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# Quick Start Program

## *Installation Guide*

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# System Requirements

## Client Machine(s) System Requirements

- Pentium III 800-MHz or higher processor
- Windows 2000 or higher Operating System
- Minimum of 128 megabytes (MB) of RAM
- GroupWise v6.x or higher\*
- Outlook 2007 or higher (32 bit version)\*

## User Requirements

- Email address capable of receiving SMTP email (from SMTP server listed in Server Requirement Section)

## Server Machine System Requirements

- Minimum of 1 GB free hard drive space (expandable as needed)
- P4 class server or higher
- Minimum of 1 GB of RAM
- Minimum of 100 MB of free hard drive space (expandable as needed)
- SMTP server capable of relaying to desired domains

## Operating System

### *Windows*

- Windows 2000 Server Operating System or higher

One of the Following

### *MS SQL Server*

- Windows 2000 Server Operating System or higher
- MSSQL Server 2000, 2005, and 2008

### *Oracle*

- Windows 2000 Server or higher
- Oracle 9i

## Authentication Requirements

- GroupWise 6.5 or higher, Outlook 2003, 2007, and 2010 for persistent identity management
- X.500 Compliant Directory with LDAP support (for optional ContactWise Security, anonymous binding through port 389)

\*Not required for core ContactWise functionality.

# Installation

Follow these steps to install ContactWise for your organization:

- Be sure GroupWise (or Outlook) is closed during the installation of ContactWise
- Use the cw.exe or cw.msi file to install ContactWise on your computer. If you don't already have this file, it can be downloaded using the following link:

[downloads.grouplink.net](http://downloads.grouplink.net)

**OPTIONAL:** If you wish to use MSDE as your database provider, you will also need to install MSDE. This can be installed with the file named add\_msde\_sp3.exe. Use the following link to download this file:

[ftp://ftp.xmission.com/pub/users/g/grplink/cw611/add\\_msde\\_sp3.exe](http://ftp.xmission.com/pub/users/g/grplink/cw611/add_msde_sp3.exe)

Follow the appropriate instructions below, depending on whether or not there is a previous version of ContactWise installed on your computer:

- New ContactWise users (no version of ContactWise currently installed on computer) can simply install ContactWise using the cw.exe or cw.msi file. Simply double click on the file and follow the instructions on the screen.
- If you have a previous version of ContactWise on the computer (6.0 and up), you will need to uninstall it before installing the current version. It is important that you use Add/Remove programs to remove the previous version. After uninstalling, continue as described above. If you have ContactWise 5.x on the computer, it will be necessary to leave it installed for the database conversion process.

## Installation Wizard

To open the ContactWise Installation Wizard, drag the cw.exe or cw.msi file you were sent to your desktop. Double-click the file to open the Installation Wizard and follow the steps.

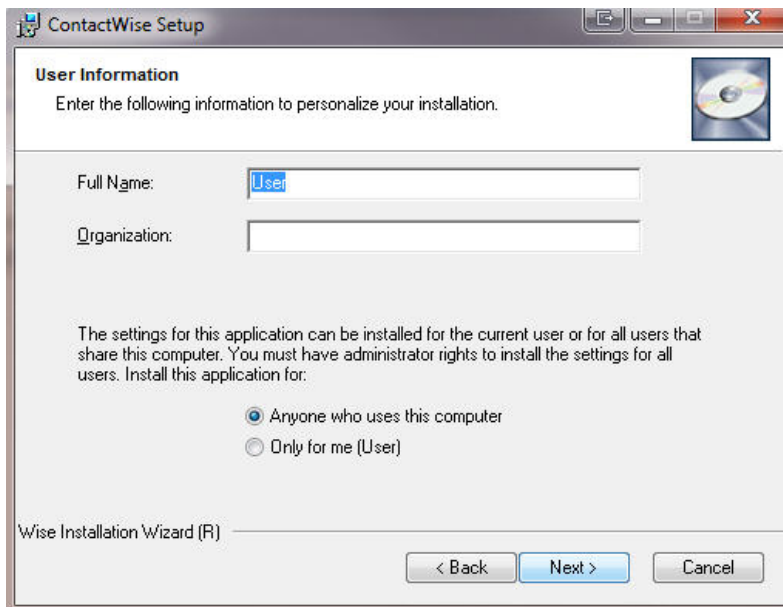
- In the first installation screen, click the **Next** button to open the **License Agreement** screen (*Figure 1*).

**Figure 1**



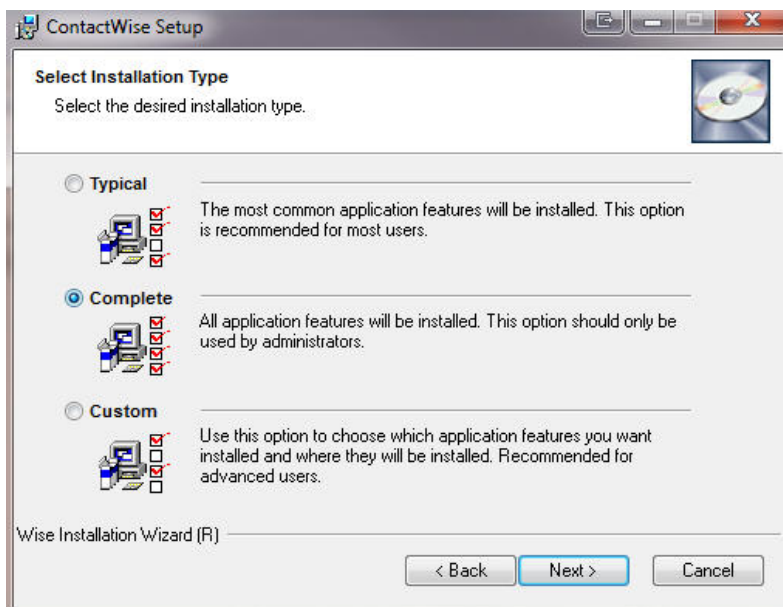
- Select the **I accept the license agreement** radio button and click the **Next** button.
- In the next screen (**Figure 2**) select the user you wish to install ContactWise for and click **Next**.

**Figure 2**



- Next, select the destination folder where you wish ContactWise installed. You may choose to leave the default as the destination.
- Once you have chosen the destination folder, click the **Next** button to open the **Installation Type** screen (**Figure 3**).

**Figure 3**



- In the Installation Type screen, you will need to select which installation type you would like to use.
  - A **Typical** installation is the most common option for users and only installs the ContactWise program.
  - A **Complete** installation is generally used for the Administrator and installs the ContactWise client, the Database Administrator, and the Import Utility.

- After you have selected your Installation Type, click the **Next** button to open the final screen of the Installation Wizard.
- Click the **Next** button to run the installation.

Once the installation is complete, you can open GroupWise or Outlook and click on the ContactWise icon to open the program.

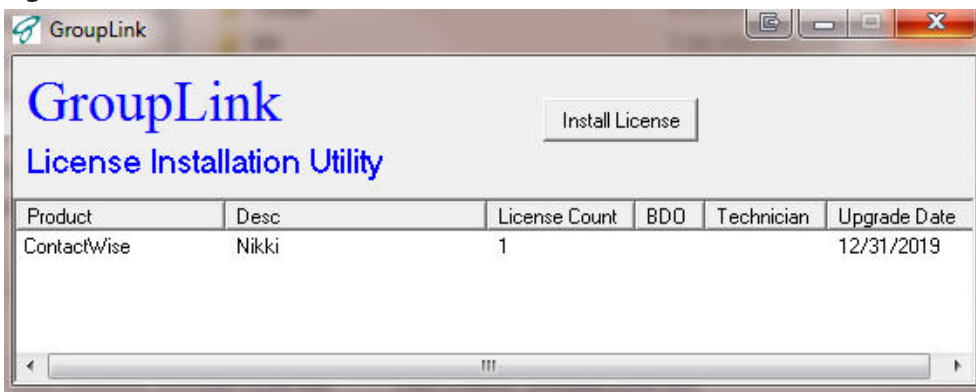
# Licensing ContactWise

How ContactWise is licensed depends on your situation:

## *Purchased ContactWise License*

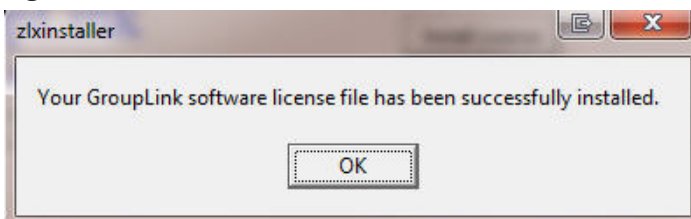
- If you have purchased ContactWise, you should have received an email from GroupLink containing a link to your license file. The name of the file is usually the name of your company with the extension “exe”.  
Example: For a company with the name of ABC Company, the file name would be “ABCCompany.exe”.
- To install the license, simply double-click on the license file. This will bring up a dialog box.
- Next, click the **Setup** button which will open the **GroupLink License Installation Utility** as show in **Figure 4**.

**Figure 4**




- Click the **Install License** button. Your license will be installed and the following message (**Figure 5**) will be displayed indicating the process is complete.

**Figure 5**



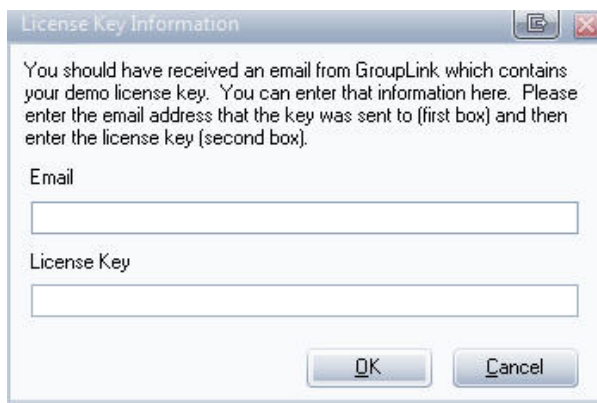
- You can now close the message by clicking the **OK** button and close the **License Installation Utility**.

## *Evaluating ContactWise*

- Open ContactWise using one of the following methods:
  - **Method 1** Open GroupWise and click the ContactWise icon  in the GroupWise or Outlook toolbar and select the **Open ContactWise** menu item.
  - Method 2 Open from the Windows Start menu by clicking **Start | All Programs | GroupLink | ContactWise | ContactWise**
- If you see the pop-up in **Figure 6**, your license key has not been installed.



**Figure 6**



The image shows a Windows-style dialog box titled "License Key Information". It has a standard title bar with a minimize button, a maximize button, and a close button. The main text area contains the following instructions: "You should have received an email from GroupLink which contains your demo license key. You can enter that information here. Please enter the email address that the key was sent to (first box) and then enter the license key (second box).". Below this text are two input fields. The first field is labeled "Email" and the second field is labeled "License Key". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

License Key Information

You should have received an email from GroupLink which contains your demo license key. You can enter that information here. Please enter the email address that the key was sent to (first box) and then enter the license key (second box).

Email

License Key


OK Cancel

- Click the Cancel button, install the license file, and restart ContactWise.

# Open ContactWise & Database

## Open ContactWise

Either of the following methods may be used to open ContactWise:

- Open ContactWise through GroupWise or Outlook
  - Open GroupWise or Outlook
  - Click the ContactWise icon  in the GroupWise/Outlook toolbar
  - Select the **Open ContactWise** menu item
- Open ContactWise through the Windows Start menu
  - Click the **Start** button in the bottom, left-hand corner of your screen
  - Select **All Programs** | **GroupLink** | **ContactWise** | **ContactWise**

## Open the Company Database

If you have never connected to your database, use the following steps:

- From the **File** menu, select **Open Database** to open the **Open Database** pop-up (**Figure 7**)
- In the **Open Database** pop-up, enter the **Server**, **User Name**, **Password**, and **Database Name** information

**Figure 7**



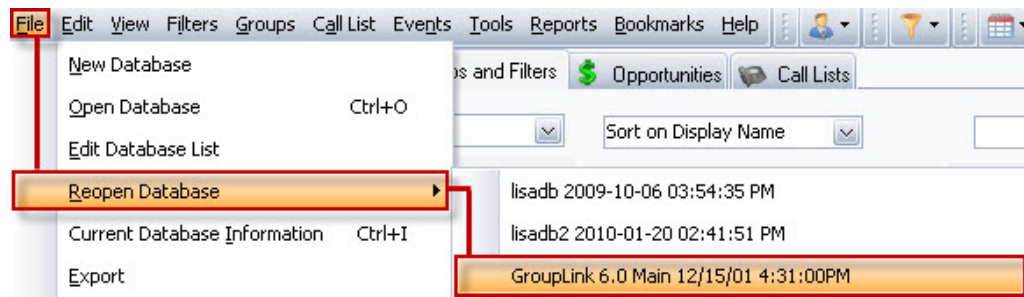
The image shows a Windows-style dialog box titled "Open Database". It contains a text area with instructions: "Please provide the following information so that ContactWise can successfully open an existing database or create a new database. If you are creating a new database please note that the database name can not contain spaces, please use underscores instead." Below this, there is a "Provider Type" section with four radio buttons: "MSSQL" (selected), "PostgreSQL", "Access", and "Oracle". To the right of these are four text input fields labeled "Server:", "User Name:", "Password:", and "Database Name:". At the bottom right are "OK" and "Cancel" buttons.

When you have filled in the appropriate information, click the OK button and your database will be successfully created.

If you have already created the company database and it does not open by default when ContactWise is opened, use the following steps (**Figure 8**) to open it.

- From the **File** menu, select **Reopen Database**
- Select the correct database from the extended database list to open

**Figure 8**



# Enable Security Features

Follow these steps to enable the ContactWise security features:

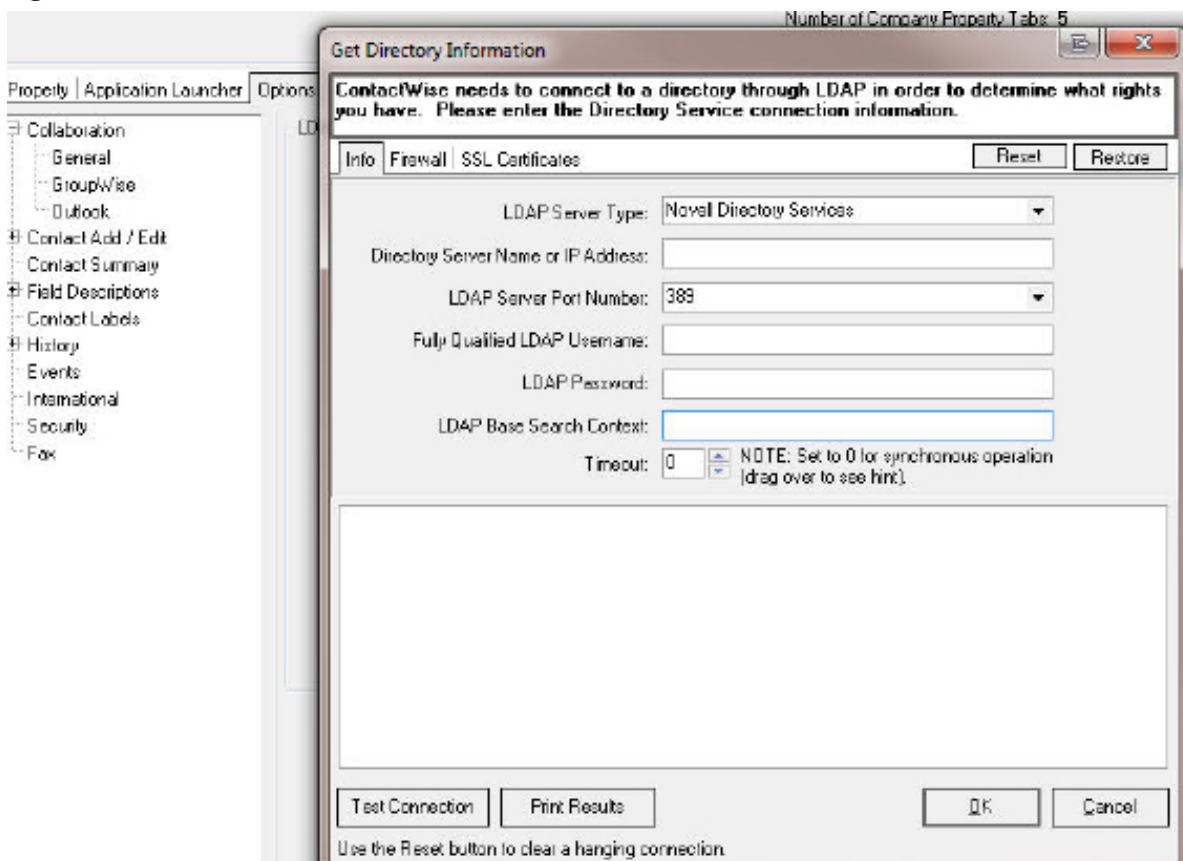
- Novell Directory Services (NDS) or Active Directory Services (ADS) must be running on the network.
- One of the NDS or ADS servers in the tree must have LDAP enabled.
- The database will need to be configured with the LDAP Server Type, name or IP address of the LDAP server, and the port number where LDAP requests will be answered. The default port number is 389 if using clear text passwords. The default port number is 636 if using SSL.

- Open the ContactWise **Database Administrator**. This can be done from the Windows Start menu.

**Start | All Programs | GroupLink | ContactWise | Database Administrator**

- To run the Database Administrator file manually from the .exe executable file called "DB Admin.exe" located in the C:\Program Files\GroupLink\ContactWise folder.
- Make sure you are connected to the correct database by looking at the database information at the top of the screen. If you are not connected to the correct database, connect by selecting the **Database menu, Reopen Database**, and the correct database from the extended menu.
- Once the correct database is open, select the **Options** tab.
- Select the **Security** section on the left side of the screen (*Figure 9*).

**Figure 9**



- If SSL is being used, the security certificate will need to be registered on each client machine. Follow these two steps:
  - Obtain the certificate
  - Install the certificate on the client machines (instructions based on Windows XP Operating System)
    - o Double-click on the Certificate file. This will open the Certificate dialog.
    - o On the **General** tab, click the **Install Certificate** button to open the **Certificate Import Wizard**.
    - o Click **Next** on the first page of the Wizard.
    - o In the second screen, choose the radio button labeled “Place all certificates in the following store” and click the **Browse** button. This will open the **Select Certificate Store** dialog.
    - o In the **Select Certificate Store** dialog, check the box labeled “Show physical stores”.
    - o Expand the folder labeled “Trusted Root Certification Authorities”, select the **Local Computer** folder and click the **OK** button.
    - o Click the **Next** button to go to the last screen and click the **Finish** button.
- If ContactWise Security was not turned on when the database was initially created, it needs to be turned on from within the ContactWise **Database Administrator**. It is recommended to NOT turn on security when first creating a database, especially if you are not already familiar with the ContactWise security model. It is best to become familiar with ContactWise and the Security model before turning on security.
  - Launch the ContactWise **Database Administrator** and open the database from which security is to be enabled.
  - From the **Tools** menu, select the **Add Security to Existing Database** menu item.
  - Follow the instructions in the **Add Security Wizard**.
- In order for a user to log into ContactWise, and LDAP username and non-blank password will be required.

# Group Rights in ContactWise

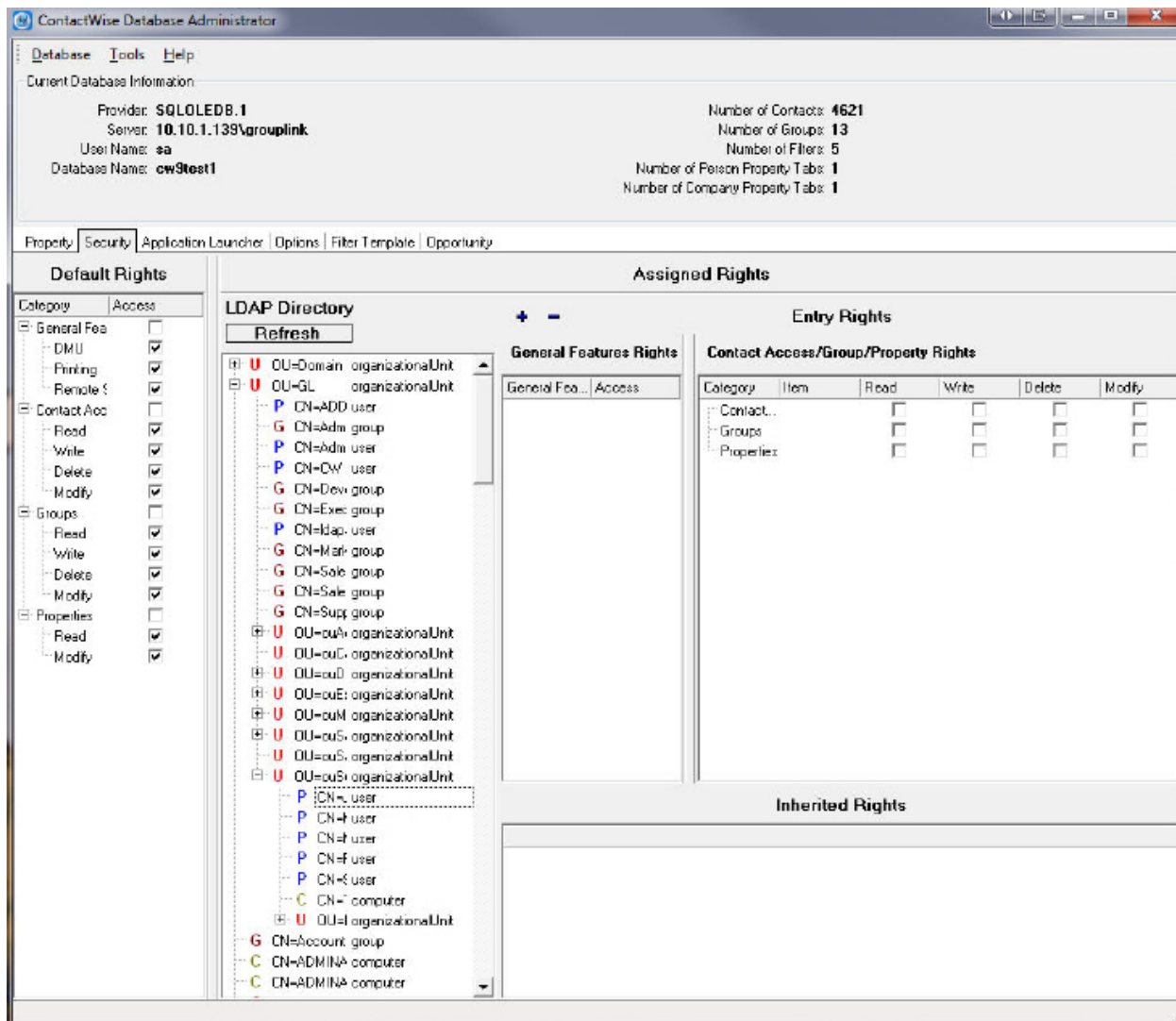
To grant a group in NDS or ADS the right to view and modify a group of records in ContactWise, use the following steps:

- Enable security as outlined in the previous chapter.
- Open the ContactWise **Database Administrator**. This can be opened from the Windows Start menu.

**Start | All Programs | GroupLink | ContactWise | Database Administrator**

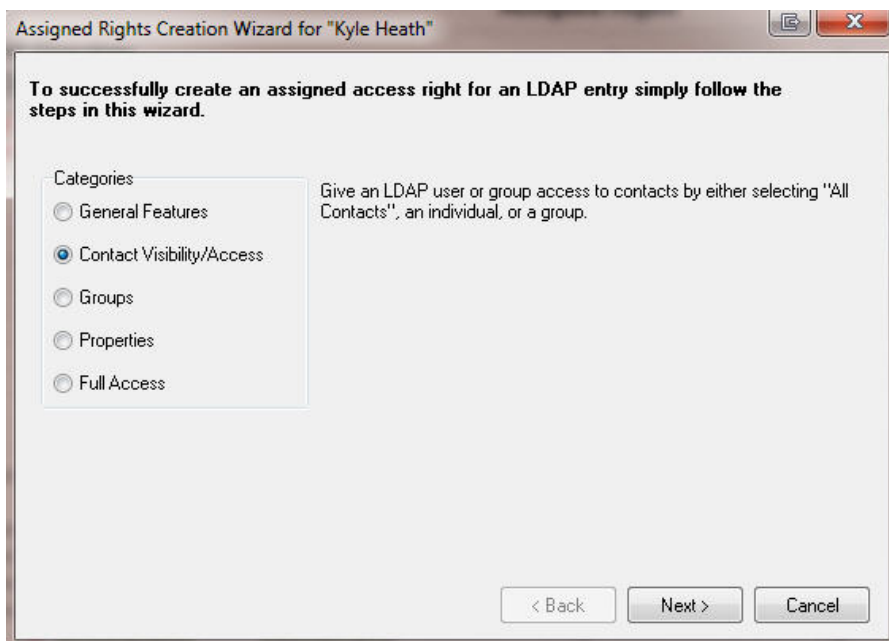
- Select an NDS group in the **Directory** section and click the **Add** button as shown in **Figure 10**.

**Figure 10**



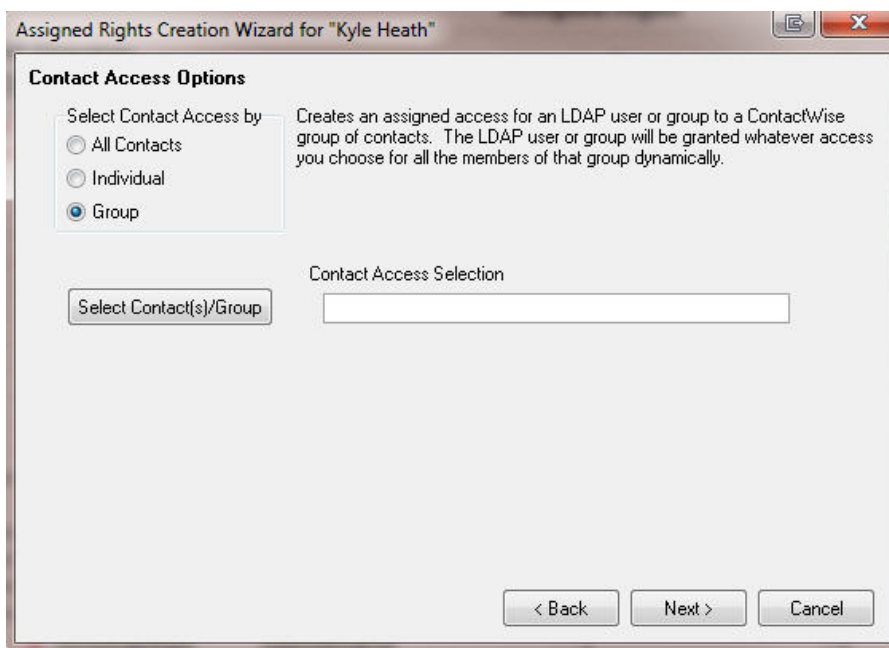
- Select **Contact Visibility/Access** and click the **Next** button (**Figure 11**).

**Figure 11**



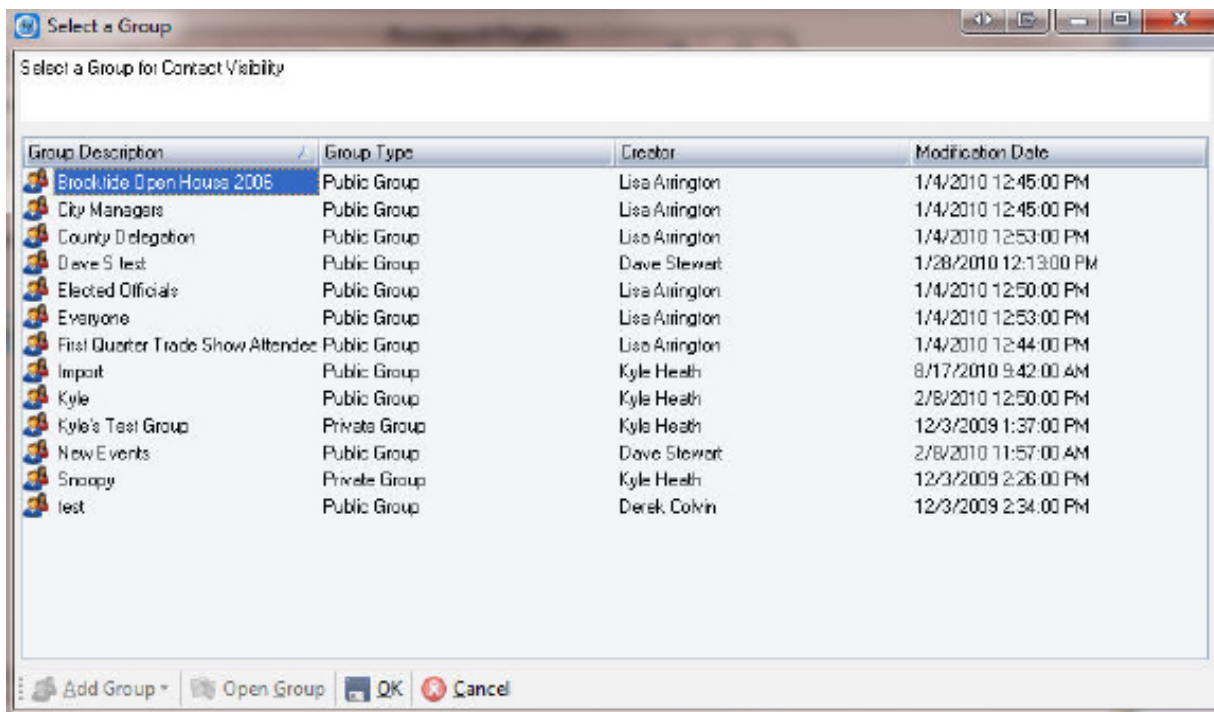
- In the next dialog box (**Figure 12**), first select the **Group** radion button and click the **Select Contact(s)/Group** button.

**Figure 12**



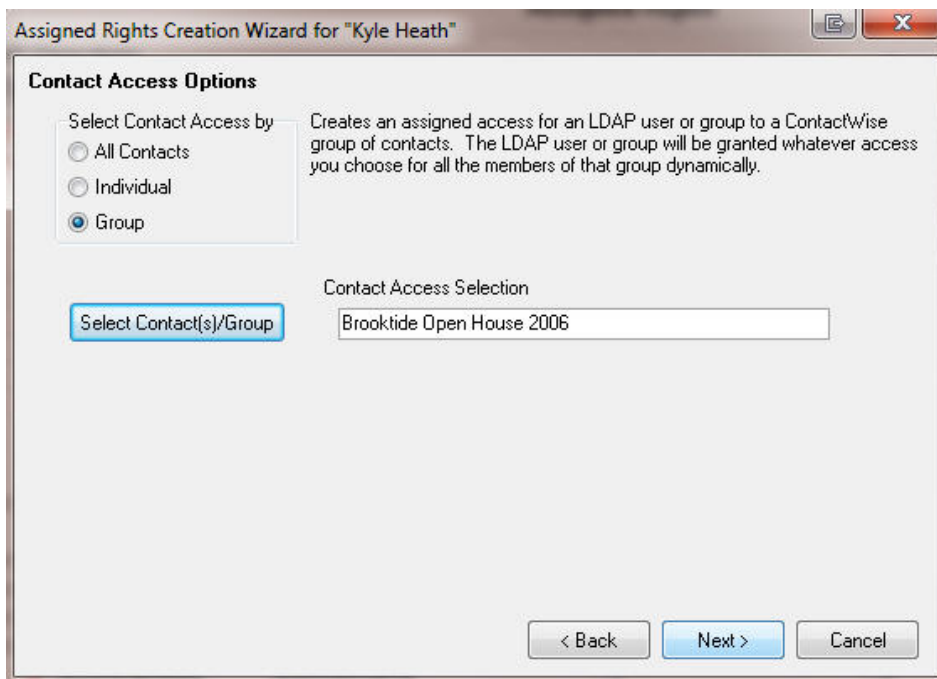
This will open the **Select a Group** dialog (**Figure 13**) from which the appropriate ContactWise group can be selected. Select the group and click the **OK** button.

**Figure 13**



Once this is complete, click the **Next** button.

**Figure 14**

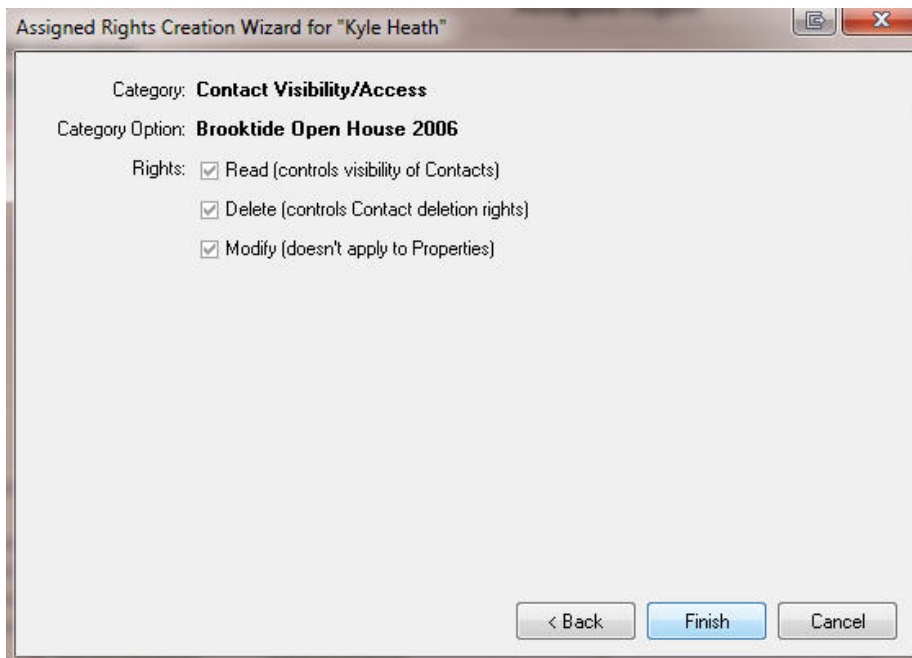


- In the next dialog (**Figure 15**) check the appropriate rights and click the **Finish** button.

Note that in this example, some default rights had already been set. You can see this by referring to **Figure 9**. Since the read right was set by default, it is already set in this dialog with a gray checkmark, indicating that it can't be unchecked. Default Rights will overwrite any rights set in the Assigned Rights section.



**Figure 15**



For more information about using the security features, see **ContactWise Help** within the program.