



## **OfficeStatus Deployment Guide**

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# 1 Deploying OfficeStatus

## 1.1 Introduction

OfficeStatus is a powerful employee status management software solution that leverages the power of a distributed, service-oriented architecture to provide:

- **"Install anywhere" client capability** - OfficeStatus Windows Client can connect to an OfficeStatus Server installation via a local area network, over the Internet, etc. Users can also interact with the system through a rich web-based client interface.
- **Deep scalability** - A single OfficeStatus Server installation can service thousands of end users with its rich, light-weight web service connection model and proven Microsoft technology stack.
- **Simple administration** - All system administration functions are available from within the OfficeStatus web interface.
- **Low maintenance** - OfficeStatus includes its own maintenance service, which runs in the background and helps keep the system lean and stable.

Deploying OfficeStatus within your organization involves a few simple steps:

1. Establish the pre-requisites
2. Install OfficeStatus Server
3. Install OfficeStatus Client on each user's desktop (note: Group Policy Deployment is supported)

The remainder of this guide discusses each of these steps in detail.

## 2 Server Requirements

### 2.1 Server Requirements Overview

The OfficeStatus Server installation package has the following requirements:

- A Microsoft Windows Server operating system (see topic)
- A Microsoft SQL Server database server - numerous free options are available (see topic)
- Internet Information Services web server (included with Windows Server operating system)
- The Microsoft .NET Framework v2.0 (included in OfficeStatus installer) or later
- Microsoft Windows Installer v3.0 (included in OfficeStatus installer) or later

The OfficeStatus Server installation package automatically installs (or upgrades) and configures the Microsoft .NET Framework and Windows Installer requirements on the target server if they don't already exist.

The list of related pages below describes the remaining requirements in more detail.

### 2.2 Minimum Hardware Requirements

The server hardware upon which you elect to install OfficeStatus Server should meet the following minimum requirements:

- Any modern Pentium-grade server CPU (600 MHz minimum, 1GHz or better recommended)

- 256MB RAM minimum (512MB or more recommended)
- 300MB of free disk space (including space required for .NET 2.0)
- Network connectivity (e.g. LAN, WAN, Internet, etc.)

If you elect to install one of the supported databases on the same machine as OfficeStatus, then you'll need to meet the minimum requirements for the chosen database platform as well.

## 2.3 Supported Operating Systems

OfficeStatus Server supports the following list of Windows operating systems:

- Windows Server 2008 (any edition) - see configuration note below
- Windows Server 2003 SP2 or later (any edition)
- Windows Server 2000 SP4 or later (any edition)

Note that both 64 and 32 bit operating system environments are supported. The only added consideration is that for 64-bit environments, the OfficeStatus Server and Client installation packages cannot automatically install the .NET Framework (the 64-bit version of the .NET Framework can be downloaded directly from Microsoft).

When installing or configuring one of these supported operating systems for use with OfficeStatus, please be sure to install the optional Internet Information Services (IIS) web server components as well.

### Important Windows Server 2008 Installation Notes

OfficeStatus Server can be installed on Windows Server 2008 when Internet Information Services (IIS) 7.0 is configured correctly.

To install OfficeStatus Server on Windows Server 2008, IIS 7 must have the IIS 6 Management Compatibility role installed. It must also have ASP.NET support installed.

Install ASP.NET and the IIS 6 Management Compatibility Role

1. Open the Windows Server 2008 Server Manager.
2. In the server management tree, click Roles.
3. If IIS 7 has not yet been installed on this server, select Add Roles and add the Web Server (IIS) role before proceeding.
4. Select Add Role Services.
5. Select ASP.NET and accept any feature dependency notices that appear.
6. Select Management Tools and IIS 6 Management Compatibility and accept any feature dependency notices that appear.
7. Complete the Add Role Services wizard.

Once these configuration steps are complete, OfficeStatus Server should install properly on Windows Server 2008.

## 2.4 Supported Databases

Like many modern business software applications, OfficeStatus relies on a back-end relational database for its data storage requirements. A database server, installed either locally or on a remote server, must be available prior to the installation of OfficeStatus Server.

OfficeStatus was designed to support a range of Microsoft database platforms, some of which are entirely free.

Supported **commercial** SQL Server platforms include:

- SQL Server 2008 (Standard, Workgroup, Web, or Enterprise Editions)
- SQL Server 2005 (Standard, Workgroup, or Enterprise Editions)
- SQL Server 2000 SP4 (Standard, Enterprise Editions)

Supported **free** SQL Server database platforms:

- SQL Server 2008 Express Edition - **FREE**
- SQL Server 2005 Express Edition - **FREE**
- MSDE 2000 SP4 - **FREE**

If you already have a licensed copy of SQL Server running on your local area network, then you don't need to take any additional steps. OfficeStatus Server will automatically recognize existing SQL Server instances during installation, and you'll have the option to select one.

If you don't already have a licensed version of SQL Server running, we recommend using SQL Server 2005 Express Edition or SQL Server 2008 Express Edition. SQL Server Express 2005 and 2008 are free, light-weight, easy-to-use versions of the commercial SQL Server engines. They are generally appropriate for OfficeStatus installations with 25 to 100 users, depending upon usage and configuration. Note that existing MSDE 2000 databases can also be upgraded to SQL Server 2005 Express.

Whether you install the database server software on the *same* computer as OfficeStatus Server or on a *different* computer (on the same network) is entirely up to you. OfficeStatus will handle both arrangements equally well, with a very small performance gain (unnoticeable in the majority of cases) being derived from having the database available locally (e.g. on the same computer).

The OfficeStatus Server installation package will handle the creation of an OfficeStatus database (including required login, schema, and default data). You need only make one of these database platforms available prior to the start of installation - OfficeStatus will handle the rest.

## 2.5 OfficeStatus Server Components

OfficeStatus leverages the power of a standards-based, service-oriented architecture to provide a robust and scalable operational platform for employee status management.

When the OfficeStatus Server installation package is complete, the following list of components will have been created or installed:

- An OfficeStatus Windows user account (local or on the target domain)
- The OfficeStatus operational database and associated login (installed on the target database server instance)
- The OfficeStatus Maintenance system service (a Windows background service)
- The OfficeStatus web components, including the administrative interface and operational web service (hosted within IIS)

During product installation, you will be asked to create (or identify) a Windows account specifically for use by OfficeStatus. Most of the OfficeStatus software components will listed above will execute under the identity of this user account. This approach allows the OfficeStatus installer to assign a minimal

number or rights and privileges to the OfficeStatus user account in order to do its job, thus minimizing security exposure.

## 3 Client Requirements

### 3.1 Windows Client vs. Web Interface

OfficeStatus provides two separate end user interface options:

1. **OfficeStatus Web Interface** - End users can log into the OfficeStatus web interface via the same web address (URL) that administrators use. Normal users will not have access to any administrative functions through the web interface.
2. **OfficeStatus Windows Client** - End users can install and use the OfficeStatus Windows Client on their computer for an even richer experience that more deeply integrates into their Windows operating system.

Note that OfficeStatus users can switch freely between these two user interfaces as needed. For example, a user may have OfficeStatus Windows Client installed on their office workstation for normal daily use, but then elect to log into the OfficeStatus Web Interface when they're traveling with a company laptop (or working from a home computer).

Regardless of which interface your end users employ, they will have a rich and highly interactive experience. However, each interface has its own distinct advantages:

#### **OfficeStatus Windows Client:**

- Can run automatically when Windows starts up, with optional auto-login capability.
- Runs within the user's Windows notification area (e.g. system tray) for extremely convenient access.
- Provides rich (and configurable) status watch and note arrival pop-up notifications.
- Allows for a richer overall user experience (typical of desktop applications).
- Offers smart "auto-sensing" technology that can detect an end user's status based upon activity or environmental events.

#### **OfficeStatus Web Interface:**

- Usually requires no software component installation on the end user's computer (they use a supported web browser).
- Allows end users to configure their own contact information (OfficeStatus Windows Client does not).
- Can work with non-Windows operating systems, as long as they have a supported web browser installed.
- Provides a more immediate, real-time view of underlying data (OfficeStatus Windows Client relies more heavily upon caching).
- Needn't be upgraded separately when new versions of OfficeStatus are released.

### 3.2 OfficeStatus Windows Client

#### 3.2.1 Windows Client Requirements

OfficeStatus Window Client is a desktop client application that can be installed on the computers of one or more OfficeStatus end users. It provides deep integration with the host Windows operating system.

More details about how the OfficeStatus Windows Client differs from the Web Client Interface can be found [here](#).

OfficeStatus Client has the following requirements:

- A Windows desktop operating system
- The Microsoft .NET Framework v2.0 (included in OfficeStatus installer) or later
- Microsoft Windows Installer v3.0 (included in OfficeStatus installer) or later

The OfficeStatus Windows Client installation package automatically installs and configures the Windows Installer and .NET Framework components if they don't already exist on the client operating system.

### 3.2.2 Supported Operating Systems

OfficeStatus Windows Client is supported on the following Microsoft Windows desktop operating systems:

- Windows Vista (all editions)
- Windows XP Home, Pro, or Media Center Edition (SP1 or SP2)
- Windows ME
- Windows 98 Second Edition
- Windows 98
- Windows 2000 Professional (SP3)

For Windows XP client installations, SP2 or better is generally recommended (but SP1 is also supported).

Note that both 64 and 32 bit Windows operating system environments are supported. The only added consideration is that for 64-bit environments, the OfficeStatus Windows Client installation package cannot automatically install the .NET Framework (the 64-bit version of the .NET Framework can be downloaded directly from Microsoft).

## 3.3 OfficeStatus Web Interface

### 3.3.1 Web Interface Requirements

Access to the OfficeStatus Web Client Interface requires only that your users have a supported browser installed. Options include:

- Microsoft Internet Explorer (version 6.0 or later)
- Firefox (version 1.5 or later)
- Google Chrome (version 0.2 or later)
- Safari (version 3.0 or later)

This broad range of web browser support effectively makes OfficeStatus accessible to users running nearly any modern desktop operating system.

## 4 Installing OfficeStatus Server

### 4.1 Server Installation Overview

The OfficeStatus Server installation package was designed and developed to help you get up and running as quickly as possible. Rather than require you to follow a long configuration checklist prior to installation, the OfficeStatus installer handles the grunt work for you.

Here are some of the things the **OfficeStatus Server installer handles automatically**:

- Installation of software pre-requisites, including:
  - Microsoft Windows Installer 3.x
  - Microsoft .NET Framework 2.0
- Website management:
  - IIS parent website identification and selection
  - Optional creation of supportive Virtual Directory
  - Assignment of appropriate IIS anonymous user account
  - Creation of IIS Application Pool on IIS 6 and above
  - Active prediction of the final web admin URL during install
- User account management:
  - Creation or selection of OfficeStatus user account
  - Assignment of appropriate account rights
  - Association of account rights to supportive file system and registry structures
  - Association of account to database server
  - Association of account to Internet Information Services
- Database server:
  - Automatic discovery of available database server instances
  - Choice between integrated and non-integrated database authentication types
  - Creation of supportive OfficeStatus database
  - Creation of supportive OfficeStatus database schema
  - Default data population for new installations
- Establishment of OfficeStatus Administrative account

The only real consideration you have prior to installation is ensuring that a database server is available either locally or on somewhere on the network.

The remainder of this help chapter will look at these installation steps in more detail.

## 4.2 Preparing for Installation

OfficeStatus Server has three primary software prerequisites, only one of which likely requires much consideration:

1. Database server software
2. Microsoft Windows Installer v3.0 (included with OfficeStatus installer) or later
3. Microsoft .NET Framework v2.0 (included with OfficeStatus installer) or later

Prior to installing OfficeStatus Server, you really only need to ensure that you have the first requirement (a database server) covered. Selecting a database server is covered in more detail in this help topic.

The OfficeStatus Server installation package includes Microsoft Windows Installer v3.x and .NET Framework 2.0, and will install either or both of them as required.

Note: The OfficeStatus Server installation package will need to reboot the host computer if installation of

the Windows Installer v3.x pre-requisite is actually installed.

## 4.3 Guided Installation Steps

### 4.3.1 Starting the Installation Process

After executing the OfficeStatus Server installation package, you'll be asked to accept the license agreement (you can't proceed without doing so) and prompted for a file system installation path (by default, OfficeStatus Server installs into your Program Files system folder).

Once that information is established, the installer will launch into the second phase of the installation process designed to configure the system for use with OfficeStatus Server. Once this configuration process is completed, the installation will be finalized by copying files into place, etc.

### 4.3.2 Selecting a Website

OfficeStatus Server requires a host website for two of its primary components: the web interface and the business logic web service. A single Internet Information Services (IIS) website (or virtual directory) will host both of these components.

During installation, OfficeStatus Server will display a drop-down box listing of all IIS websites available on the host server. On a fresh Windows Server installation, there will be only one IIS website available for selection - the "default" website. If you'd like to create a new IIS website specifically for OfficeStatus Server, do so within the IIS Management Console prior to OfficeStatus Server installation.

You will also have a choice of installing the OfficeStatus web components into the root of the selected website (e.g. <http://your-website/>) or in a new virtual directory (e.g. <http://your-website/OfficeStatus>). If you elect to install into the root of an existing website, make sure its not already used by another web application - OfficeStatus will re-configure the website root for its own use.

The website selection you make here will determine the URL that OfficeStatus Client installations will use to access the OfficeStatus Server.

### 4.3.3 Establishing a Windows Account

All of the major OfficeStatus Server software components run under the identity of a single Windows user account. In this installation step, you will have the option of either creating such an account, or selecting an existing one.

For any new OfficeStatus Server installation, it is **strongly recommended** that you create a new Windows user account. You have the option of creating this account on the host computer (as a local user), or within a Windows domain that you specify.

If you elect to have OfficeStatus Server run under the identity of an existing account, it is recommended that you limit the rights and privileges of that account according to your usage plans. This is generally considered an advanced option, and should be evaluated carefully for security risk potential within your specific environment.

During the final step of the OfficeStatus Server installation, the host Windows account will be granted the minimum rights and permissions required to allow it to function appropriately.

Components that assume the identity of this Windows account include:

- The IIS host website (anonymous user account)
- The OfficeStatus Maintenance system service
- The OfficeStatus database (associated Windows login)

#### 4.3.4 Installing the Database

OfficeStatus Server is backed by a managed SQL Server database, the creation and configuration of which is handled automatically by the product installer.

The OfficeStatus Server installer will prompt you for a specific SQL Server instance which will host the OfficeStatus database. You can either enter a known SQL Server address into the specified field, or click the drop-down arrow to build a list of available SQL Servers on the local network (including the local host computer).

Note that the SQL Server discovery mechanism can only find a specific SQL Server instance if its SQL Browser service is enabled.

In order to create and configure the OfficeStatus database, the installer must log in to your SQL Server database as a System Administrator (e.g. member of the "sysadmin" role). Two different authentication methods are supported:

- **Windows Integrated** - The Windows account under which you're currently logged in must be a SQL Server database administrator.
- **SQL Server** - Uses a built-in SQL Server account which is configured as a database administrator.

The OfficeStatus Server installer will use this information in the final stages of installation to do the following:

- Create a database named "OfficeStatus"
- Create a SQL Server login bound to the Windows user account specified in an earlier installation step
- Assign OfficeStatus database ownership to the SQL Server login

**Tip 1:** When installing OfficeStatus Server on the same machine that hosts SQL Server Express 2005, the default SQL Server instance address will be "COMPUTER-NAME\SQLEXPRESS".

**Tip 2:** If your current, logged-in user account is not a SQL Server system administrator, you can always use the "sa" account for this step (as long as your SQL Server instance has mixed mode authentication enabled).

#### 4.3.5 Creating an OfficeStatus Admin Account

OfficeStatus Server requires that at least one administrative user account exists so that the system can be managed once it is fully established.

This step of the installation process asks for the administrative user account details, including the user name, first and last name, password, etc.

Note that you can also enter the SMTP address of a mail server that OfficeStatus Server can use to send outbound notification email messages (among other things). This step is optional, and can always be configured later from within the administrative section of the OfficeStatus web interface.

### 4.3.6 Review Installation Options

Finally, you'll be asked to review your installation choices prior to finalizing your OfficeStatus Server installation.

If you need to make any changes, please click the Back button now and do so.

Once you click the finish button the installation summary screen, the OfficeStatus Server installation will be committed.

### 4.3.7 Finishing the Installation

Once the OfficeStatus Server installation process has completed successfully, you will have the option of launching the web interface. It is recommended that you do so to ensure that everything is functioning as expected.

A shortcut for accessing the OfficeStatus web interface will also be created on your Windows desktop (as well as in the OfficeStatus program group of your Start Menu).

When accessing the web interface, you will be asked for a username and password. Enter the **OfficeStatus administrative account** credentials that you provided during the guided OfficeStatus Server installation process (see related help topic).

Finally, please be sure to make a note of your chosen OfficeStatus Server web address (as specified in the first installation interview step), as you may need this during OfficeStatus Windows Client installations.

## 4.4 Troubleshooting

The OfficeStatus Server installer has been developed to make product installation as smooth and straight-forward as possible. Almost no manual configuration is required in the vast majority of cases.

If, however, you do run into trouble during the installation process, please ensure that:

1. You're logged on with as a Windows system administrator
2. Your server computer meets the software requirements (see related help topic)
3. You have administrative access to a new or existing SQL Server database instance (see related help topic)

The OfficeStatus Server installation process will create a log file named "install.log" in the root of your selected installation path (below Program Files, by default). This log file may contain additional details on the nature of the installation failure.

If you require assistance in troubleshooting your OfficeStatus Server installation, please submit a technical support request through the Support section of our product website. It would be our pleasure to assist you.

## 5 Installing OfficeStatus Windows Client

### 5.1 Windows Client Installation Overview

The OfficeStatus Windows Client installation package is primarily responsible for copying files to the user's computer and creating associated shortcuts.

Note that the OfficeStatus Windows Client installer includes two important software prerequisites (you do **not** have to manage these separately):

1. Microsoft Windows Installer version 3.x
2. Microsoft .NET Framework version 2.0

These components will be installed automatically if they don't already exist on the host computer. Note that if the installation of Windows Installer 3.x is required, the installer will usually need to reboot the host computer before it can proceed with the remaining component installation steps. This entire process will be handled by the installer - you will be prompted to reboot, and installation will resume automatically afterward.

Note: The installation of the .NET Framework 2.0 pre-requisite can take a while, particularly on slower workstations. Please be patient during this step.

### 5.2 ClientInstall.ini

When OfficeStatus Client is installed and starts up for the first time, the user is asked to authenticate by providing a username, password, and OfficeStatus service address.

The OfficeStatus service address is the URL to your organization's OfficeStatus server installation (the one you chose during the server installation process). It generally takes the form of `http://www.yourdomain.com/officestatus/` (or something similar).

Once an OfficeStatus user enters the web service address into the appropriate field during authentication, OfficeStatus Client will remember the setting and it won't have to be entered again. It would be useful, however, if end users never had to know (or enter) the OfficeStatus service address at all, and that's where the ClientInstall.ini file comes in. During the installation process, OfficeStatus Client will check the installation source folder for the presence of a ClientInstall.ini file. If it finds one, it uses the contents of this file to establish a default OfficeStatus web service address location.

The format of the ClientInstall.ini file is simple. Here's an example:

```
[Startup Defaults]
WebServiceAddress=http://www.yourdomain.com/officestatus/
```

Save this file into the folder that contains the `osclient.exe` client installation executable on your network. Then be sure to run OfficeStatus client installations from this location, and the ClientInstall.ini file settings will be honored.

Note that the use of ClientInstall.ini is entirely optional - if it exists, it is used. Otherwise it isn't.

This deployment technique helps to reduce the amount of information an OfficeStatus user needs to get up and running with OfficeStatus Client.

**Important:** The OfficeStatus Server installation process automatically generates a ClientInstall.ini file in the same folder from which it was installed.

## 5.3 Finishing the Installation

Once the OfficeStatus Windows Client installation process has completed successfully, you will be provided with an option to launch the software immediately. Is it recommended that you do so to ensure that everything functions as expected.

When OfficeStatus Windows Client is launched, it will prompt the user for the following:

1. An OfficeStatus account username
2. An OfficeStatus account password
3. The OfficeStatus Service web address

The first and second (authentication) fields correspond to the user account name and password that was created through the administrative section of the OfficeStatus web interface (please see our OfficeStatus admin guide for details).

The third field is the service address of your OfficeStatus Server installation, specified during the "Selecting a Website" phase of the server installation process (see related page link below). It will generally be in the form of "http://your-domain.com/OfficeStatus/" or something similar. Note that you have the service address default to a specific value by using the ClientInstall.ini file generated by the OfficeStatus Server installation process.

A shortcut to OfficeStatus Windows Client will be created in the startup group of the end user's Windows Startup Menu, so that it will be started automatically on boot-up.

## 5.4 Group Policy Deployment

If your organization uses Windows Active Directory services, you may wish to consider using it to deploy OfficeStatus Windows Client to multiple domain users at once. This prevents IT staff from needing to go from one machine to another in order to install OfficeStatus Windows Client.

In order to deploy OfficeStatus Client using GPO, you'll need the MSI version of the installation package, which can be downloaded from here:

[http://www.officestatus.com/download/current/OfficeStatus\\_Client\\_v2.msi](http://www.officestatus.com/download/current/OfficeStatus_Client_v2.msi)

Once downloaded, place the MSI installation package in a shared network folder. Ideally, the shared network folder will also contain a ClientInstall.ini generated by the OfficeStatus Server installation process. For more information on how the ClientInstall.ini file is generated and used, please see OfficeStatus deployment Quick Start Guide.

From here, you will need to create a group policy object on your domain controller to handle distribution of the OfficeStatus Windows Client MSI package. This is a fairly straight-forward process, and Microsoft provides detailed instructions on doing so here:

<http://support.microsoft.com/kb/816102>

## 6 Upgrading

### 6.1 Upgrade Overview

The OfficeStatus software solution is comprised of components that are installed either on the server or client side.

Each OfficeStatus software component has a four-part version number associated with it (e.g. 1.5.0.0). The four parts of the version number correspond to the major, minor, revision, and build numbers (respectively).

When upgrading your OfficeStatus deployment, a key consideration is the version compatibility of the server and client side components. OfficeStatus takes a simple and effective approach to this issue, outlined below.

- When the major / minor component version numbers are different:
  - OfficeStatus Client cannot communicate with an older version of OfficeStatus Server.
  - OfficeStatus Client can communicate with an newer version of OfficeStatus Server.
- When the major / minor component version numbers are the same:
  - Client and server components can communicate freely.

The reasoning behind this approach is straight-forward: certain features within OfficeStatus Client require communications level support within OfficeStatus Server. Changes that could potentially impact communications compatibility between client and server components are only ever made in new major / minor version releases.

As noted above, these compatibility rules only apply when the client and server side components have different major / minor version numbers. When the major / minor version numbers are the same (OfficeStatus Client v1.5.1.9 with OfficeStatus Server v1.5.0.1, for example), all components will interoperate freely.

#### Upgrade Version Rule

This information can be distilled into the following simple rule:

When upgrading to a newer major / minor version (e.g. 1.0.x.x to 1.5.x.x), upgrade OfficeStatus Server first, then upgrade OfficeStatus Client installations.

Doing so will always ensure proper communications compatibility between client and server components.

### 6.2 Upgrading OfficeStatus Server

When upgrading your OfficeStatus solution deployment, we recommend the following steps:

1. Backup your OfficeStatus database
2. Execute the new version installer on the OfficeStatus Server host computer

The first step (backing up your existing OfficeStatus database) is certainly optional, but highly recommended. Once the upgrade process starts, the installation process may need to upgrade OfficeStatus database schema (and / or data) to support the newer release.

## 6.3 Upgrading OfficeStatus Windows Client

To upgrade OfficeStatus Windows Client to a newer version, perform the following actions on the end user's workstation:

1. Shut down (terminate) OfficeStatus Windows Client
2. Execute the newer version installation program

When the installation begins, it will automatically uninstall the previous version of OfficeStatus Windows Client first, and then install the latest version.

Note: During the OfficeStatus Windows Client upgrade process, certain user interface customizations may be reset in order to ensure the availability of new functionality.