TechnologyOne <<T1DOCTYPE>> Report

<<T1CLIENTNAME>>

Performed by <<T1CONSULTANT>> - <<T1DATE>>

QUALITY ENDORSEMENT - ISO9001 Quality Management Systems - Requirements

ABOUT TECHNOLOGYONE

TechnologyOne (ASX: TNE) is a leading enterprise software solutions provider. For more than 20 years we have been providing deeply integrated software solutions for business, government, financial services, health and community, education and the utilities sectors. Tens of thousands of people each day use our world class solutions, which we develop, implement and support. Our enterprise wide solution suite is based on leading edge technology and is backed up by a substantial R&D program. Our consulting teams provide world-class services and this provides our customers with a long term, secure and valuable partnership. TechnologyOne employs more than 800 people and has offices in each State and Territory of Australia, as well as New Zealand, Asia and the United Kingdom.

Our enterprise software solution suite encompasses financials, supply chain, human resources, payroll, strategic and performance planning, business intelligence, budgeting, property and rating, student management, project and asset management and maintenance, enterprise content management and customer relationship management. For further information please visit [www.TechnologyOneCorp.com](http://www.technologyonecorp.com/).

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# Introduction

<<T1INTRODUCTION1>>



<<T1INTRODUCTION2>>

This document is designed to report on the activities undertaken, not to act as a step-by-step instruction guide for performing an installation or upgrade.

Any questions arising from this report should be addressed to the TechnologyOne Technical Support Centre on +61 7 3377-7300.

# Overview

The server platform is <<T1SERVEROS>>using <<T1RDBMS>>RDBMS.

This document will briefly outline the configuration at <<T1CLIENTNAME>> after the <<T1DOCTYPE>> performed by <<T1CONSULTANT>><<T1DATERANGE>><<T1DATE>>.

This document contains sensitive information with regards to your TechnologyOne application installation. We recommend that it be placed in a secure location.

# Notes to Client

* Backups

Please ensure the share <<T1BASE>> is included in the backup schedules along with the following databases

* Virtual Environment

TechnologyOne supports its software running in a virtual environment, to the extent that it is a true emulation of the hosted operating system running on physical hardware.

Technology One has many clients currently using the VMWare virtualisation product and has observed that well-designed and implemented VMWare infrastructure can provide performance approaching that of native hardware.

Because inappropriately designed or implemented virtual solutions can have a severely negative impact on server performance we recommend that VMWare installations that support Technology One products be either designed & implemented or audited & certified by VMWare or an appropriately qualified VMWare engineer.

* Maintaining the External Data Directory

TechnologyOne recommends maintaining the data directory on a regular basis by relocating or zipping files that are older than one month and relocating the zip file into a repository location. A large number of files in these directories may have a negative impact on performance, in particular DP jobs.  The directories which will have significant growth are:

* Internet Explorer Security Settings

The “Check for Publisher’s Certificate Revocation” was disabled on Distributed Processor server(s) (<<T1DPSERVER>>) for the <<T1DPDOMAINANDUSER>> user. This is to avoid Distributed Processor timeout issues when restarting the service, due to <<T1DPDOMAINANDUSER>> account trying to access the internet to verify the T1 Trust Policy with VeriSign.

This setting should also be disabled on all TechnologyOne Enterprise Suite SmartClient machines to speed the launching process of the SmartClient.

* .NET Framework 3.5 SP 1

The .NET Framework 3.5 Service Pack 1 must be installed to all Technology One Enterprise Suite client PCs and server(s).

* Review Outstanding Support Cases

Clients who have raised Support Cases against any previous release of the Enterprise Suite software are advised to retest the issue after the upgrade has been completed to confirm if the problem still exists in the new release of the software. It is recommended to advise Technology One of any unresolved issues or to close the Case.

# Server Environment



# Configuration Notes

## Application Security

<<T1CLIENTNAME>> <<T1AUTHENTICATION>>

The following special application user accounts exist within the system:

**techone**

This login is the default Super-User account.

## Application Server

The application code has been installed in the share <<T1BASE>>. The following table outlines the code locations.

## RDBMS Server

Databases for the TechnologyOne Enterprise Suite application reside in the <<T1RDBMS>>instance on the server <<T1DBSERVER>>.

### Instance Details

### Database Details

## Distributed Processor(s)

The Distributed Processor (DP) service has been installed on the server(s) <<T1DPSERVER>>. This service is named *T1 ci Distributed Processor*. The following tables outline the DP configuration:

### Distributed Processor(s) – Crystal Reports Runtime

The Crystal Reports runtime which has been shipped as part of the Enterprise Suite application has been installed on the following Distributed Processor Server(s):

<<T1DPSERVER>>

### Installation of 3rd Party Software

The following 3rd party software has been installed on the Distributed Processor servers:

Microsoft Excel (to enable XLOne schedules to run via the DP)

### Logical Printers

Logical Printers are required to be setup to enable users to print reports via the Distributed Processor. The following printers have been installed on the server(s) <<T1DPSERVER>> and created within the Enterprise Suite application:

## Email Configuration

Email and faxing settings have been configured with Enterprise App Store Configuration Utility as detailed in the following sections.

### Email Settings

SmartClient Email

Server Email

The DP Servers must be assigned relay rights on the mail server to enable emailing externally via the DP Service.

## T1 Connect

## N-Tier Configurations

## ECM Settings

# Client Installations

As per the installation documentation, the following programs are required to be run for a TechnologyOne Enterprise Suite SmartClient installation.

* **.NET Trust Policy:**
* **Crystal Viewer:**
* **Crystal Runtime 12:**
* **Crystal Runtime 13:**
* **XLOne Runtime (for 32-bit Microsoft Excel):**
* **XLOne Runtime (for 64-bit Microsoft Excel):**
* **Ci Link Setup:**

The following shortcuts enable the Enterprise Suite SmartClient to deploy and enable users to log into the application:

**2-Tier**

**CiAnywhere**

1. Shortcuts to the above installation programs and SmartClient application have been saved in the directory \Shortcuts.

# Required Maintenance

As the TechnologyOne Enterprise Suite system should be considered highly important, all appropriate steps should be taken to ensure the integrity of the application. This should include (though not be limited by):

* Backup the file share and database contents on a regular basis
* Review the Operating System logs regularly and fix any error or warning conditions
* Review the RDBMS logs regularly and fix and error or warning conditions
* Review the backup status daily and perform periodical restore tests to ensure information can be retrieved should the worst case scenario eventuate
* Ensure sufficient disk space is available to the application and its data
* Purge/archive files from the external data areas (especially log and hold\\* directories) from time to time to ensure the size and number of files in directories is kept to a manageable amount
* Monitor the database overall size, free space and transaction log size and resize any data files prior to issues developing
* Keep a record of the database data size (full backup file size) over time to spot trends and assist with pro-active maintenance
* Compare the database schema to that shipped by TechnologyOne to ensure conformity (quarterly)
* Update database statistics (exec sp\_updatestats) regularly
* Reindex the database monthly to reduce fragmentation and maintain performance.

# Support Procedures

All issues and requests associated with TechnologyOne software should be directed to the TechnologyOne Support Centre in Brisbane. The Support Centre is available via the following methods:

       Online 24/7 via the TechnologyOne Community <https://customercommunity.technologyonecorp.com/s/>

       Email to [T1Support@TechnologyOneCorp.com](mailto:T1Support@TechnologyOneCorp.com)

       Telephone between 9am and 5pm, Monday to Friday in your regions (Australia, New Zealand, United Kingdom and Malaysia)

|  |  |
| --- | --- |
| **Australia** | 1300 735 130 |
| **New Zealand** | 0800 174 091 |
| **Malaysia** | 0800 6060 2222 |
| **United Kingdom** | 0870 7708 874 |
| **Malaysia** | 1800818451 |
| **Fiji** | 008002188 |

Document Control

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