

## Technical Users Installation Guide

# Gimmel Physical

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### Version History

Version	Approved By	Effective Date	Product Version	Description of Change
1	Terry Butler	03/01/2022	3.11	Created for Gimmel Version 3.11
2	Marta Farensbach	2/20/2023	3.12	Minor formatting updates

## For Windows 2016

1. Open Server, click **Manage** at the top and then click **Add Roles and Features**.
2. Click **Next** three times to reach the 'Select Server Roles' screen and open **Web Server**.
3. Be sure the following options are selected:

- .NET Framework 3.5 Features
  - .NET Framework 3.5 (includes .NET 2.0 and 3.0)
- .NET Framework 4.6 Features
  - ASP.NET 4.6
- Web Server (IIS)
  - Management Tools
    - IIS 6 Management Compatibility
    - IIS 6 Scripting Tools
    - IIS 6 Metabase Compatibility
    - IIS 6 WMI Compatibility
  - IIS Management Console
  - Web Server
    - Application Development
      - Application Initialization
      - ASP.NET 4.6
      - ISAPI Extensions
      - ISAPI Filters
      - .NET Extensibility 3.5
      - .NET Extensibility 4.6
    - Common HTTP Features
      - Default Document
      - Directory Browsing
      - HTTP Errors
      - HTTP Redirection
      - Static Content
    - Health and Diagnostics
      - HTTP Logging
    - Performance
      - Static Content Compression
    - Security
      - Basic Authentication
      - Request Filtering
      - Windows Authentication

## Installation

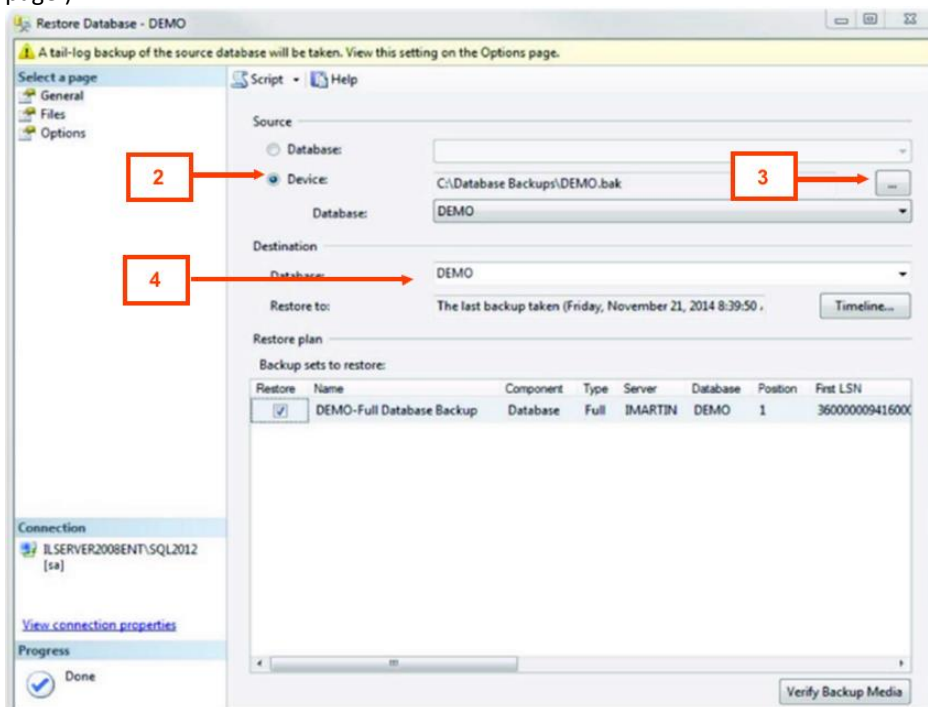
Gimmel Physical will provide the following files for on-premises installations:

1. A backup file to be restored in SQL Server database (.bak or backupac)
2. Prerequisites.zip. A folder containing installers that are prerequisites to installing Gimmel Physical
3. A setup file to install the main application on the Web Server (exe)
4. Hangfire.zip. The Hangfire service is responsible for running all the batch processes and large imports/exports
5. CRUD (Create, Read, Update and Delete) folder

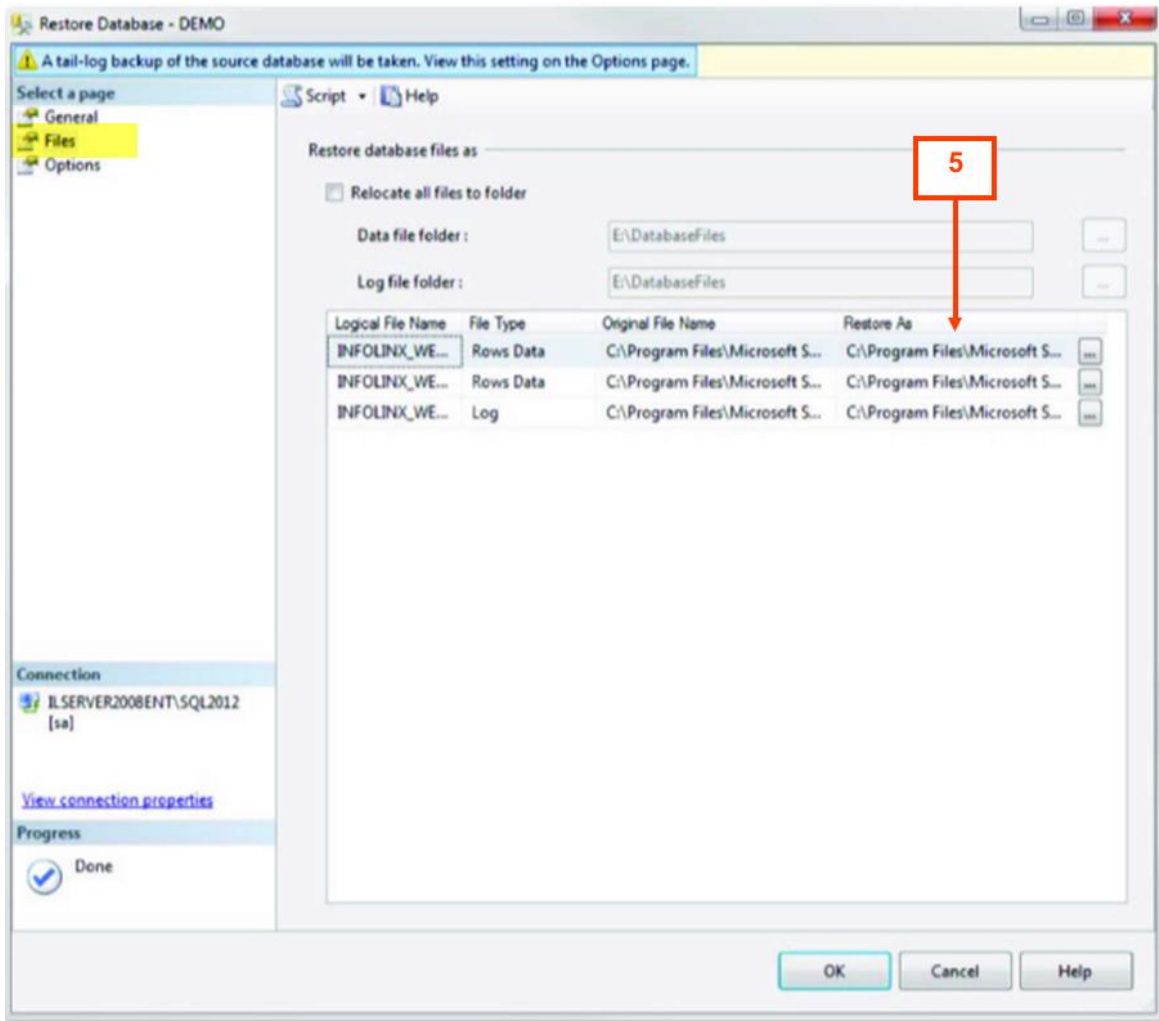
The first step in installing Gimmel Physical is to restore the database backup on the SQL Server.

## Restore Database

1. Open the SQL Server Management Studio and right-click **Databases** and choose the **Restore Database** option in Object Explorer.
2. Select the **Device** option.
3. Select the database backup file downloaded from the FTP site (button to the right of text field).
4. Select or type the name of a new or existing database in the Database drop down field. (Continued on next page.)



5. Click the Files tab to verify the file paths are valid.



6. Click OK to perform the restore.

## Install Prerequisites

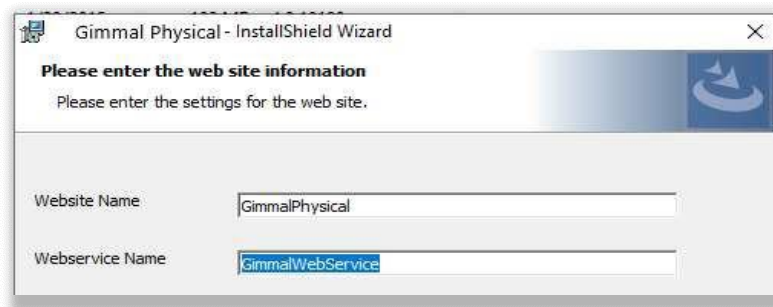
On the Web server:

1. Unzip Prerequisites.zip and run all installers contained within.

## Install Application

On the Web server, follow these steps to install the application.

1. **Open** the install file.
2. If you agree to the license agreement, click through until you reach the 'Installation Type' page.
3. Choose the **Installation Type** that is most appropriate for your organization. In most cases, this is 'Typical' or 'Complete'. Click **Next**.
4. Enter the Website and Web Service Name you want to use with IIS.



The screenshot shows a Windows dialog box titled "Gimmal Physical - InstallShield Wizard". The main heading is "Please enter the web site information" with a sub-heading "Please enter the settings for the web site." Below this, there are two text input fields: "Website Name" containing the text "GimmalPhysical" and "Webservice Name" containing the text "GimmalWebService". A blue arrow icon is visible in the top right corner of the dialog box.

5. Enter the database information and then click Next.



The screenshot shows a Windows dialog box titled "Gimmal Physical - InstallShield Wizard". The main heading is "Database Settings" with a sub-heading "Please enter the database settings". Below this, there are four text input fields: "Database Server Name", "Database Name", "Database User Name", and "Database Password". At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a blue border.

The Gimmal Physical application is now installed. **If you are using Windows Authentication for your Gimmal Physical system, please read the [next paragraph](#) as well as the [Windows Authentication](#) section at the end of this document.**



## Windows Authentication

Before you can access the Gimmel Physical application, one or more valid Windows Security Groups must exist in the Gimmel Physical roles table. If no roles in the roles table match any of your network Windows Security Groups, you will get an HTTP 403 Forbidden message. To temporarily get the system up and running, it is recommended to rename the Gimmel Physical administrator role in the Gimmel Physical database to match a valid Windows Security Groups on your network. To do this, open the ROLES table in the Gimmel Physical database and update the ROLE\_NAME field for the role with ROLE\_ID 1 to DOMAIN\Domain Users where DOMAIN is your network domain name.

## Gimmel Physical as its own web site

In some organizations, the desired configuration is to create a new web site in the IIS manager that uses port 80 but utilizes HTTP headers to route traffic to the correct site (i.e., `gimmelphysical.yourdomain.com`). This configuration is supported and Gimmel Physical will work correctly. However, the Gimmel Physical setup program does not currently install to a separate web site on port 80 with an http header. If this is the desired environment, install Gimmel Physical to a virtual directory and then copy all the files using Windows Explorer into your separate Gimmel Physical web site.

## Installing CRUD pages

Copy the provided CRUD folder under the Application /ItemTypeCRUD folder. The default path is:

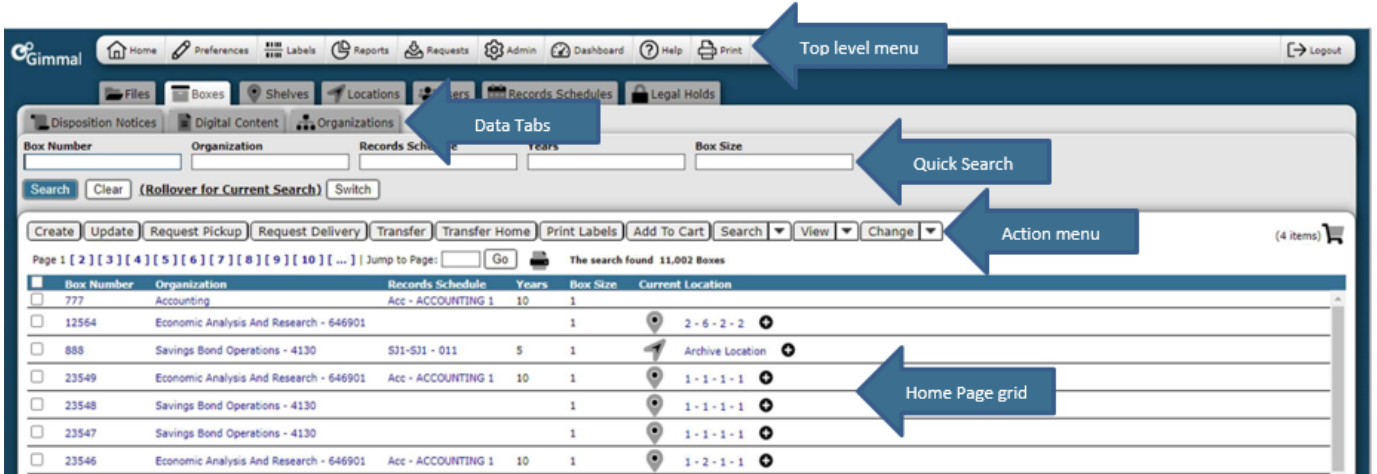
```
C:\inetpub\wwwroot\Gimmel\3.12\Application\ItemTypesCRUD\
```

## Installing Hangfire

Included with the installation files is the Hangfire.zip file. To install this:

1. Unzip the Hangfire.zip file.
2. Copy the Hangfire folder into Application folder that was created during the installation of the Gimmel Physical software.  
Note: if you have changed the default install directory, the InstallHangfire.cmd (run in Step 4 below) will need to be updated accordingly.
3. Update InfolinxHangfire.exe.config with correct database connection string after installing.
4. Run the InstallHangfire.cmd
5. Open Services and set properties for the Hangfire service. If using integrated security in the database connection string, the service will need to run under a service account that can access the database. The recovery options should all be set to Restart the Service.
6. In the Gimmel Physical web site go to Admin/Application settings and select the value for the setting Hour to run background jobs in UTC time.

## Quick Start Guide



The screenshot shows the Gimmel application interface with several key components highlighted by blue callout boxes:

- Top level menu:** Located at the top right, containing links for Home, Preferences, Labels, Reports, Requests, Admin, Dashboard, Help, and Print.
- Data Tabs:** A horizontal bar below the top menu with tabs for Files, Boxes, Shelves, Locations, Records Schedules, and Legal Holds.
- Quick Search:** A search bar with fields for Box Number, Organization, Records Schedule, Years, and Box Size, along with Search, Clear, and Rollover buttons.
- Action menu:** A row of buttons including Create, Update, Request Pickup, Request Delivery, Transfer, Transfer Home, Print Labels, Add To Cart, Search, View, and Change.
- Home Page grid:** A table displaying search results for boxes, with columns for Box Number, Organization, Records Schedule, Years, Box Size, and Current Location.

Box Number	Organization	Records Schedule	Years	Box Size	Current Location
777	Accounting	Acc - ACCOUNTING 1	10	1	
12564	Economic Analysis And Research - 646901			1	2 - 6 - 2 - 2
888	Savings Bond Operations - 4130	S31-S31 - 011	5	1	Archive Location
23549	Economic Analysis And Research - 646901	Acc - ACCOUNTING 1	10	1	1 - 1 - 1 - 1
23548	Savings Bond Operations - 4130			1	1 - 1 - 1 - 1
23547	Savings Bond Operations - 4130			1	1 - 1 - 1 - 1
23546	Economic Analysis And Research - 646901	Acc - ACCOUNTING 1	10	1	1 - 2 - 1 - 1

1. **Top Level Menu** – provides access to the various indicated functions
2. **Data Tabs** – used to access the various items being tracked
3. **Quick Search** – used to query within tabs
4. **Action Menu** – provides access to listed actions
5. **Home Page Grid** – displays queried results

## User Administration

Gimmel Physical operates in two modes for user authentication:

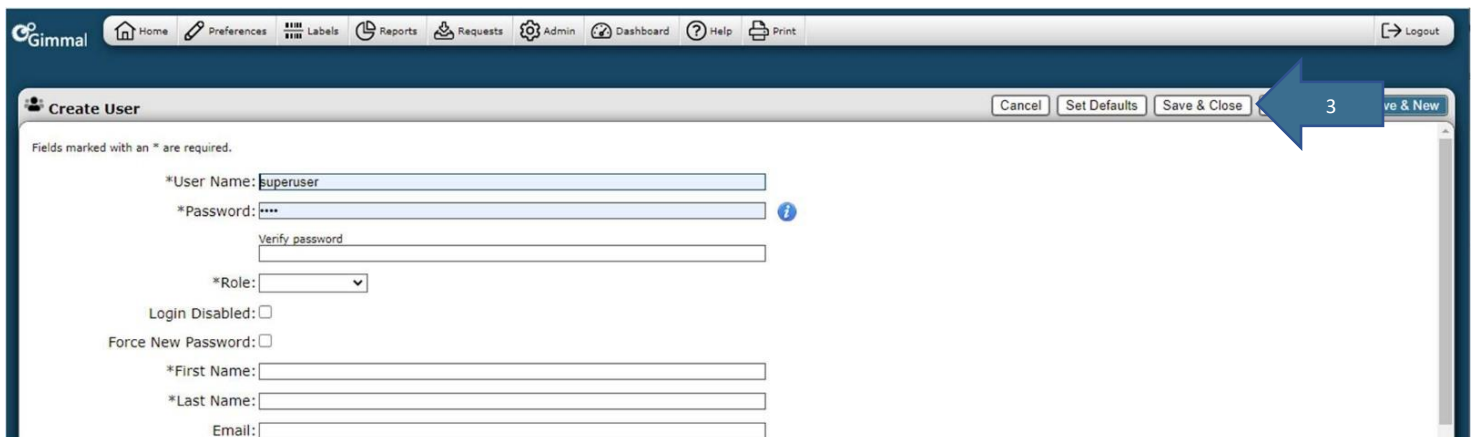
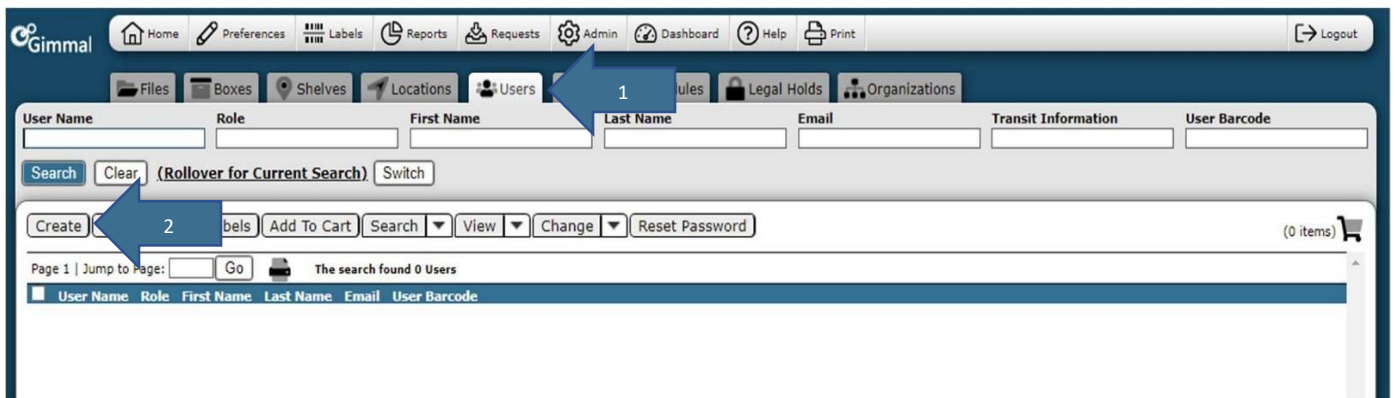
- [Forms Authentication](#): the username and password are managed by the Gimmel Physical database.
- [Windows Authentication](#): the username and password are managed in the Windows NT Domain or Windows Active Directory

## Forms Authentication

When using Forms Authentication, the user is prompted with a Gimmel Physical login screen where they must enter valid credentials to access the system.

### Add Users to Gimmel Physical:

1. Click the **Users** tab on the Home Page.
2. Click **Create** in the Action Menu.
3. Enter the user's information and click on the Save & Close button.



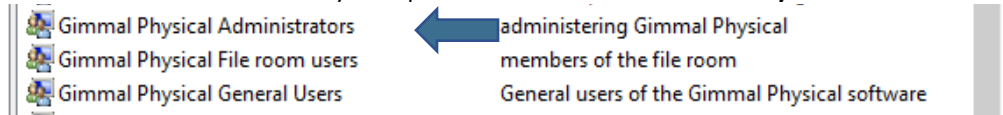


## Windows Authentication

When using Windows Authentication, the user is prompted with a Windows login dialog where they enter their network username and password. Once a user is authenticated, Gimmel Physical compares the Role Name to see if the user is a member of any of the Gimmel Physical Roles. If the user is not a member of any of the Roles assigned in Gimmel Physical, an HTTP 403 (Forbidden) error is generated. Gimmel Physical Roles must exist as Security Groups in the Windows domain.

For example, if SSI is the domain name:

1. Create a Windows Security Group in the Domain called **Gimmel Physical Administrators**.



2. On the top menu in Gimmel Physical, click **Admin**. Select **Roles and Permissions** and click **Edit**. Edit the Administrators Role.



3. Change the name to match the syntax DOMAIN NAME\Security Group Name (i.e. SSI\Gimmel Physical Administrators) and click **Save**.