FACILIWORKS ESSENTIALS

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SOFTWARE LICENSE

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TECHNICAL SUPPORT

Local or outside US: +1 (480) 212-1257
Toll-free: 1-800-777-7020
M-F 8:00 a.m. to 5:00 p.m., MST

https://faciliworks.com/support/

Technical support cannot be provided unless the user has a current maintenance agreement.

TABLE OF CONTENTS

TRAINING

Learn how to save time, avoid common mistakes and get the most out of your software with FaciliWorks Essentials training classes. We offer online, regional and on-site training. Please visit https://faciliworks.com/training-schedule/ for detailed training information or contact us today at 1-800-776-3090 or training@cybermetrics.com for more information.

CHAPTER 1: SYSTEM REQUIREMENTS

WINDOWS INSTALLATION MINIMUM REQUIREMENTS

APPLICATION SERVER

- Windows Server 2016 64 Bit and later (Standard or Data Center)
- 1 GB free disk space
- 4 GB RAM (8+ GB Recommended)
- Microsoft IIS 10 or later with WebSockets enabled
    » Microsoft IIS and WebSockets (Will be installed by the installation if not previously installed)
    » IIS URL Rewrite Module (Will be installed by the installation if not previously installed)
- Valid SSL certificate
    » A self-signed certificate will be created by the installation if one is not provided.

NETWORK REQUIREMENTS

- Local Area or Wide Area Network (25 Mbps or better recommended)
- Internet connection* (required for product registration and license management)

*FaciliWorks can be installed in dark or Internet restricted sites with special licensing provisions.

DATABASE SERVER

MS SQL Server

- MS SQL Server 2012 or later (Microsoft SQL Express versions supported)
- Microsoft SQL Server Management Studio

PostgreSQL Server

- PostgreSQL 10 and later

Note: The Application and Database Servers can reside on the same or separate machines.
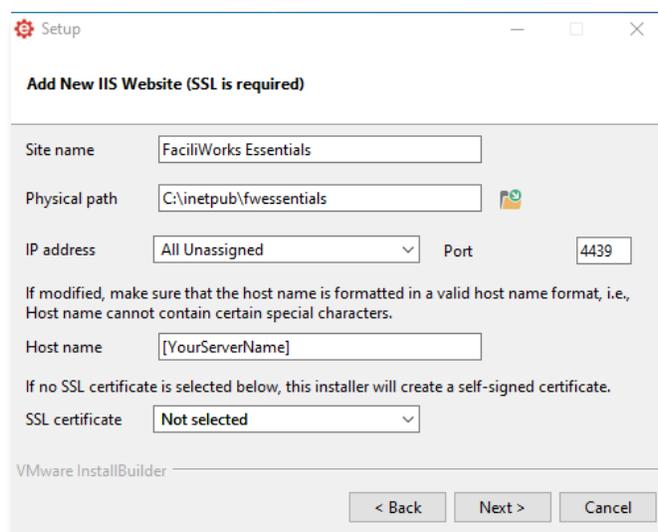
WORKSTATION

- Web browsers: Most modern web browsers supported

CHAPTER 2: INSTALLATION

1. On your FaciliWorks installation media, double click the .exe file to open the menu, go to the installation pane and click the appropriate button to begin the install. If you have downloaded FaciliWorks from our website, double click the .exe file to begin.

2. You will be prompted to select a language; make your selection and click **OK**.

3. If you downloaded the installer from the Web, you will be prompted for an Extraction Code which is provided by your sales representative. Enter this code and click **OK** to continue.

4. The FaciliWorks Essentials Setup Wizard screen is displayed; click **Next**.

5. To proceed with installation, review and accept the License Agreement and then click **Next**.

6. On the **Select Components** screen, click **Next**.

7. On the **FaciliWorks Essentials Web Site** screen, select **New Web Site** to prompt the installation to create a new IIS website for FaciliWorks Essentials. If you would like to use the Default Web Site, you may select it from the drop-down list.

8. If you selected **New Web Site** in the previous step, enter the appropriate information in the **Add New IIS Website** screen. The **Host name** field should be pre-populated with the server name, but this can be changed if you plan to use DNS routing. If you leave the default Host name value, then the FaciliWorks URL will resolve to https://[YourServerName]:4439. Be sure to review this portion closely and edit the configuration as needed. Note: If you chose the **New Web Site** option on the previous screen, then the installer creates a custom port number of 4439. The installer will attempt to add that port in Windows firewall's TCP Inbound Rules. This will ensure that your network users can access the webserver with a custom port number. Therefore, if you plan to change this port number, you will need to update that information elsewhere.

   An SSL certificate is required for FaciliWorks Essentials. If you do not choose an existing SSL certificate, the installer will create a self-signed one. The self-signed certificate created will bear the same host name and it will be added to the Https binding. To allow FaciliWorks to be accessed from local network computers, the self-signed SSL certificate should be made trusted. You may need to export the certificate and import it to each network user's computer. Ultimately, it would be best, however, to obtain an SSL certificate from a Trust Authority.

9. On the **Database Provider** screen, you can select between PostgreSQL server or Microsoft SQL Server. For PostgreSQL, go to step 10. For Microsoft SQL Server, skip to step 11.

10. In the **PostgreSQL Server Configuration** screen, enter your PostgreSQL connection information and click **Next**. The installation will ensure a connection can be made to the PostgreSQL before proceeding. Skip to step 12.

11. In the **SQL Server Configuration** screen, enter your server connection information. FaciliWorks Essentials supports both SQL Authentication and Windows Authentication. If you choose to use Windows Authentication, the currently logged in user will be used. Continue to step 12.

12. In the **Email Configuration** screen, enter the settings to ensure that FaciliWorks can send user invitations and notifications. The FaciliWorks installer will send a test email to confirm the email settings are correct.

13. You will now be prompted to customize your login page. Click **Modify** to edit the html content in Notepad or to skip this step, click **Next**.

14. The **Pre Installation Summary** shows a list of the configuration settings specified through the previous steps. Click **Next** to proceed.

15. The **Ready to Install** screen is now displayed; click **Next** to proceed.

16. The **Open FaciliWorks Essentials** screen is now displayed. To open the application, click the **Launch FaciliWorks Essentials** hyperlink. Click **Next** on the **Open FaciliWorks Essentials** screen.

17. Installation is now complete; click **Finish** to exit the Setup Wizard.

TECHNICAL SUPPORT

If you have any issues with installation, please contact us at 1-800-777-7020 or support@cybermetrics.com.

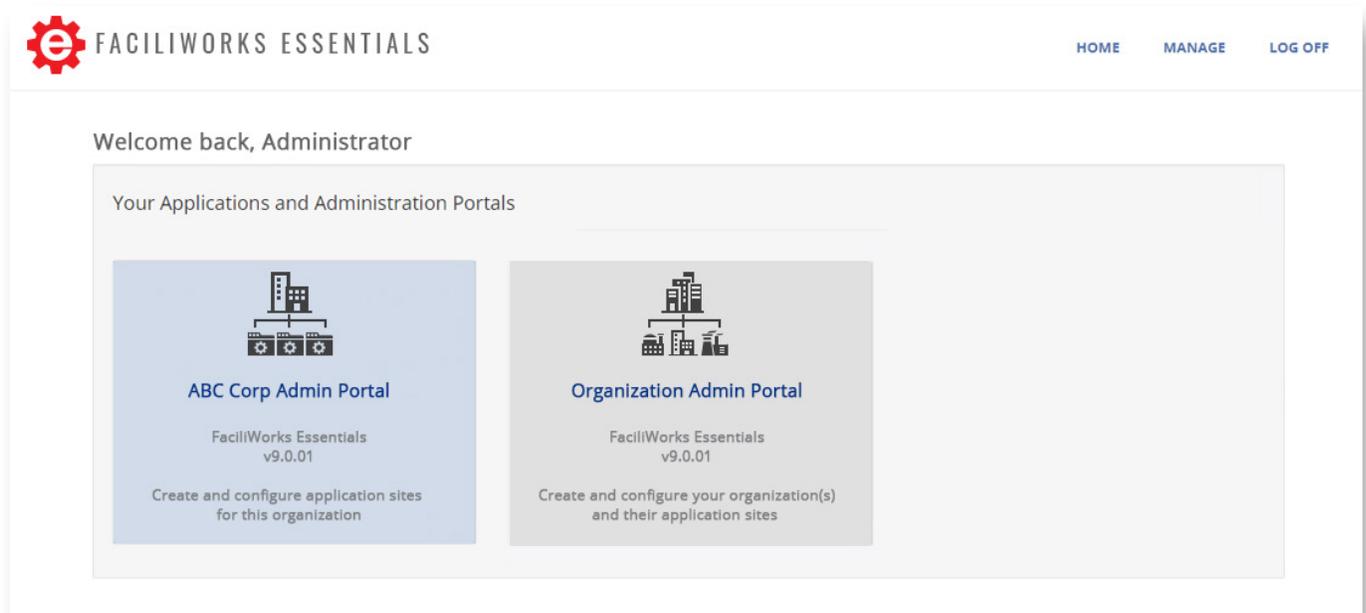# CHAPTER 3: ORGANIZATION & APPLICATION SITES

UNDERSTANDING ORGANIZATIONS AND APPLICATIONS SITES

The **Organization** represents your company or corporation name, i.e., *ABC Corp*. In most cases, you will only need to create and administer a single organization and associated FaciliWorks Essentials **Application Site**. In the instructions below, we will set up a single organization and single application site. If your company is comprised of several subsidiary companies, you can create more than one organization if you want to maintain FaciliWorks Essentials applications for all of the subsidiaries on a single host. For example, if *EFG Corp.* is a subsidiary of *ABC Corp.* and you want to administer all of your users on the same application host, then you could create a separate organization and application site for each of the subsidiaries. Alternatively, you could just have your separate subsidiary locations within a single organization, but still allow each to maintain their own data within their own application site. Since you can add organizations and any associated application sites at any time, this does not need to be decided now, so let's get started registering your primary organization.
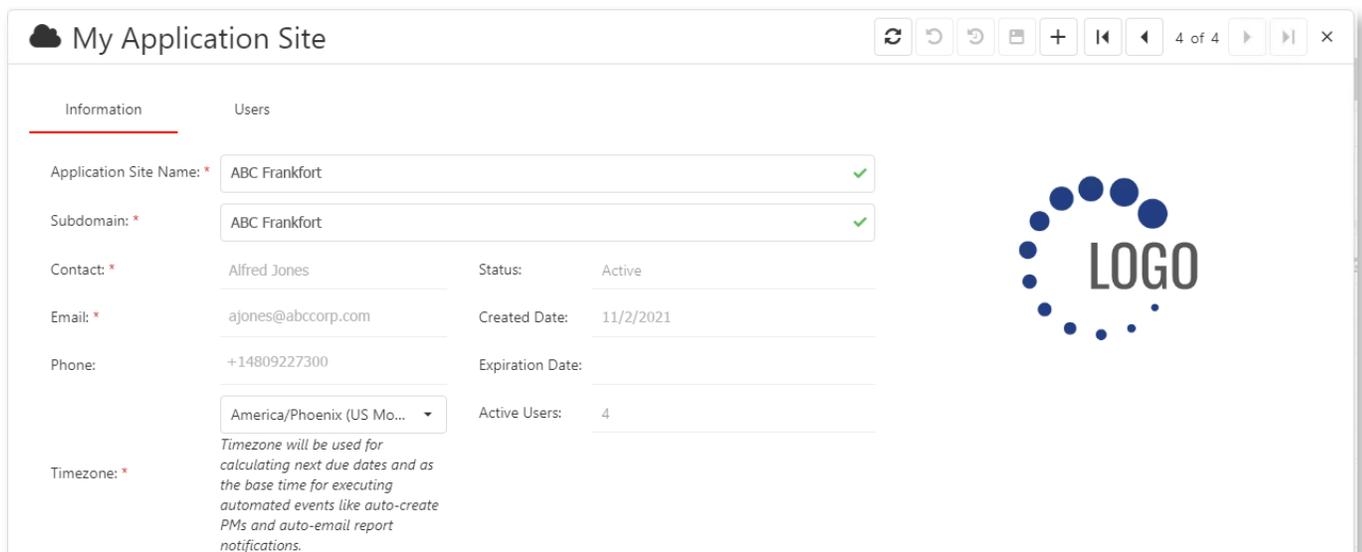
REGISTER YOUR ORGANIZATION

1. Upon loading the FaciliWorks Essentials site for the first time, you will be prompted to register your organization. Enter your preferred organization name. Now enter the primary user's User ID and email address and then click **Register**. The primary user will be the default administrator for your Organization and Application Sites and will have access to the Administration Portals.

2. FaciliWorks will now send verification to the email address entered in the previous step. Click the **Verify Address** link in the email.

3. You will be prompted to complete your registration. Enter the required information and click **Submit**.

4. You can now log into FaciliWorks Essentials.

5. Upon login, you will be presented with two Admin Portals. The **Organization Admin Portal** (shown below in the grey box) is used to manage the organization settings and any global application site settings. The other **Admin Portal** (shown below in the blue box) will display the organization name you created in the above steps. Click on this blue Admin Portal to create your first FaciliWorks Essentials Application Site.

CREATE YOUR FIRST SITE

1. The first time you enter the blue Admin Portal, you will be prompted to create your first application site. Click **Yes** to begin creating your first site.

2. In the **My Application Site** window, enter your site information and click the **Save** icon. The application site is the FaciliWorks Essentials install location to which you will provide access to your users.

3. You have successfully created your first FaciliWorks Essentials application site within your organization. If you already have your **License Code(s)**, you can click on your application site and save the code under the **Licenses** tab. Once you have finished in the Admin Portal, click the **Switch App** icon in the upper right corner of the page to return to the Welcome screen.

ACCESSING YOUR APPLICATION

Your new FaciliWorks Essentials application site should now be available for you to access from the Welcome screen (shown below in the white box). It is recommended that you open the application and navigate around to be sure all of the views are available. If you did not enter your License Code in the step above, the FaciliWorks Essentials application site will be in trial mode until you enter in the License Code provided from your purchase. If you have created more than one site, please be aware that you cannot use the same License Code for multiple sites (each application site requires its own licensing).