OrgChart Now
Server Setup Guide

OfficeWork Software LLC

OrgChart Now Server Setup Guide

Intended Audience: Certain OrgChart Now customers choose to install OrgChart Now as an **on premise solution**. This document is not relevant to customer using the cloud service.

Introduction: This document details how to set up the base server for OrgChart Now. <mark>This document is recommended for someone who is already has some experience with Windows Server 2012.</mark>

Before you begin:

1. Request a DNS name from your system administrator. For example, 'orgcharts.mycompany.com'
2. Make sure the DNS is mapped to your server's IP address (your system administrator can do this)
3. Request an email from your IT department. This address will be used for sending support emails (such as password resets). The email address should be something like orgcharts@mycompany.com.
4. Make sure OfficeWork Software (or distributor) has supplied you with a link to installer files and a software key. Contact orgchartnow@officeworksoftware.com for more information.

Optional: You may want to install Google Chrome on your server to make downloading files easier – See **Install Google Chrome** section at the end of this document.

Remote Login

5. From your computer, Remote Login to your Server

Install IIS and Components

6. If 'Server Manager' is not already running, launch it.
7. Click on the 'Manage' menu
8. Select 'Add Roles and Features'
   a. On the 'Before You Begin' screen click [Next] (**Note:** This screen may not be shown for some configurations).
   b. On the 'Installation Type' screen make sure the 'Role-based or feature-based installation' radio button is selected and then click [Next]
   c. On the 'Select destination Server' screen make sure your server is selected and click [Next]
   d. On the 'Select Server Role' screen:
      i. Check the 'Web Server (IIS)' option
      ii. You may be prompted with 'Add features that are required for IIS' - If so, [Click Add Features]
      iii. Click [Next]
   e. On the 'Select features' screen click [Next]
   f. On the 'Web Server Roles (IIS)' screen click [Next]
   g. On the 'Role Services' Screen

    iv. Expand 'Application Development' section
      1. Check the 'CGI' option
    v. Click [Next]
  h. On the 'Confirmation Screen' click [Install]
  i. When installation is complete, click [Close]. If installation fails, contact your IT Administrator for guidance (you have a site specific issue).

Install Python

9. Download Python
  a. Go to the web site: https://www.python.org/download/releases/2.7.8/
  b. ==DO NOT DOWNLOAD 2.7.10 (The newest version) – it contains a bug that causes issues==
  c. Download version 2.7.8 of Python (Typically 'Windows X86-64 MSI Installer (2.7.8)' if running on a 64 bit server)
10. Install Python
  a. After download is complete, click (or double click) on the file 'python-2.7.X.msi'
  b. Click 'Run' when prompted
  c. Select 'Install for all users' [Next]
  d. Select 'Destination Directory' screen- Make sure 'C:\Python27\' is set for the directory – Click [Next]
  e. Customize screen – Click [Next]
  f. Click 'Finish'
11. Add Python entry to the PATH Environment Variable
  a. Open File Explorer
  b. Right Click on 'This PC'
  c. Select 'Properties'
  d. Click on 'Advanced System Settings' (on the left)
  e. Click on the 'Advanced' Tab
  f. Click on 'Environment Variables…'
  g. Click on 'Path' (in the bottom list)
  h. Click Edit…
  i. In the 'Variable value:' text area. Add the following text: : ';C:\Python27' [Do not replace existing text – add to the end of the existing text]
  j. Click OK, Click OK, Click OK

Install GhostScript

12. Download and Install GhostScript
  a. Go to the website - http://www.ghostscript.com/download/
  b. Click on 'GhostScript 9.XX' under 'Postscript and PDF interpreter/renderer'
  c. Select 'Ghostscript GPL Release' in the Windows (64-bit) row
  d. Double click on the downloaded gs***.exe
  e. Click 'Run' when prompted
  f. Select default installer options as you proceed through the install wizard
  g. Make sure the ocn_config.xml is updated correctly (see Install OrgChart Now Application section below)

Install the OrgChart Now

13. Create the following folder on the C: drive
    a. OCNKeys
14. Copy the file 'ocn_config.xml' to the OCNKeys folder and modify as needed
    a. This file is supplied with the installer but must be modified as follows (using a text editor like notepad)
        i. Set <publink> to the web address (e.g. http://yourserver.com) of your server
        ii. Set <ghostpath> to the actual path to the ghost application
        iii. Set <applogin> to the address (e.g. yourserver.com) of your server
        iv. Set <emailsvr> to your email server address (e.g. smtp.yourserver.com)
        v. Set <emailaddr> to an email address that will be used as the from address for password resets
        vi. Set <emailpw> to the password for the email address
        vii. Set <emailname> to the name that will be associated with the email address (e.g. Org Chart Support)

        Note 1: If email authentication is not supported by your email server, add the following tag: <emailauth>0</emailauth>. Try this resetting your password (from the OrgChart Now login screen) – if you do not receive an email, you may need to set the 'emailauth' tag to '0'. Make sure to regenerate the configuration after updating the tag (See the section – 'Updating the OCN_Config.xml file').

        Note 2: If you don't have your DNS name you can use the IP address. When you do have a DNS name for your server, see the section – 'Updating the OCN_Config.xml file' Note: If you don't have an email address you can put in any valid placeholder string. See the section – 'Updating the OCN_Config.xml file' when you obtain the support email address.

    b. If you modify the 'ocn_config.xml' AFTER installation, you must run a python script
        viii. Launch Powershell (or similar)
        ix. Type 'cd "C:\OCNInstall" <return>
        x. Type 'python uregenconfig.py" <return>
15. Copy the 'ocninstall.zip' file to your server and unzip to your C: drive
    a. Delete the 'OCNInstall' folder from C:\ (if it already exists)
    b. Right click on the OCNInstall.zip file
    c. Select Extract All…
    d. Set the directory path to C:\ when prompted in unzip
16. Install Org Chart Now
    a. Launch Powershell (or similar)
    b. Type 'cd "C:\OCNInstall" <return>
    c. Type 'python uocninstall.py <version>" <return> [Check inside the OCNInstall folder to find the version] [Example: *python uocninstall.py OCN28*]
    d. Examine the output and see if the install completed successfully. If not, correct the issue and re-run the uinstallocn.py (see previous step). Usually the issues are related to the 'ocn_config.xml' file

17. Right click on the PXBin folder (on C:\) and select 'Properties'
    a. Select Security Tab
    b. Click Edit Button
    c. Click Add Button
    d. Type IUSR (Enter object names to select) [Click OK] – See Figure 1
    e. Give IUSR Full Permissions on the PXBin folder – See Figure 2

Install Python Modules

18. Install required Python modules using cmd shell
    a. Launch Powershell
    b. Type 'cd C:\OCNInstall\OCNXXX\PXApp\Modules' and hit return (where XXX is the version being installed [Use Windows Explorer if you need to find the exact path])
    c. Type 'python ez_setup.py' and hit return
    d. Type 'cd xlrd-X.X.X' and hit return (replace X.X.X with actual version)
    e. Type 'python setup.py install' and hit return
    f. Type 'cd ..' and hit return
    g. Type 'cd xlwt -X.X.X' and hit return (replace X.X.X with actual version)
    h. Type 'python setup.py install' and hit return
    i. Type 'cd ..' and hit return
    j. Type 'cd requests -X.X.X' and hit return (replace X.X.X with actual version)
    k. Type 'python setup.py install' and hit return
    l. Type 'cd ..' and hit return
    m. Type 'cd httpagentparser -X.X.X' and hit return (replace X.X.X with actual version)
    n. Type 'python setup.py install' and hit return
    o. Type 'cd ..' and hit return
    p. Type 'cd suds -X.X.X' and hit return (replace X.X.X with actual version)
    q. Type 'cd ..' and hit return
    r. Type 'python setup.py install' and hit return
    s. Type 'cd chardet-X.X.X' and hit return (replace X.X.X with actual version)
    t. Type 'python setup.py install' and hit return
    u. Type 'cd ..' and hit return
    v. Type 'cd pypyodbc-X.X.X' and hit return (replace X.X.X with actual version)
    w. Type 'python setup.py install' and hit return
    x. Type 'cd ..' and hit return
    y. Type 'cd defusedxml-X.X.X' and hit return (replace X.X.X with actual version)
    z. Type 'python setup.py install' and hit return
19. Install PIL
    a. In Windows Explorer, navigate to the folder "C:\OCNInstall\OCNXXX\PXApp\Modules'
    b. Double click on 'Pillow-2***' installer
    c. Install on your server using the standard install wizard settings

IIS Setup

20. If 'Server Manager' is not already running, launch it.
21. Click on the 'Tools' menu
22. Select 'Internet Information Services'
23. Expand the icon for your server (triangle to the left of your server name – on the left). **Note:** If prompted to get started with Microsoft Web Platform, select 'Do not show this message' and then select 'No'
24. Expand 'Sites'
25. Right click on 'Default Web Site' and Select 'Remove' (answer Yes to 'Are you sure?' message)
26. Right Click on 'Sites' and select 'Add Website'
27. Select 'Add WebSite…' (Right Click on Sites)
    a. Set Site name to OrgChartNow
    b. Set Physical Path to - 'C:\PXApp'
    c. Host Name: *<Host name> (See DNS Bindings section below if you want to set the DNS name later) – Can be left blank if needed*
    d. Click 'OK'
       NOTE: If you want https setup you must install an SSL Certificate on your server. See you system administrator to obtain a certificate. Look for the *SSL Certificate Installation Guide* on the https://orgchartpro.com website for additional instructions.
28. Select OrgChartNow (in IIS) and then double click on 'Handler Mappings'
    a. Select 'Add Script Map…' (on the right)
    b. Set Request path to '*.py'
    c. Set Executable to 'C:\Python27\python.exe -u %s'
    d. Set Name to 'Python'
    e. Click OK
    f. Click 'Yes' if prompted about 'ISAPI Extensions…'

Set Default Document

29. If 'Internet Information Services' is not running do the following:
    a. If 'Server Manager' is not already running, launch it.
    b. Click on the 'Tools' menu
    c. Select 'Internet Information Services'
30. In IIS, select 'OrgChartNow' site (on the left under Sites on the left)
31. In IIS, click on Default Directory Icon
32. Click Add… (on the right)
33. Type 'login.html' and click OK

Installation is complete!

Test by launching your browser and typing http://<yourserver>.com – this should launch OrgChartNow (showing the login screen).

Setting a DNS Name in IIS (for OrgChart Now)

Note: Perform these steps if you need to change or set the 'Host Name' for OrgChart Now

1. If 'Internet Information Services' is not running do the following
   a. If 'Server Manager' is not already running, launch it.
   b. Click on the 'Tools' menu
   c. Select 'Internet Information Services'
2. In IIS, right click on the 'OrgChartNow' site (on the left under Sites on the left)
3. Select 'Edit Bindings…' (See Figure 3)
4. Select 'Edit'
5. Type in the host name (See 'Before you begin' section at the top of this document)

Updating the OCN_Config.xml file (After Installation)

Note: Perform these steps if you need to update the 'OCN_Config.xml' file

1. Update 'OCN_Config.xml' as needed (in the C:/OCNKeys folder)
2. Save 'OCN_Config.xml'
3. Run Powershell
4. Type 'cd C:\OCNInstall'
5. Type 'python uregenconfig.py'

Install Google Chrome (Optional)

1. Launch Internet Explorer
2. Go to – http://google.com/chrome
3. Internet Explorer may block accessing the google site. **Note**: Sites you need to add trusted site may vary based on your location (for example: *.google.com.au for Australia).
   b. Add 'http://*.google.com' to trusted sites
   c. Add 'https://*.google.com' to trusted sites
   d. Add 'http://www.gstatic.com' to trusted sites
   e. Add 'https://www.gstatic.com' to trusted sites
4. You can ignore the any other site requests (click 'Close')
5. Once the chrome page is up, Click 'Download now' and then 'Accept and Install' to install Google Chrome. Click 'Run' when prompted.
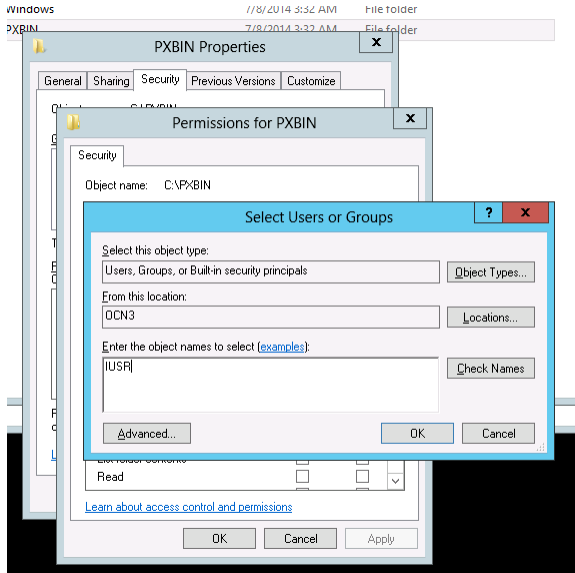**Note**: Before you exit Internet Explorer, you may want to delete all added entries from trusted site in order to return to default IE setting.
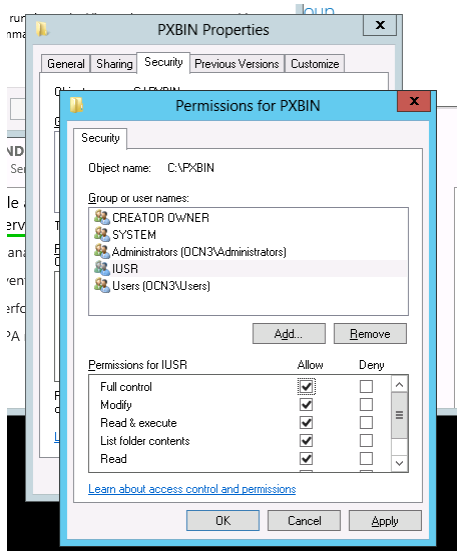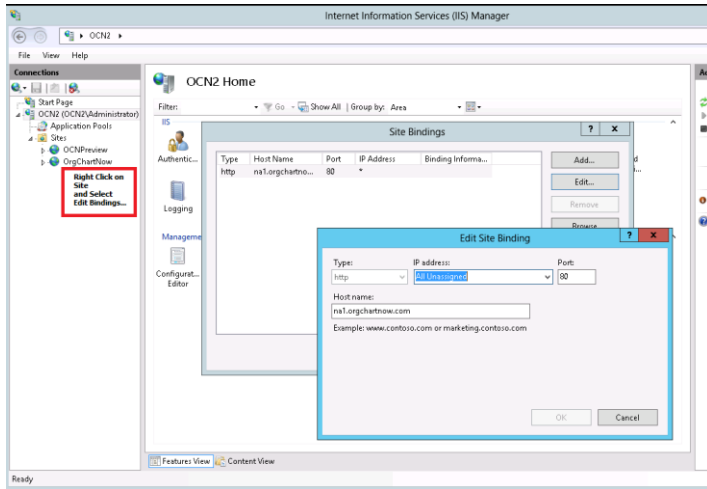
Figure 1

Figure 2

Figure 3