



Allocatus

- Admin Guide -



Contents

CONTENTS	2
PREPARE FOR ALLOCATUS	4
Overview	4
General Requirements for Allocatus Server	4
Requirements for Project Server 2002/2003	4
Requirements for Project Server 2007/2010/2013	4
Requirements for Outlook	5
Requirements for Exchange Server 2003	5
Requirements for Exchange Server 2007	5
Requirements for Exchange Server 2010/2013	5
Requirements for Exchange Online	5
Requirements for Lotus Notes	5
Requirements for Domino Server	5
INSTALL ALLOCATUS SERVER	6
Run Express setup	6
Run Advanced setup	10
Verify and move Allocatus web application if required	18
Add Firewall rule for new port.....	19
Test the connection.....	19
Install License Key	20
CONFIGURE ALLOCATUS SERVER	20
Configure the Project Server Connection	21
Configure Project Server 2002/2003 Connection	21
Configure Project Server 2007 Connection	21
Configure Project Server 2010/2013 Connection	24
Configure Allocatus Server Settings	28
Permission Manager	28
Mail Settings	29
Optional: Write Back mode.....	29



- Optional: Enable E-Mail User Notification 30
- Optional: Customize subject line 30
- Configure Allocatus User settings 30**
 - Configure the default User configuration 30
 - Add new users 31
- Configure Exchange Server Connection 31**
 - Configure Exchange 2003/2007 Connection 31
 - Configure Exchange 2010/2013 Connection 32
 - Configure Exchange Online Connection 33
- Configure Domino Server Connection 34**
- Start Allocatus Server 35**
- OPTIONAL: INSTALL AND CONFIGURE ALLOCATUS CLIENT 35**
- MAINTAIN ALLOCATUS 35**
 - Manage Allocatus Server 35**
 - Monitor Allocatus Logs 35
 - Control Windows Service 36
 - Backup and Restore Allocatus Server 37**
 - Backup Allocatus Server 37
 - Restore Allocatus Server 37
 - Update Allocatus Server and Client 37**
 - Major Update 37
 - Minor Update 38
 - Optional: Post installation check 38
- TROUBLESHOOTING 38**



Prepare for Allocatus

Overview

Allocatus integrates tasks from Project Server into either Microsoft Outlook or Lotus Notes, allowing a user to see all of their work in a single place. Two integration methods are available; the first uses Microsoft Exchange or Lotus Domino allowing Allocatus to synchronize tasks between Project Server and the messaging environment, the second utilizes an Allocatus client (installed on each PC) to directly synchronize tasks between Project Server and each Microsoft Outlook or Lotus Notes PC.

This document is intended for IT Administrators and provides detailed guidance on how to install, configure and maintain Allocatus.

If you have any questions please e-mail us at support@allocatus.com or post in the Allocatus forum at <http://community.allocatus.com/forums/>.

General Requirements for Allocatus Server

For Allocatus Server the following prerequisites must be met:

- To host Allocatus Server: A server running Windows Server 2003 SP2, 2008, 2008 R2, 2012; typically a Project Server machine with NET Framework 3.5 SP1 and Internet Information Services (IIS) enabled. There must not be a virtual directory or Project Server Instance with the name *Allocatus*
- To host Allocatus Server database: SQL Server with Mixed Mode Authentication (SQL Server Authentication)
- Optional, to send user notifications: An SMTP server which accepts anonymous connections from the server running Allocatus Server.
- Installation account with local Admin rights on the Allocatus Server machine and *db_creator* and *db_securityadmin* permission on SQL Server

Requirements for Project Server 2002/2003

- Project Server 2002 SP1, 2003 SP2
- Installation account with local Admin rights on Project Server machine and *db_creator* and *db_securityadmin* permission on SQL server
- Connection info for Project Server database (server name, database name)

Requirements for Project Server 2007/2010/2013

- Project Server 2007 SP2 (x86/x64), Project Server 2010 SP1, Project Server 2013
- For Project Server 2013: Project Server Security Mode. (see <http://community.allocatus.com/forums/thread/587.aspx>)
- SharePoint Farm Administrator Account
- Windows Account as Allocatus Service Account for Project Server

NOTE If you have installed Project Server with setup type *Standalone*, please refer to <http://community.allocatus.com/forums/thread/371.aspx>.



Requirements for Outlook

Outlook 2000, 2002, 2003, 2007, 2010 (x86), 2013 (x86)

Requirements for Exchange Server 2003

- Exchange Server 2003 SP2
- Valid SSL certificate(s) for the servers with Frontend Servers
- Determine Exchange Server Frontend Server URL and Outlook Web Access Authentication Method (NTLM or FBA)
Note: If you access OWA and see a separate login page, OWA uses FBA.
- Create Windows Account with an Exchange Mailbox as Allocatus Service account for Exchange Server

Requirements for Exchange Server 2007

- Exchange Server 2007 SP2
- Valid SSL certificate(s) for the servers Mailbox and Hub Role.
- Determine Exchange WebDAV URL of a Client Access Server
- Create a Windows Account with an Exchange Mailbox as Allocatus Service account for Exchange Server

Requirements for Exchange Server 2010/2013

- Exchange Server 2010, 2013
- Valid SSL certificate(s) for the servers with CAS Role
- Determine Exchange Web Service URL of a Client Access Server
- Create a Windows Account with an Exchange Mailbox as Allocatus Service account for Exchange Server

Requirements for Exchange Online

- Active Directory Federation between On Premises AD of Project Server and Office 365
- Configured AD Attributes proxyAddresses, mail, mailNickname for each user
- Internal CNAME for Autodiscovery Url of Exchange Online
- Create a Windows Account with an Exchange Mailbox as Allocatus Service account for Exchange Server

Requirements for Lotus Notes

Lotus Notes 4.x, 5.x, 6.x, 7.x, 8.x

Requirements for Domino Server

- Domino Server 8.x
- Http task enabled
- View which maps Windows Account of Project Server Users to Notes Users (By default looks for a view *People By UserID | X-ShortName* and expects the Windows Username in the first column. In addition the first value in the field *ShortName* in the Person document needs to be *UserID*).



Install Allocatus Server

To install Allocatus run Allocatus Server setup on a computer running Project Server. If you have multiple machines running Project Server use one of the application servers.

The Allocatus Server setup provides two setup types: *Express* and *Advanced*. For new installations or in place upgrade run always the Express Setup. For other scenarios, e.g. restoring an existing database run the Advanced Setup.

NOTE During the installation, IIS will be stopped and restarted. If the server cannot restart IIS, then this can be manually performed using the `iisreset /start` command from the command prompt or `services.msc`

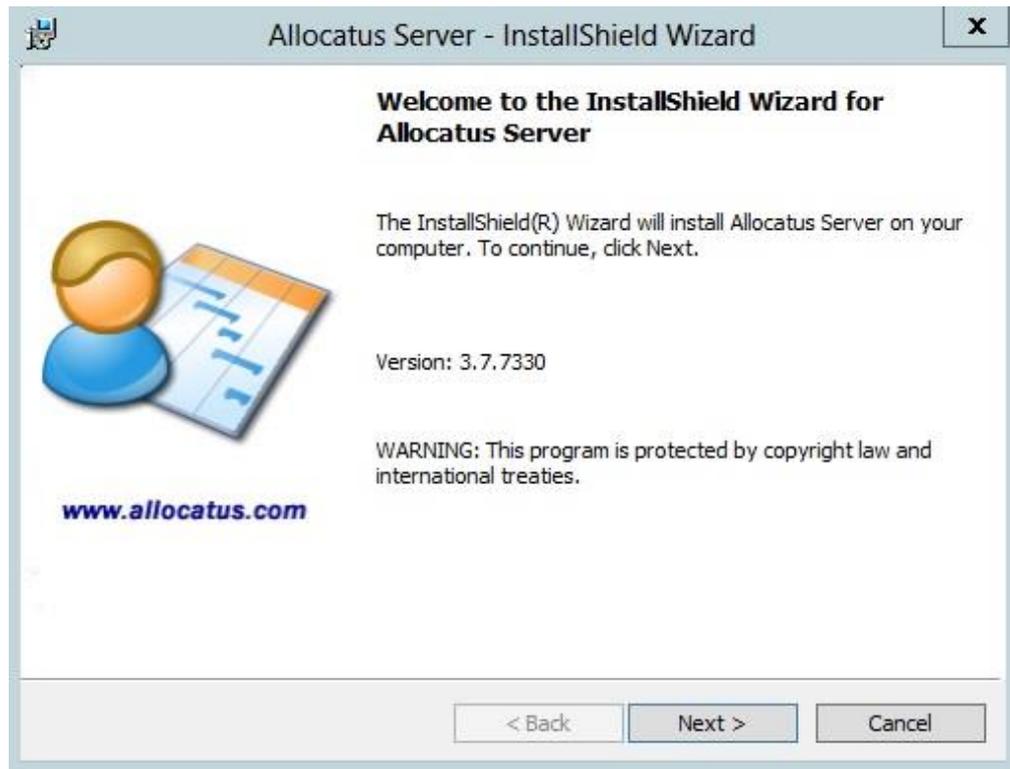
NOTE 2010/2013 Since SharePoint Server 2010/2013 disables the *Default Web Site* by default, you have to move the *Allocatus* web application to another Website after the setup is completed. See the section *Verify and move Allocatus web application if required*, page 18.

Run Express setup

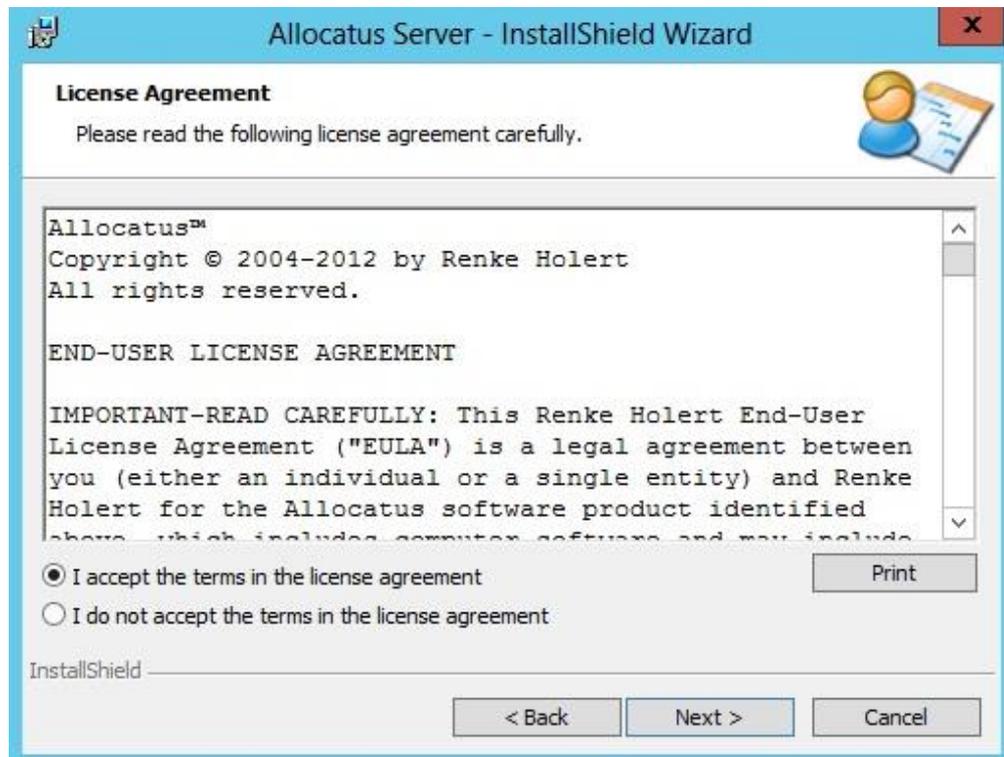
The Express setup automatically creates the Allocatus database account and SQL Server Login *Allocatus* as well as creates or updates the Allocatus database *Allocatus*.

NOTE 2002/2003 For Project Server 2002/2003 the Express setup grants the *Allocatus* user *db_datareader* permissions to Project Server database and adds the *Link to Groupware* button to Project Web Access.

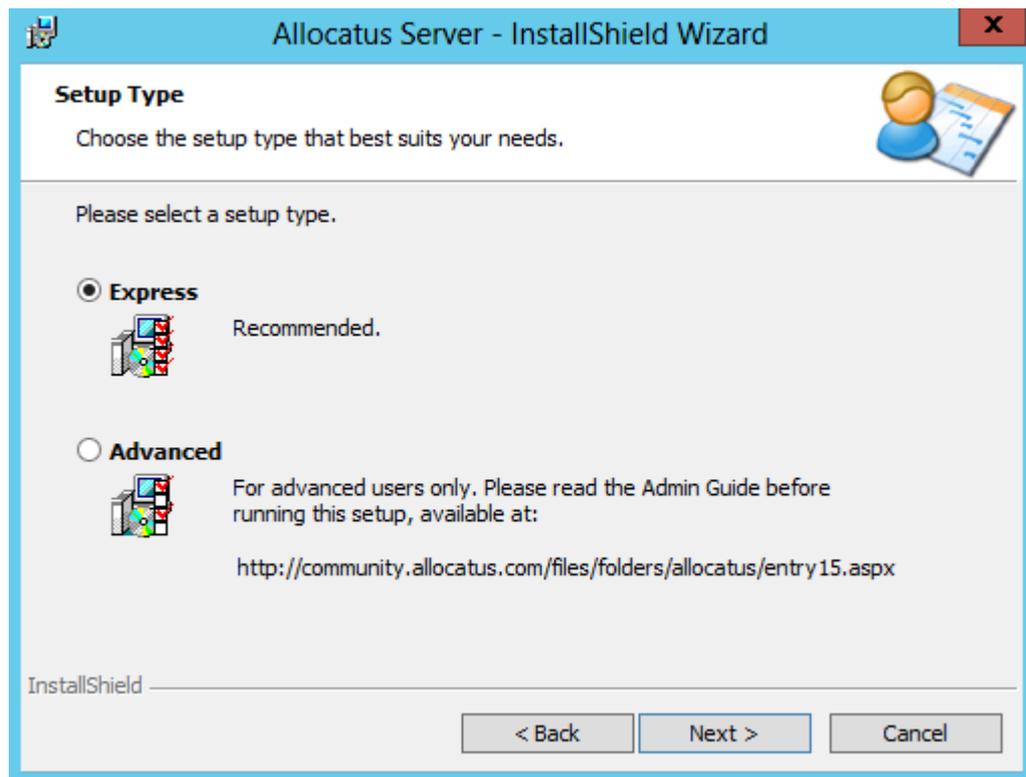
Run the Allocatus Server Setup.



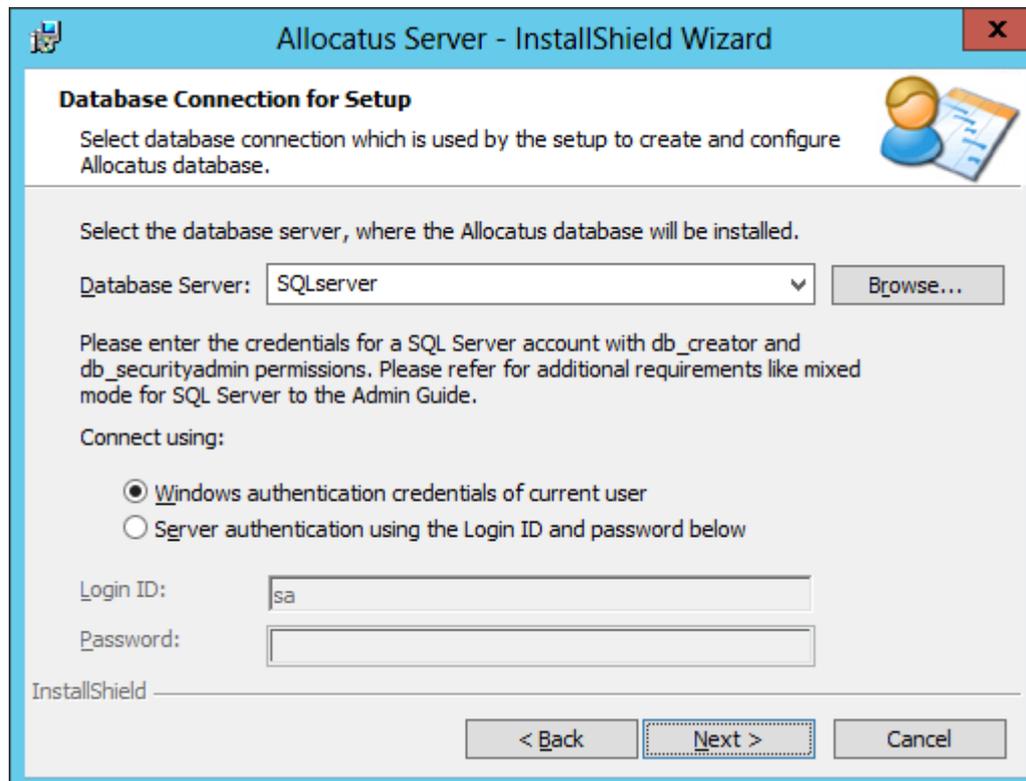
1. Click *Next*.



2. Select the radio button *I accept the terms of the license agreement* and click *Next*.



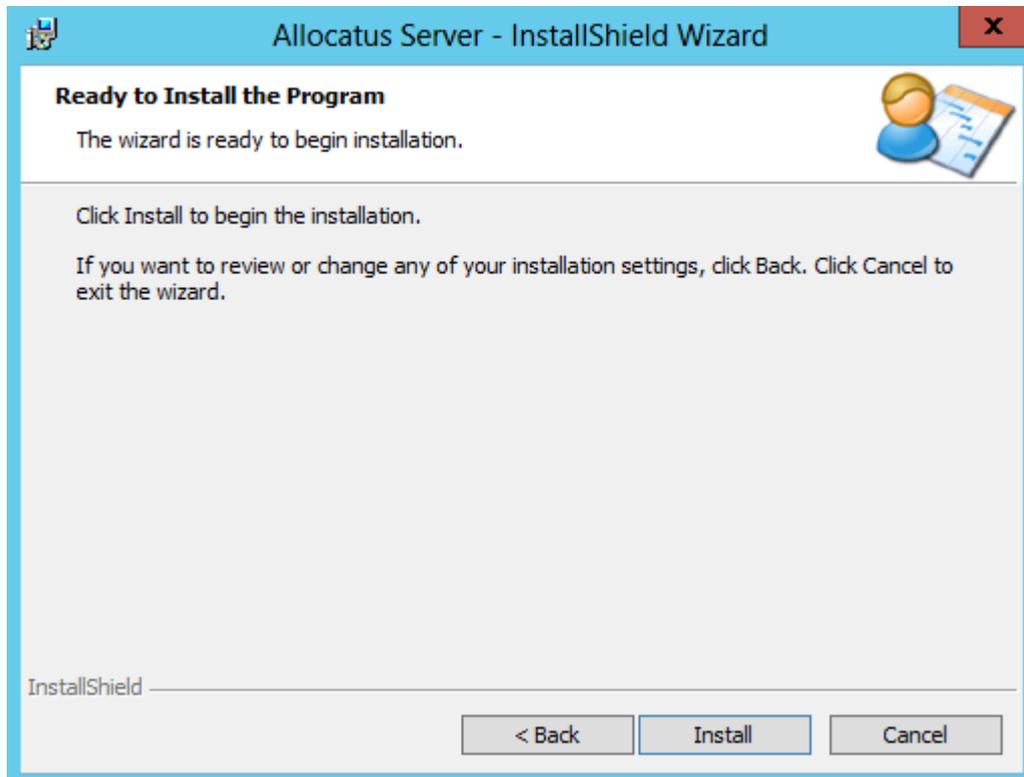
3. Click *Next*.



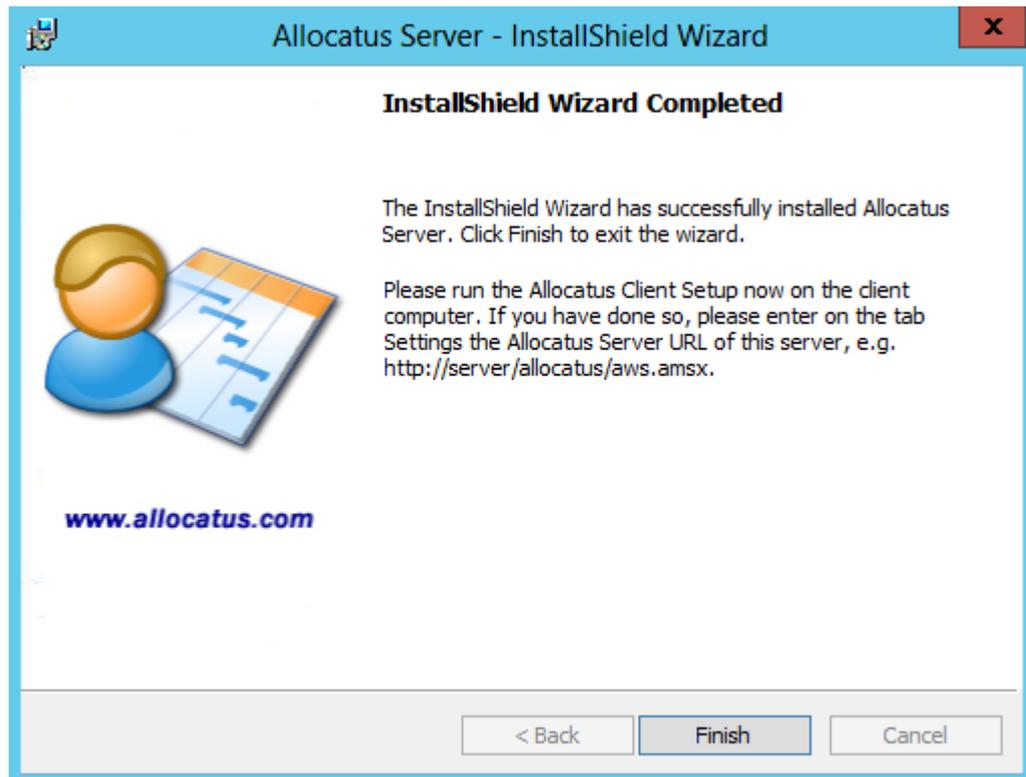
4. Select the database server, e.g. the one that hosts the Project Server databases. Choose the appropriate authentication method. Click *Next*.



NOTE The credentials provided in the dialog will only be used during the installation.



5. Click *Install*.



6. Click *Finish*.

Continue with section *Verify and move Allocatus web application if required*, page 18.

Run Advanced setup

The Advanced setup gives you more control over the installation process. You can

- choose between creating a new database or connecting to an existing Allocatus database.
- specify the database account for the Allocatus and Project Server database.
- decide whether to add the *Link to Groupware* button to Project Web Access 2002/2003 or not.

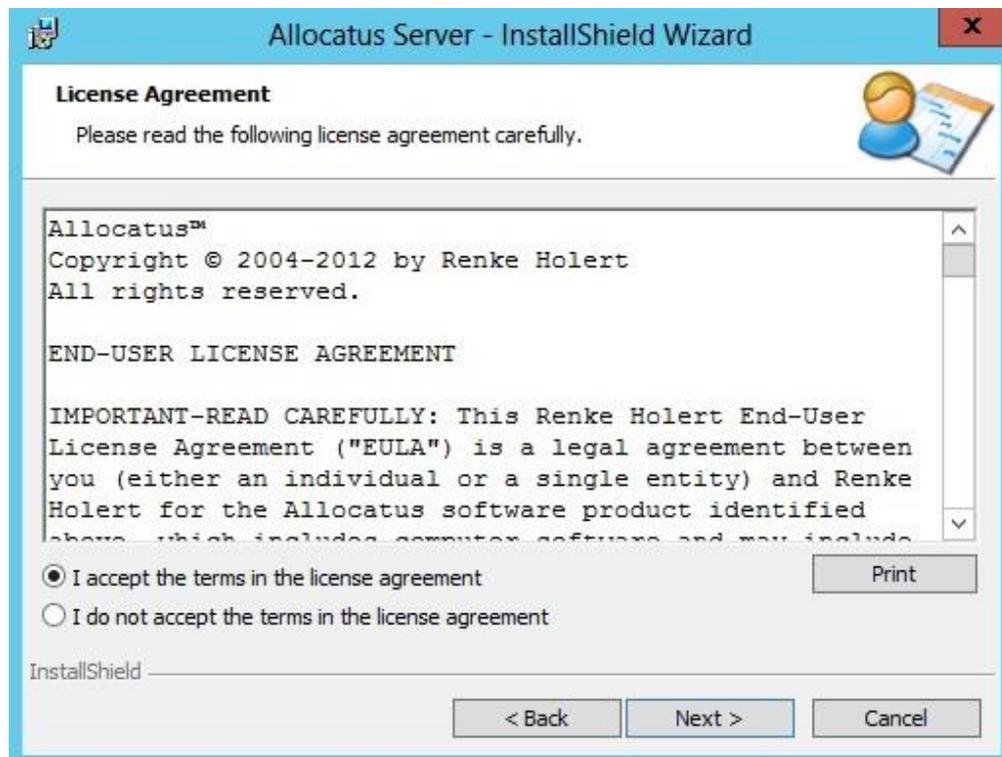
NOTE Before running the Allocatus Setup in *Advanced* type you have to manually create a SQL login for Allocatus with SQL Server authentication. The login has to meet your password policies and must not contain xml special characters like `<> () [] ;`

NOTE For Project Server 2002/2003, the permission *db_datareader* needs to be granted to the Project Server database for the SQL account created above.
If you wish to use the WriteBack feature of the Allocatus Client, then the *db_datawriter* permission needs to be granted to the Project Server database for the SQL account created above.

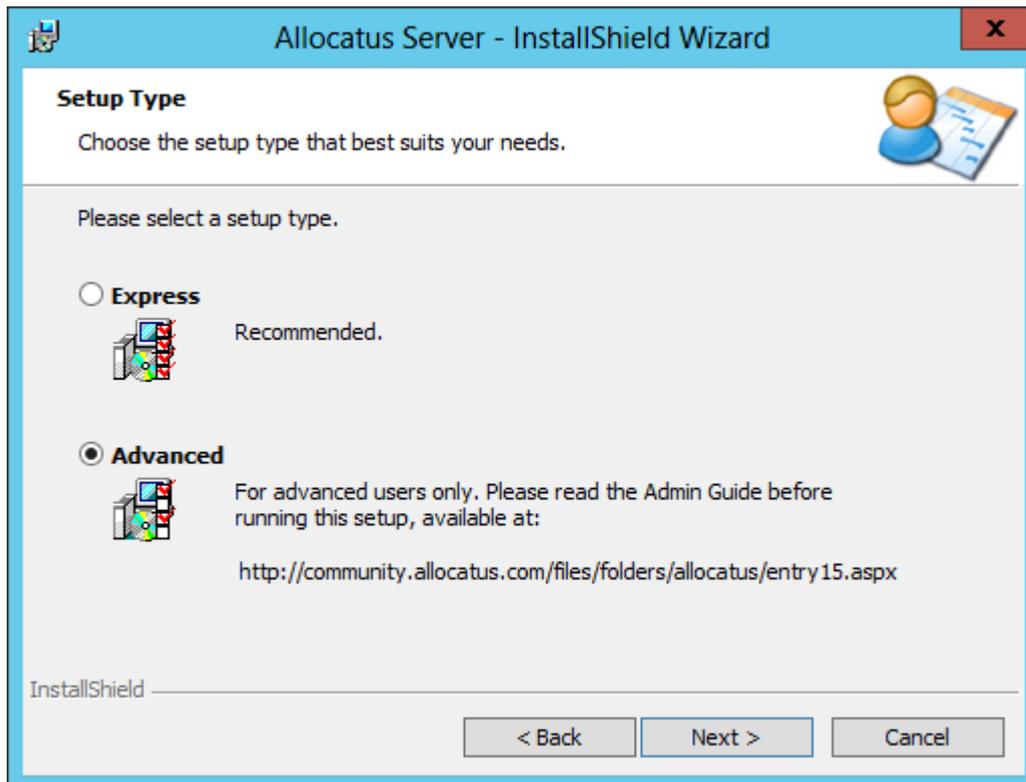
Run the Allocatus Server Setup.



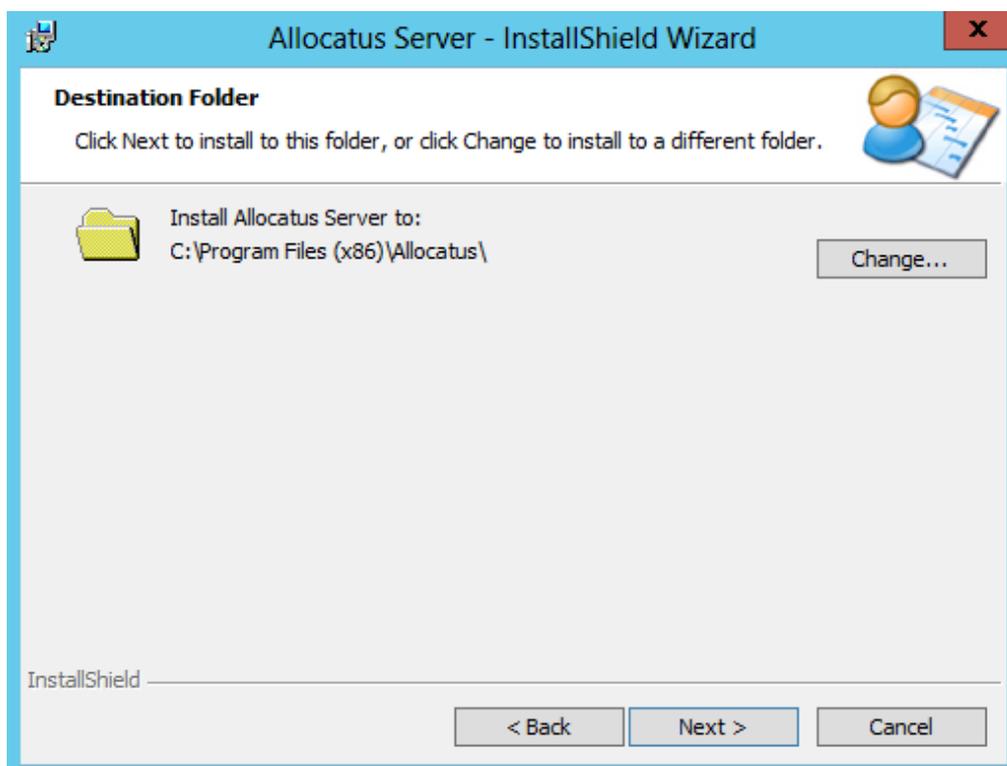
1. Click *Next*.



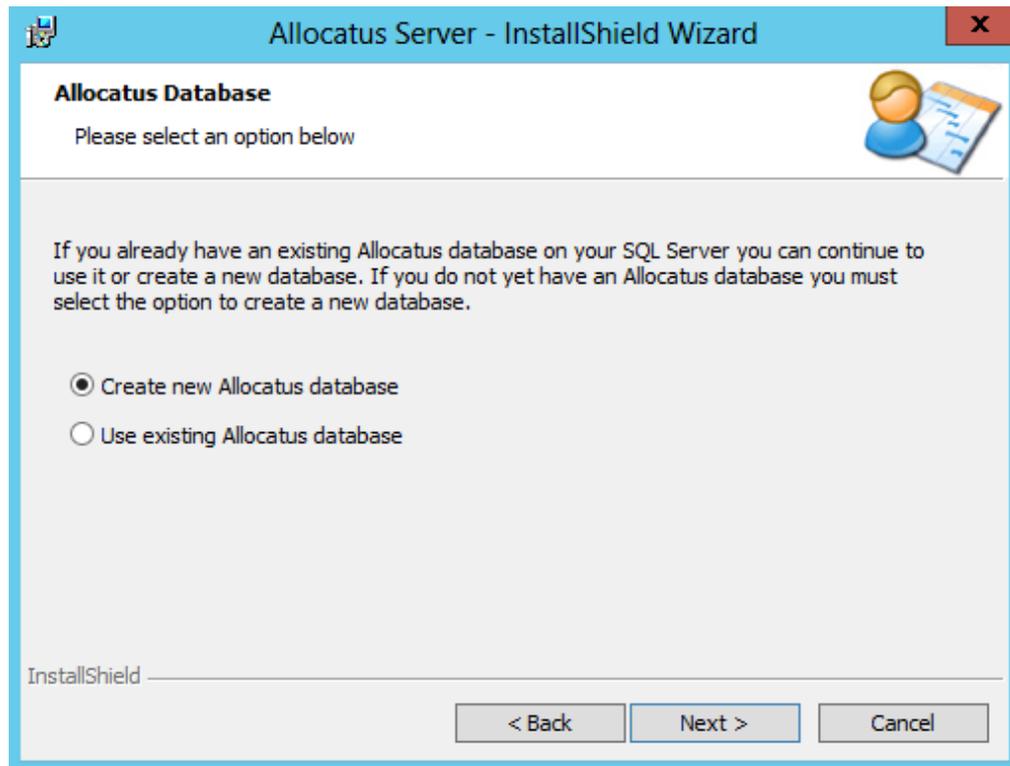
2. Select the radio button *I accept the terms of the license agreement* and click the button *Next*.



3. Select the *Advanced* radio button and click *Next*.



4. Choose the location of the Allocatus Server files and click *Next*.



5. Select the *Create new Allocatus database* radio button and click *Next*.

NOTE

Selecting *Use existing Allocatus database* does not update an existing database to the latest version. You need to run the update scripts manually or use the Express Setup type. Please contact support@allocatus.com in case you want to do a migration manually.



Create Allocatus Database

Select SQL Server and authentication method to create the Allocatus database

Please enter the connection information for the SQL Server, where the Allocatus database should be created.

This account must belong to the 'System Administrators' fixed role. The account to run the database will be specified on the next dialog.

Database Server: V87 Browse...

Database: Allocatus

Connect using:

Windows authentication credentials of current user

Server authentication using the Login ID and password below

Login ID: sa

Password:

InstallShield

< Back Next > Cancel

6. Enter the name of the database server, the database name and the credentials with admin privilege and click *Next*.

NOTE The credentials provided in the dialog will only be used during the installation.



Allocatus Database Runtime Account
Specify Allocatus user database account

Please create an SQL Server Login with SQL Server Authentication for Allocatus and enter User Name and Password here.

If connecting to an existing Allocatus database this user must be member of the role 'AllocatusRole' in the Allocatus database. If you create a new database the user will be automatically assigned to this role.

User Name:

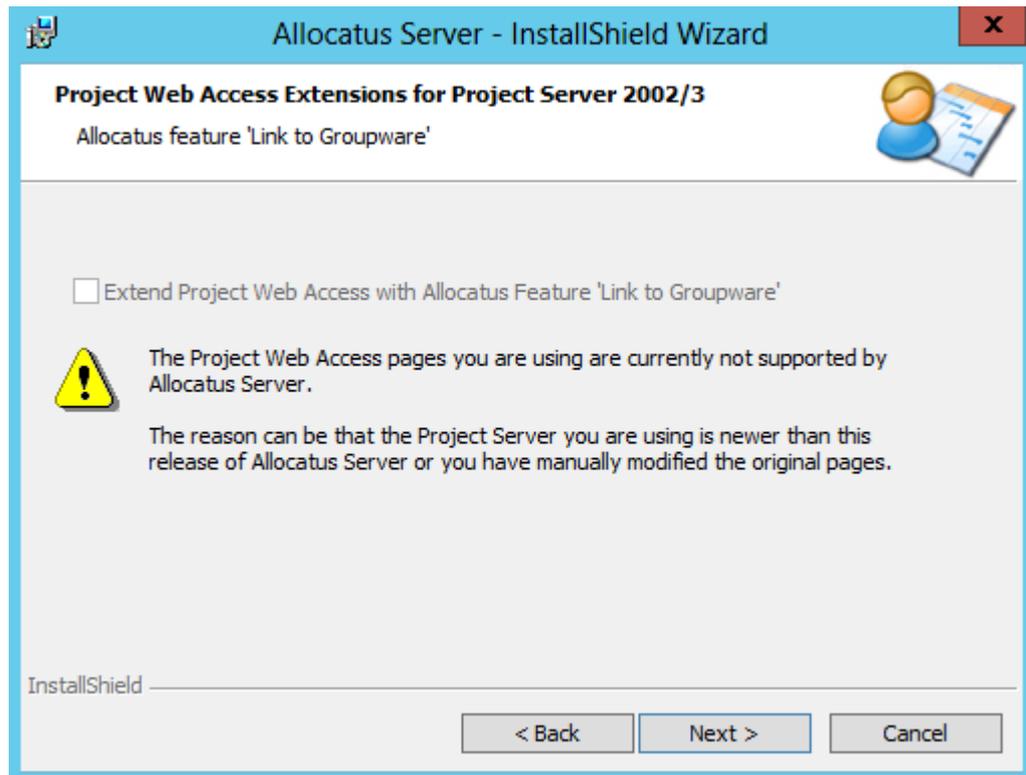
Password:

InstallShield

< Back Next > Cancel

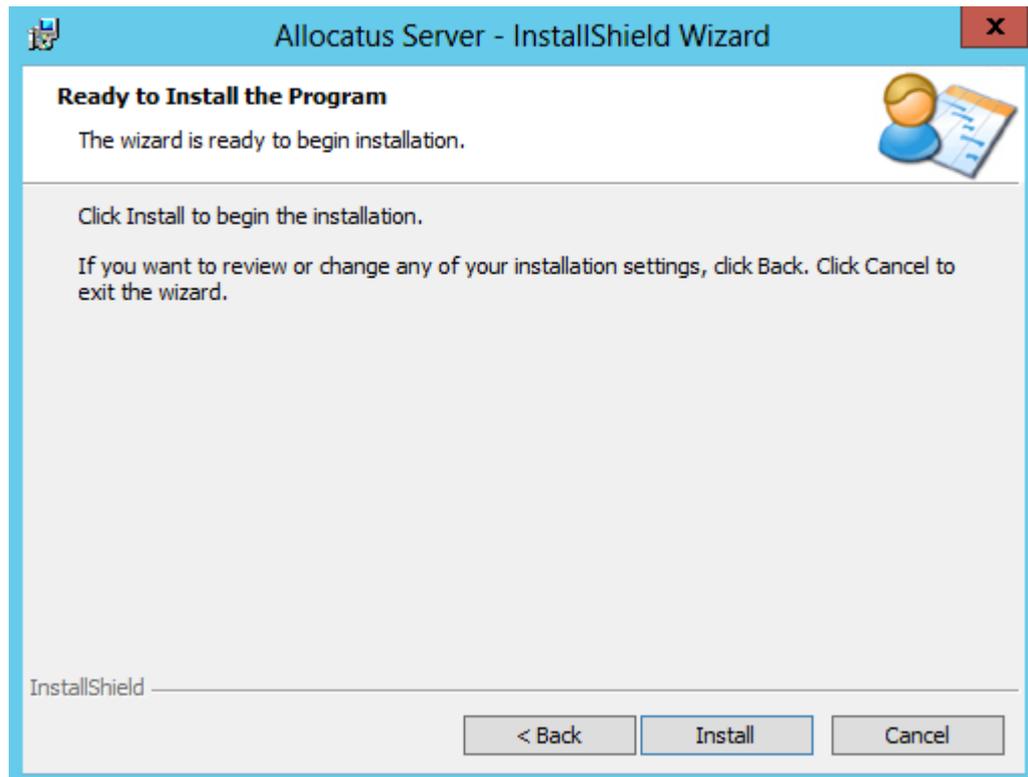
7. Enter the *User Name* and *Password* of the SQL account for Allocatus that was previously created and click *Next*.

NOTE This account will be used by the Allocatus Server to connect to the Allocatus database during runtime.

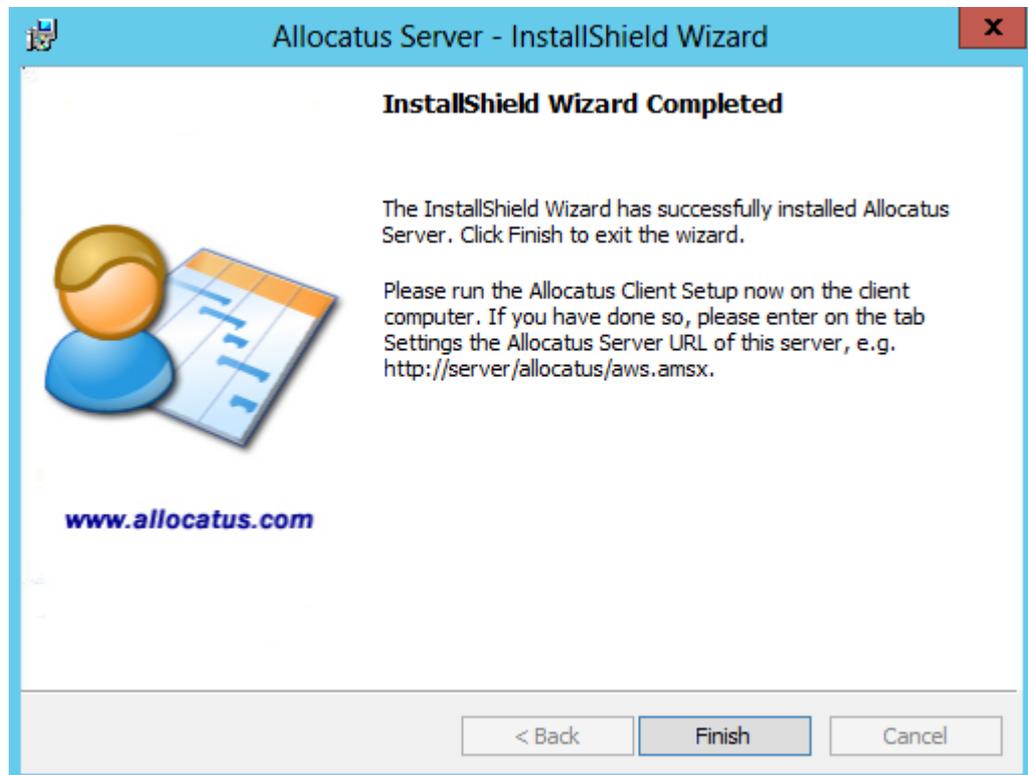


- Select option *Extend Project Web Access with Allocatus Feature 'Link to Groupware'* and click *Next*.

NOTE This option is only available for Project Server 2002/2003 and creates the button *Link to Groupware* in Microsoft Project Web Access. This allows the user to link tasks manually. The setup validates the version of the Project Web Access and will display a warning if the version is not supported.



8. Click *Install*.



9. Click *Finish*.



Verify and move Allocatus web application if required

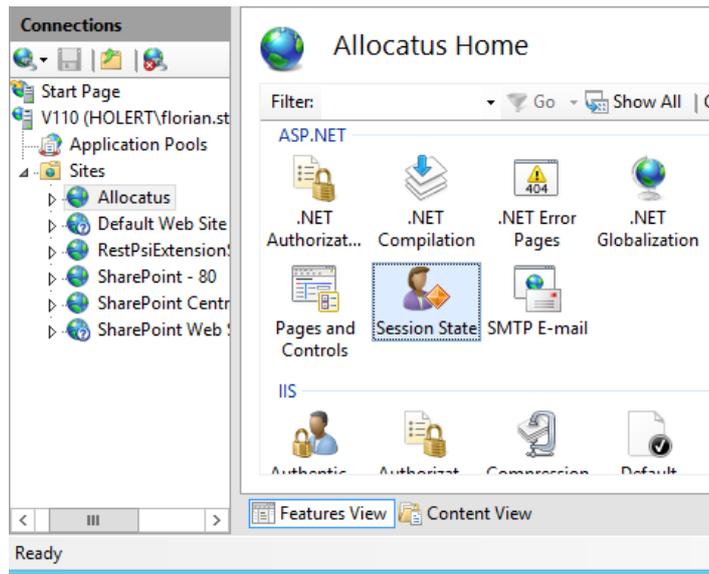
During installation a virtual directory called *Allocatus* is created in the *Default Web Site*. If the *Default Web Site* is stopped (which it is in a standard SharePoint environment) create a new Web Site for Allocatus Server.

Internet Information Services 6.0 (Windows Server 2003)

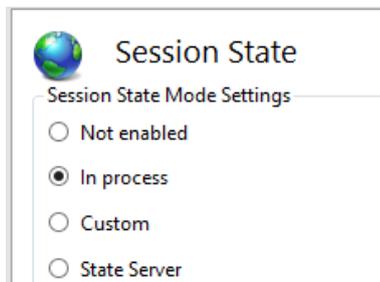
1. Start the Internet Information Services (IIS) Manager.
2. Expand the node *Web Sites*.
3. Right-click the node select *New Web Site*.
4. Click *Next*.
5. Enter in the field Description *Allocatus*.
6. Set the binding, e.g. TCP Port 81 and click *Next*.
7. Set the *Path* by browsing to the Allocatus Server root folder, e.g. *C:\Program Files (x86)\Allocatus\Server* and click *Next*.
8. Click *Next* and *Finish*.

Internet Information Services 7.0/7.5/8.0 (Windows Server 2008/2008 R2/2012/2012 R2)

1. Start the Internet Information Services (IIS) Manager.
2. Right click the node *Application pools* and select *Add Application Pool*
3. Enter *Allocatus* as *Name*, *.NET Framework v2.0.50727* as *.NET Framework version*, *Classic* as *Managed pipeline mode* and click *OK*.
4. Set Application Pool identity to the Allocatus Service account used to access Project Server (*Advanced Settings/Process Model/Identity*)
5. Expand the node *Sites*
6. Right-click the node and select *Add Web Site*
7. Enter in the field Site name *Allocatus*.
8. Select the newly created application pool *Allocatus* for the application
9. Set the physical path by browsing to the Allocatus Server root folder, e.g. *C:\Program Files (x86)\Allocatus\Server*.
10. Set the binding, e.g. TCP Port 81 and click *Next*.
11. Click *OK*.
12. Click the Allocatus Web Site. Chose *Features View* and double-click *Session State*.



13. Make sure that the *Session State Mode* is *In process*.

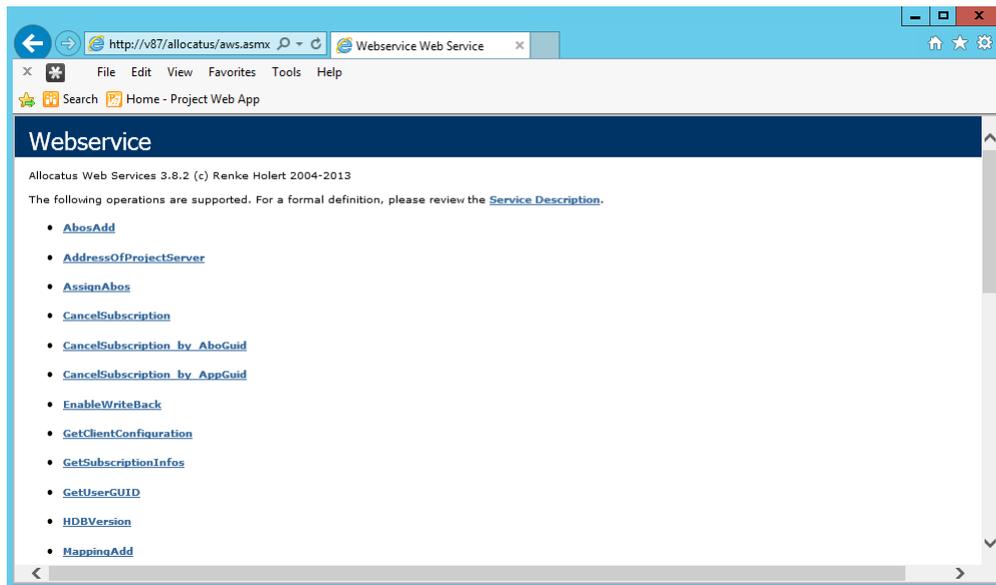


Add Firewall rule for new port

1. Click *Start*, click *Administrative Tools*, and then click *Windows Firewall with Advanced Security*.
2. Right-click *Inbound Rules*, and then click *New Rule*.
3. In the *New Inbound Rule Wizard* dialog box, on the *Rule Type* page, click *Port*, and then click *Next*.
4. On the *Protocol and Ports* page, click *TCP*, click *Specific local ports*, type the port of the Allocatus Web Site (e.g. 81), and then click *Next*.
5. On the *Action* page, click *Allow the connection*, and then click *Next*.
6. On the *Profile* page, select: *Domain* and *Private* check box. Click *Next*.
7. On the *Name* page, type a meaningful name for the new inbound rule (e.g. Allocatus Server TCP Port 81). You can add also a description. Click *Finish*.

Test the connection

Browse to Allocatus Web Service URL according to the configured binding, e.g. <http://servername:81/aws.asmx> to verify the correct installation of the Allocatus web site.

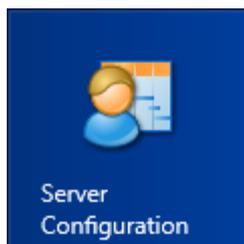


Install License Key

Place the file *license.xml* in the Allocatus Server binaries folder e.g. *C:\Program Files (x86)\Allocatus\Server\bin*.

Configure Allocatus Server

The majority of configuration for the Allocatus Server is performed using the Allocatus Server Configuration utility. On a pre Windows 2012 server, this can be found on the Start menu under *All Programs/Allocatus/Server configuration*. On a Windows 2012 server, the utility is on the start screen and is name *Server Configuration*.



The following sections should be configured appropriately depending on your environment:

- Configure the Project Server Connection
- Configure the Allocatus Server Settings
- Configure the Allocatus User Settings
- Configure the Exchange Server Connection
- Configure the Domino Server Connection
- Optional: Configure the Allocatus Client



- Start the Allocatus Server

Configure the Project Server Connection

Configure Project Server 2002/2003 Connection

1. Under *Connections* select *Project Server*.

Allocatus Server Configuration

Project Server

Project Server version: 2002/2003

Database server: DatabaseServer

Database name: ProjectServer

Authentication:

Use the credential of the Allocatus service
To use this option, the service must run under the context of a domain user

Use a specific user account
The user account [Allocatus](#) is currently used to access the Project Server database server. Click on the name to change the used account.

Ok Cancel Apply

2. In the *Project Server version* drop-down list field select *2002/2003*.
3. In the field *Database server* enter name of the SQL Server which hosts the Project Server database.
4. In the field *Database name* enter name of the Project Server database

NOTE Do not click *Apply* yet, instead go to *Configure Allocatus Server Settings*, page 28.

Configure Project Server 2007 Connection

To configure the Project Server 2007 connection you need to perform the following steps:

1. Get Project Server Web Access address
2. Get Project Web Access Site Identity (PWA Site Identity)



3. Get SharePoint Shared Service Provider URL (SSP URL)
4. Configure the Project Web Access Site Identity as a Project Server Administrator
5. Configure the Project Server Connection

Get Project Server Web Access address

The screenshot shows a Microsoft Internet Explorer browser window displaying the Project Web Access site. The address bar contains the URL `http://v7/PWA/default.aspx`, which is highlighted with a red box. A red box labeled `pwaUri` points to the address bar. The page content includes a navigation menu on the left and a main content area with reminders and project workspaces.

Sample: <http://v7/pwa>

Get Project Web Access Site Identity (PWA Site Identity)

Open the *SharePoint Central Administration* and navigate to *Operations* and then *Service Accounts*.

1. Select the radio button *Web application pool*.
2. In the dropdown list box labelled *Web service* select the entry *Windows SharePoint Web Application Services*.
3. In the dropdown list box *Application pool* select the application pool of your Project Web Access site (For example: *SharePoint - 80*).
4. Write down *User Name* from of the Project Web Access site identity (see *Configurable*).

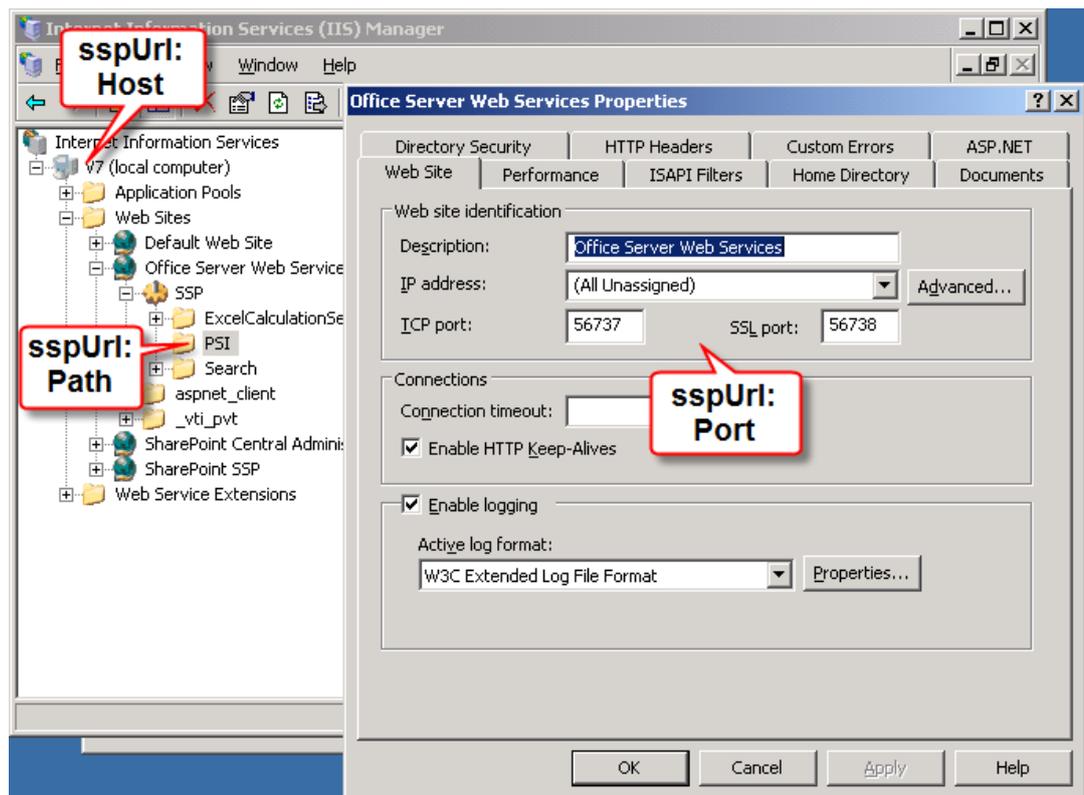
Sample: `v7\WSSAdmin`

Get SharePoint Shared Service Provider URL (SSP URL)

Navigate to *Start/All Programs/Administrative Tools/Internet Information Services (IIS) Manager*



1. Write down: Hostname (Sample: v7).
2. Expand Sites/Office Server Web Services.
3. Right-click Office Server Web Services and select Properties (On Windows 2008 and later this is called *Edit bindings*) and write down TCP port for http. (Sample: 56737).
4. Write down virtual directory name of Shared Service Provider URL (Sample: SSP).
5. Compose SSP URL with protocol, hostname, port and virtual directory (Sample: `http://v7:56737/SSP`).



Configure the Project Web Access Site Identity as a Project Server Administrator

To grant the Project Web Access site identity administrative privileges take the following actions:

1. Open the Project Web Access.
2. Change to User Management *Server Settings/Manage Users*.
3. Click *New User*.
4. In the field *Display Name* enter the Active Directory display name of the Allocatus Service Account, e.g. *WSSAdmin*.
5. In the field *User Logon Account* enter the name of the Allocatus Service Account, e.g. *v7\WSSAdmin*.
6. Select in the list field *Available Groups* the entry *Administrators* and click *Add*.



7. Click **Save**.

Configure the Project Server Connection

1. Open the Allocatus Server Configuration utility from the *Start/All Programs/Allocatus/Server Configuration*.
2. Under *Connections* select *Project Server*.

The screenshot shows the 'Allocatus Server Configuration' dialog box with the 'Project Server' tab selected. The left-hand navigation pane is expanded to 'Connections', with 'Project Server' highlighted. The main area contains the following fields and options:

- Project Server version:** A drop-down menu set to '2007'.
- Project Web Access Url:** A text box containing 'http://v7/pwa'.
- Shared Services Provider Url:** A text box containing 'http://v7:56737/SSP'.
- Authentication:** Two radio buttons are present:
 - Use the credential of the Allocatus service**
To use this option, the service must run under the context of a domain user
 - Use a specific user account**
The user account `v7wssadmin` is currently used to access the Project Web Access server. Click on the name to change the used account.
- Validate credentials**

At the bottom right of the dialog are three buttons: 'Ok', 'Cancel', and 'Apply'.

3. In the *Project Server version* drop-down list select *2007*.
4. In the field *Project Web Access URL* enter the Project Web Access URL collected earlier, e.g. `http://v7/pwa`.
5. In the field *Shared Service Provider URL* enter the address of the Shared Service Provider collected earlier, e.g. `http://v7:56737/SSP`.
6. Under *Authentication* select the radio button *Use a specific user account* and enter the Project Web Access site identity, e.g. `V7\WSSAdmin` and the password of that account.

NOTE Do not click *Apply* yet, instead go to *Configure Allocatus Server Settings*, page 28

Configure Project Server 2010/2013 Connection

To configure the Project Server connection you need to perform the following steps:

1. Connection Permission for Project Server Service Application



2. Add the Allocatus Service Account to Project Server Administrators group in Project Server 2010 or
3. Add the Allocatus Service Account to Project Server Administrators group in Project Server 2013
4. Enable Claims based Authentication
5. Configure the Project Server Connection

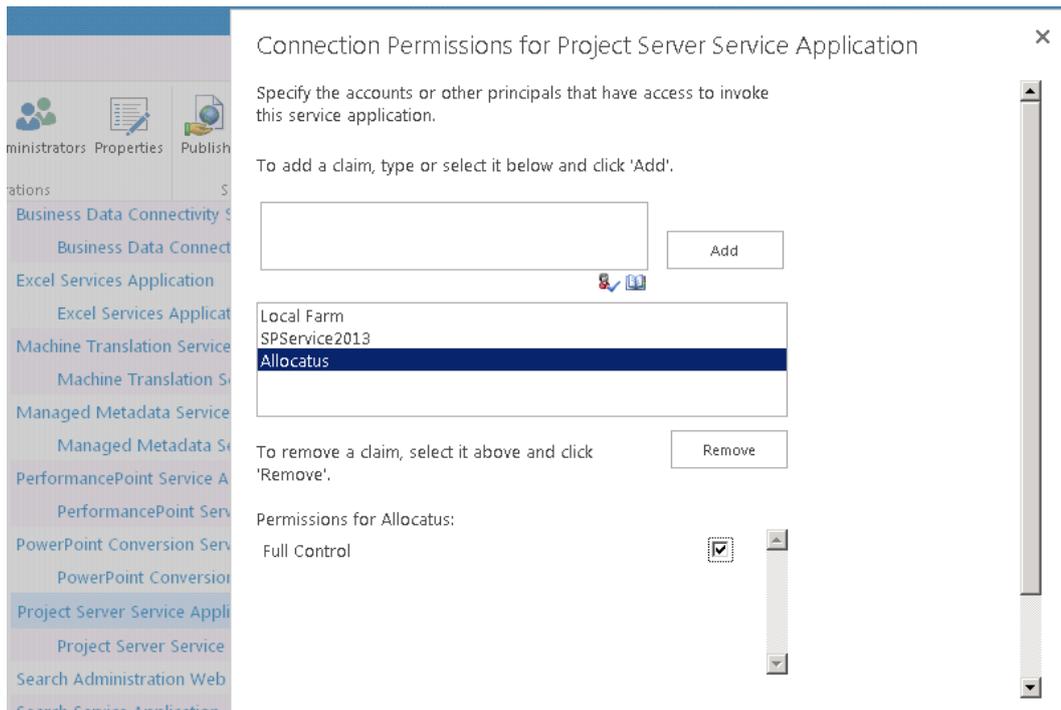
Connection Permission for Project Server Service Application

To grant the *connection* permission to the Allocatus service account, follow these steps:

1. Start the *SharePoint Central Administration: All Programs/Microsoft SharePoint <version> Products/SharePoint <version> Central Administration* or
2. Navigate to *Application Management/Manage Service Applications*.

Name	Type	Status
App Management Service Application	App Management Service Application	Started
App Management Service Application Proxy	App Management Service Application Proxy	Started
Application Discovery and Load Balancer Service Application	Application Discovery and Load Balancer Service Application	Started
Application Discovery and Load Balancer Service Application Proxy	Application Discovery and Load Balancer Service Application Proxy	Started
AppServiceApp	App Management Service Application	Started
App Management Service Application Proxy_a5095d71-4419-4d08-901c-b4ea42cfba95	App Management Service Application Proxy	Started
Excel Services Application	Excel Services Application Web Service Application	Started
Excel Services Application	Excel Services Application Web Service Application Proxy	Started
Managed Metadata Service Application	Managed Metadata Service	Started
Managed Metadata Service Application	Managed Metadata Service Connection	Started
PerformancePoint Service Application	PerformancePoint Service Application	Started
PerformancePoint Service Application	PerformancePoint Service Application Proxy	Started
Project Server Service Application	Project Application Services	Started
Connects to Project Server Service Application	Project Services Application Proxy	Started
Secure Store Service Application	Secure Store Service Application	Started
Secure Store Service Application	Secure Store Service Application Proxy	Started
Security Token Service Application	Security Token Service Application	Started

3. Select the row of the Project Server Service application to highlight it, but don't activate the link by clicking on the text.
4. On the *Service Applications* tab, click *Sharing/Permissions*.
5. In the *Connection Permissions for Project Server Service Application* dialog box add the Allocatus Service account.



6. Click *Add*, select the user from the list and then check the *Full Control* check box.
7. Click *Ok* to apply the changes.

Add the Allocatus Service Account to Project Server Administrators group in Project Server 2010

To grant the Allocatus Service Account administrative privileges follow these steps:

1. Open the Project Web App.
2. Navigate to *Server Settings* and then *Security/Manage Users*.
3. Click *New User*.
4. Enable *User can be assigned as a resource*.
5. In the field *Display Name* enter the Active Directory display name of the Allocatus Service account, e.g. *Allocatus*.
6. In the field *User Logon account* enter the Windows account name of the Allocatus Service Account, e.g. *Domain\Allocatus*.
7. In the field *Available Groups* select the entry *Administrators* and click *Add*.
8. If your PWA Administrator Group is synchronized with an AD Group, either add the Allocatus user account to the AD Group or enable the checkbox *Active Directory Synchronisation*
9. Click *Save*.

Add the Allocatus Service Account to Project Server Administrators group in Project Server 2013

To grant the Allocatus Service Account administrator privileges follow these steps:



1. Open the Project Web App
2. Navigate to *Server Settings* and then *Security/Manage Users*.
3. Click *New User*.
4. Enable *User can be assigned as a resource*.
5. In the field *User Logon account* enter the Windows account name of the Allocatus Service Account, e.g. *Domain\Allocatus*.

User Authentication
Enter the user account that the resource will need to logon.

* User logon account:

 Prevent Active Directory synchronization for this user

Departments
Each Resource can belong to zero or more Departments. If a Department is not selected then the Resource will only have to fill in globally required Custom Fields.

Resource Departments:
 ...

Security Groups
Select the Project Web App Security Group that you wish to add the user to. By adding the user to these groups you will allow or deny them certain global permissions as well as access to Projects and Resources.

Available Groups:
Portfolio Managers
Portfolio Viewers
Project Managers
Resource Managers
Team Leads

Groups that contain this user:
Administrators

6. In the field *Available Groups* double click on the *Administrators* group to add the resource to the group.
7. Click *Save*.

Enable Claims based Authentication if required

If using Claims based authentication for Project Server 2010 and always for Project Server 2013 then *config.xml* must be edited to set the tag *ClaimsBasedAuthenticationEnabled* to true.

<http://community.allocatus.com/forums/post/512.aspx>

Configure the Project Server Connection

1. Open the Allocatus Server Configuration utility from the *Start/All Programs/Allocatus/Server Configuration*, or if using Windows Server 2012, select the *Server Configuration* icon on the desktop.
2. Under *Connections* select *Project Server*.



Allocatus Server Configuration

Status

- Services
- Logs

Settings

- Server settings
- User settings

Connections

- Project Server**
- Exchange Server

Project Server

Project Server version: 2010/2013

Project Web App Url: http://projectserver/pwa

Authentication:

Use the credential of the Allocatus service
To use this option, the service must run under the context of a domain user

Use a specific user account
The user account [Domain\Allocatus](#) is currently used to access the Project Web App server. Click on the name to change the used account.

Validate credentials

Ok Cancel Apply

3. In the *Project Server version* drop-down list select *2010/2013*.
4. In the field *Project Web App URL* enter the *Project Web App URL*, e.g. *http://projectserver/pwa*.
5. In the *Authentication* section, select the radio button *Use a specific user account*.
6. Click on the link *Domain\User* and enter the credentials of the Allocatus Service account.

NOTE Do not click *Apply* yet, instead go to *Configure Allocatus Server Settings*, page 28.

Configure Allocatus Server Settings

After the Project Server Connection has been configured please select *Server Settings*.

NOTE When trying to apply the Project Server Connection Settings before the Allocatus Server Settings have been configured properly, the validation check will fail.

Permission Manager

In the section *Permission Manager* enter the address of the Allocatus Web Site, e.g. *http://projectserver:81* (page 19).



Mail Settings

In the section *Mail Settings* enter the DNS name of your SMTP server, and an email address for mail sent by Allocatus.

The screenshot shows the 'Allocatus Server Configuration' dialog box. On the left is a navigation pane with sections: Status (Services, Logs), Settings (Server settings, User settings), and Connections (Project Server, Exchange Server). The 'Server settings' section is selected. The main area is titled 'Server settings' and contains three sections: 'Write Back' with radio buttons for 'Enable Write Back Mode' and 'Disable Write Back Mode' (selected); 'Mail settings' with text 'The settings specified here are used for all mails sent by Allocatus.' and input fields for 'Smtp server:' (smtp) and 'Sender address:' (allocatus@domain.com); and 'Permission Manager' with text 'Allocatus needs to know the HTTP address where the Allocatus WebService resides. This will usually something like http://servername.domain/allocatus.' and an input field for 'Address:' (http://projectserver/allocatus). At the bottom right are 'Ok', 'Cancel', and 'Apply' buttons.

Click the *Apply* button to save the configuration.

Optional: Write Back mode

This screenshot is identical to the previous one, but it focuses on the 'Write Back' section. The 'Enable Write Back Mode' radio button is now selected, and the 'Disable Write Back Mode' option is unselected. The rest of the dialog box remains the same.

1. From *Settings* select *Server Settings*.
2. Select the radio button *Enable Write Back mode* to enable Write Back.
3. Click *Apply* to save the configuration.

NOTE We do **not** recommend enabling Write Back when using Allocatus



Server for the first time.

Optional: Enable E-Mail User Notification

If you want to notify users of any change that is made to their calendar or task folder, User Notification needs to be enabled.

1. Run Notepad as Administrator and edit the config.xml file in the directory C:\Program Files (x86)\Allocatus\Server\bin.
2. Search the tag UserNotificationsEnabled and set its value to true:
<UserNotificationsEnabled>true</UserNotificationsEnabled>

NOTE This setting must be enabled, along with a valid SMTP server name (defined in the Allocatus Server Configuration utility) in order for emails to be sent to the user.

Optional: Customize subject line

You can specify if you want to see the project name (or part of it) in front of the task name in the subject line of a task or calendar entry. To do this, follow these steps:

1. Run Notepad as Administrator and edit the *config.xml* file in the directory C:\Program Files (x86)\Allocatus\Server\bin.
2. Search the tags SubjectProjNameStart and SubjectProjNameLength:
<SubjectProjNameStart>0</SubjectProjNameStart>
<SubjectProjNameLength>0</SubjectProjNameLength>

These two fields define which part of the project name is prepended to the subject of appointments or tasks.

For example: If the project name is *1234-MyProjectName*, this setting

```
<SubjectProjNameStart>4</SubjectProjNameStart>  
<SubjectProjNameLength>9</SubjectProjNameLength>
```

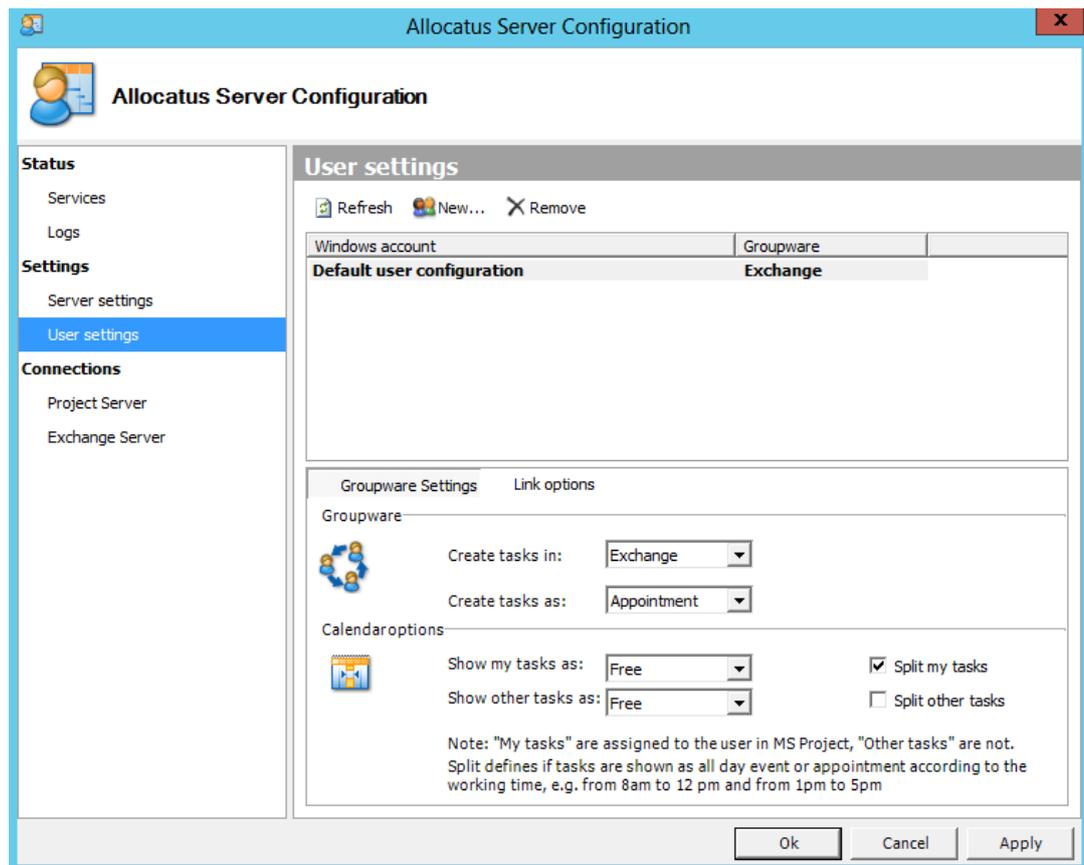
creates a subject line like *MyProject – TaskName*.

Configure Allocatus User settings

Configure the default User configuration

The default configuration is applied whenever a new user is added. To define the default settings for users follow these steps:

1. From *Settings* select *User Settings*.



2. Select the row *Default user configuration*. Within the *Groupware Settings* choose the appropriate fields (e.g. Outlook, see Allocatus User Guide) for your infrastructure.
3. Click *Apply* to save the configuration.

Add new users

To configure settings for specific users follow these steps:

1. Under *Settings* select *User Settings*
2. Click the *New* button and select one or more Project Server users from the list and click *OK*.
3. Click *Apply* to save the configuration.

Configure Exchange Server Connection

This step configures Allocatus Server to directly integrate with Exchange Server. It is not used for Lotus Notes or Outlook client integration through the use of the Allocatus client.

Configure Exchange 2003/2007 Connection

1. From *Connections* select *Exchange Server*.



The screenshot shows the 'Allocatus Server Configuration' dialog box with the 'Exchange Server' tab selected. The 'Exchange Server version' is set to '2003/2007'. The 'Use a specific user account' radio button is selected. The 'Authentication method' dropdown is open, showing 'Basic', 'NTLM', and 'Form based authentication'. The 'Server url' is 'https://owa/exchange'. A warning icon is present next to a note about front-end/client access server requirements.

Allocatus Server Configuration

Exchange Server

Exchange Server version: 2003/2007

Connections to the Exchange Server can either be made using the credential of the Allocatus service or an explicit username and password.

Use the credential of the Allocatus service
To use this option, the service must run under the context of a domain user

Use a specific user account
The user account [Domain\Allocatus](#) is currently used to access the Exchange server. Click on the name to change the used account.

Authentication method: Basic
 Validate credentials

Use a front-end/client access server for all connections to Exchange
Server url: https://owa/exchange
Example: https://cas.example.com/exchange

Front-end/client access server feature requires at least Exchange 2003 SP2 or Exchange 2007 and basic or form based authentication.
The form based authentication requires an SSL connection.
For use of a client access server with Exchange 2007 basic authentication is recommended.

Ok Cancel Apply

2. In the *Exchange Server version* drop-down list select 2003/2007.
3. Select the *Use a specific user account* radio button.
4. Click on the [Domain\user account](#) link.
5. Enter the credentials of the Allocatus service account which you created before and select the appropriate authentication method.

NOTE For Exchange 2003 see *Requirements for Exchange Server 2003* on page 5.
For Exchange 2007 always select *NTLM*.

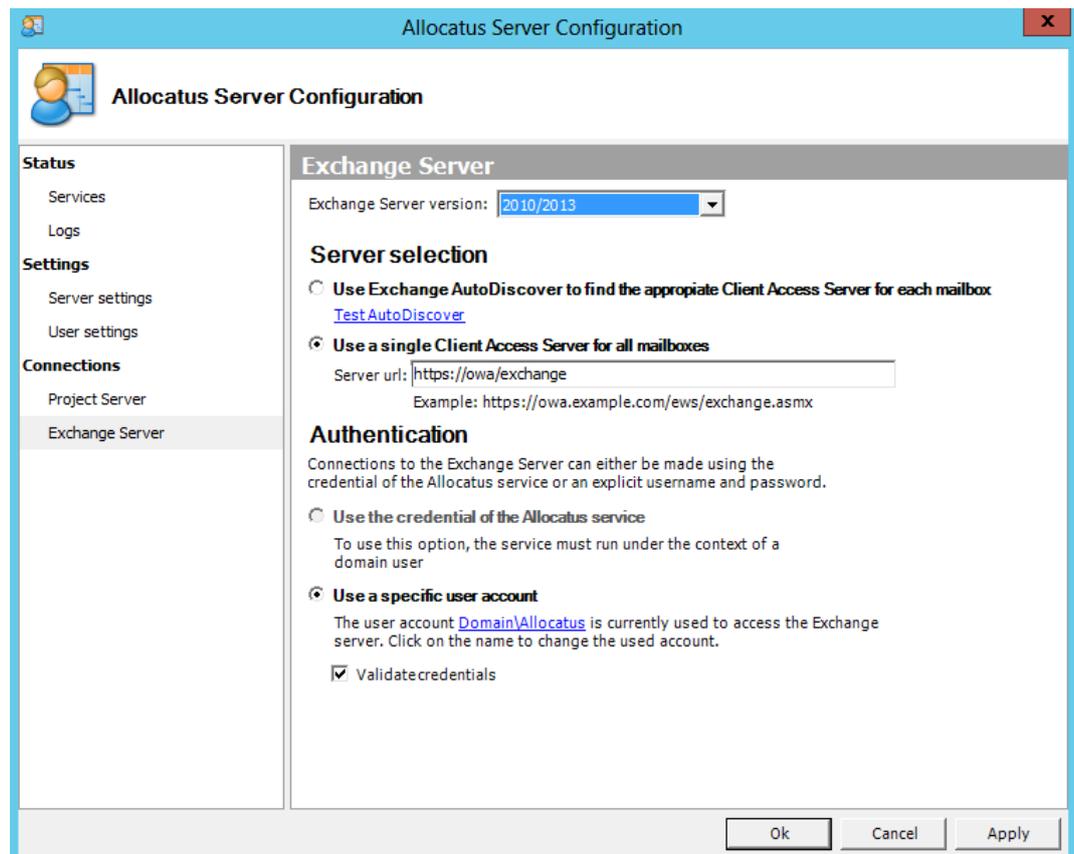
6. If your farm has a separate front-end/client-access server, check *Use a front-end/client-access server for all connection to Exchange* and specify the server name.

NOTE Exchange Server 2007 requires SSL for the Outlook Web Access by default.

7. Click *Apply* to validate and save your configuration.

Configure Exchange 2010/2013 Connection

1. From *Connections* select *Exchange Server*.



2. In the *Exchange Server version* drop-down list select *2010/2013*.
3. Decide whether you want to use *Exchange AutoDiscover* for the mailbox access. You can also use a dedicated *Client Access server* instead.
4. For *AutoDiscover*, no further configuration is required. Click on the link *Test AutoDiscover* to test *AutoDiscover* in your environment.
5. To route all requests to a specific *Client Access server* select this option and enter the address of your *Client Access Server* in the textbox labelled *Server URL*.
6. In section *Authentication* select the option *Use a specific user account*. Click on the *Domain\user account* link
7. Enter the credentials of the *Allocatus service account* which you created before.

Configure Exchange Online Connection

1. From *Connections* select *Exchange Server*.



The screenshot shows the 'Allocatus Server Configuration' window with the 'Exchange Server' tab selected. The window has a sidebar on the left with sections: Status (Services, Logs), Settings (Server settings, User settings), and Connections (Project Server, Exchange Server). The main area is titled 'Exchange Server' and contains the following settings:

- Exchange Server version:** 2010/2013 (selected in a dropdown menu)
- Server selection:**
 - Use Exchange AutoDiscover to find the appropriate Client Access Server for each mailbox. [Test AutoDiscover](#)
 - Use a single Client Access Server for all mailboxes. Server url: . Example: <https://owa.example.com/ews/exchange.asmx>
- Authentication:**

Connections to the Exchange Server can either be made using the credential of the Allocatus service or an explicit username and password.

 - Use the credential of the Allocatus service. To use this option, the service must run under the context of a domain user.
 - Use a specific user account. The user account [Domain\Allocatus](#) is currently used to access the Exchange server. Click on the name to change the used account. Validate credentials

At the bottom right, there are 'Ok', 'Cancel', and 'Apply' buttons.

2. In the *Exchange Server version* drop-down list select *2010/2013*.
3. Select *Use Exchange AutoDiscover* to find the appropriate Client Access Server for each mailbox.
4. In section *Authentication* select the option *Use a specific user account*. Click on the *Domain\user account* link
5. Enter the credentials of the Allocatus service account as User Principal Name (UPN), e.g. allocatus@domain.com which you created before.
6. Click on the link *Test AutoDiscover* enter a valid E-mail Address and validate that Allocatus can resolve *autodiscover.domain.com* to find its Exchange Online mailbox server.

Configure Domino Server Connection

This step configures Allocatus Server to directly integrate with Domino Server. It is not for used Lotus Notes or Outlook client integration through the use of the Allocatus client, nor is it used for integration with Exchange Server.

1. Deploy the Allocatus database. For details, consult the *Allocatus_AdminGuide_Domino_EN.pdf* document.
2. Configure the Lotus Domino Server Web Service address
3. Run Notepad as Administrator and edit the *config.xml* file in the directory *C:\Program Files (x86)\Allocatus\Server\bin*.



4. Search the tag DominoWSUrl and enter the address of the Lotus Domino Server Web Service Url:
`<DominoWSUrl>http://dominoserver/allocatus.nsf/dws</DominoWSUrl>`

Start Allocatus Server

Go to *Allocatus Server Configuration/Status/Services* and click *Start Service* and check *Allocatus Event Log* (see section *Monitor Allocatus Logs*, page 35).

Optional: Install and Configure Allocatus Client

- NOTE** The Allocatus Client is necessary in the following scenarios.
1. You do not use Exchange or Domino for sync
 2. You want to use the Outlook Add-In to link existing Outlook appointments to Project tasks

You can either run and configure the Allocatus Client manually or through an unattended execution of the Allocatus Client Setup.

How to run the setup and configure the Allocatus Client manually is described at: <http://www.allocatus.com/Product/en/ClientInstallation.aspx>

If want to install and configure the Allocatus Client by an unattended execution of the setup use the following syntax:

```
AllocatusClientSetup.exe  
/v"ALLOCATUS_CLIENT_WSURL=http://projectserver/allocatus/aws.asmx"
```

Maintain Allocatus

To maintain Allocatus Server perform the following steps depending on your needs:

1. Manage Allocatus Server
2. Backup and Restore Allocatus Server
3. Update Allocatus Server and Client

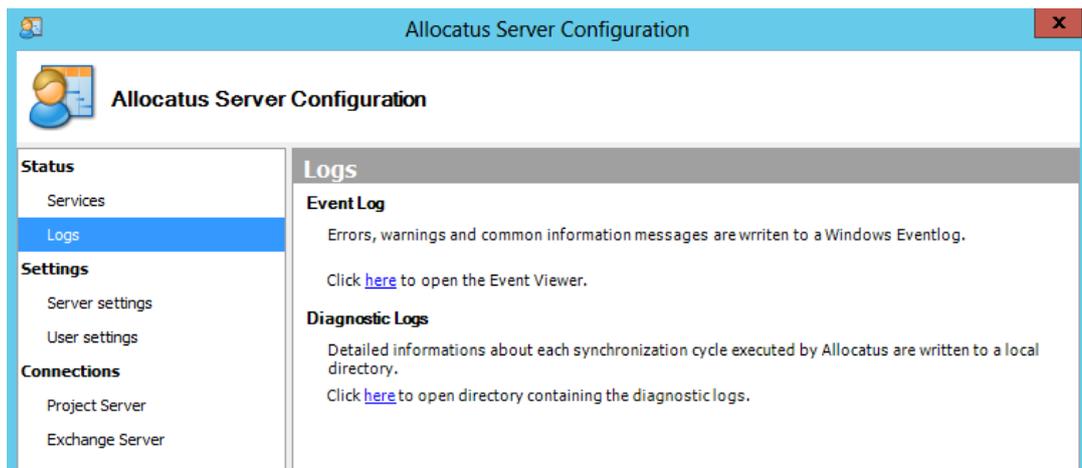
Manage Allocatus Server

To manage Allocatus Server monitor the Allocatus logs and control the Windows service.

Monitor Allocatus Logs

Allocatus Server writes important events into the Allocatus event log and writes verbose information about the sync to the Diagnostic Log.

1. Open the Allocatus Server Configuration utility from the start menu *Start/All Programs/Allocatus/Server Configuration* or the start screen of Windows Server 2012.
2. From *Status* select *Logs*.



3. Click on either of the two hyperlinks to view the logs, either directly in the Event Viewer or within a directory for browsing.

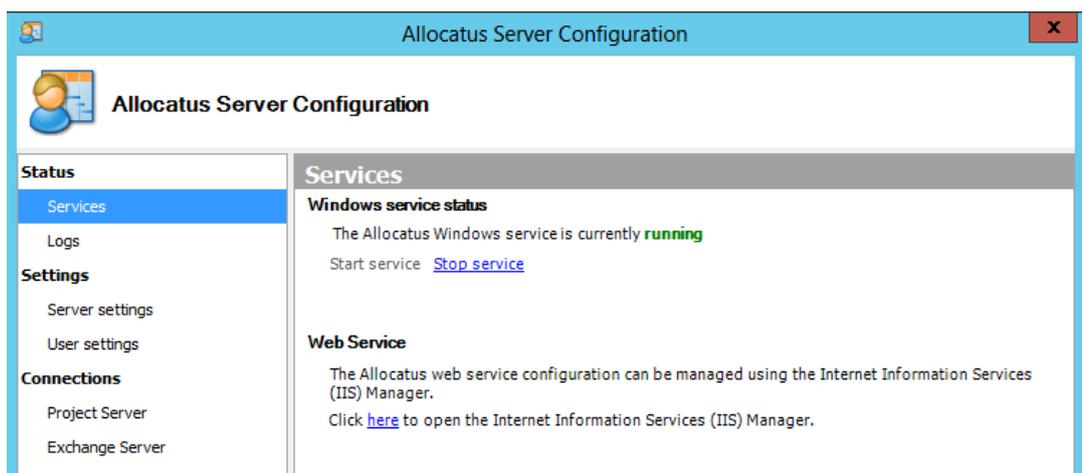
To log on a more detailed level open the *Allocatus config.xml* and set the tag *LogLevel* to a value from 1 (important events) to 4 (verbose).

Control Windows Service

The Allocatus Server runs as a Windows service and can be stopped, started and restarted as required. Note that the service should be restarted whenever the *Allocatus config.xml* file is modified. The service can be managed from the Allocatus Server Configuration console or from the Services MMC.

Use the Allocatus Server Configuration to check on the Allocatus Windows service status, and to stop and start the service.

1. Open the Allocatus Server Configuration utility from the start menu *Start/All Programs/Allocatus/Server Configuration* or Start Screen.
2. From *Status* select *Services*.

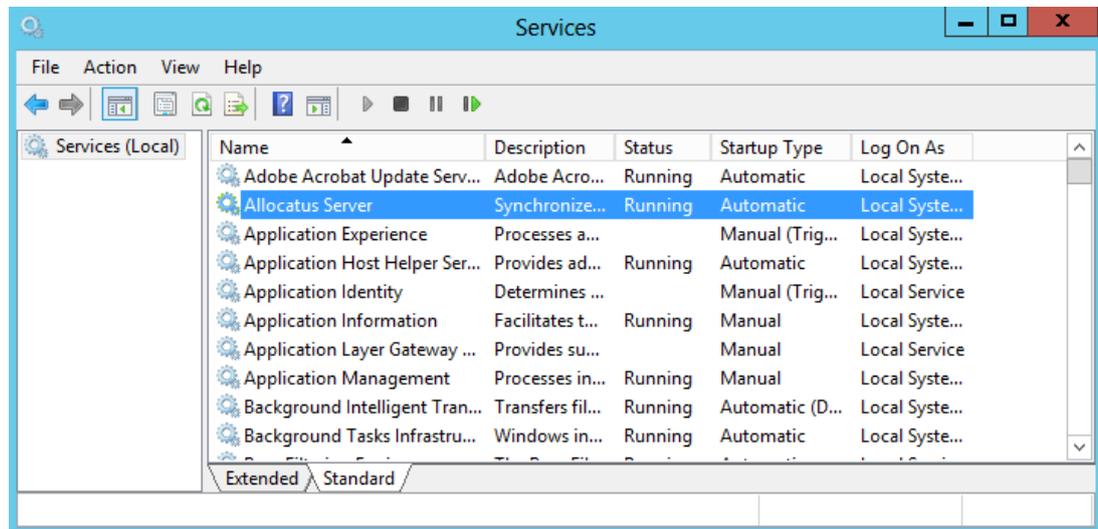


3. Click on the appropriate hyperlink to start or stop the Allocatus service.



Optional: Use the Services MMC to check on the Allocatus Windows service status, and to stop and start the service.

1. In the Services MMC, select Allocatus Server.
2. Right click on the Allocatus Server service to perform the appropriate action.



Backup and Restore Allocatus Server

Backup Allocatus Server

Apply standard SQL Server procedures to back up the Allocatus Server database.

In addition, backup the Allocatus Server configuration file *config.xml*. The file is located in the directory *C:\Program Files (x86)\Allocatus\Server\bin*.

Restore Allocatus Server

To restore Allocatus Server, restore the Allocatus database first and grant the Allocatus SQL Server account *db_owner* permissions. Then follow the instructions in the section **Fehler! Verweisquelle konnte nicht gefunden werden./Run Advanced** setup and select *Use existing Allocatus database*. Restore your previously saved copy of the *config.xml*.

Update Allocatus Server and Client

Before performing an update, ensure that Allocatus database and Server configuration file are backed up.

Major Update

Uninstall the Allocatus Server and run the new *AllocatusServerSetup.exe* in Express Mode. It will update the database automatically. Alternatively you can run the Advanced Setup and do a manual update of the database schema. Restore your previously saved copy of the *config.xml*.



Minor Update

To update Allocatus Server and Client just run the setup. For Allocatus Server run *AllocatusServerSetup.exe* and for Allocatus Client run *AllocatusClientSetup.exe*.

Optional: Post installation check

Check the Allocatus Web Application configuration (see section *Verify and move Allocatus* , page 18).

Troubleshooting

If you have questions regarding Allocatus you can use the forum:

<http://community.allocatus.com/forums/default.aspx?GroupID=7>