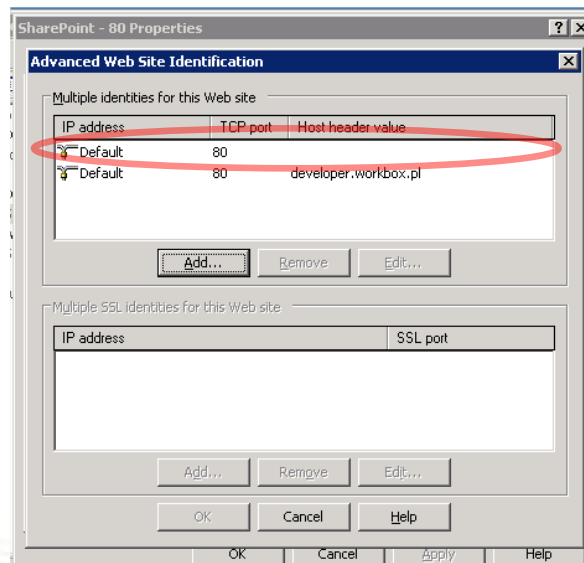
3. In IIS Manager find the web application that hosts your SharePoint, right-click it and choose “Properties”.



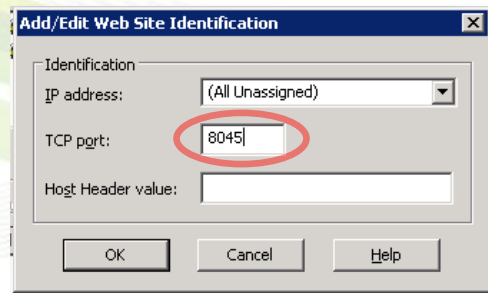
- On the “Web Site” tab click “Advanced” (next to “IP address” field).



- In the “Advanced Web Site Identification” window check if in “Multiple identities for this Web site” (without SSL) you have at least one entry for default IP address and empty Host header value. Port number is irrelevant.



- If you don't have this entry, click the “Add” button and provide a port number. Do not change other settings. Click OK on all windows.



- Repeat these steps for all web applications that host SharePoint and use Workbox.

2.4 Licensing

Setup configures a fully functional solution. By default, a 30-day Trial version is installed, this time constraint being the only limitation. In order to use Workbox after 30 days, you need to purchase and install a license.

The Trial version includes all of the Unlimited version features.

License can be obtained at <https://partner.datapolis.com>.

Note: When you have installed the Trial version of Workbox and you want to continue using it after the trial period, you don't have to reinstall or reconfigure anything. It is sufficient to purchase and activate either the Standard, Enterprise or Unlimited license.

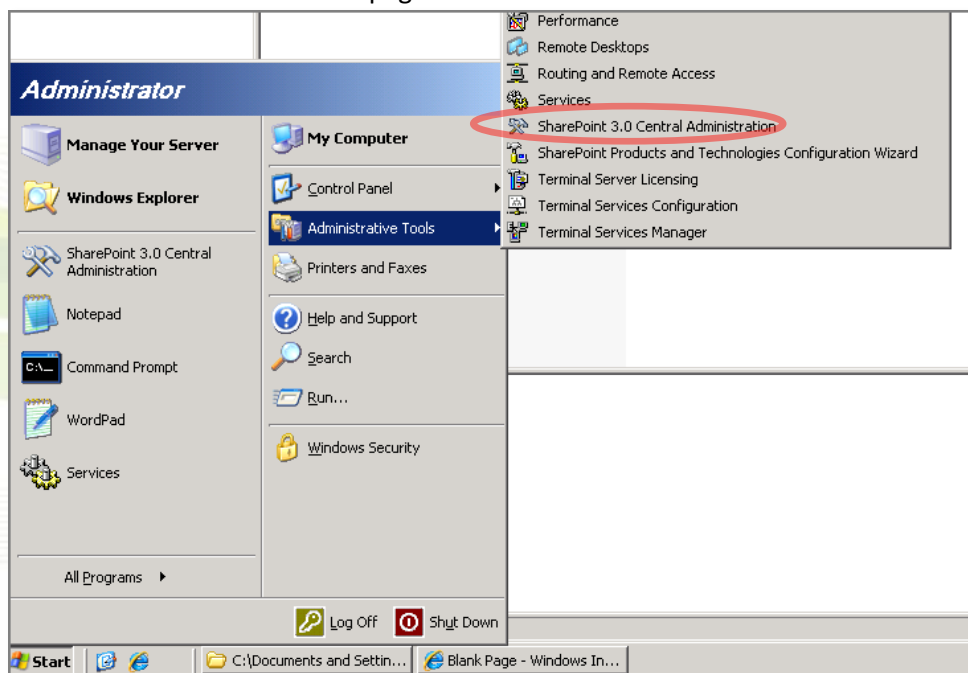
Note: When you activate Standard license, which has limit to 5 workflows deployed concurrently, you need to redeploy the workflows which you want to use, otherwise the workflows will not start.

To activate license on server farm you need to:

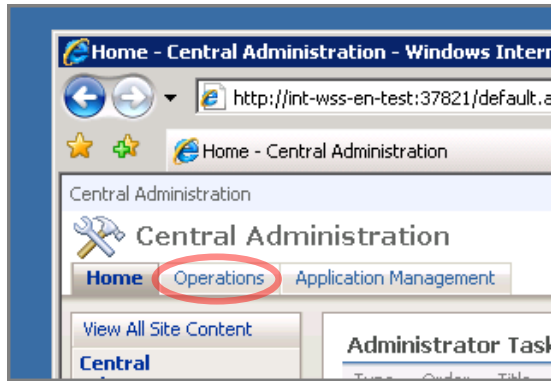
1. Purchase license for Workbox on our website: <https://partner.datapolis.com/en/customer/pages/buy.aspx>. You can use a link provided on the License Management page in SharePoint Central Administration -> Operations -> License management for Datapolis products.
2. Once you have purchased a license, it should be available for you on "My Products" page. In order to set the license, go to "License Management" page on your server (SharePoint 3.0 Central Administration -> Operations -> License management for Datapolis products)

Note: Workbox is licensed per server and per users of your SharePoint farm. You cannot transfer your license from one server farm to another once you have generated License Key based on the Product Key for a given farm.

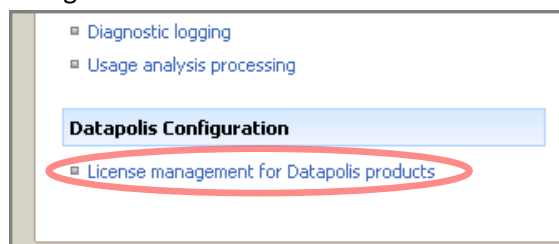
- a. Go to "Central Administration" page for the server farm



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

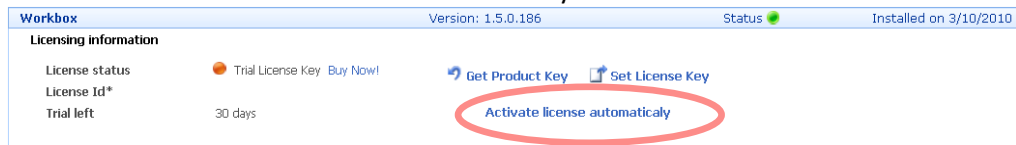


- c. On the *Operations* page click “License management for Datapolis products” link under “Datapolis Configuration” header.

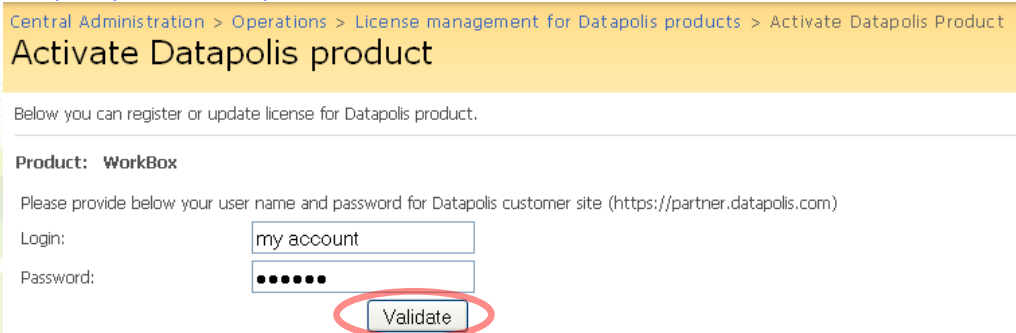


3. **If your server (the one where Workbox is installed) has internet connectivity, you can activate your product automatically. If you don't have internet connection on the server, you have to activate your product manually – go to step 4.**

- a. Click on the link “Activate license automatically”



- b. Enter your credentials for the Datapolis customer site (<https://partner.datapolis.com>) and click “Validate”.



- c. After you credentials are successfully verified you will have to choose license which should be used to activate your copy of Workbox. Please choose appropriate license and click “Activate”.

Central Administration > Operations > License management for Datapolis products > Activate Datapolis Product
Activate Datapolis product

Below you can register or update license for Datapolis product.

Product: **WorkBox**

Choose license which you want to activate

Unlimited License for Workbox (License Id = 111)

>>

Choose name for the license activation (this name will help you find this license later on the list of all your license which is available on Datapolis customer site in My Products section)

SERVER01




d. After that your copy of Workbox has a valid license.

Central Administration > Operations > License management for Datapolis products > Activate Datapolis Product
Activate Datapolis product

Below you can register or update license for Datapolis product.

Product: **WorkBox**

License was successfully activated.
[Go back to license management.](#)





Workbox	
Licensing information	
License status	 Valid License Key
License Id*	111
License type	Unlimited



Note: If the automatic license activation was successful, you can skip point 4, 5 and 6.

4. Generate Product Key for your installation of Workbox on given farm.

a. Click the "Get Product Key" button.

Workbox	Version: 1.5.0.186	Status 	Installed on 3/10/2010
Licensing information			
License status	 Trial License Key Buy Now!	 Get Product Key	 Set License Key
License Id*		Activate license automatically	
Trial left	30 days		



b. 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 blocked by your browser.

5. Generate license key

a. Go to <https://partner.datapolis.com/en/customer/pages/myproducts.aspx> page. Expand "Workbox" product section and upload your product key in the "Licenses" section.

Note: When uploading a product key, please add a meaningful description. This will help you locate your license later.


Invoice 81/3/WWW/2010




Workbox

Advanced platform designed to create and manage business processes. It is a practical tool to define simple documents flow such as flow of invoices, absences, sick leaves, business trips as well as modeling complex business processes based on company's IT systems. Thanks to implementation of state workflow model, processes may be modeled in extremely easy and legible way.

Licenses



Unlimited License for Workbox

License Id: 111 

License for Demonstration use only.

Unlimited license for Workbox allows you to create and run any number of business processes. No additional Workbox CALs are required.

License for 1 Front End Web Servers


Number of available license keys **1**
 Number of used license keys **0**

Per server – that is for every front end web server at which MOSS 2007 is installed or WSS 3.0 service is running (in the SharePoint farm on which SCP is to be installed). Server is a physical hardware system available to run server software.


Add new product key

Below you can upload your product key. To get a valid license key you must enter order ID of this license in your system according to user guide, generate product key and upload it here.

- b. When product key is in place, you can download your license key. Save it in a convenient place so you can locate it easily – you will have to upload it on your SharePoint Central Administration site.



Unlimited License for Workbox

License Id: 111 

License for Demonstration use only.

Unlimited license for Workbox allows you to create and run any number of business processes. No additional Workbox CALs are required.

License for 1 Front End Web Servers

Number of available license keys **1**
 Number of used license keys **0**

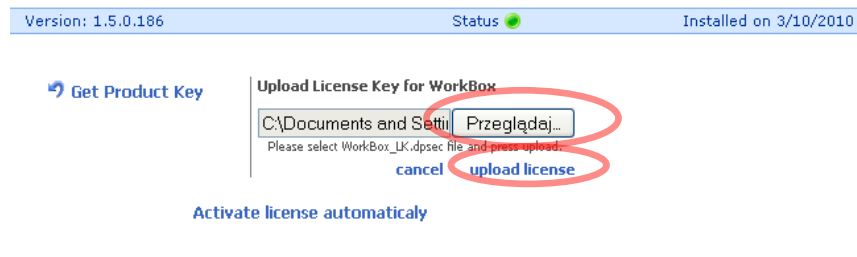
Per server – that is for every front end web server at which MOSS 2007 is installed or WSS 3.0 service is running (in the SharePoint farm on which SCP is to be installed). Server is a physical hardware system available to run server software.

License keys


#	Description	Issue Date	
# 1	SERVER01	3/8/2010	get license key

Before downloading the license please make sure you have installed latest version of Workbox. License will work only with latest version of Workbox.

6. Activate product with license key
 - a. Return to *License Management* page and click the “Set License Key” button. Browse for the license key file and click the “Upload license” link.



- b. If provided license key is valid for this product, license status will change to “Valid License Key”.

Workbox	
Licensing information	
License status	 Valid License Key
License Id*	111
License type	Unlimited

- c. If provided license key is invalid – for example product key used to generate license key was generated from another server farm or trial has expired, license status will change to “Not valid License Key” and product status will change to “not valid”.

Note: Workbox workflows will deploy and start if product status is “Not valid”.

2.5 Feature activation

WARNING: If the Workbox feature is not activated on a given site, users will not be able to launch actions and define workflows. Newly created workflows will be suspended.

If during the setup you have checked the “Activate Workbox on all sites on all site collections on selected web applications” option, the Workbox feature will be active after completing installation, so you can use the application right away.

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

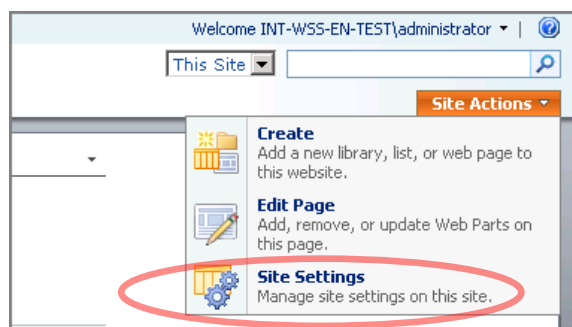
If the feature has been deactivated, or the setup was unable to activate the feature, you need to activate it before you can use Workbox.

If you don’t see the link to Workbox administration in the SharePoint list settings menu, then most likely you need to activate it for the site collection that hosts the list.

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

To activate the feature:

1. Go to the site’s administration page. Choose “Site settings” from the “Site actions” menu on the top-right side.



2. On the site’s “Site Settings” page click the “Site features” link in the rightmost column with “Site Collection Administration” header.

Team Site > Subsite > Site Settings

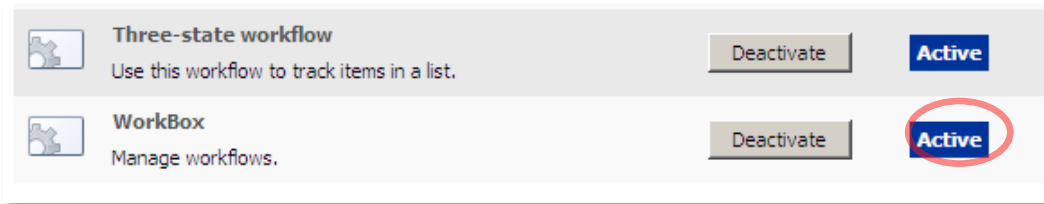
Site Settings

Site Information

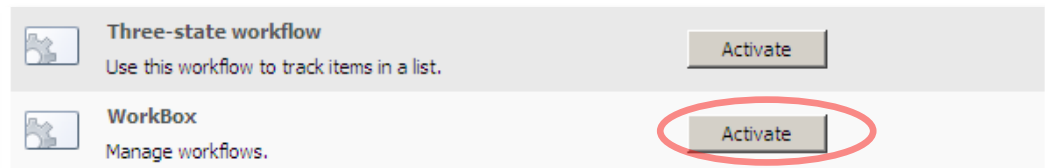
Site URL:	http://int-wss-en-test/subsite/
Mobile Site URL:	http://int-wss-en-test/subsite/m/
Version:	12.0.0.6219

Users and Permissions	Look and Feel	Galleries	Site Administration	Site Collection Administration
<ul style="list-style-type: none">People and groupsAdvanced permissions	<ul style="list-style-type: none">Title, description, and iconTree viewSite themeTop link barQuick LaunchSave site as templateReset to site definition	<ul style="list-style-type: none">Master pagesSite content typesSite columns	<ul style="list-style-type: none">Regional settingsSite libraries and listsSite usage reportUser alertsRSSSearch visibilitySites and workspacesSite featuresDelete this site	<ul style="list-style-type: none">Go to top level site settings

3. Check if the status of Workbox is “Active”.



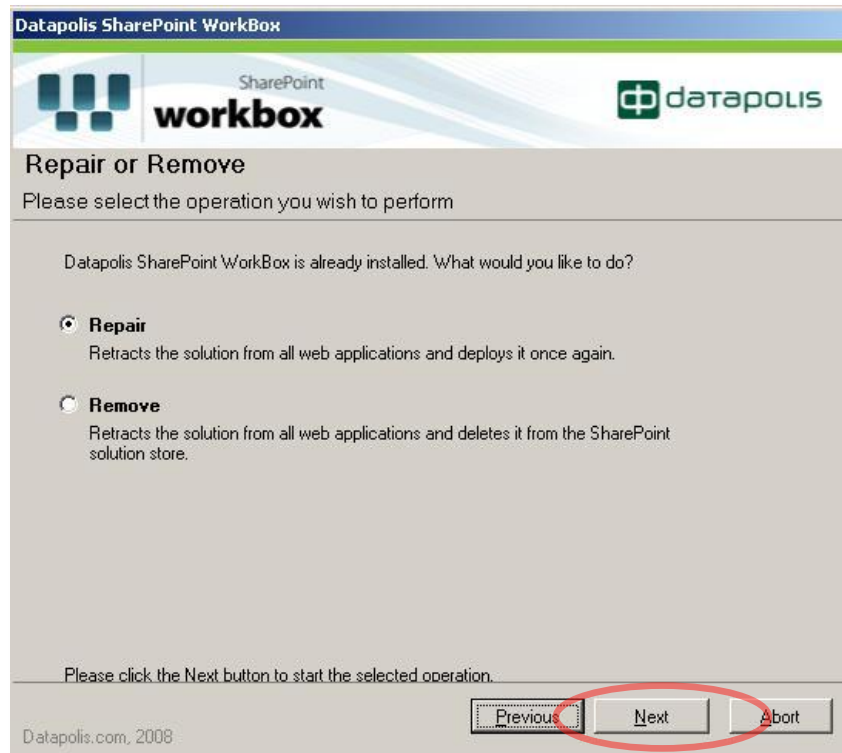
4. If the feature is not active, click the “Activate” button to activate the Workbox feature.



2.6 Repairing/removing Workbox

If by any reason - deleted files, version upgrade or malfunction - you want to repair Workbox installation, run the Setup application, as described in the “Installation” chapter above.

1. After all configuration checks are completed (paragraph 5 in the “Installation” chapter) you will enter the “Repair or Remove” screen:



2. To repair the 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 environment. 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. You can do this with SharePoint Designer.

3 Troubleshooting

If any errors or other issues occur, please visit the Workbox Team blog at <http://blogs.datapolis.com.pl/Workbox/>. This site contains a list of known bugs and solutions to common issues. There you can also find additional information about Workbox's new features and development trends.

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

Workbox has reached production phase. While its base functionality is fully tested and stable, we are constantly adding new functionalities with each release. We strongly recommend you to register on <http://partner.datapolis.com.pl>, where you will be able to easily track latest Workbox releases. Also, you will be able to get additional Workbox materials and to try our on-line demonstration environment with latest version of Workbox.

3.1 Known errors

Please visit the following web page for a list of known errors and possible solutions <http://blogs.datapolis.com.pl/workbox/Lists/Known%20errors/AllItems.aspx>.