



FileOnQ™  
**Desktop™**

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**Installation & Administration Guide**



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## About This Guide

This guide shows you how to install and configure the FileOnQ Database and Desktop software. It is assumed that you are familiar with Microsoft SQL Server and the Windows operating system, as well as concepts related to computer networks and security. It is also assumed that Microsoft SQL Server is already running in your environment. For information on SQL Server installation and setup, see your SQL Server documentation.

The installation procedure consists of the following 10 steps.

- Step 1: Verify Server and Client Requirements ..... 4
- Step 2: Install an OnQ Database on your Server ..... 5
- Step 3: Install the FileOnQ Portal Administrator (New Installations Only) ..... 7
- Step 4: Install OnQ Administrative Tools (New Installations Only) ..... 8
- Step 5: Create an OnQ Application ..... 9
- Step 6: Enable Access to the OnQ Application ..... 11
- Step 7: Request and Apply the License..... 13
- Step 8: Install OnQ Desktop Software ..... 15
- Step 9: Install Peripheral Hardware to Use with FileOnQ ..... 16
- Step 10: Install Optional Modules ..... 17

## Overview of the OnQ System

The OnQ system is a 32-bit, Windows-compliant application that uses Microsoft SQL Server as its backend database. It is often used in conjunction with peripheral hardware such as barcode scanners. The OnQ system may include the following optional modules:

**eDocs:** Electronic documents stored in a SQL database repository.

**WebView:** A browser-based application that runs on Internet Explorer version 6.x and later. It is a .NET application that runs on an Internet Information Services (IIS) server.

**MobileOnQ:** An application that works in conjunction with Motorola's portable MCxx PDA to allow transactions from remote locations. The mobile device can use a wireless network or a 3G network. It runs by way of web services installed on your IIS server.

## **Step 1:**

# **Verify Server and Client Requirements**

Before you begin the installation procedure, make sure that the server and all client machines meet the minimum system requirements.

For server requirements, see [Server Hardware and Software Requirements](#).

For client requirements, see [Client Machine Requirements](#).

## Step 2: Install an OnQ Database on your Server

These instructions assume that Microsoft SQL Server is already running in your environment. For information on SQL Server installation and setup, see your SQL Server documentation.

Two options are available for installing an OnQ database:

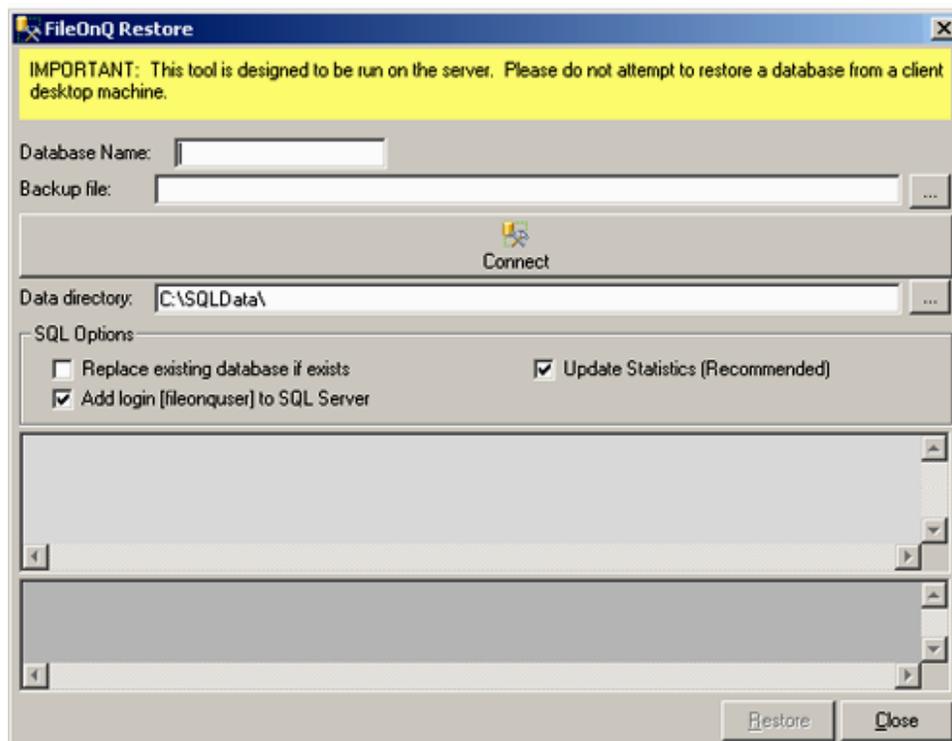
- Restore an existing OnQ database and install it on your SQL Server machine.
- Create a new, empty database.

### OPTION 1: Use the DBRestore utility to restore an existing OnQ database on your SQL Server machine

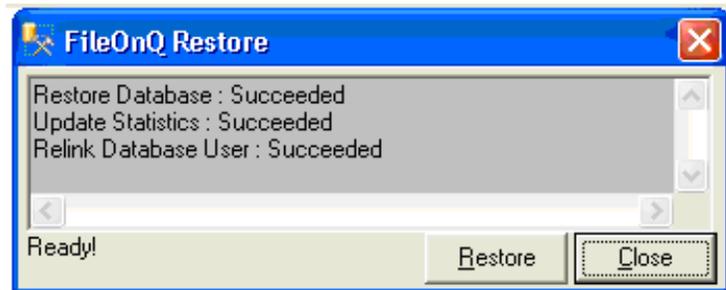
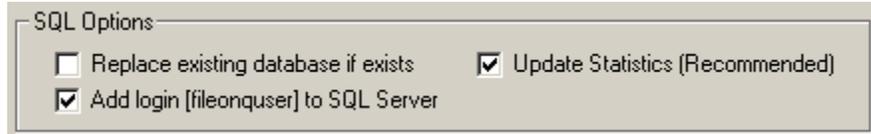
Use this option if FileOnQ technical support created your OnQ database and supplied a database backup file. You can also use this option if you want to copy your existing OnQ database as a starting place for deploying a new database, or if you are splitting your first database into two.

The DBRestore utility creates an SQL script and allows you to run the SQL statements directly from the utility. Alternatively, you can copy the SQL script and run it with SQL Server Management Studio to make modifications, such as changing the user name.

1. Move the backup file to the SQL Server machine. The file must physically reside on this server.
2. Download the DBRestore utility (DBRestore.exe, 84.0 KB) from the following link:  
<https://www.onlinefilefolder.com/2sk8ZbNWK511aF>
3. Run DBRestore. The **FileOnQ Restore** window appears.



4. In the **Database Name** field, type a name for the new database.
5. Click the first ellipsis button to browse to the database backup file. 
6. Click the **Connect** button to establish a connection with the SQL Server.  
A login window appears. Supply the server name and the System Administrator (sa) login and password. Click **OK**.
7. If you are running the DBRestore utility to replace an earlier installation of the OnQ database, select the **Replace existing database if exists** check box. Otherwise, keep the default settings.
8. Click **Restore**. Watch for messages that indicate a successful restoration. Click **Close**.



## OPTION 2: Create a blank OnQ database for a new project

Use this option to create a new, empty OnQ database. It will not contain any fields for user data. After you finish the installation procedure, use the OnQ Profiler to define all user fields.

The install files received from FileOnQ include an installation script that will build an empty OnQ database.

**NOTE** You must use an installation script that is compatible with the version of your database. Send an email message to [support@fileonq.com](mailto:support@fileonq.com) to get the correct script to run on your server. Include the version of your OnQ Desktop software, which appears at the top of your login screen.



## Step 3: Install the FileOnQ Portal Administrator (New Installations Only)

The installer file package from FileOnQ includes a SQL script to install the Portal Administrator on your SQL Server machine.

If you have previously installed an OnQ (version 6 or greater) database, the FileOnQ Portal Administrator is already installed on your SQL Server machine. This step is required only if this is the first OnQ database ever installed on your system, or if you are establishing another administrative entity for an OnQ database that will not be accessed by current OnQ users.

1. In the FileOnQ installer file package, find the SQL script for installing the Portal Administrator, and then run the script from SQL Server Management Studio.
2. Configure the access to this program: go to C:\Program Files\FileOnQ\FQPortalAdmin and open the FQPortalAdmin.exe.config file with a text editor.
3. Type the correct values for dbportalserver, dbportaldbname, dbportaldblogin, and dbportaldbpassword. Save and close the file.

```
<?xml version="1.0"?>
<configuration>
  <appSettings>
    <add key="dbportalserver" value="sqlserver2" />
    <add key="dbportaldbname" value="fqportal" />
    <add key="dbportaldblogin" value="fileonquser" />
    <add key="dbportaldbpassword" value="passpass" />
    <add key="APPWINAUTHCSTemplate" value="Data Source={0};Initial Catalog={0};User ID={0};Password={0};" />
    <add key="APPSQLAUTHCSTemplate" value="Server={0};Initial Catalog={0};User ID={0};Password={0};" />
    <add key="PORTALSQLCSTemplate" value="Server={0};Initial Catalog={0};User ID={0};Password={0};" />
  </appSettings>
  <startup>
    <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.0" />
  </startup>
</configuration>
```

## Step 4: Install OnQ Administrative Tools (New Installations Only)

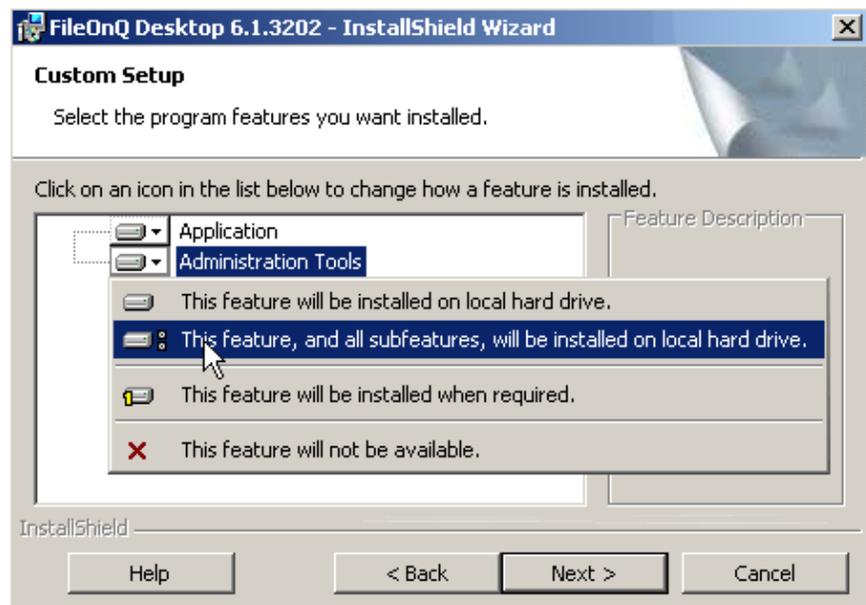
If you have previously installed an OnQ database, the administrative tools are already installed on a PC in your environment. This step is required only if this is the first OnQ database ever installed on your system, or if you are establishing another administrative entity for an OnQ database that will not be accessed by current OnQ users.

The installer file package from FileOnQ includes one installer (FQDesktopxx.msi). This file installs the Desktop Client and the administrative tools.

1. Locate the .msi file from the FileOnQ installation files.



2. Double-click the .msi file, click through the first few screens of the Setup wizard, and then select **Custom Setup**. For both the application and the administration tools, select **This feature, and all subfeatures, will be installed on local hard drive**. Do not use the default (with the red X in the window), which skips the administrative tools.
3. Click **Next** through the rest of the installer windows, and use the defaults for the remaining settings.



After the installation is complete, you should see a **New Programs Installed** message on your Windows Start menu. The FileOnQ folder will contain the Desktop, Administrator, and Profiler programs.

## Step 5: Create an OnQ Application

You use the Portal Administrator to create an OnQ application.

1. Click **Start > FileonQ > FQPortalAdmin > FileonQ Portal Administrator**.  
The Portal Administrator dialog box appears.

2. Click the Create a new Application icon, located at the upper-left corner of the window.  
The **Application** dialog box appears.



3. Enter values into the following fields and click **OK**:

- **Application Name:** Enter a unique name for the application.
- Select the **Active** check box. If you are licensed for and want to enable web browser access (WebView), select the **Enable Web Access** checkbox.
- If you want to use Active Directory to define and maintain security groups, select the **Use Active Directory for application authentication** checkbox.
- **Server Address, Database Name:** Enter the machine name of the server, and the name of the OnQ database that you created or restored in Step 2 on page 5.
- **Login, Password:** Enter login credentials.

**Application**

Application Name :

Active

Enable Web Access

Use Active Directory for application authentication

**SQL Server Database**

Connection String Template :

Server Address :

Database Name :

**Authentication**

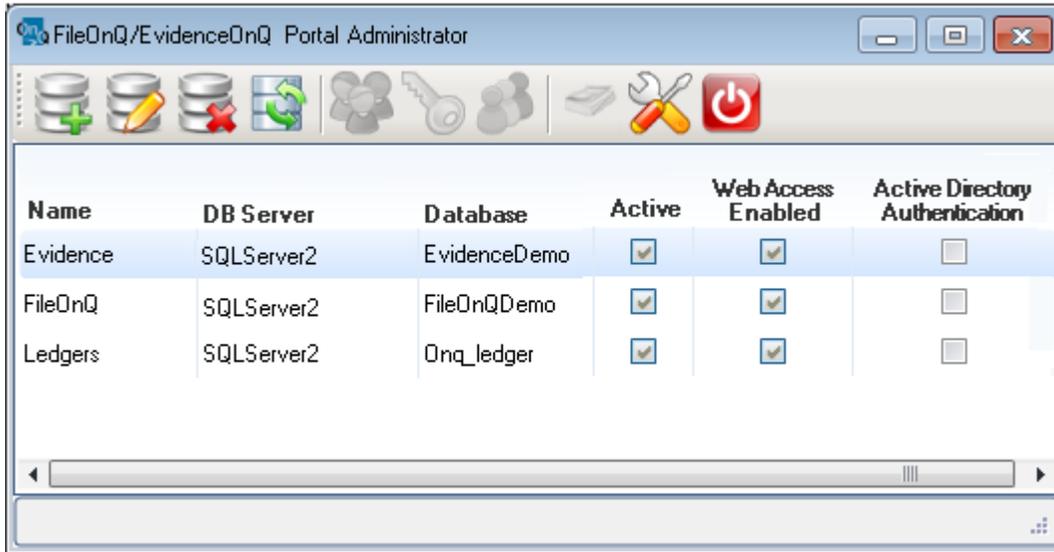
Use Windows Authentication Mode

Login :

Password :

OK Cancel

The new application now appears on the **Portal Administration** dialog box.



## Step 6: Enable Access to the OnQ Application

When client Desktop users log into an OnQ application, the system reads a file called ServerProfiles.xml. This file identifies the location of the Portal Administrator, which maintains your site's OnQ application and the credentials required for users to access it.

If your organization uses more than one OnQ application, users indicate which application they want to log into by choosing it from the **Connection Profile** drop-down list on the **Login** window.

The screenshot shows a login form with the following fields:

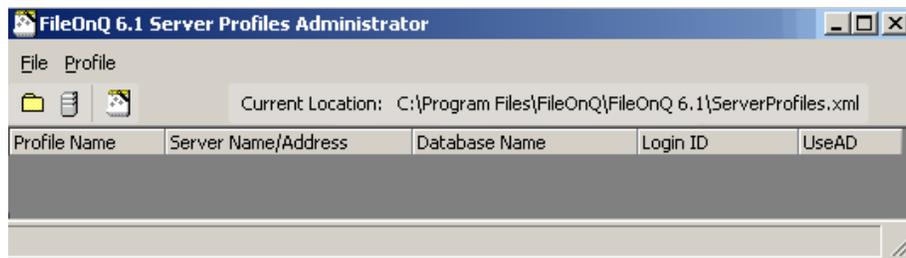
- Connection Profile:** A dropdown menu with 'Evidence' selected. The dropdown list is open, showing 'Evidence' and 'Ledgers'.
- User ID:** A text input field.
- Password:** A password input field.

Your workstation's C:\Program Files\FileOnQ\FileOnQ <version> folder contains a default ServerProfiles.xml file. You must edit it, by using the FileOnQ Server Profiles Administrator (Admin Tool), to point to the Portal Administrator.

1. From the Windows Start menu, start the FileOnQ Administrator application.  
A login screen appears.
2. Log in with **fileonqadmin** as your initial login.  
FileOnQ Support will provide your initial password.  
Click **OK**.  
The Admin Tool launches.

The screenshot shows the 'Admin Tool Login' window with the following fields:

- Login ID:** A text input field containing 'fileonqadmin'.
- Password:** A password input field containing '\*\*\*\*'.

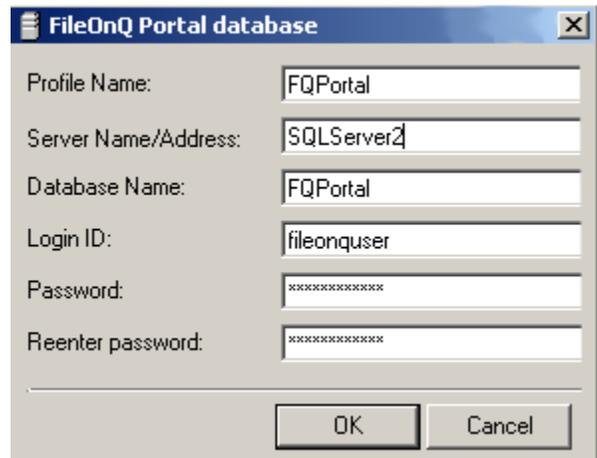


3. For a new installation, you should select a network location to store the ServerProfiles.xml file. To set the location, from the Admin Tool, select **File > Change Location**, and then specify the network location.

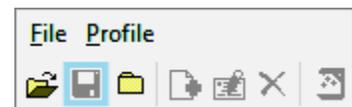


- From the Admin Tool, select **File > Edit Portal** to edit the ServerProfiles.xml file. The **FileOnQ Portal Database** window appears. Edit the fields as follows:

- Profile Name:** Descriptive name to identify the application. If your site maintains more than one OnQ application, this is the name that will appear in the **Connection Profiles** drop-down menu when users log in.
- Server Name/Address:** Machine name and static IP address of the SQL Server machine. If there is an instance specified on your server, you must include that instance name in this field.
- Database Name:** Enter the value **FQPortal**.
- Login ID:** Enter the value **fileonquser**.
- Password:** Supplied by FileOnQ Support in the DBRestore utility or by your database administrator.



- Click **OK**. Click the **Save** icon.



## Step 7: Request and Apply a License

Every OnQ application must be licensed. A new OnQ application will function with no license—in “demo mode”—until the database contains 50 records. At that time, you must load a valid license file.

After you request a license file, FileOnQ sends you an encrypted license file as an attachment to an email message. The filename extension for the license file is .lic.

### Request a License File

1. From the Windows Start menu, log into the Admin Tool.
2. From the Admin Tool, click the profile name that you are requesting a license for.



3. Click the Administer Application icon .  
Or,  
From the menu at the top of the window, select **Profile > Administer Application**.  
A login window appears.
4. Log into the application. The login ID is **System**. The password is supplied by FileOnQ support.
5. Click the **Request License** button on the right side of the window that appears.  
The **License Request** window appears.



6. Fill out the fields with your information. Click **Request**. Save the request file with a meaningful name and the extension **.req**.

7. A message tells you that a request file has been created. Send an email message to [License@fileonq.com](mailto:License@fileonq.com) and include the request file as an attachment.

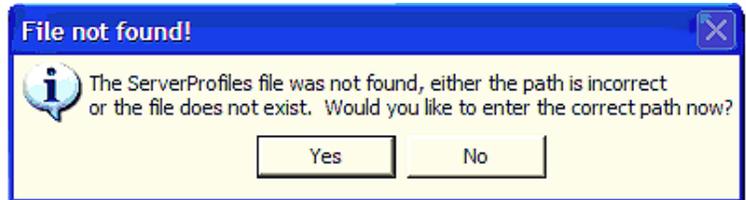
### Apply the License File

1. When you receive the email message that contains the license file, save it to a convenient location.
2. Sign into the FileOnQ Administration tool again, select the profile to apply the license to, and then click the **Administer Application** icon. 
3. Sign in and click the **Load License File** button. The **Select License File** dialog box appears.
4. Navigate to the location where you saved the .lic file, select the license file, and then click **Open**. You should receive a success message.

## Step 8: Install OnQ Desktop Software

All computers that need the Desktop software can install it from the FQDesktopxx.msi file, described on page 8. All of the default settings should be used, which means that the Administration Tools will not be installed. A Windows user with administrative permissions should perform the installations.

If you see an error message that says the ServerProfiles.xml file was not found, you must set the path to this file. From the Admin Tool, select **File > Change Location**, and then specify the network location.

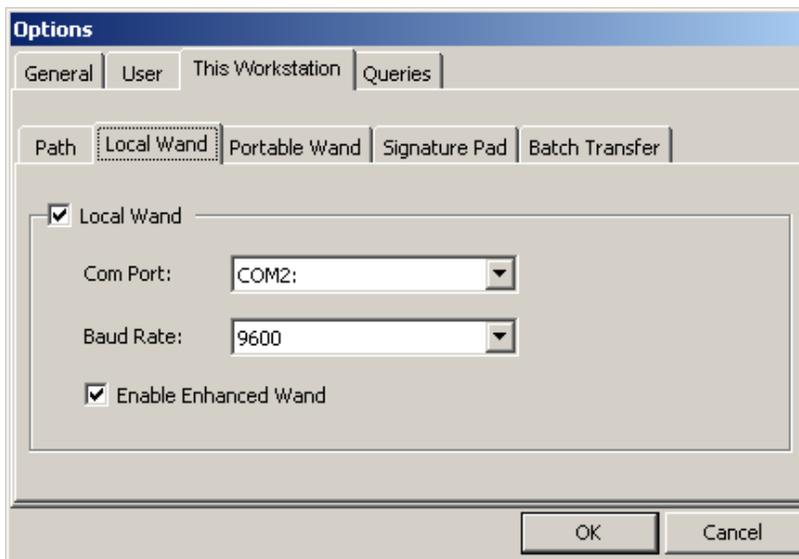


## Step 9: Install Peripheral Hardware to Use with FileOnQ

Any computer that has attached hardware—such as a barcode scanner or an electronic signature pad—must have those devices installed and configured while the administrator is still logged in.

For installation instructions, see the documentation provided with your hardware devices.

To configure hardware devices, from the main menu, select **Tools > Options > This Workstation**. Use the tabs to find the settings for the particular type of device you want to configure.



**NOTE** FileOnQ uses Windows printers, either locally attached or network printers. Although there is no setup inside FileOnQ for any printers, you may have received some configuration information about barcode label printers that will be useful in setting them up to work with FileOnQ.

## Step 10: Install Optional Modules

If your system includes eDocs or WebView, you must set up those optional modules.

### Install and Configure eDocs

With the bundled eDocs module, users can store electronic files in a SQL database repository. To enable this functionality, you must define at least one storage device and an associated SQL database.

1. Start the FileOnQ Administrator program and select the profile for the database to which you want to add the eDocs Repository. Click the **Administer the application** icon.
2. Log in to the database using administrator credentials.
3. From the window that appears, click **eDocs Manager**.



4. Select **SQLServer** and then click the **Add a new storage device under the selected connector** icon.



5. Assign a short name and a long name to the storage device. Click **OK**. The storage device now appears in the list under SQLServer.  
**NOTE** Over time, you might add multiple storage devices to an eDocs Repository. Consider an appropriate naming convention so users will be clear where documents are being stored.



6. Select the new storage device and click the **Configure Connector** icon.



7. You are asked whether you want to run the Database Create wizard. Click **Yes**.

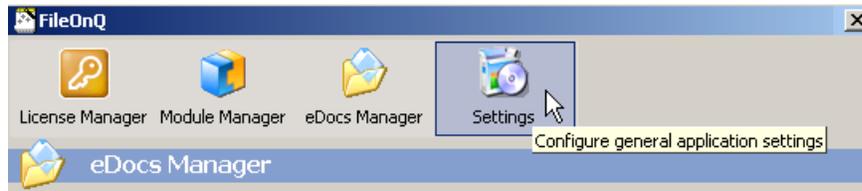
8. Enter the name (and instance if one exists) of the SQL Server that will host this repository. Enter the **sa** password for this SQL server. Click **Next**.

9. Complete the fields to define the database and the locations of the data and log files. Choose appropriate starting sizes for the data and log files. These will be set to grow automatically.

**NOTE** The User Login ID is usually the same SQL login that was established for the main FileOnQ database. If this eDocs Repository is on the same SQL Server, it is convenient to use the same SQL login and associated password.

10. Supply the full path to the DATA and LOG files for this database, the SQL login and password, and the initial file sizes.

11. Click **Create**. You will see the progress and completion messages in the window. Click **Close**.
12. The eDocs Connector Configurations window will be displayed with the previously chosen parameters. Click **OK**.
13. Click the **Settings** button to go to the FileOnQ database settings window.

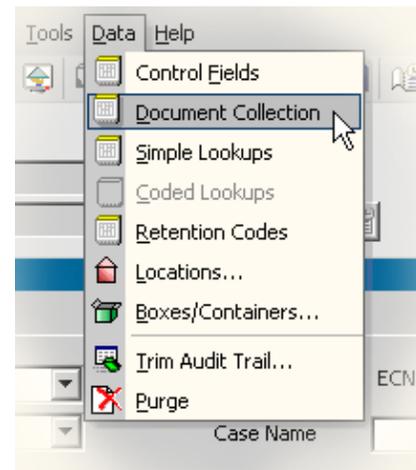
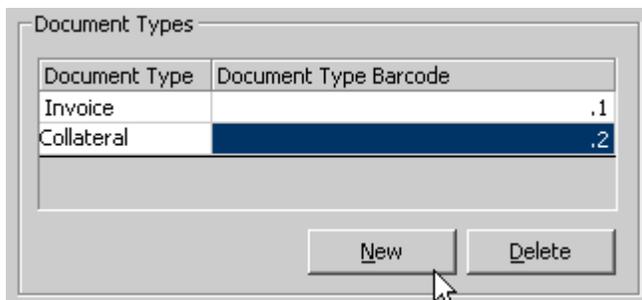


14. In the database settings window, make sure the **Document Tab Caption** field contains a value, such as "Documents". Also, we recommend that you select the **Auto-assign Document Barcode** check box. Save and close the FileOnQ Administrator.

Captions	Barcodes	Query Performance	Record Security	Features
Main Tab Caption :	<input type="text" value="Item Info"/>	Comments Tab :	<input type="text" value="Comment"/>	
Barcode Caption :	<input type="text" value="Barcode:"/>	Prompt Text :	<input type="text" value="Enter Barcode"/>	
Container/Box Prefix:	<input type="text" value="BOX"/>	Container Name :	<input type="text" value="Box"/>	
Document Tab Caption :	<input type="text" value="DOCUMENTS"/>	<input checked="" type="checkbox"/> Auto-assign Document Barcode		

15. You may choose to add document types to the FileOnQ application to organize the stored eDocs by category. An administrator can log in to FileOnQ and, from the **Data** menu, select **Document Collection**. The **Document Collection Maintenance** window appears.

16. To add new document types, click **New**. The system will supply consecutive decimal numbers to distinguish between the different types.



## Technical Support

### Need Assistance?

Please call (206) 575-3488 or (800) 603-6802 (option 4) for Technical Support.:

### Or send questions to:

[support@fileonq.com](mailto:support@fileonq.com)

### See us on the web at:

[www.fileonq.com](http://www.fileonq.com)

[www.evidenceonq.com](http://www.evidenceonq.com)