Workgroup Edition

Server Manager Guide

Version 1

11th November 2008

The purpose of this User Guide is to help you install Ezidoesit Workgroup Edition and start using the software quickly.

There is further help on the Ezidoesit website at www.ezidoesit.com.

Ezidoesit Workgroup System Requirements

Ezidoesit Workgroup Edition is an add-on software component to Ezidoesit Professional. Workgroup Edition will not run without Ezidoesit Professional being first installed.

Installation Instructions
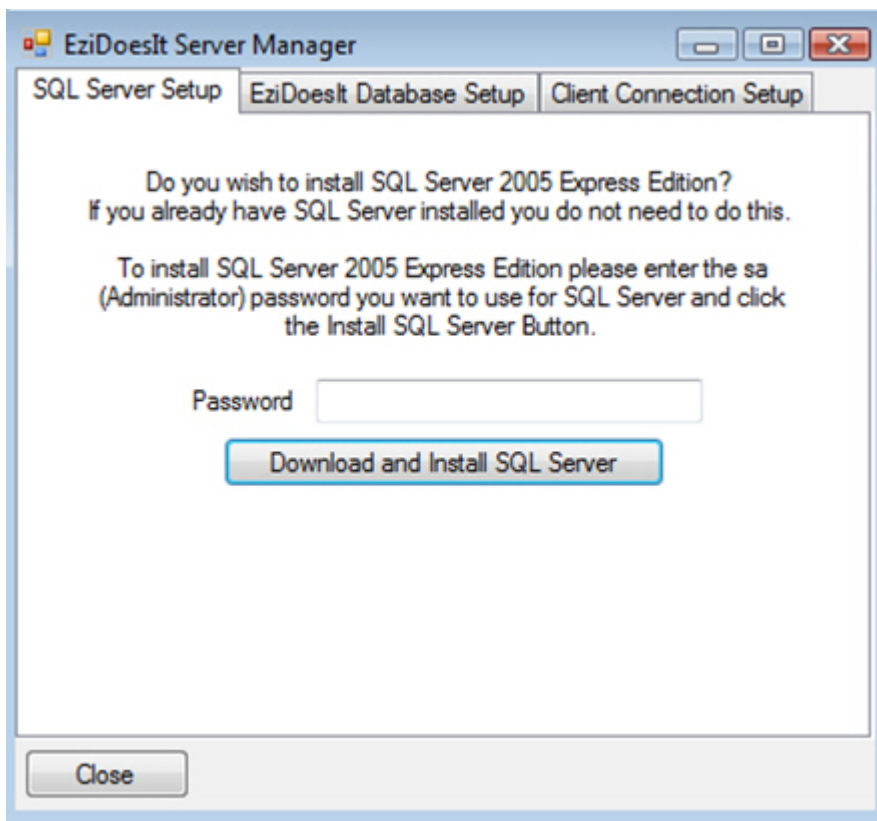
Ezidoesit Workgroup Edition Server Manager

The install of Ezidoesit Server Manager should be run on the server where SQL Server is installed and the Ezidoesit database will be created.

The Server Manager install will install the Microsoft .NET Framework 2.0 and Windows Installer 3.1 prerequisites if they are not already installed on the server.

Once the above prerequisites are installed, the Ezidoesit Server Manager is installed along with the install files for Ezidoesit for Outlook 2003 and 2007 and the Team Management Client (this is so these programs can then be installed from a server location onto individual workstations)>
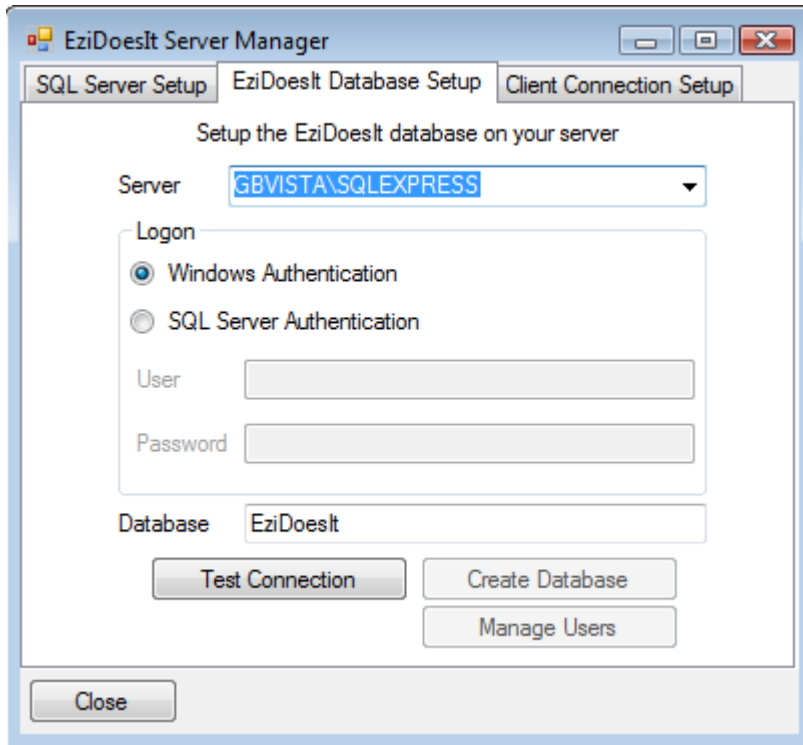
Ezidoesit Server Manager

This tool is used to configure the Ezidoesit database.

This first tab has an option to download and install SQL Server 2005 Express Edition if the user wants to. If they already have SQL Server installed then this is not necessary.

Ezidoesit Database Setup

The Ezidoesit Database Setup Tab allows the user to configure the database.

The Server dropdown will be filled with the instances of SQL Server that are currently installed on the server which the user can pick from.
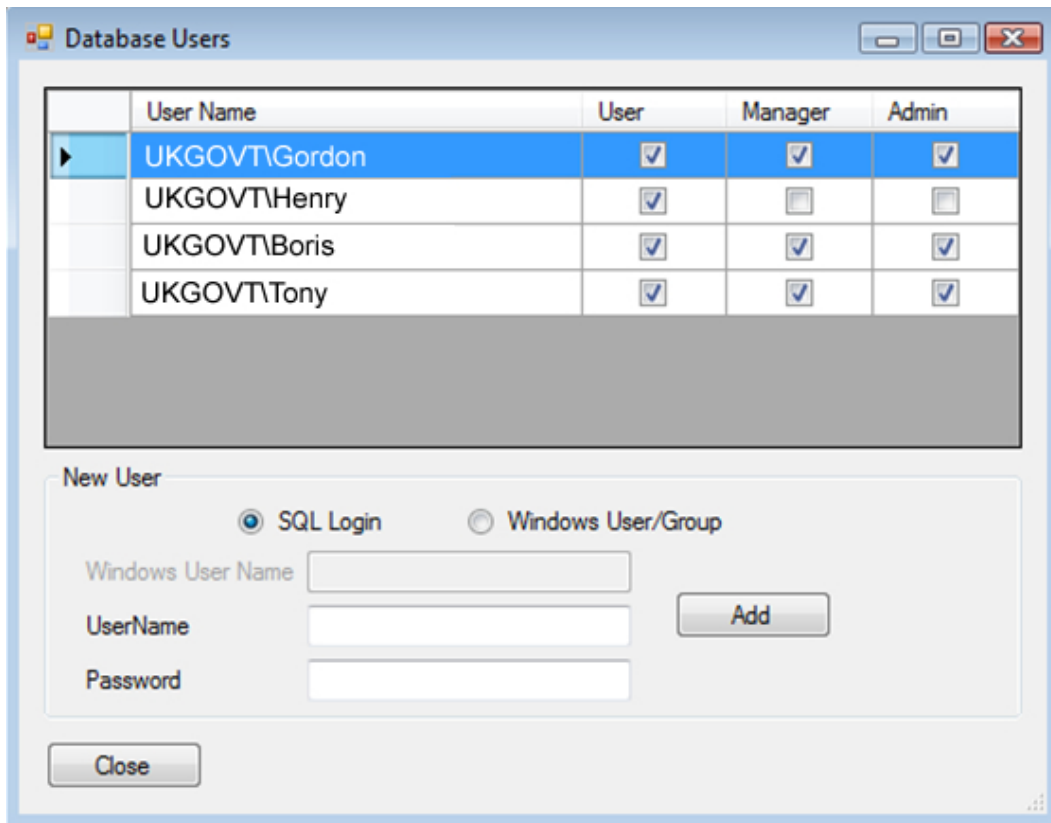If the SQL instance they wish to use is not listed then they can type in the correct instance.

The database name is filled with Ezidoesit by default but can be changed to whatever the user wishes.

Clicking on Test Connection will attempt to connect to SQL Server and check for the existence of the named database.

The results of that will enable the other buttons.

1. If the database does not exist the Create Database button will be enabled. Clicking this will create the database.
2. If the database does already exist then the Manage Users button will be enabled.
   Click on the Manage Users button to open the User Management form.

User Management

This screen allows you to add and remove access to the Ezidoesit database. The users/groups that have access are listed in the table.

All users have User level access – this allows them to use the Ezidoesit client connected to this database.

In the screenshot above the UKGOVT\HENRY windows group has User access so all members of this group have user access to the database.

Manager access gives the user access to the Reports section in the Team Management Tools.
Admin access gives the user access to the Setup section of the Team Management Tools.

The Manager and Admin options can be configured independently of each other so you can have users who set up the teams/projects but cannot actually see any of the reports and users who can run the reports for the teams/projects they have access to but cannot change the team/project settings.

To remove a user, select the user in the table and either right click and select delete from the context menu or press the delete key.
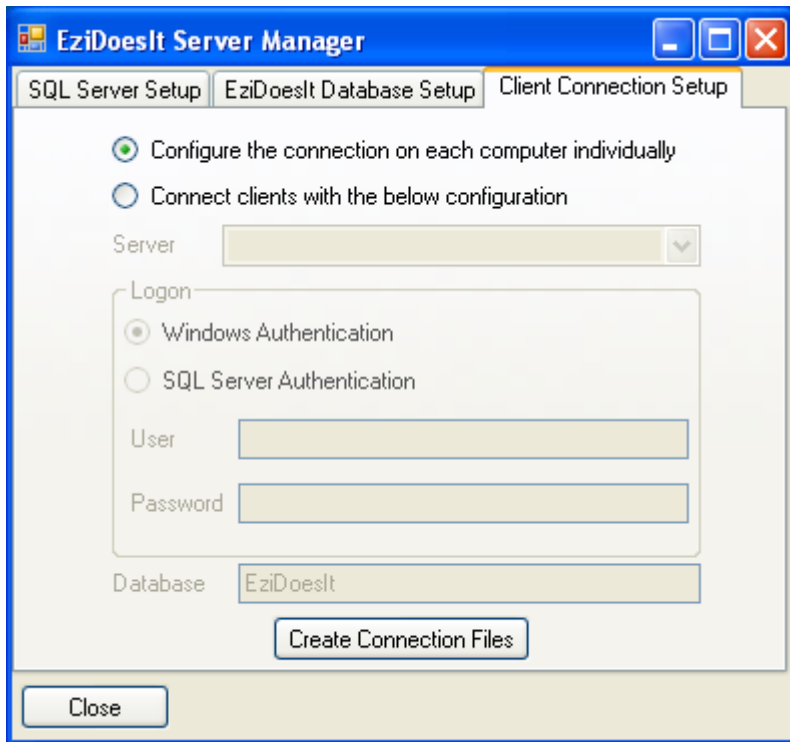
To add a new SQL Login, enter the username and password then click on Add.
The new user will appear in the table with User access.

To add a new Windows User/Group enter the Domain\Username and click on add.

When setting up Teams and Projects in the Team Management tool the individual users need to be linked to their respective SQL login details configured here to allow the security in the database to correctly identify the records that a specific user has access to.

Client Connection Setup

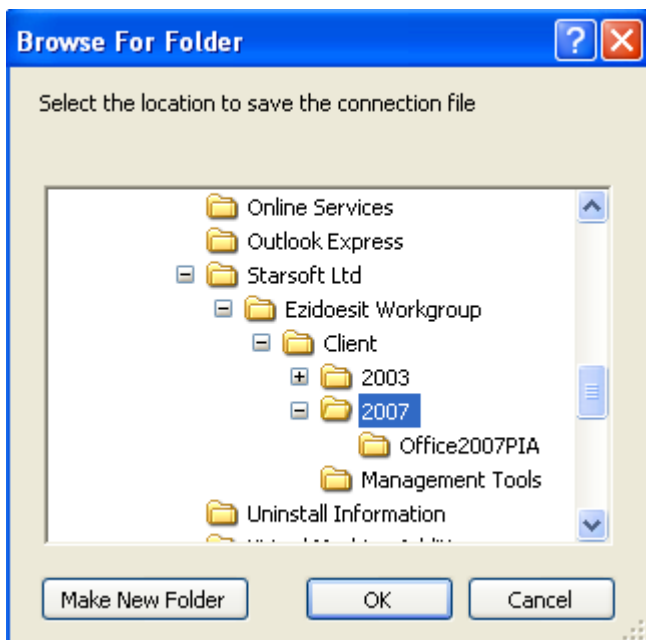This tab is used to create the connection files used by the client installs

Using this page you enter the details of how the clients connect to your database.
Enter the SQL connection details and click on "Create Connection Files".
A dialog pops up asking you where to save the connection file.
Select the location where the install files for the Ezidoesit client are located.

If you select "Configure the connection on each computer individually" then the user will be asked for database connection details the first time Ezidoesit is run on their computer.
If you have entered any other details then Ezidoesit will use those connection details when it is run.

At any time you can create a new connection file and copy it to the "C:\Program Files\Starsoft\Ezidoesit" folder on a client machine to change the Ezidoesit connection information.

If multiple people are going to be logged into the same computer and using Ezidoesit then it is recommended that the SQL connection is configured to use Windows Authentication or the connection is configured on each computer individually.

Different users should connect with their own usernames and passwords at all times to enabled the database security to function correctly.