



**BizOS**®  
**Installation and First-Use  
Guide**

Software By:



[OOPSystems.com](http://OOPSystems.com)

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## Introduction

This document describes the steps involved in installing **BizOS®** Server and Client Software and the user activities and steps that need to be performed after the installation of **BizOS®**.

To start using **BizOS®**, the organization would need to configure essential business details related to the company, within the software.

The **BizOS®** Server is the central part of the software. It needs to be installed only once throughout your entire company. It is the core of the system where most operations are processed and all data is stored. The computer on which you will install the **BizOS®** server software should be a somewhat powerful machine. It is advised that the **BizOS®** server software be installed on a computer that provides high network and internet connectivity as well as strong performance. OOPSystems recommends high processor power (Pentium PIV 2GHz. better is preferred) as well as More RAM (1GB of RAM. More is preferred) for the **BizOS®** server machine.

You can elect to install the **BizOS®** Client software on multiple workstations within your organization. These machines will need to connect to the **BizOS®** Server. The **BizOS®** Clients workstations need to be connected to the same local area network as the **BizOS®** server, in order to operate. It is recommended that the Client workstation should have enough processing capacity (Pentium PIV 1.2 GHz. Better is preferred) and enough RAM (512MB of RAM. Higher is preferred).

## Before you start Installing:

Before you start installing **BizOS®** please prepare a few things.

- You need to have some business details, like your company name a picture of your company logo, your accounting practice preferences etc...
- You should also have administrator privileges to install **BizOS®** Server and Client on each computer System involved.
- You should select "File and Pinter Sharing" as well as "SQL server" in the **Windows Firewall** Exception tab on the **BizOS®** Server computer. This is essential for the operation and connectivity with the **BizOS®** Clients throughout your company.

## Definitions

The following are the definitions of terms used throughout document.

**BizOS®** – The complete **BizOS®** Software including the **BizOS®** Server, **BizOS®** Client, **BizOS®** Documentation and Help, as well as the **BizOS®** Administration Tool.

**BizOS® Server** or **Server** - The Server part of the software that helps store the data and operate the processes of your business. Also, refers to the computer on which the **BizOS®** Server software had been installed.

**BizOS® Client** or **Client** – The Client part of the software that the individual users use to connect to the **BizOS®** Server to help operate the business. Also, could refer to the computer on which the **BizOS®** Client software has been installed.

**BizOS® Administration Tool** or **Admin Tool** – A tool provided to configure and personalize the **BizOS®** server software for your entire organization. It is available only on the server.

### **BizOS® Server and Prerequisites Installation**

Once you insert the BizOS® CD into your computer the BizOS® installer will automatically show up. However, if it does not:

► **Run BizOS® Software Application Installer on the BizOS® Server by Double clicking “BizOS-Setup.hta” from the CD.**

### **BizOS® Server Prerequisite Installations**

**BizOS®** Server Prerequisites are infrastructural Software that are redistributable by Microsoft, and can be installed on machines with genuine windows Operating systems.

**Note:** for more information please visit Microsoft at <http://www.microsoft.com>

Once you start the installer you will get the following window with the status of **BizOS®** prerequisites and **BizOS®** Application displayed.

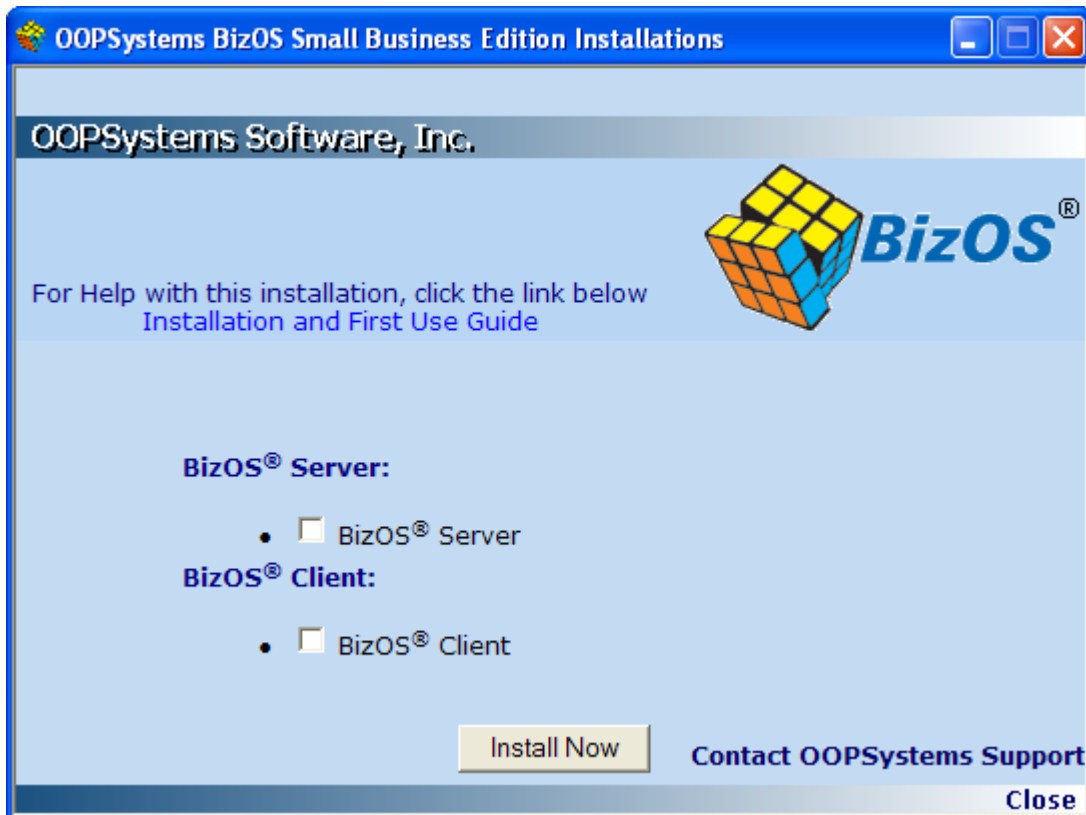


Fig 0-1: Status of BizOS® Application Prerequisites.

## BizOS® Server Installation Instructions

► Start the Installation of the BizOS® Server by Clicking on “**Install**” link and follow the onscreen instruction.

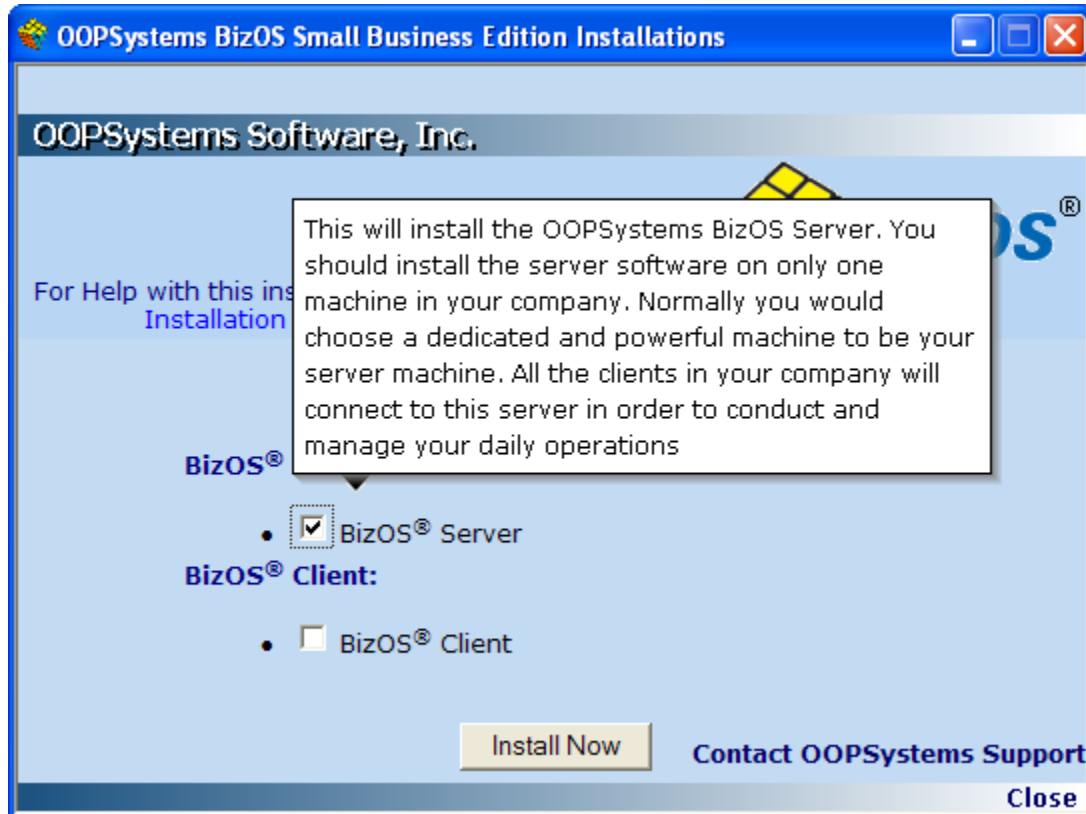


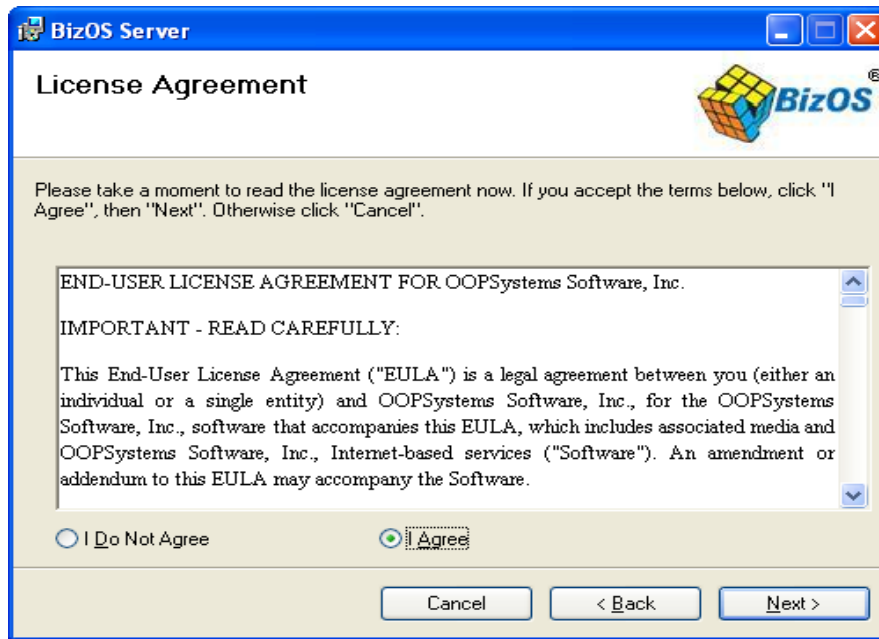
Fig 0-2: Status of BizOS® Server installation.

► Click on the “**Next**” button to proceed and follow the onscreen instructions to continue with the installation of BizOS® Server.

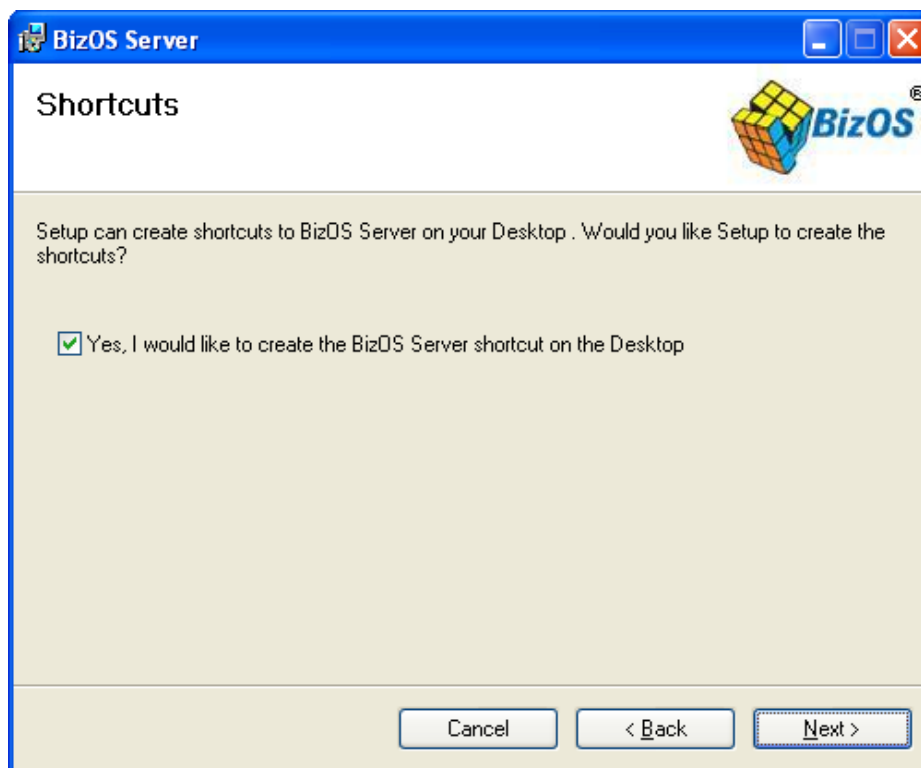


Fig 0-3: Welcome to BizOS® Server Setup wizard

► Click on the “**Next**” button to proceed and follow the instructions on the screen.



If u accept the terms below, click "**I Agree**", then "**Next**". Otherwise click "**Cancel**".



Would you like to create the shortcuts..? If yes click on the check box then click "**Next**".

► Click on the **"Next"** button to select the Folder location, where the BizOS<sup>®</sup> server application will be installed. In most cases, the default location as on the screen (as shown below) is preferred. This will help in case you need to contact support for help in configuring or operating BizOS<sup>®</sup>

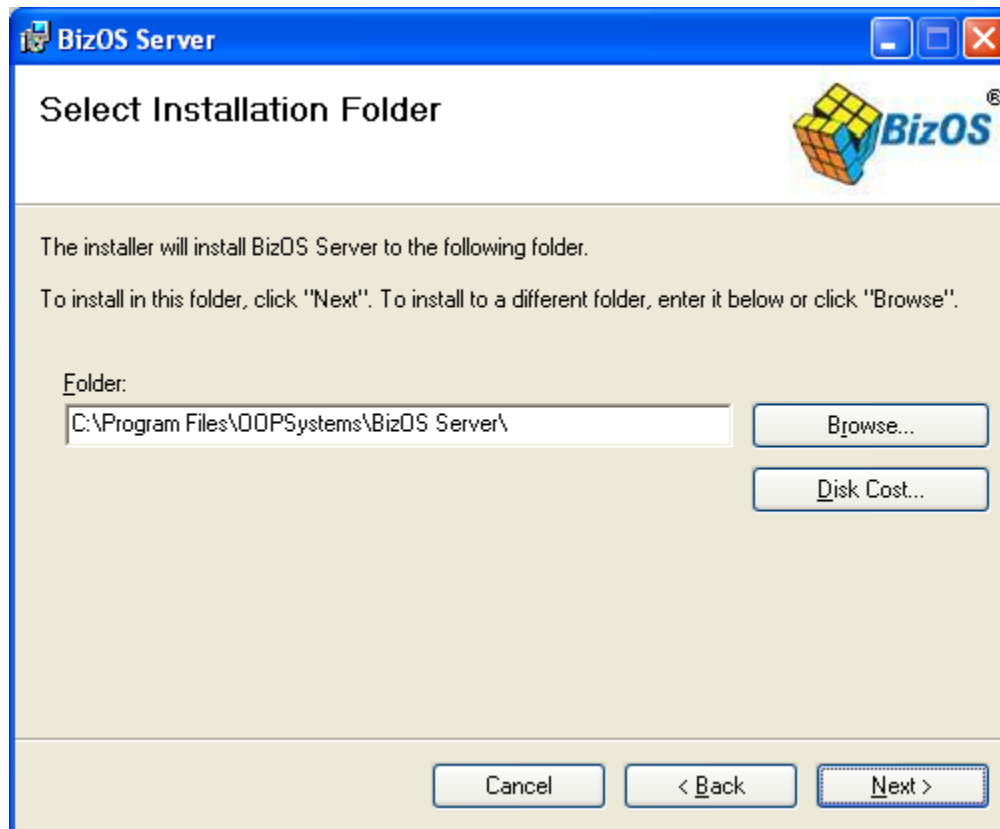


Fig 0-4: Select Installation folder for **BizOS**<sup>®</sup> Server

► Click on the **"Next"** button to for a confirmation message. This screen only provides a way for you to go back to your previous selection to make changes if necessary.

**Note:** This may take several minutes

► Click on the **"Close"** button to complete **BizOS**<sup>®</sup> Server installation

► Click on **"OK"** button to exit the **BizOS**<sup>®</sup> installation.



## **BizOS® Client and Prerequisite Installations**

► Start the Installation of the **BizOS®** Client by Clicking on "**Install**" link next to the **BizOS®** Client then follow the instructions on the screen.



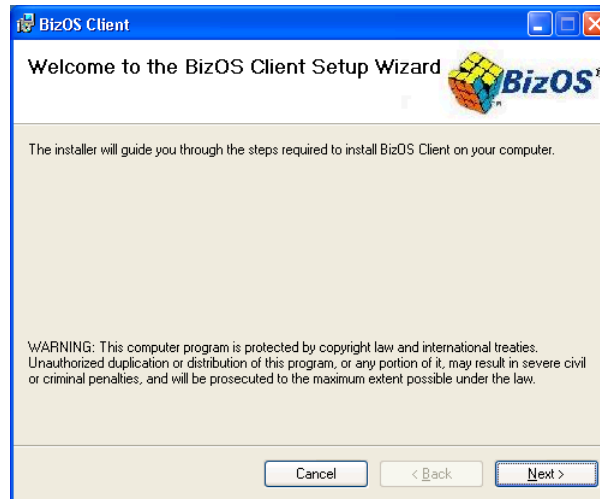
**NOTE:** You need to install the **BizOS®** client on workstations belonging to each of your connected knowledge workers in your company.

The **BizOS®** software package which you had purchased came with a number of licenses. That is the maximum number of connected knowledge workers that are allowed to connect to the **BizOS®** server at any given time from within your organization.

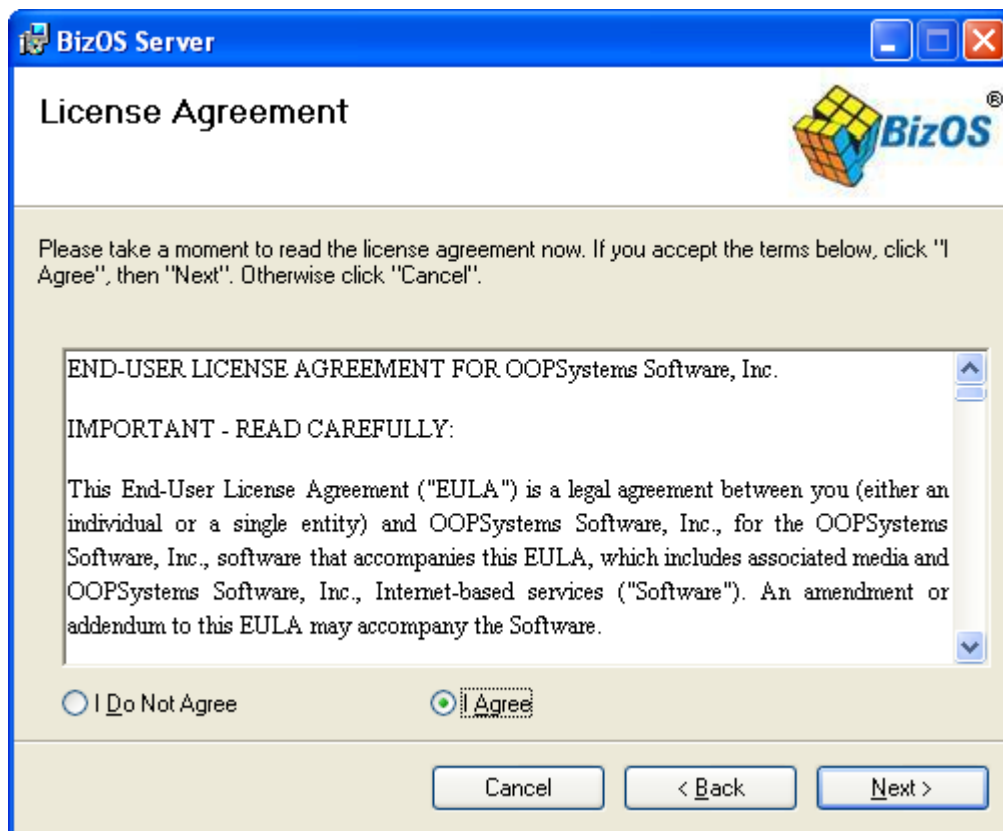
If you do not know how many licenses your package allows, or if you require additional licenses, please contact your reseller or OOPSystems support. We are here to help.

→ Send us email to [support@BizOS.WS](mailto:support@BizOS.WS) or

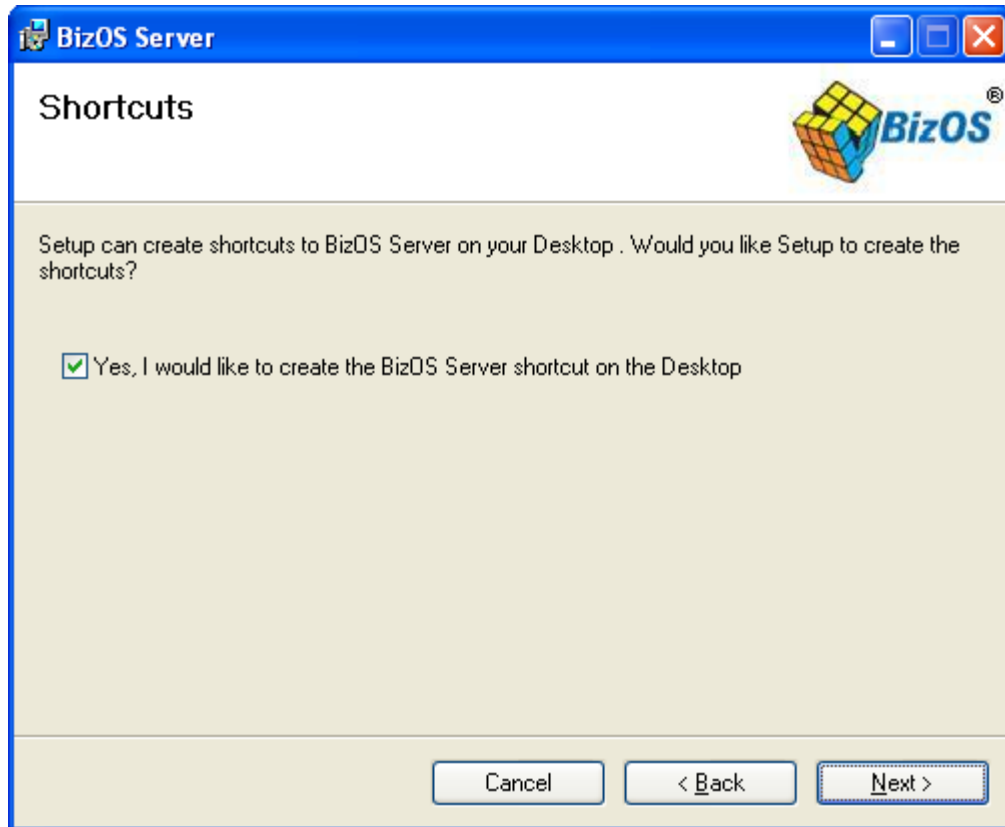
→ visit the support website at: [HTTP://BizOS.OOPSystems.com/Support/](http://BizOS.OOPSystems.com/Support/)



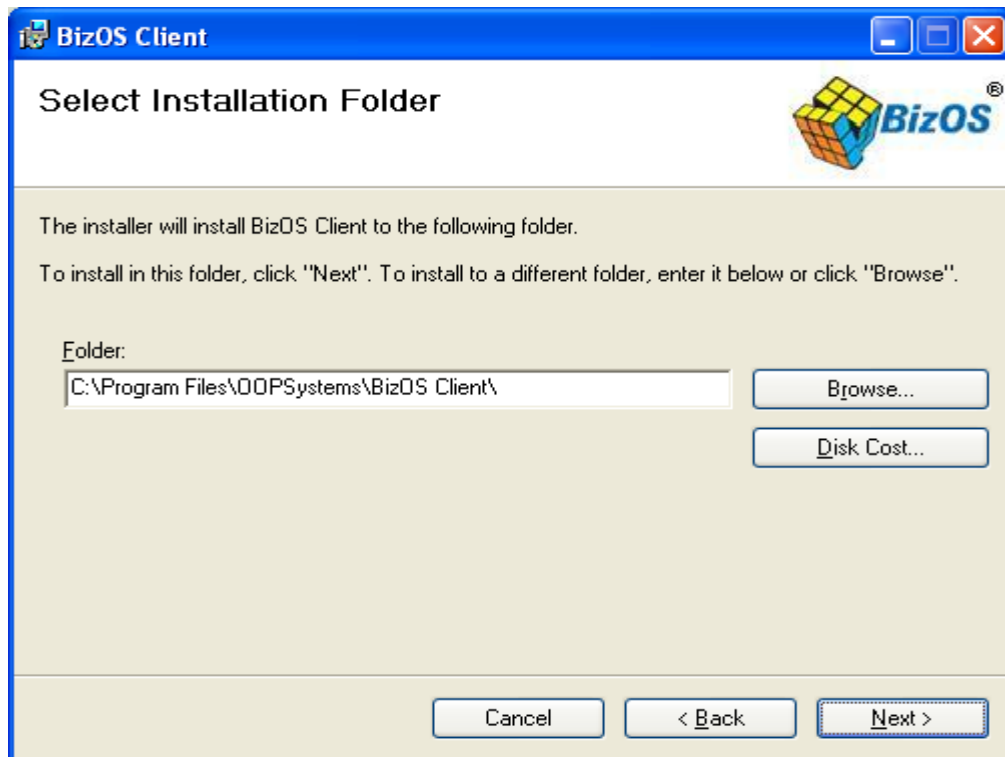
► Click on the **"Next"** button to proceed and follow the instructions on the screen.



If u accept the terms below, click **"I Agree"**, then **"Next"**. Otherwise click **"Cancel"**.



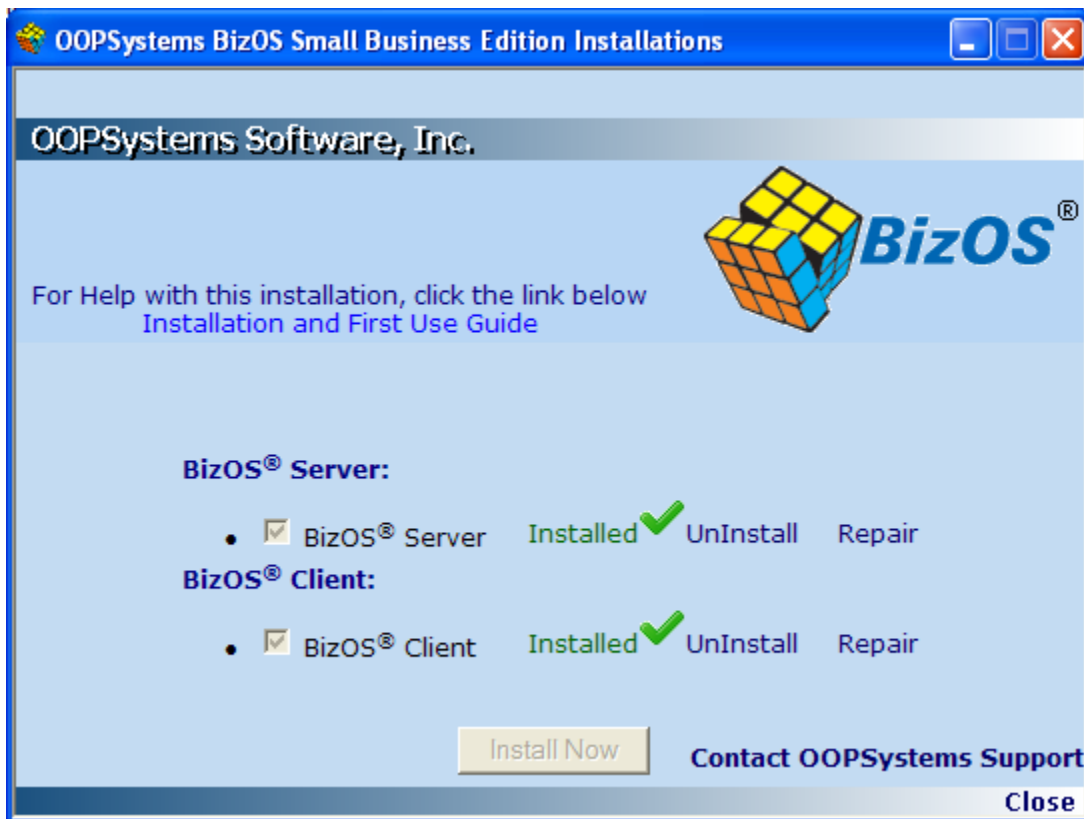
Would you like to create the shortcuts..? If yes click on the check box then click **"Next"**.



- ▶ Click on the **"Next"** button to proceed then follow the instructions on the screen.
- ▶ Click on the **"Close"** button to complete the **BizOS®** Client installation.
- ▶ Click on **"OK"** button to close the **BizOS®** Client installation.

Now you have successfully installed **BizOS®**.

You will see a screen like the one shown below. You can exit the **BizOS®** installer software by clicking on the close link at the bottom right corner of your screen.



**Note:** To Uninstall the application click on the link **"UnInstall"**.

If the user unknowingly skips some mandatory settings while installing, you can accomplish the same through the link **"REPAIR"**.

If you are installing on a client workstation, you are done, and no further steps are needed.

If you are installing on the server machine: After clicking on the **"Close"** button, the **BizOS®** Server Configuration will automatically be launched.

**Please read the next section for  
BizOS® Server Configuration.**

## BizOS® Server Configuration

**NOTE:** The BizOS® server configuration should only be performed by one person (the system administrator) in your company. And it is performed only once on the BizOS® Server machine.

The BizOS® Server needs to be configured with basic information about your company. Please complete the following steps to configure the server for your organization use.

Once BizOS® Server installation is completed successfully, you will automatically get the following registration form,

Here the system administrator has two options:

1. Legalize your company's BizOS® site installation by filling up the Registration form then submitting it.

**Note:** this step requires a Valid Security Key

2. Use the 90 day free trial version of BizOS®. You will be reminded to register each time you log into the system.

The Admin Tool provides options for configuring organization level parameters for business use. You can launch the admin tool from

["Start Menu\All Programs\OOPSystems\BizOS"](#).

When the Admin Tool is used for the first time, the BizOS® system administrator needs to set a password for using the Admin Tool. The Admin tool allows the configuration of vital business and accounting information. This password is added for the security of your company's data. Proper care must be taken so that this password is available only to the designated system administrator. Please remember this password. OOPSystems can not recover it for you.



Fig 0-1: Setting the Admin Tool Password

If the software is being used for the first time or a trial version of BizOS® Software is being used, the administrator will see a reminder (as illustrated below) regarding the status of the software.

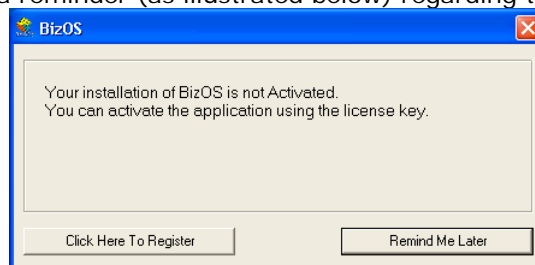


Fig 0-2: Trial Version Reminder

➔To continue using the software as a trial; please click on the "Remind Me Later" button to proceed. This is the **recommended** action for first time use by a system administrator. In case you needed to start the installation over. This way, you will not invalidate your license key, which is useable only once.

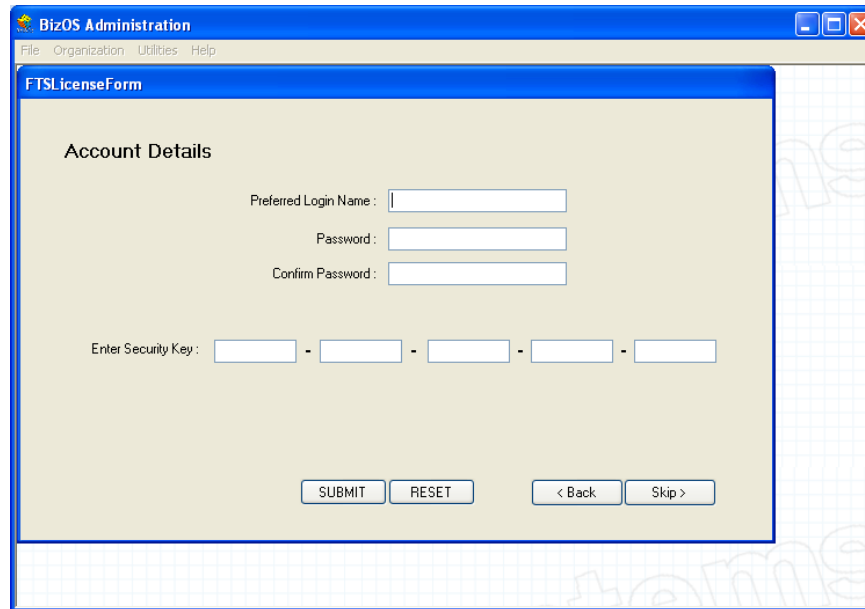


Fig 0-3: Enter the License Security Key

→ To legalize your copy of **BizOS**<sup>®</sup> application, please click on the **“Click here To Register”** button and fill up the Registration form then submit it (as shown below).

Wait until you get “Activation Successful and Rerun **BizOS**<sup>®</sup> Admin tool” Message.

**Run the BizOS**<sup>®</sup> Admin tool again and follow the **BizOS**<sup>®</sup> Server Configuration wizard screens as described below.

When the Admin tool is being used for the first time, a wizard will appear which will help you to configure your software. A welcome screen will appear.

▶ Click on the **“Next”** button to continue.

**NOTE:** All details required by the wizard are mandatory.

Your company **Name** and **Logo** need to be configured first.

Please Enter the Organization Name in the space provided. Then select the organization Logo by clicking on the

**“Upload File”** button and click on **“Open”** in the file dialog box that appears. The steps are shown below:

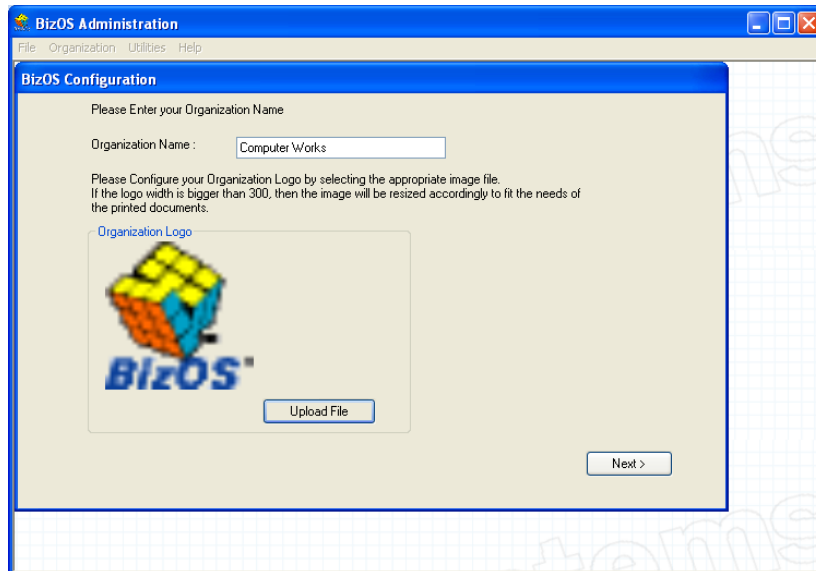


Fig 0-4: Configuring Organization Details

► Click on the **"Next"** button to continue.

At least one main address for the organization needs to be entered. In case the Country, State or City details for the organization address are not found in the options provided on the screen, the **"<Add New>"** Option can be selected for each field that allows for the addition of such data.

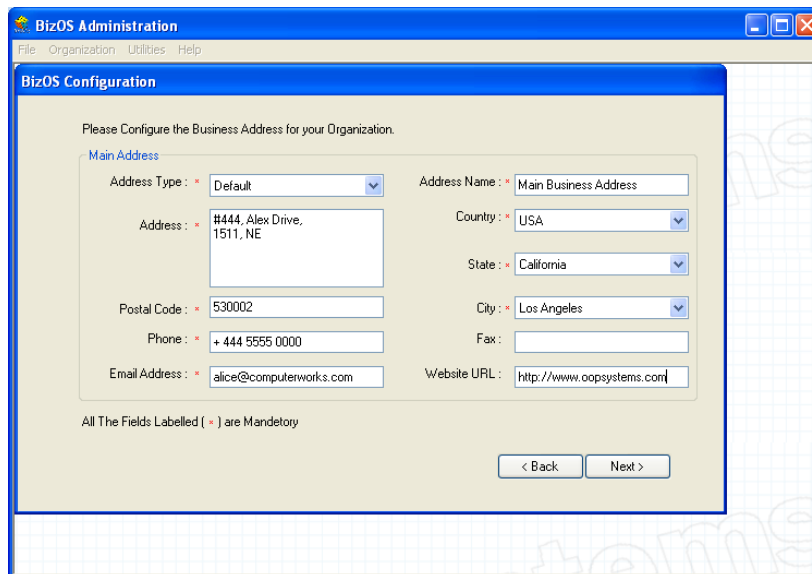


Fig 0-5: Configuring Organization Address

► Click on the **"Next"** button to Continue.

The main accounting currency and the financial year for the organization need to be configured next. The accounting start date can be any date within the current financial year. The start of the accounting period will be calculated as of this date.

Consult your accounting department or your accountant for this information.

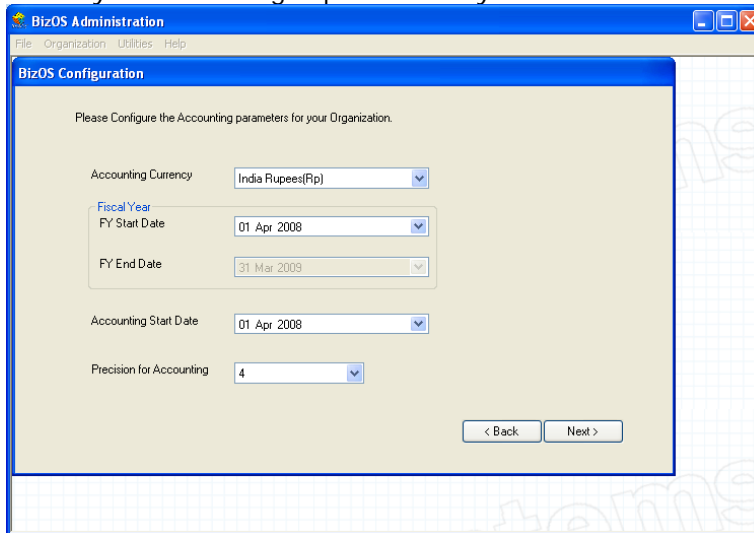


Fig 0-6: Configuring Accounting Parameters

►Click on the “**Next**” button to Continue.

The next screen of the organization setup wizard provides a list of ledgers for accounts that are created and provided by default with the application. You can enter the opening balances for these accounts as well as the nature of the opening balances as provided by your accounting department.

It is advisable that, if you do not know these accounting details, to **stop here** and bring a representative from your accounting department to help you in this part of the configuration.

In the case when you do not have any preference with regard to any of these settings, you can leave them at their default values.

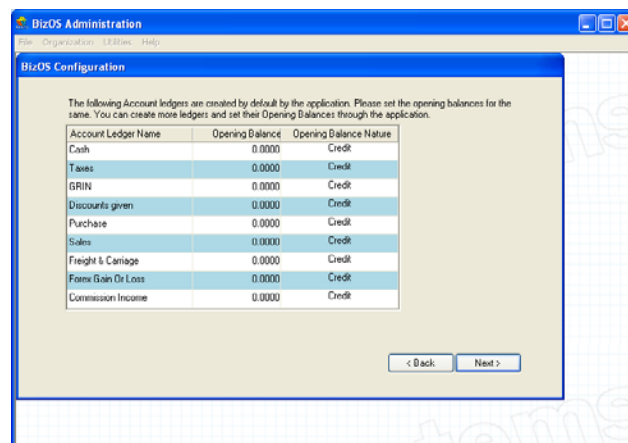


Fig 0-7: Configuring Opening Balances

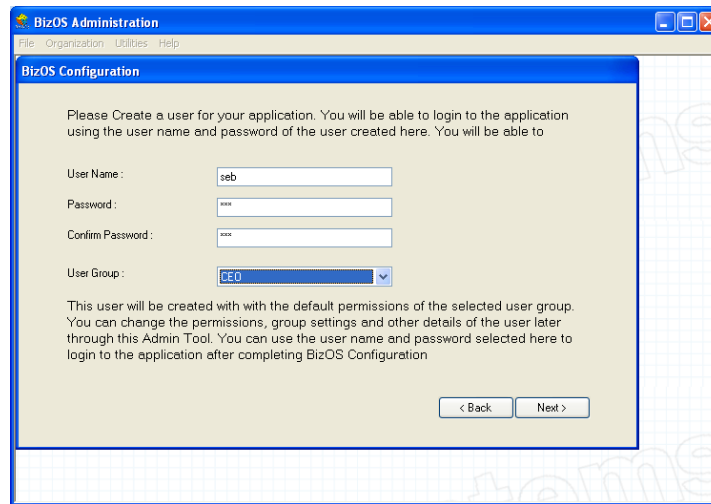
►Click on the “**Next**” button To Continue.

You will be presented with a screen that allows you to configure the first user of the system. You will have a chance later to create many users for the various functions within your business.

At least one user needs to be created to access the **BizOS®** client application. More users can be created later through the **BizOS®** Admin Tool. All permissions for the users can also be modified



later.



The screenshot shows a window titled "BizOS Administration" with a menu bar containing "File", "Organization", "Utilities", and "Help". The main content area is titled "BizOS Configuration" and contains the following text: "Please Create a user for your application. You will be able to login to the application using the user name and password of the user created here. You will be able to". Below this text are four input fields: "User Name:" with the value "seb", "Password:" with "xxx", "Confirm Password:" with "xxx", and "User Group:" with a dropdown menu showing "CEO". Below the input fields is a paragraph: "This user will be created with with the default permissions of the selected user group. You can change the permissions, group settings and other details of the user later through this Admin Tool. You can use the user name and password selected here to login to the application after completing BizOS Configuration". At the bottom right of the form are two buttons: "< Back" and "Next >".

Fig 0-8: Configuring User

► Click on the **"Next"** button to Continue.

If all the required details have been entered, a confirmation message will be shown.

► Click on the **"Finish"** button to complete the initial configuration of the BizOS® server for use by your company.

## BizOS® Client Configuration

Run the BizOS® Client Application on any of the client workstations. You can find a shortcut for this on the desktop.

Some larger organizations require multiple BizOS® server installations. Thus, the first time you run the BizOS® Client, you need to configure it to connect to an appropriate BizOS® Server. In most cases there is only one server.

► In the dialog box below, **select the server** which your system administrator has configured if it can be seen from the list. Or simply type the server name. Please check with your system administrator for the correct server name.

The text "\OOPDB" added after the server name indicates that this is a BizOS® Server. If the server name is being typed into the box, then adding the text "\OOPDB" is not necessary.

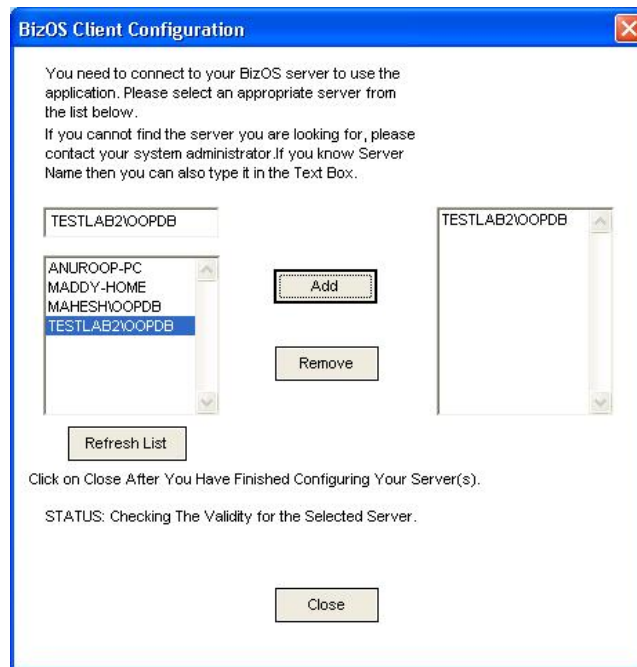


Fig 0-1: Configuring Server Connection for Client

► Click on the **"Add"** to add the server to your list of configured servers.

Upon Successful addition of the server you will see a confirmation box.

► Then click on the **"Close"** button in the main dialog box.

If you are using a trial version of the software, you will receive an information message as below indicating the length of trial period left.

If your system administrator installs a valid license, this message will not appear.

To acquire additional licenses  
Contact your local reseller or  
OOPSystems at [HTTP://BizOS.OOPSystems.com](http://BizOS.OOPSystems.com)

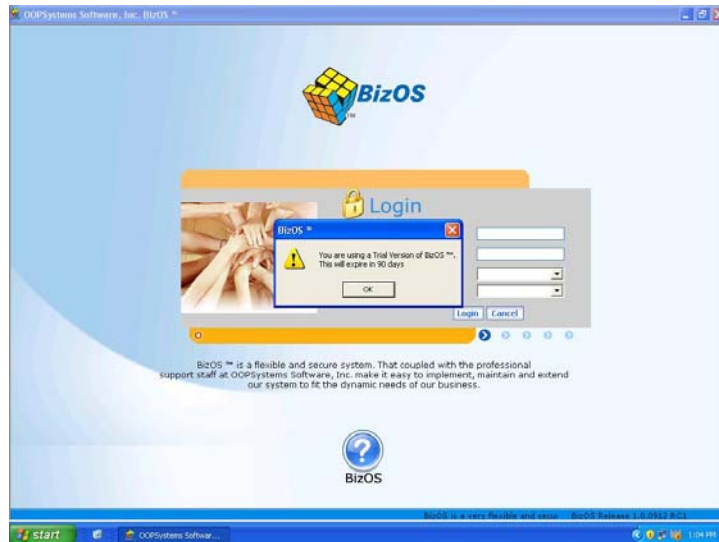


Fig O-2: Trial Version Information Message

Now you can log in to the application using the user name and password your system administrator had configured in the administration tool.

When you start **BizOS®**, you are first presented with the login screen. In here you need to enter your **user ID** and your **password**. You also need to choose which **BizOS® Server** to which you want to connect. This is necessary for large installations with multiple BizOS servers. All of the items above can be obtained from your BizOS administrator before the first time you use BizOS.



Fig O-3: Logging into the Application

If you are the administrator for the site, please take notes of the name of the machine on which you had installed the BizOS® Server Software.

**Also, all machines sharing a single BizOS® server will need to be on the same network. Make sure your server setup has been performed correctly. Also make sure that the firewall on the server is setup as per the instructions described in that section. If you encounter any problems in this or any other task while deploying BizOS® in your company, please contact OOPSystems.**

You can contact OOPSystems support by

- ➔ Sending E-Mail to [Support@BizOS.WS](mailto:Support@BizOS.WS) or
- ➔ Visit our support website at [HTTP://BizOS.OOPSystems.com/Support/](http://BizOS.OOPSystems.com/Support/)

Then you need to choose the language in which you are most comfortable to work.

▶ Click on “Login” To Continue.

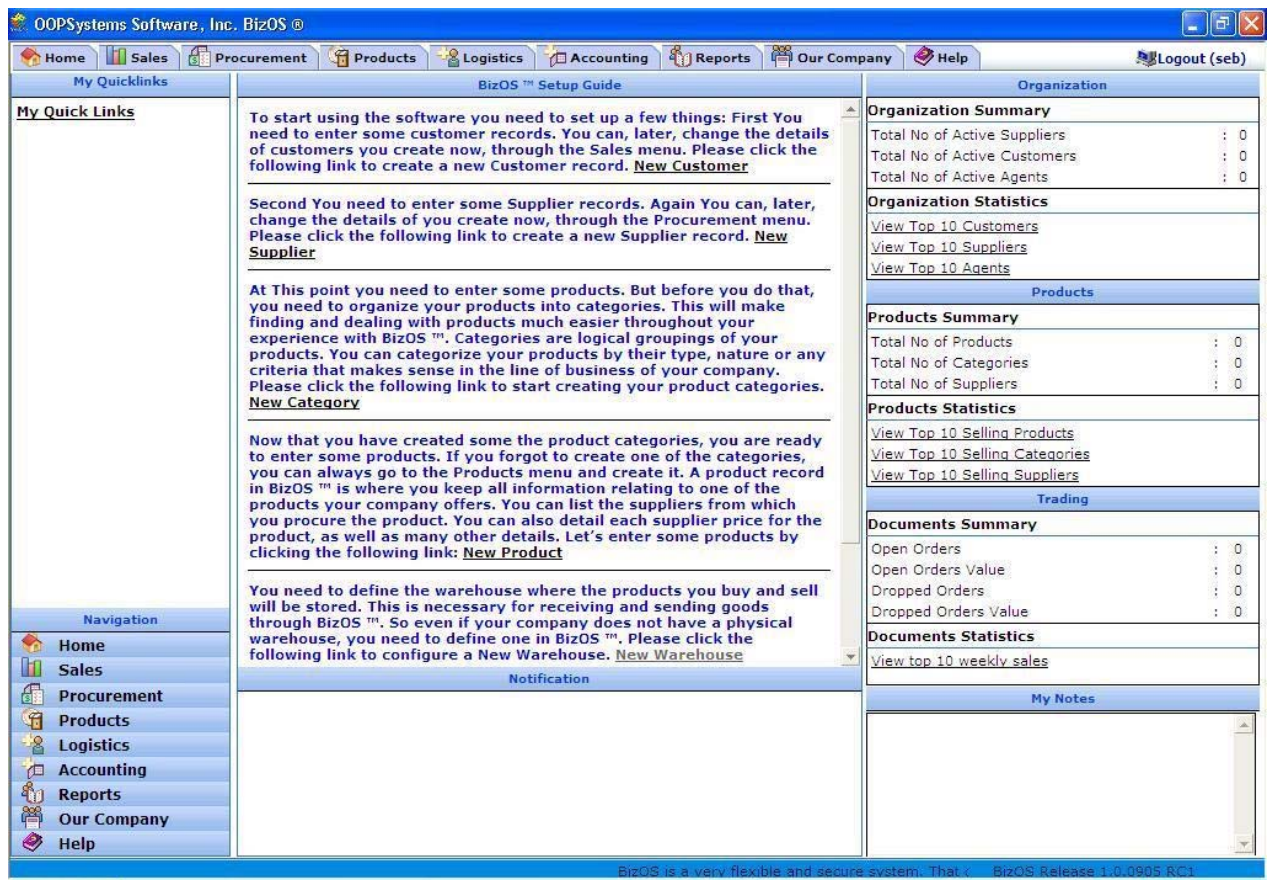


Fig 0-4: Application View on First Use

## Other BizOS® Configuration Options

### Server Options

In addition to the above discussed items there are other Server related configuration options that can be set.

The steps below are common to all the options discussed below.

- ▶ Run the **BizOS®** Admin Tool.
- ▶ Enter the Admin password that you have entered during the initial configuration. The screen is illustrated below.

Fig 0-1: Admin Tool Password Check

### Document Settings

- ▶ Select the “**Options**” menu from the drop down menu that appears,
- ▶ select “**Document Settings**”. You should see a screen as shown below.

Fig 0-2: Configuring Document Settings

You can configure the format of how dates would appear on your printed documents. Select an option from the select list provided and review the sample date.

You can also configure how you would like your Document numbers to appear. A document, in the order processing module of **BizOS®**, is a document such as a sales order, a purchase order, a quote, an invoice, etc. Documents can be customer or supplier related. The application adds some characters and the date of the document. Then it uses a running index of numbers for successive documents. Please select the length of this index. Also, by default, users cannot edit the document numbers. Select the check box to allow the individual users to edit the document numbers. This depends on your individual company policy.

## Users and Permissions

You can create more users using the BizOS® Administration Tool.

- ▶ Select the **"Options"** menu. Then from the drop down menu that appears, select **"Users and Groups"**. You will see a tab-based form appear such as the one below.
- ▶ Click on the **"Create user"** tab to see the screen as shown below:

The screenshot shows the 'Create New User' form in the BizOS Administration tool. The form has the following fields and values:

- User ID:
- Employee ID:
- Password:
- Confirm Password:
- Group Name:
- Organization:

Buttons at the bottom: Save, Save and Set Permissions, Reset.

Fig 0-3: Creating a New User

As part of creating the user, you can set the user name and password, link to an employee (created using the client application) and the user group to which the user will belong.

- ▶ When you Click the **"save"** button, the user will be created with the default permissions. These defaults came from the user group which you assigned to the user.

If you need to change the permissions for this specific user, just follow the instructions below.

- ▶ Click on the **"User Permissions"** tab to set the user permissions.
- ▶ In the **"User ID"** list, select the user for whom you wish to change the permissions.
- ▶ In the grid that appears below, **select** or **deselect** the various permissions available, as appropriate for the current user to allow them to perform in his / her job role.

The screenshot shows the 'Set User Permissions' form in the BizOS Administration tool. The User ID is set to 'seb'. The grid below shows the following permissions:

Navigation Menu	Action Group	Action Menu	Permission
Employee Vitals		New Employee	<input checked="" type="checkbox"/>
		Manage Employees	<input checked="" type="checkbox"/>
		Employee Directory	<input checked="" type="checkbox"/>
Personal Customization		My Quick Links	<input checked="" type="checkbox"/>
		Change My Password	<input checked="" type="checkbox"/>
Task Manager		New Task	<input checked="" type="checkbox"/>
		Manage Tasks	<input checked="" type="checkbox"/>
Help		FAQs	<input checked="" type="checkbox"/>
		Knowledge Base	<input checked="" type="checkbox"/>
		About BizOS®	<input checked="" type="checkbox"/>
		Contents	<input checked="" type="checkbox"/>
		Request Support	<input checked="" type="checkbox"/>
		Demo	<input checked="" type="checkbox"/>

Buttons at the bottom: Update, Reset.

Fig 0-4: Setting User Permissions

**You are now ready to use BizOS®.**



Please remember that, if at any time you require help from OOPSystems to **install BizOS**®, **configure BizOS**® for the first time or to **operate BizOS**®, OOPSystems Support Personnel are standing by. We are here to help.

You can contact OOPSystems support by

➔ Sending E-Mail to [Support@BizOS.WS](mailto:Support@BizOS.WS) or

➔ Visit our support website at [HTTP://BizOS.OOPSystems.com/Support/](http://BizOS.OOPSystems.com/Support/)

### **OOPSystems Locations & Presence**



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Fax: +91 80 25434823  
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86-21-56657591  
Fax: 86-21-66313526  
E-mail: [chinasales@oopsystems.com](mailto:chinasales@oopsystems.com)

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Seoul, South Korea 152-848  
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Fax: (82-2)6330-1101  
E-mail: [koreasales@oopsystems.com](mailto:koreasales@oopsystems.com)

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