



# Installation Guide

**Enterprise Events**

**For SharePoint 2013/2016**

**Version 4.13.1**

**January 2019**

15 January 2019

Title: *Gimmal Enterprise Events Installation Guide*

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## Preface

Gimmel delivers market leading content governance and compliant records solutions built on Microsoft® SharePoint®. Gimmel solutions drive user adoption and simplify information access by making information lifecycle management of content simple and transparent, ensuring consistent compliance and proactive litigation readiness enterprise-wide while lowering costs.

Gimmel's Enterprise Events provides a flexible, extensible, and amenable product to manage conditional-based aging in a large organization.

## Who Should Use This Guide

The intended audience for this document consists of SharePoint Administrators. Administrators are considered to be SharePoint power users who are familiar with the enterprise's content management and retention policies.

## Introduction

Enterprise Events (EE) provides a tool for conditional-based records management based on events, as opposed to cutoff or calendar dates. You can define events as any enterprise occurrence, such as end of contract or fiscal year. Enterprise Events allows you to create groups of event instances for which you can enter trigger dates at any time. The expiration date is automatically calculated from the trigger date you enter based upon the types, event instances, stages, and policies you put in place. Trigger dates can be in the past, present, or future.

Enterprise Events can be used across multiple farms and works with Gimmel Compliance Suite's File Plan Builder. You can use Enterprise Events outside of a record center (i.e., team site), in a record center without Compliance Suite, and in a record center with Compliance Suite installed. SharePoint Administrators can use the Local Admin Mode to manage all configuration and administration for Enterprise Events. Accessing Enterprise Events through SharePoint's Site Settings allows you to edit types, permissions, and instances and produce the Enterprise Events report.

## Installing Web Deploy

This chapter provides step-by-step instructions for installing Web Deploy, which is required for installing Enterprise Events.

### Important!

You must install Web Deploy and Enterprise Events on each server where Enterprise Events.web (remote web) will be installed.

## Installing Web Deploy

Follow these steps to install the most recent version of Web Deploy:

1. On the Web Server, run the `WebPlatformInstaller.exe` usually located in `C:\Program Files\Microsoft\Web Platform Installer`. You can also download the most recent version of the Microsoft Web Platform Installer from <http://www.microsoft.com/web/downloads/platform.aspx>.
2. Download and run the Web Deploy package.
3. Launch the Web Platform Installer.

### Important!

Enterprise Events requires Web Platform Installer Version 5.0 and Web Deploy Version 3.5.

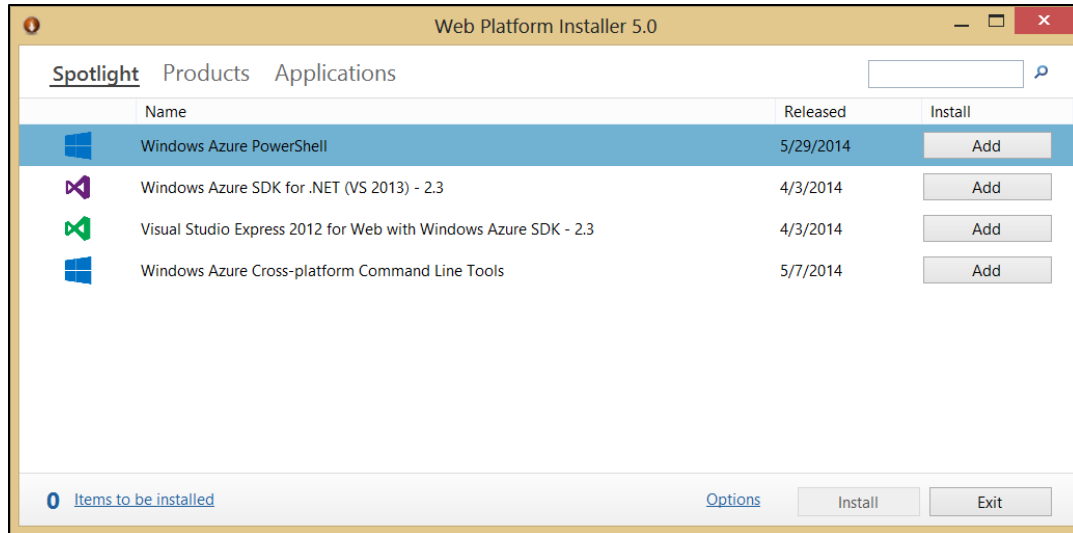


Figure 1 Web Platform Installer Dialog

4. In the search box to the right at the top of the page, type `Web Deploy`, then press **Enter**.
5. Next, to the Web Deploy entry, click **Add** and then **Install** at the bottom of the page.

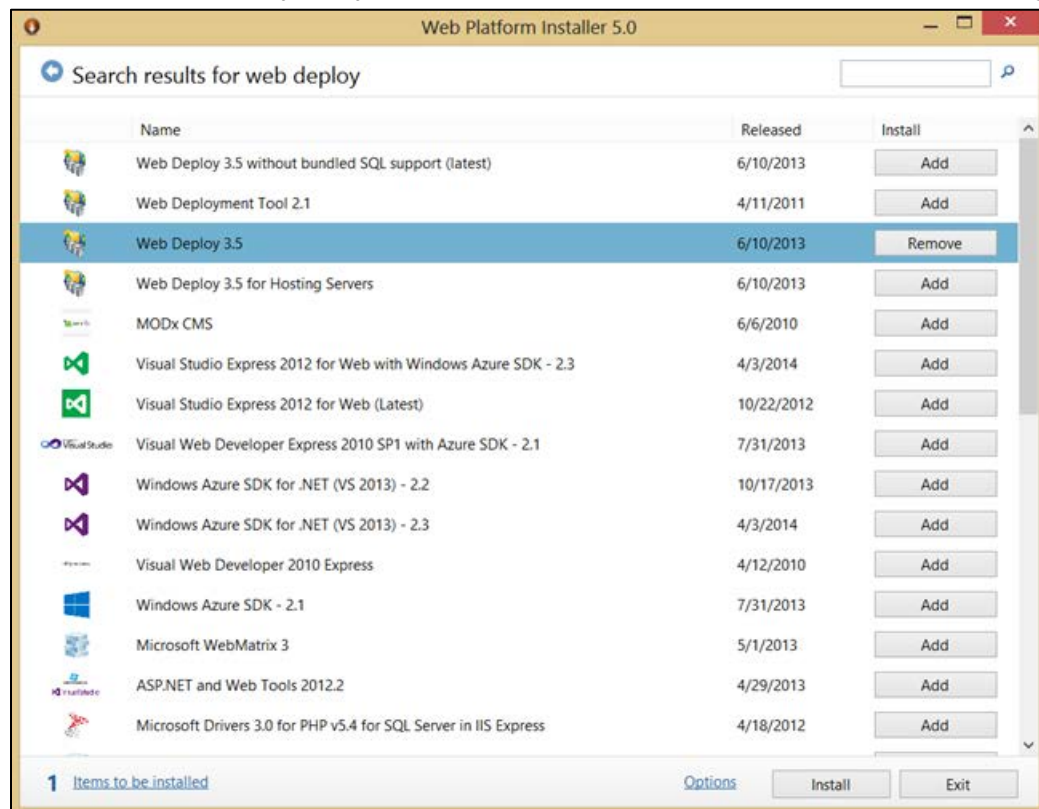
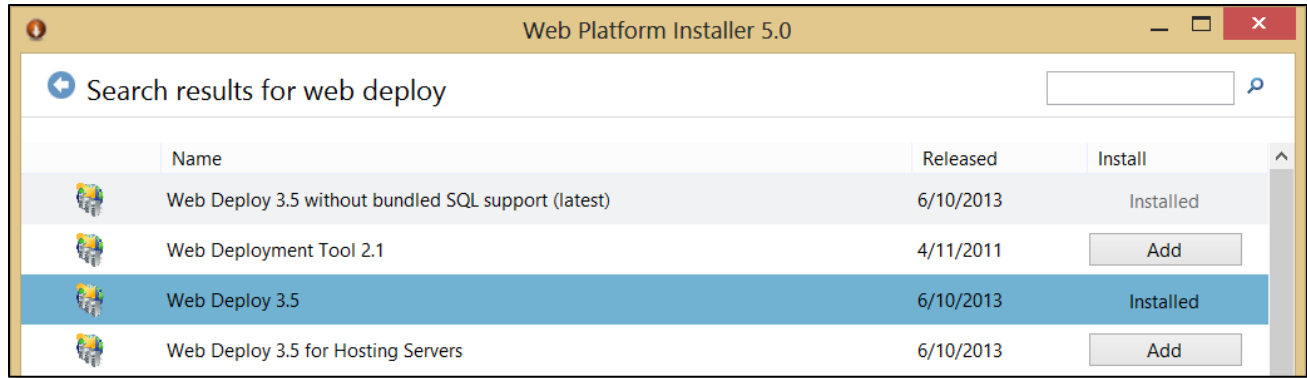


Figure 2 Web Platform Installer

If the component is already installed, then you will not be able to add it and it will display as **Installed**.



*Figure 3 Web Platform Installed*



## Installing Enterprise Events

Gimmel Enterprise Events is distributed separately from other Gimmel products. You must have System Administrator privileges to install Enterprise Events. You must first download/run Enterprise Events and then download/run the Gimmel App Installer.

If you are running the installer from a SharePoint server and intend to install the Enterprise Events web application on the SharePoint server, you must install the database and web. If you are running the install from a SharePoint server and intend to install the Enterprise Events web application on a different server, SQL Server Data Tools must be installed on the server. If you are running the installer from the server intended to house the Enterprise Events web application and it is not a SharePoint server, you only install the web. These options are available from the **Actions** tab in the installer.

### Important!

If you must install apps on **SQL Server 2014**, see Appendix A, "Installing Apps on SQL Server 2014" before continuing with this chapter.

If you must install apps on **SQL Server 2016**, see Appendix B, "Installing Apps on SQL Server 2016" before continuing with this chapter.

## Downloading and Extracting Enterprise Events

Perform these steps on one server in your SharePoint farm running the SharePoint 2013 **Microsoft SharePoint Foundation Web Application** service. Use an account that is a member of the local server Administrators group.

1. Retrieve the latest version of Enterprise Events from the Gimmel software download site:  
<https://gimmel1.sharepoint.com/sites/EXT-download/SitePages/Home.aspx>
2. Extract the files to a folder.
3. Open the SharePoint 2013/2016 Management Shell as an administrator (right-click and choose **Run as Administrator**).
4. Browse the management shell to the included WSPs folder where you extracted the files.
5. Run the `setup.ps1` script found in the directory.

### Important!

If you see a message similar to "setup.ps1 cannot be loaded because the execution of scripts is disabled on this system," you must enable running scripts. Run the following command: Set -

ExecutionPolicy Unrestricted. For more information, see [Using the Set-ExecutionPolicy Cmdlet](#).

6. Wait for the script to complete.

## Downloading and Running the Gimmel App Installer

Follow these steps to download and run the Gimmel App Installer:

1. Download the latest version of the Gimmel App Installer from the Gimmel software download site:  
<https://gimmel1.sharepoint.com/sites/EXT-download/SitePages/Home.aspx>
2. Extract the files to a folder.
3. From the application files you downloaded and extracted, right-click `GimmelAppInstaller.exe` and select **Run as Administrator** from the menu. The **Gimmel App Configuration and Installation Wizard** displays the **Locate Files** page.

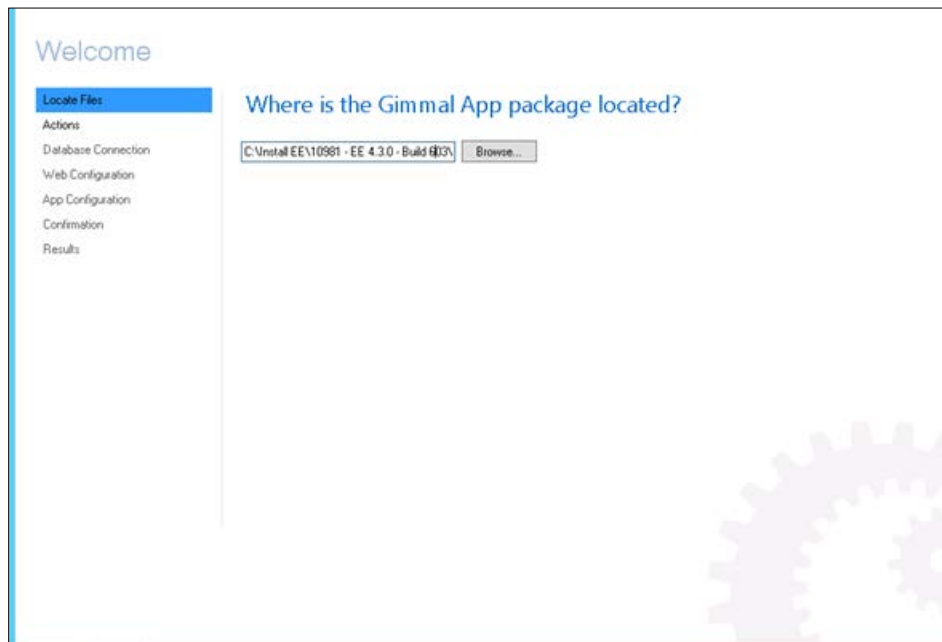


Figure 4 Locate Files Tab

4. Click **Browse** if the correct path for the app package does not display.

5. Click **Next** to add the Deploy folder from the folder where you extracted the files. The Actions page displays.

Figure 5 Actions Page

6. Specify the actions for the wizard to perform.
  - a. If you are running the installer from a SharePoint server and intend to install the Enterprise Events web application on the SharePoint server, select both **Install Web** and **Install Database**.
  - b. If you are running the installer from a SharePoint server and intend to install the Enterprise Events web application on a different server, select only **Install Database**.

## Important!

The SQL package must be available to install the database. The package is available if the installer is run from a machine with SQL Server installed or if the SQL Server Data Tools are installed on the server from which the installer is run.

- c. If running the installer from the server intended to house the Enterprise Events web application and it is not a SharePoint server, select only **Install Web**.
7. Click **Next**. The Database Connection Page displays with a field for the **Database connection string**.

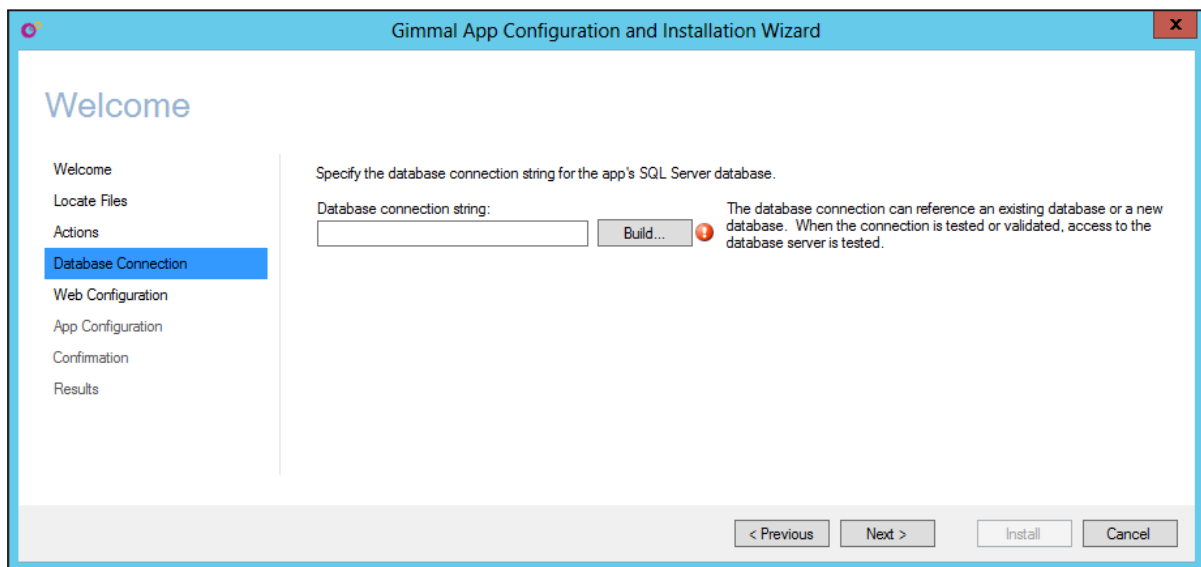


Figure 6 Database Connection Tab

8. Click **Build**. The Connection Properties window displays.

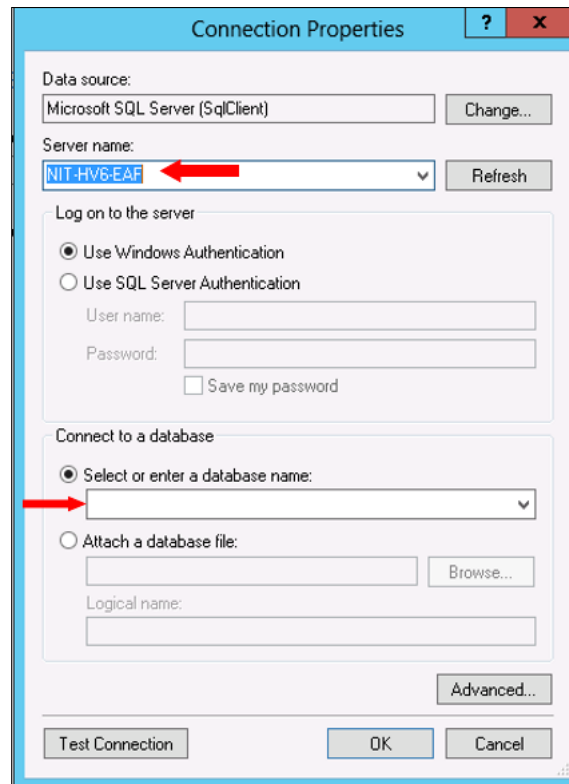


Figure 7 Connection Properties Dialog

9. Enter the following information:
- Data source:** Microsoft SQL Server (SqlClient).
  - Server name:** Fully qualified domain name of the Microsoft SQL Server. Copy the server name from the Database Server for this field.
  - Log on to the server:** Select Use Windows Authentication.
  - Connect to a database:** Choose the option **Select or enter a database name**. From the pull-down, select an existing database or type in the box to create a new database (i.e., Gimmel\_EE). It is best practice to use a new database.
10. After entering the required information, click **Test Connection**. A successful message should display. After dismissing the message, click **OK**.

If the successful message does not display, check the server name and be sure the database server is running. Resolve these issues before continuing.

The Database connection string field should now contain information to connect to the database.

11. Click **Next**. The Web Configuration Page displays.

Figure 8 Web Configuration Page

### Important!

The following are default configuration values that Gimmal provides: **IIS web site:** Gimmal\_EE; **Content directory:** <IIS Path>\Gimmal\_EE, **Create application pool:** Gimmal\_EE. All of these defaults can be changed.

**If Enterprise Events is installed in the SharePoint Virtual Directory, it overwrites the existing IIS entries with these values. Be sure to install Enterprise Events in the default site or choose a virtual directory that does not conflict with the SharePoint Virtual Directory.**

- a. In the **Web Site** section, either select **Use existing web site** and choose the web site where Enterprise Events was previously installed, or select **Create website** (default) for the remote web. If you are creating a new website, you must provide **the IIS web site** name, **SSL certificate** (if **https** is selected), and **Content directory**.
- b. In the **Application Pool** section, either select **Use existing application pool** and select its name or select **Create application pool** (default). If you are creating a new

application pool, enter the username and password for the application pool and accept the defaults.

12. Click **Next**. The Confirmation page displays.

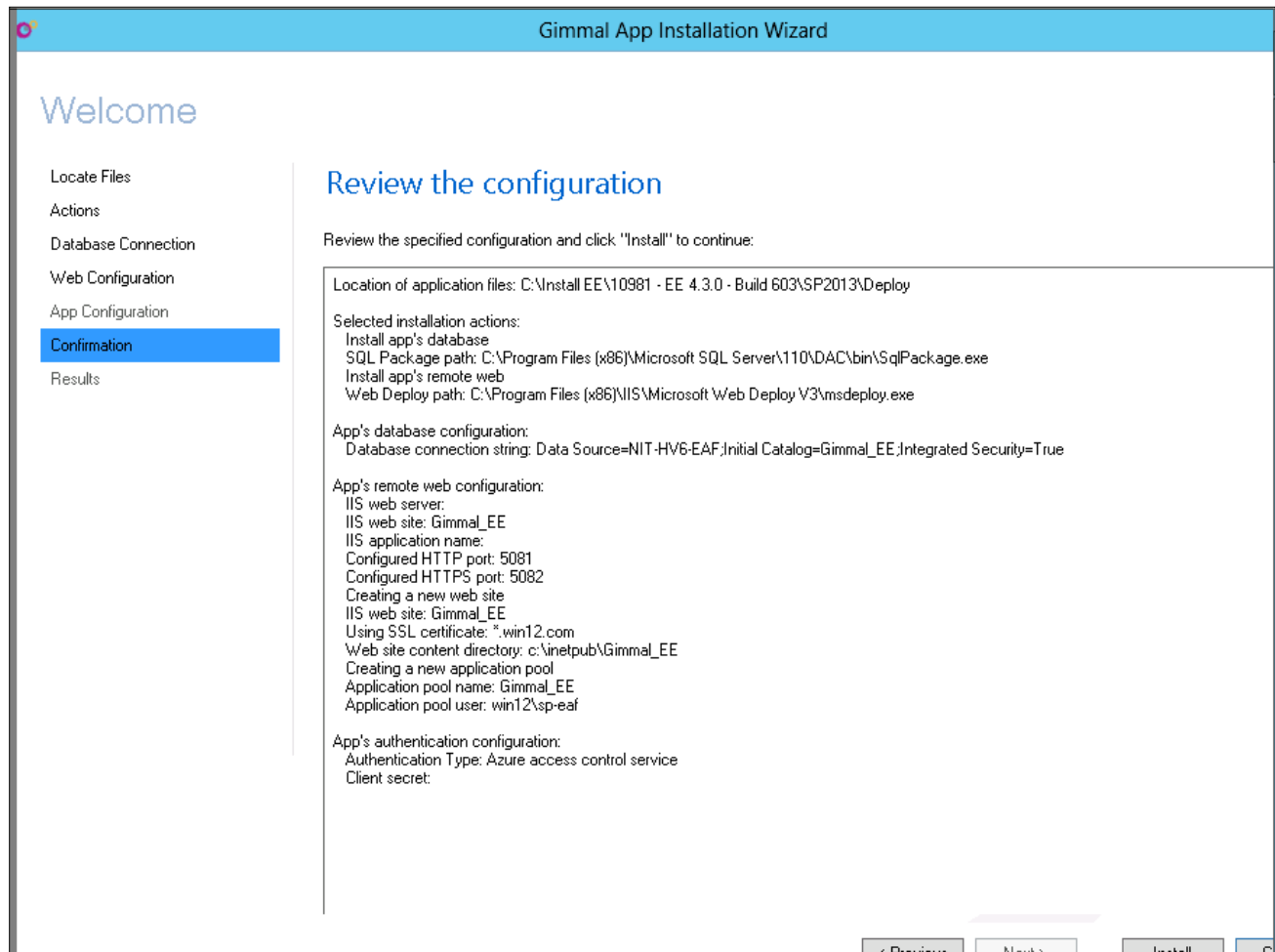


Figure 9 Confirmation Page

13. Click **Install**. The Results page with a Success message displays when complete.

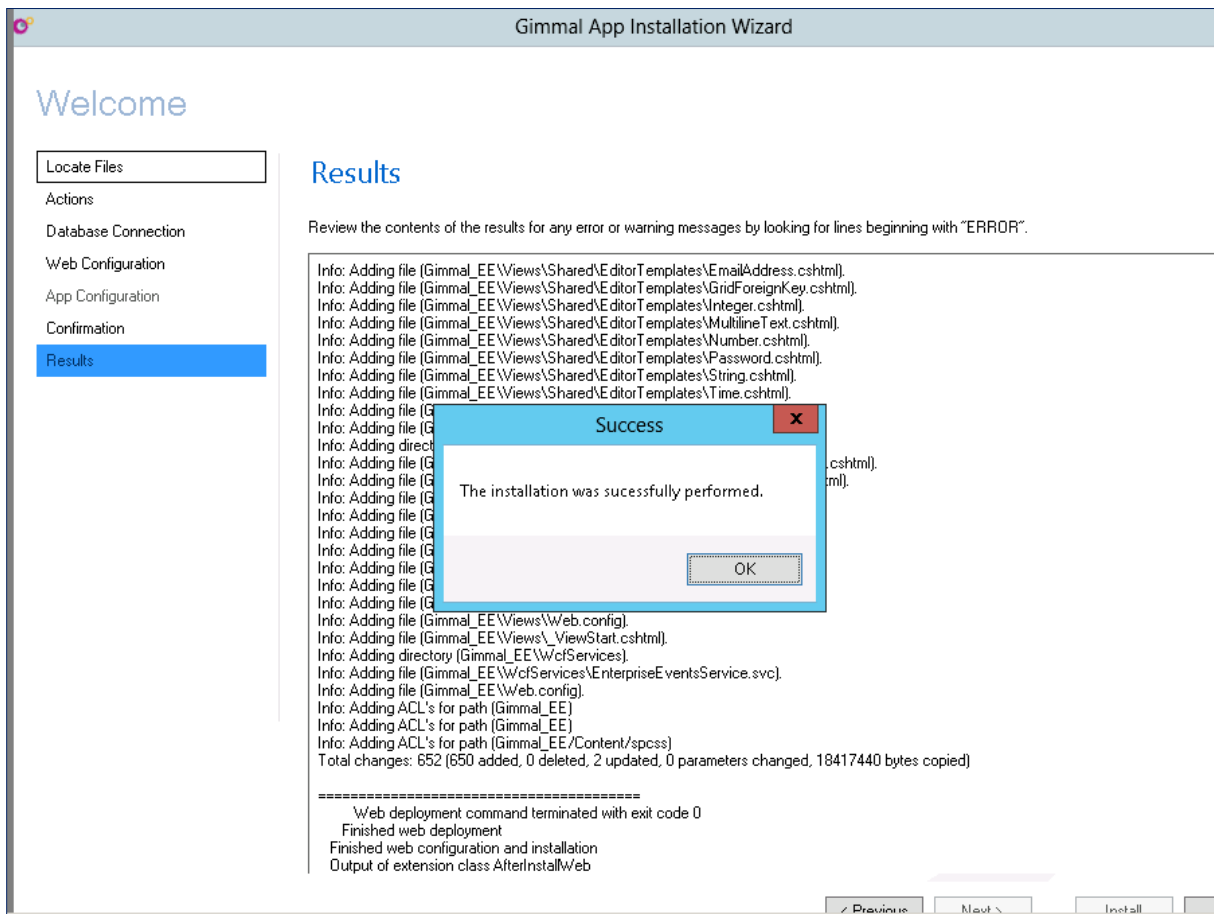


Figure 10 Results and Success Message

14. A web page launches (default URL: <http://localhost:<port number>/account/adminlogin>). Bookmark the URL for future reference.

The screenshot shows a web form titled 'Admin Log In'. It contains two input fields: 'User Name \*' with the text 'admin' and 'Password \*' with masked characters (dots). A 'Log In' button is positioned at the bottom right of the form.

Figure 11 Enterprise Events URL

15. Enter the default **User Name** of admin and the **Password** of password. The main Enterprise Events page displays.



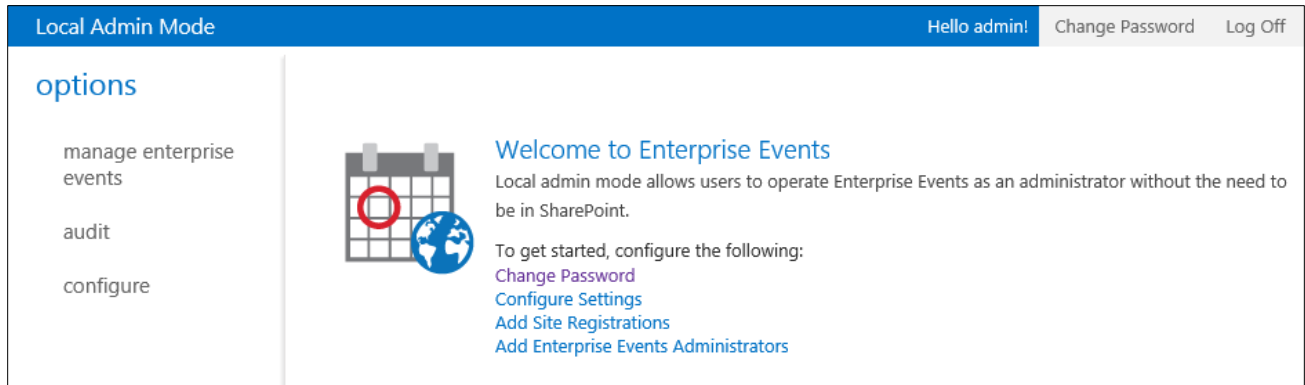


Figure 12 Welcome to Enterprise Events

## Configuring Enterprise Events

The sections in this chapter describe the configurations necessary to administer Enterprise Events. You must be an administrator in the Local Admin Mode to configure Enterprise Events. After completing the configurations, see the *Gimmel Enterprise Events Administration Guide* for managing Enterprise Events.

### Changing the Password

Because Enterprise Events comes with the default **User Name** of admin and the **Password** of password, Gimmel strongly suggests that you change the admin password as soon as possible. Select the **Change Password** option on the Welcome to Enterprise Events page to enter and save a new password. After you save a new password, the **Change Password** option no longer displays on the Welcome page.

#### Important!

You can change the password at any time by selecting the **Change Password** option in the upper, right corner of the Local Admin Mode.

## Configuring Enterprise Events

You must configure Enterprise Events before you can use it.

1. From the Welcome to Enterprise Events page, select **Configure Settings**. The settings page displays.

The screenshot shows the 'Local Admin Mode' interface. The top navigation bar includes 'Hello admin!', 'Change Password', and 'Log Off'. The main content area is titled 'options' and contains a sidebar with 'manage enterprise events', 'audit', and 'configure' (highlighted). The main settings area is titled 'home registrations settings admins error logs' and contains the following configuration options:

- SharePoint Connection Information:** Allows Enterprise Events to communicate with SharePoint and obtain necessary data.
- Registration Type \*:** A dropdown menu set to 'SharePoint 2013 (ADFS)'.
- ADFS URL \*:** A text input field containing 'https://nit-hv4-uss.win12.com'.
- SharePoint Site Collection URL \*:** A text input field containing 'https://twister1.win12.com:12000/sites/NonRoot12000'.
- User Name \*:** A text input field containing 'win12\sp-eaf'.
- Password \*:** A password input field with masked characters.
- Enable Audit Logging:** A checkbox that is checked, with the description 'Saves the audit trail to the audit log.'
- Hide Details Pane:** An unchecked checkbox with the description 'Hides the details pane for all users.'

At the bottom right of the settings area, there are 'Save' and 'Cancel' buttons.

Figure 13 Settings Page

2. Under **SharePoint Connection Information**, select the **Registration Type** to use. If you select SharePoint 2013 ADFS for the **Registration Type**, you must enter the ADFS URL in the field that displays.

### Important!

You can obtain the ADFS URL by using the `Get-SPTrustedIdentityTokenIssuer` command from the management shell.

3. For the **SharePoint Site Collection URL**, enter the URL to the site collection from which Enterprise Events can pull the list of attributes to use for grouping event instances. This is usually the Content Hub site (from which content types and the associated site columns/attributes are published), but it can be any site collection in the farm.

### Important!

If you are not using the Content Hub, not all site collections will contain all attributes.

4. Enter the site collection administrator **User Name** and **Password** for the **SharePoint Site Collection URL** you entered in the previous step.
5. Select the **Enable Audit Logging** checkbox if you want to save the audit trail to the Enterprise Events audit log.
6. When you select a type in Enterprise Events, the details can display in the **Details** pane on the right. If you want to hide the Details pane to allow room for more screen real estate, select the **Hide Details Pane** checkbox.
7. Click **Save**. The settings are saved and the **Welcome** page displays without the **Configure Settings** option.

## Adding Site Registrations

If you want Enterprise Events to access information from certain sites, such as attributes, you must add those site registrations to the Enterprise Events configuration. These are the site collections that can be used with Enterprise Events and display when associating an Enterprise Events policy.

Follow these steps to add site registrations:


1. From the Welcome to Enterprise Events page, select **Add Site Registrations**. The registrations page displays.
2. Click . The registrations dialog displays.

Figure 14 Registrations Page

3. Select the **Registration Type** from the dropdown menu.
4. If you are using ADFS, enter the ADFS URL for the SharePoint site collection.
5. Enter the **SharePoint Site Collection URL** where you intend to use Enterprise Events.
6. Enter a member's **Username** and **Password** for the Site Collection URL.
7. Click **Add**. The dialog closes and the entry displays in the registrations page.

## Activating Farm-Level Features

If you are installing Enterprise Events as your environment's first Gimmel software product or have previously installed Gimmel Compliance Suite, the Gimmel - Common farm-level feature should be activated.


Follow these steps to ensure that Gimmel – Common is activated:

1. From Central Administration, select **System Settings > Manage Farm Features**.
2. Scroll down to **Gimmel - Common** and ensure that it is activated. If not, click **Activate**.

## Activating the Site Collection Feature

The site collection feature is only necessary to run reports and allow access to Enterprise Events via SharePoint (it creates the links in Site Settings).

Follow these steps to activate the site collection feature.

1. As a Site Collection Administrator, select **Settings** (  ) → **Site Settings**, then **Site collection features** under **Site Collection Administration**.
2. Click **Activate** next to **Gimmel – Enterprise Events**.

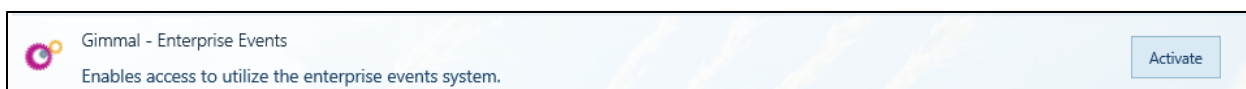


Figure 15 Activating Enterprise Events Site Collection Feature

When you return to the Site Settings page, it is updated with the Enterprise Events entries.



Figure 16 Enterprise Events Entries

3. Click **Enterprise Events Configuration**. The Enterprise Events Settings page displays.

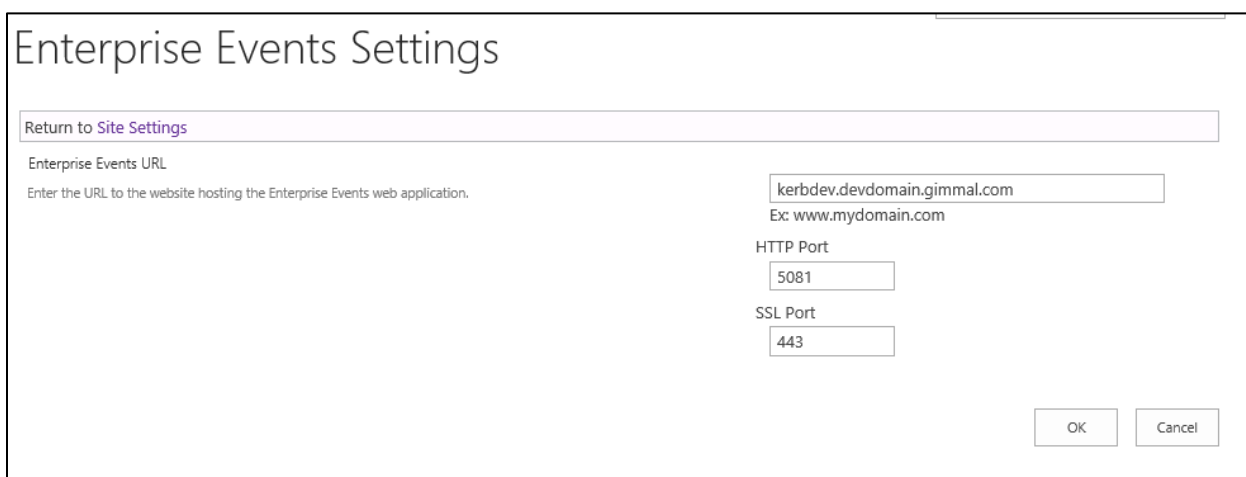


Figure 17 Enterprise Events Settings Page

4. Enter the hostname and **HTTP Port** along with the **SSL Port** number (if selected during the install). Verify that the information is correct.
5. Click **OK** to save any new changes or **Cancel** to exit while keeping the existing entries.

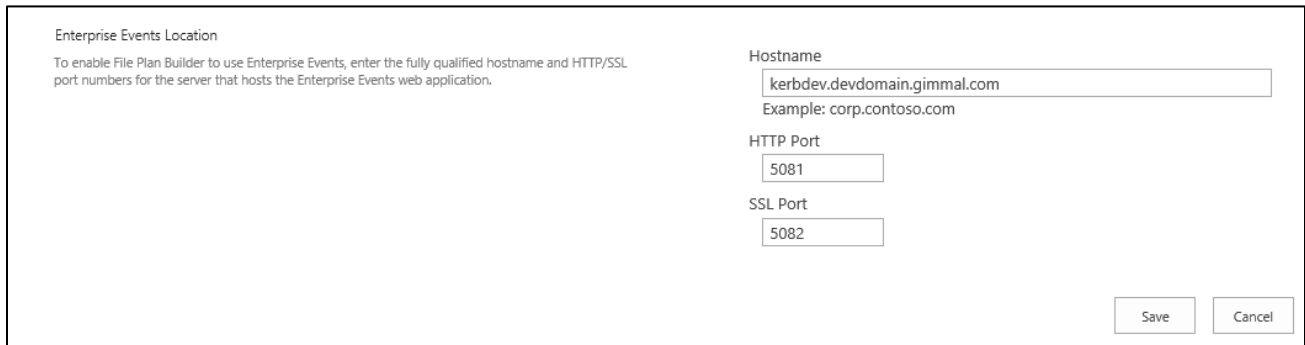
## Configuring File Plan Builder to Use Enterprise Events

If you have Compliance Suite installed and want to use Enterprise Events for aging criteria in File Plan Builder (FPB), you must configure the Enterprise Events settings for FPB. If you do not configure FPB for Enterprise Events, the Event option is not accessible as a **Stage Activation Type** and is grayed out.

### Important!

You can also find information for configuring File Plan Builder to use Enterprise Events in the *File Plan Builder Administration Guide*.

1. Go to Central Administration and select **File Plan Builder Settings** under Compliance Suite. The File Plan Builder Settings page displays.
2. Scroll to the bottom of the page to view Enterprise Events Settings.



The screenshot shows a configuration form titled "Enterprise Events Location". It includes a descriptive text block: "To enable File Plan Builder to use Enterprise Events, enter the fully qualified hostname and HTTP/SSL port numbers for the server that hosts the Enterprise Events web application." The form has three input fields: "Hostname" with the value "kerbdev.devdomain.gimmel.com" and an example "corp.contoso.com", "HTTP Port" with the value "5081", and "SSL Port" with the value "5082". At the bottom right, there are "Save" and "Cancel" buttons.

Figure 18 File Plan Builder Enterprise Events Settings

3. Enter the **Hostname**, **HTTP Port**, and **SSL Port** (if applicable) for the server where Enterprise Events is installed. Click **Save**.

## Upgrading Enterprise Events from Version 4.13 to 4.13.1

This version supports new installations on SharePoint 2013/2016 or upgrades from previous versions of Enterprise Events for SharePoint 2013.

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### Note:

Enterprise Events skipped version numbers to go from 4.3 to 4.12. This was done in an effort to make it consistent with Compliance Suite. Enterprise Events v4.4 through v4.10 do not exist. Enterprise Events 4.11 is only for SharePoint 2016.

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## Downloading the Latest Version

1. Retrieve the latest version of Enterprise Events from the Gimmel software download site:  
<https://gimmel1.sharepoint.com/sites/EXT-download/SitePages/Home.aspx>
2. Extract the files to a folder.
3. Open SharePoint 2013/2016 Management Shell as an administrator (right-click and choose **Run as Administrator**).
4. Browse the management shell to the included WSPs folder where you extracted the files.
5. Run the setup.ps1 script found in the directory.

### Important!

If you see a message similar to "setup.ps1 cannot be loaded because the execution of scripts is disabled on this system," you must enable running scripts. Run the following command: Set-ExecutionPolicy Unrestricted. For more information, see [Using the Set-ExecutionPolicy Cmdlet](#).

6. Wait for the script to complete.

## Downloading and Running the Gimmel App Installer

You must have System Administrator privileges to upgrade Enterprise Events. To upgrade EE, you must choose to Install Web when presented with the Actions page.

Follow these steps to download and run the Gimmel Enterprise Events Installer:

1. Download the latest version of the Gimmel App Installer from the Gimmel software download site: <https://gimmel1.sharepoint.com/sites/EXT-download/SitePages/Home.aspx>
2. Extract the files to a folder.
3. From the application files you downloaded and extracted, right-click `GimmelAppInstaller.exe` and select **Run as Administrator** from the menu. The **Gimmel App Installation Wizard** displays the Locate Files page.

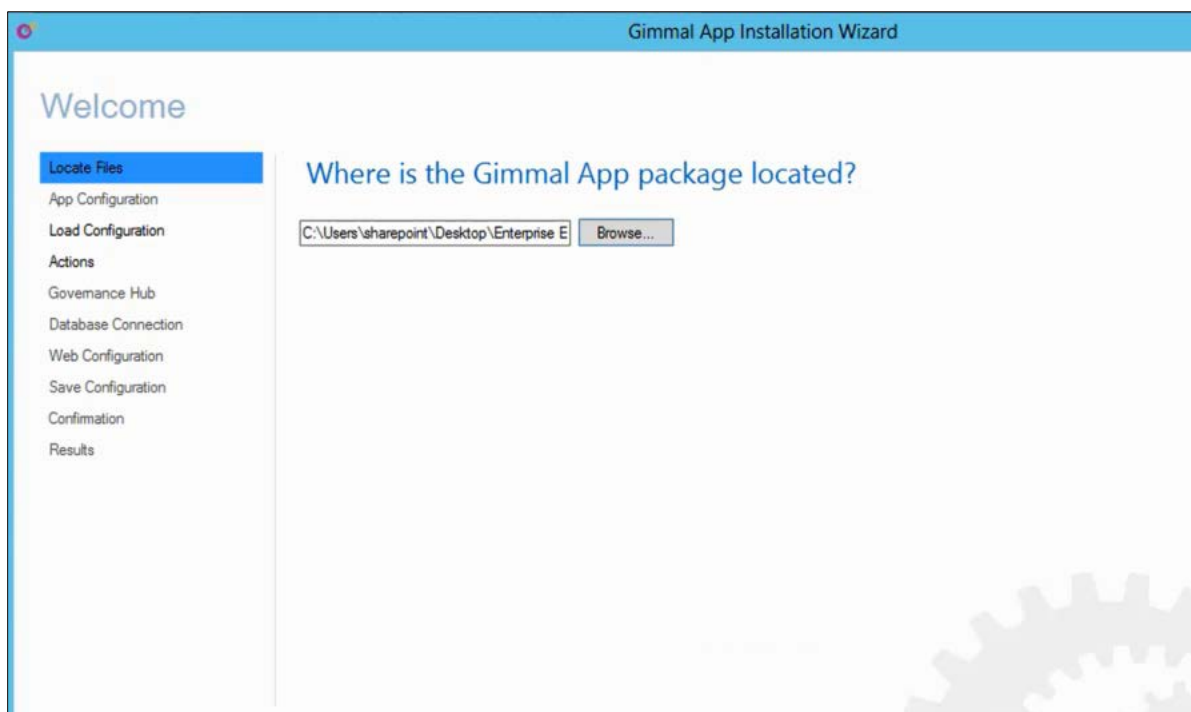


Figure 19 Locate Files Tab

4. Click **Browse...** to add the Deploy folder from the folder where the files were extracted.

### Note

The path to the Deploy folder cannot have parentheses in it.



5. Click **Next**. The Load Configuration page displays.
6. Click **Browse...** to locate the Gimmel App installer configuration file (.GAI) that was used when you originally installed Enterprise Events. If you cannot locate your .GAI file, contact Gimmel Support.



Figure 20 Load Configuration Tab

7. Click **Next**. The Actions page displays.

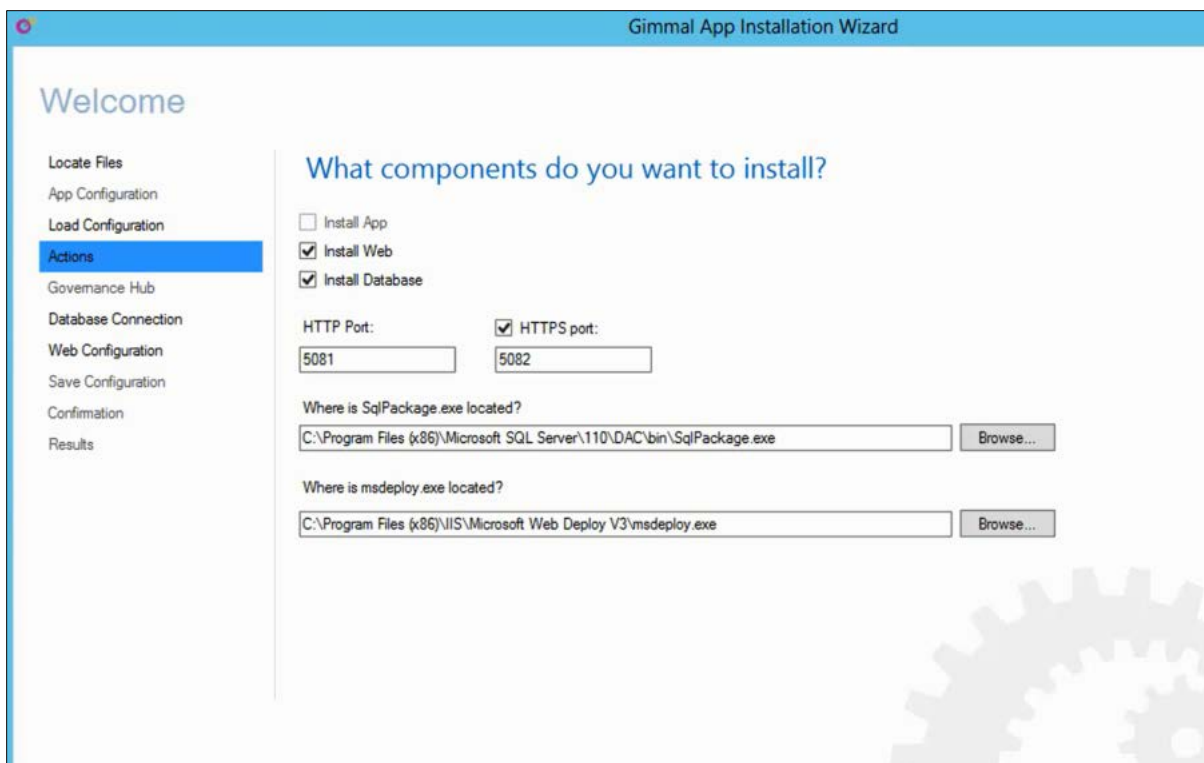


Figure 21 Actions Tab

### Important!

If you enter different port numbers from the original install, the new port numbers are not accepted and EE upgrades on the original port numbers.

8. Select only **Install Web**.
9. Click **Next**. The Database Connection page displays, listing the database connection string

from the GAI file.



Figure 22 Database Connection Tab

10. Click **Next**. The Web Configuration page displays.

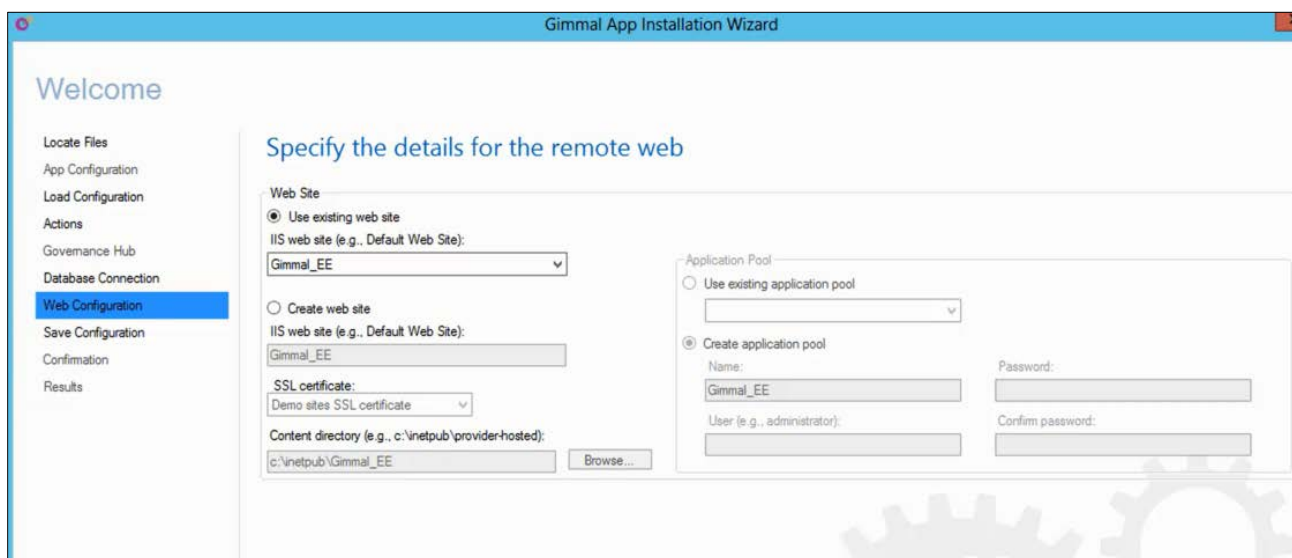


Figure 23 Web Configuration Tab

11. In the **Web Site** section, select **Use existing web site** and choose the name.

### Important!

You must use the existing EE web site when upgrading.

12. Click **Next**. The Save Configuration page displays.

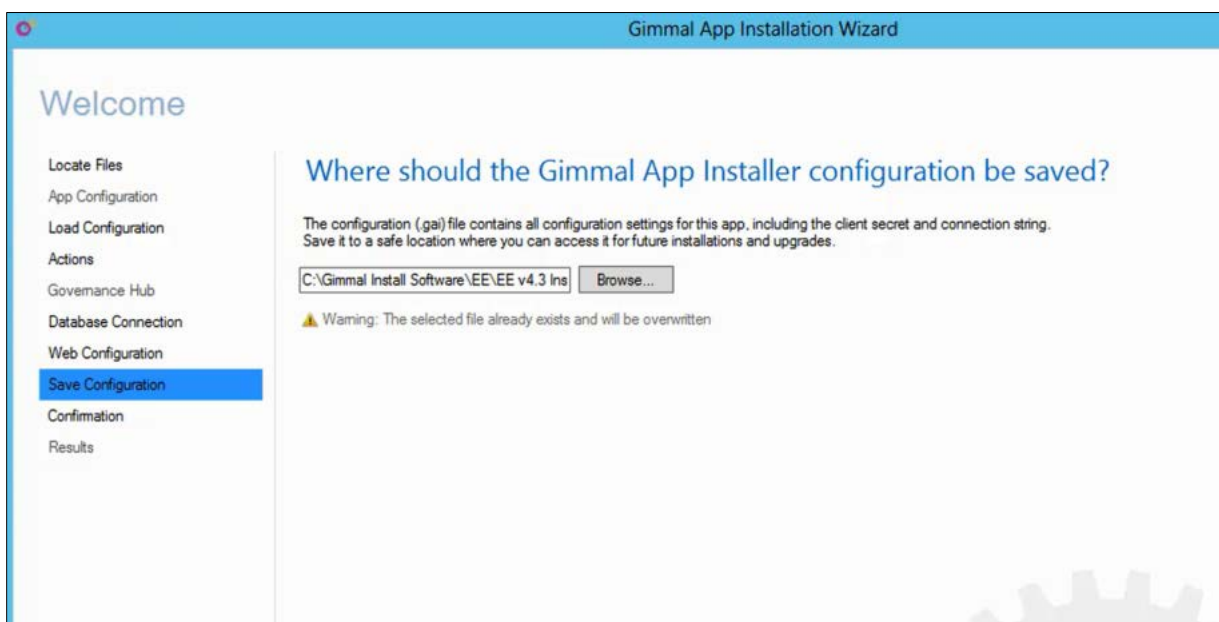


Figure 24 Save Configuration Tab

13. Click **Browse...** to choose another location instead of overwriting the file (optional).

14. Click **Next**. The Confirmation page displays, enabling you to review your configuration.

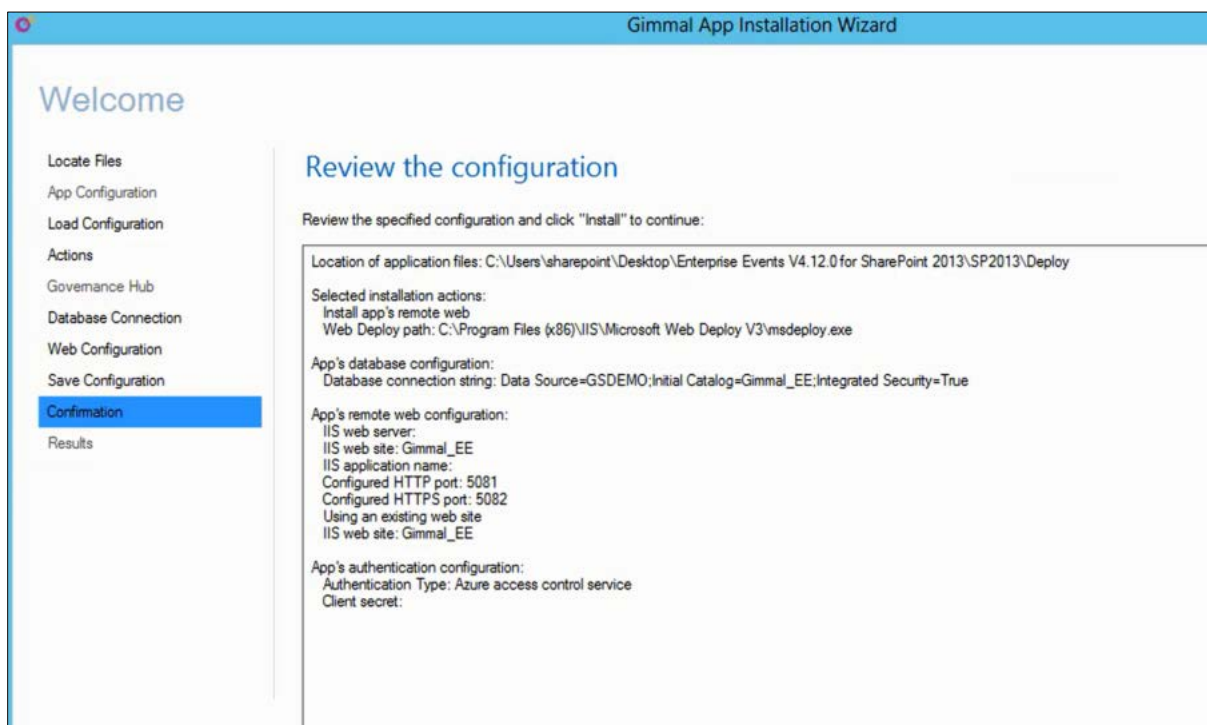


Figure 25 Confirmation Tab

15. Click **Install**. The Results page displays with a Success message when complete.

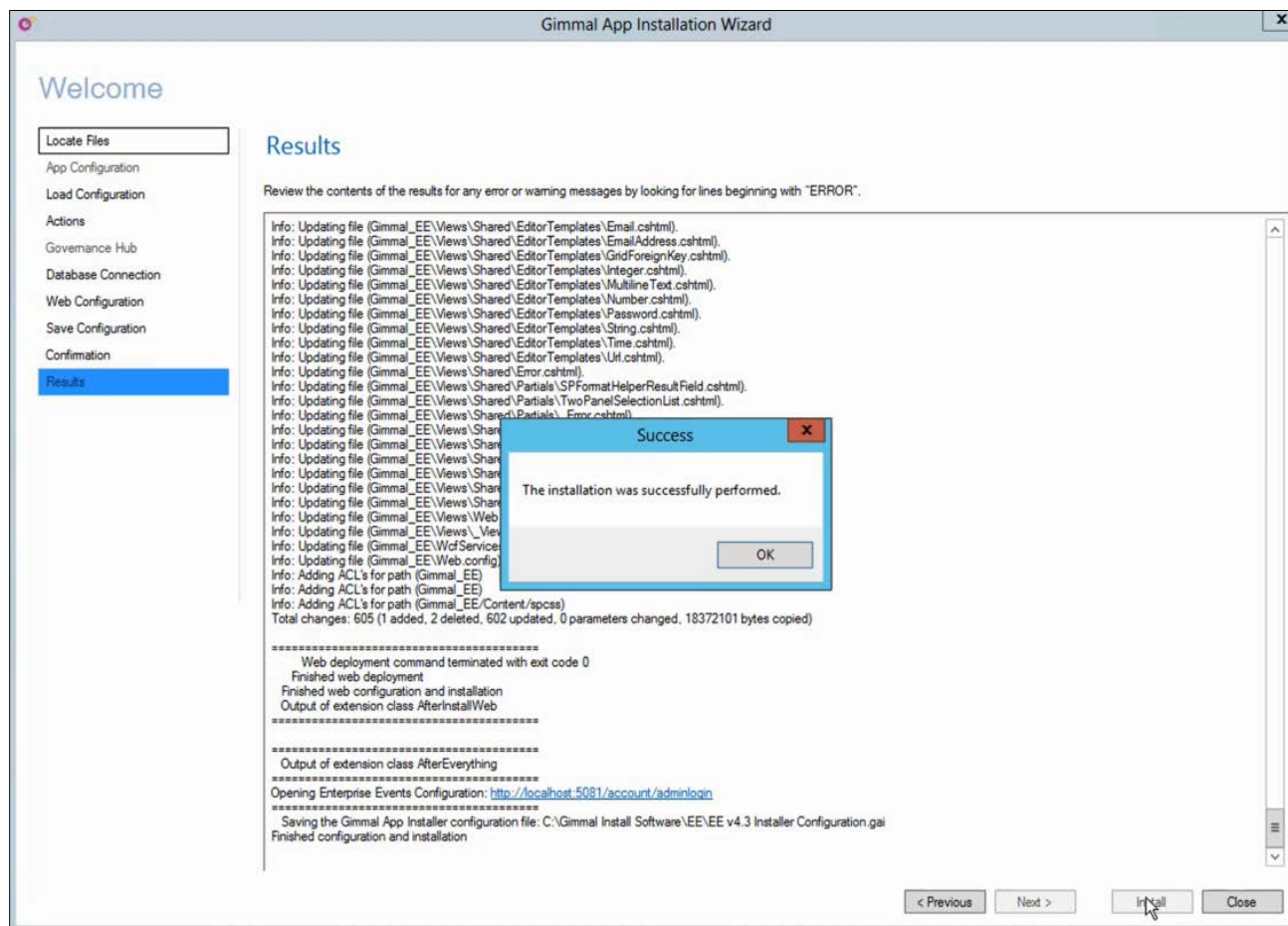


Figure 26 Results and Success Message

16. A web page launches (default URL: <http://localhost:<port number>/account/adminlogin>). Bookmark the URL for future reference, if you have not done so already.

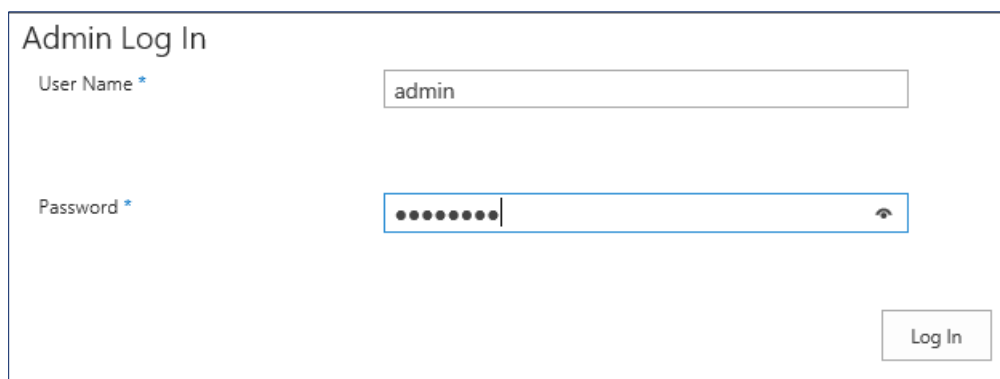


Figure 27 Enterprise Events URL

17. To continue with the upgrade, enter the **User Name** and **Password** used for the previous version of Enterprise Events. The main Enterprise Events page displays.

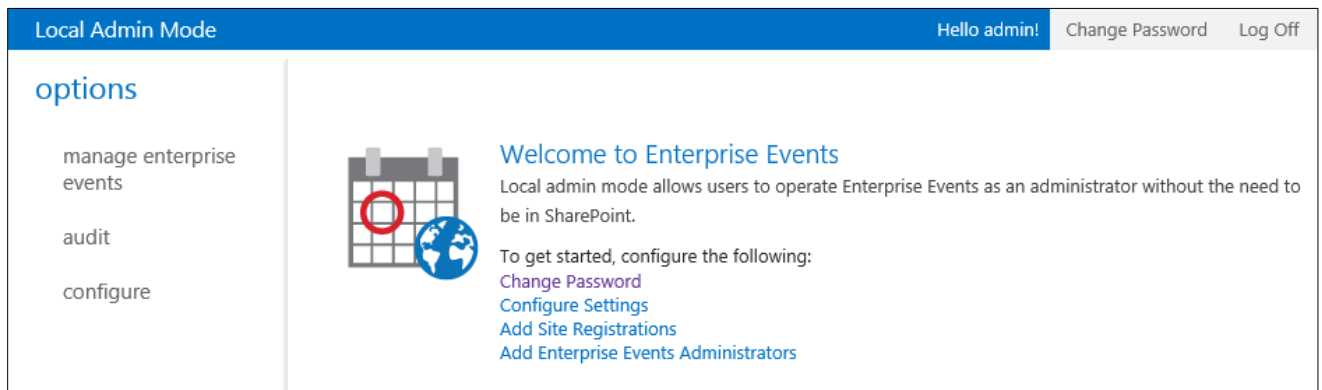


Figure 28 Welcome to Enterprise Events

## Appendix A: Installing Apps on SQL Server 2014

Use the procedure in this appendix if you must install apps on SQL Server 2014.

### Important!

The Gimmel App Installer points to this default location, which is provided by Web Deploy 3.5, for the SqlPackage.exe file:

C:\Program Files (x86)\Microsoft SQL Server\110\DAC\bin

If you have SSMS 2014 installed, you must install Microsoft SQL Server Data-Tier Application Framework (DACFx) (June 2014). This enables you to obtain the new SQL Package path, which you must manually enter as follows at the time of install or an error message is returned.

C:\Program Files (x86)\Microsoft SQL Server\120\DAC\bin

This section provides the procedure for installing Microsoft SQL Server Data-Tier Application Framework (DACFx) (June 2014) to obtain new SQL Package path.

Follow these steps to install Microsoft's DACFx:

1. Navigate to the Windows **Start** menu.

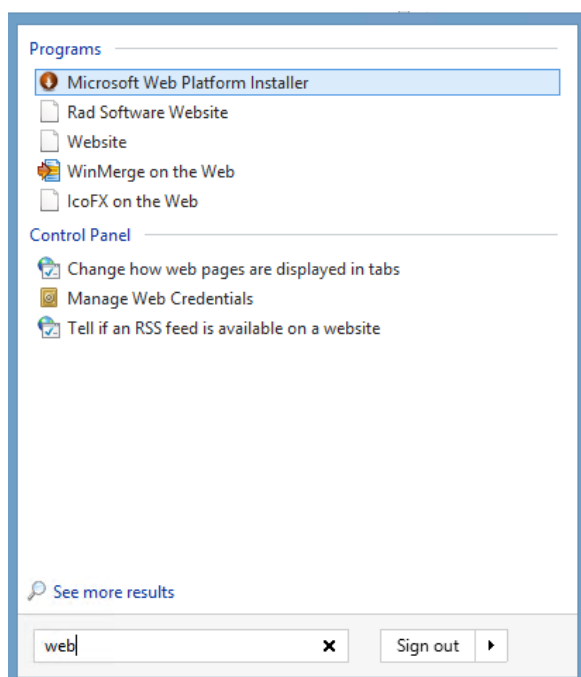


Figure 29 Windows Start Menu

2. In the Programs list, search for **Microsoft Web Platform installer** (assumes you have installed it before), open it, and search for dacfx.

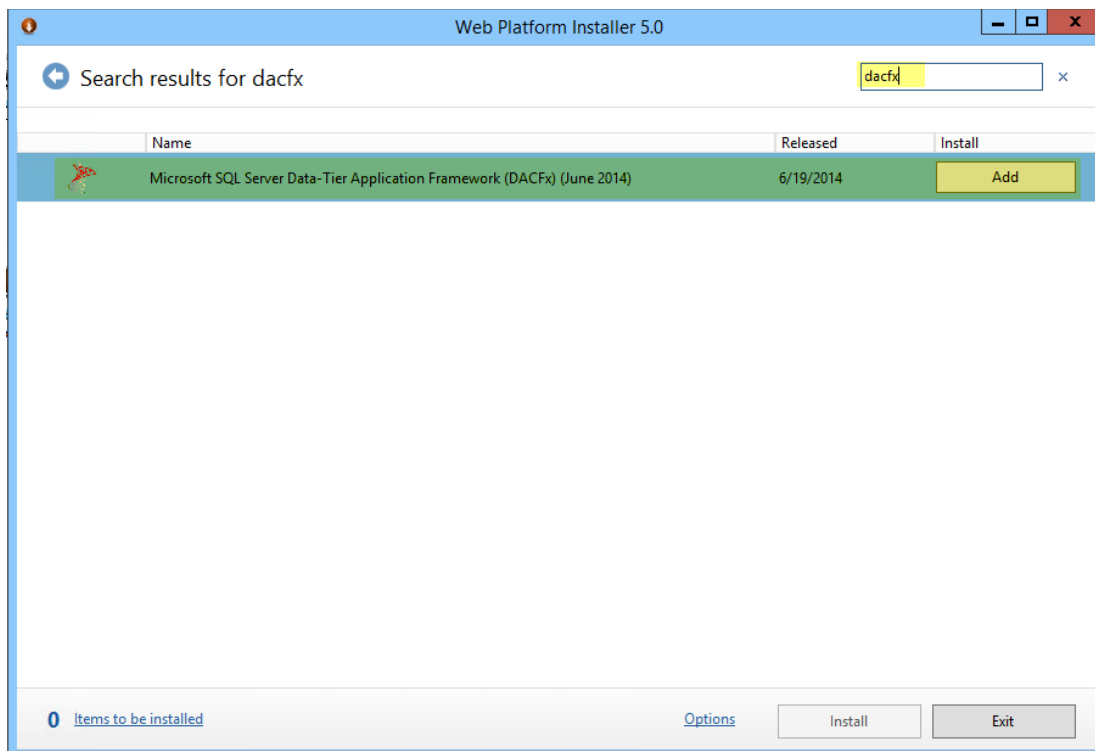


Figure 30 Search for DACfx

3. Click **Add** to install Microsoft SQL Server Data-Tier Application Framework (DACFx) (June 2014).

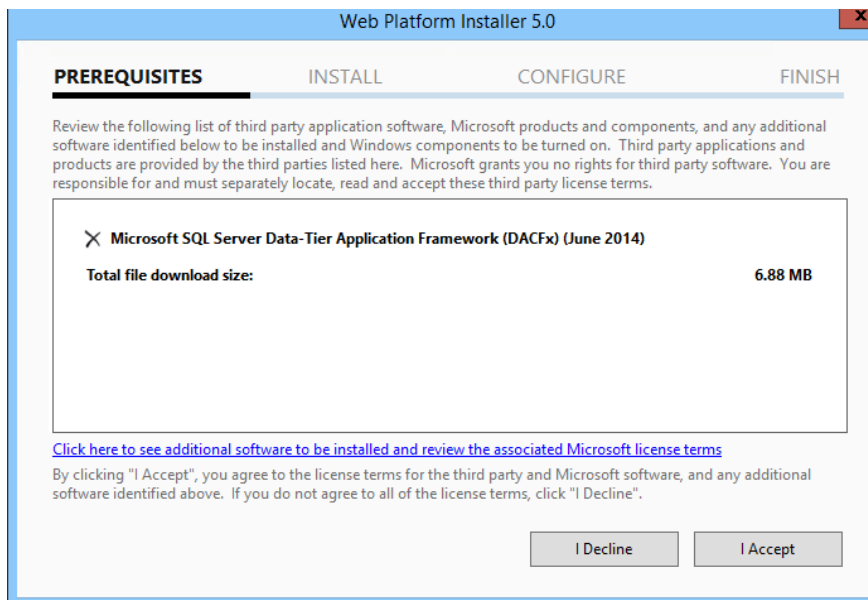


Figure 31 Terms Window

4. Click **Install** then click **I Accept** to accept the terms. A message will display when the installation is successfully completed.
5. Click **Finish** upon a successful installation; then exit.



6. Ensure that `SqlPackage.exe` exists at the location shown in the figure below. When you deploy the App Installer, ensure that the **Where is sqlpackage.exe located?** field (on the Actions page) points to this directory, if this field is active.

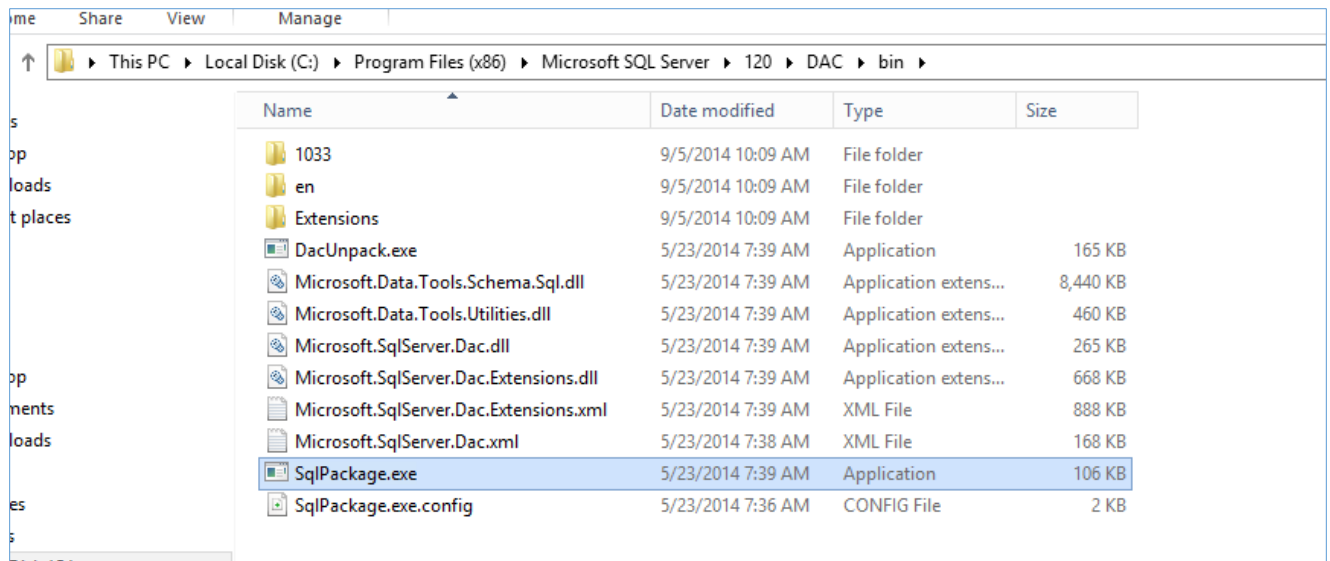


Figure 32 `SqlPackage.exe` Location

## Appendix B: Installing Apps on SQL Server 2016

Use the procedure in this appendix if you must install apps on SQL Server 2016.

Important!
<p>The Gimmel App Installer points to this default location, which is provided by Web Deploy 3.5, for the SqlPackage.exe file:</p> <p>C:\Program Files (x86)\Microsoft SQL Server\110\DAC\bin</p> <p>If you have SSMS 2016 installed, you must install Microsoft SQL Server Data-Tier Application Framework (DACFx) (June 30 2016). This enables you to obtain the new SQL Package path, which you must manually enter as follows at the time of install or an error message is returned.</p> <p>C:\Program Files (x86)\Microsoft SQL Server\130\DAC\bin</p>

This section provides the procedure for installing Microsoft SQL Server Data-Tier Application Framework (DACFx) (June 30 2016) to obtain new SQL Package path.

Follow these steps to install Microsoft's DACFx:

1. Download "Microsoft® SQL Server® Data-Tier Application Framework (June 30 2016)"
  - <https://www.microsoft.com/en-us/download/details.aspx?id=53013>
2. Download the dependency "Microsoft SQL Server System CLR Types"
  - <http://go.microsoft.com/fwlink/?LinkID=817290&clid=0x409> (64 bit version)
3. Install "Microsoft SQL Server System CLR Types"

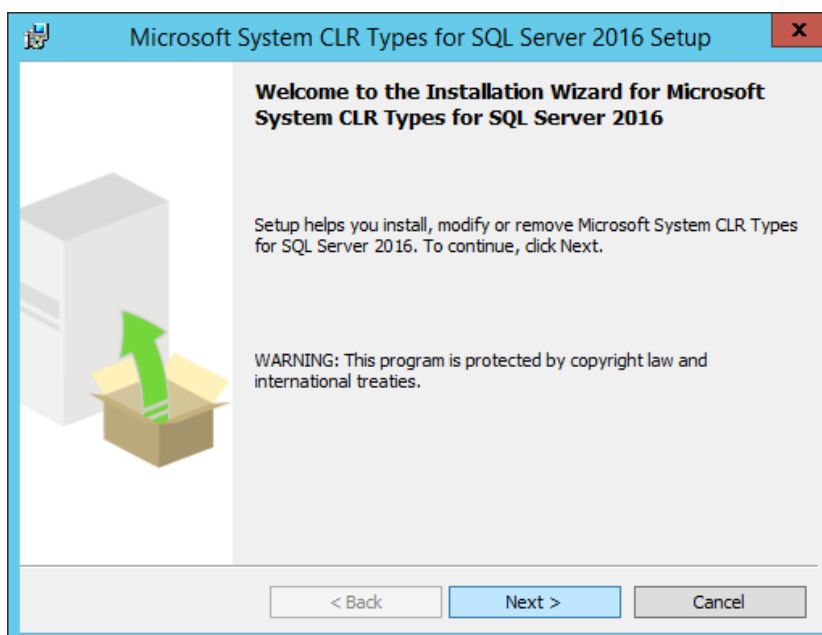


Figure 33 Install SQL Server System CLR Types

4. Install "Microsoft® SQL Server® Data-Tier Application Framework (June 30 2016)"

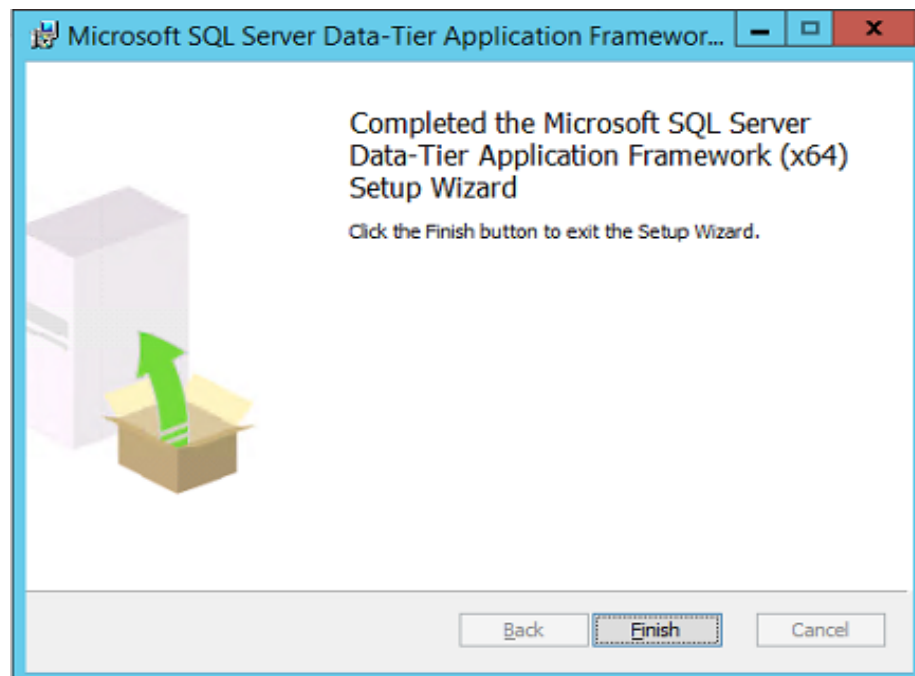
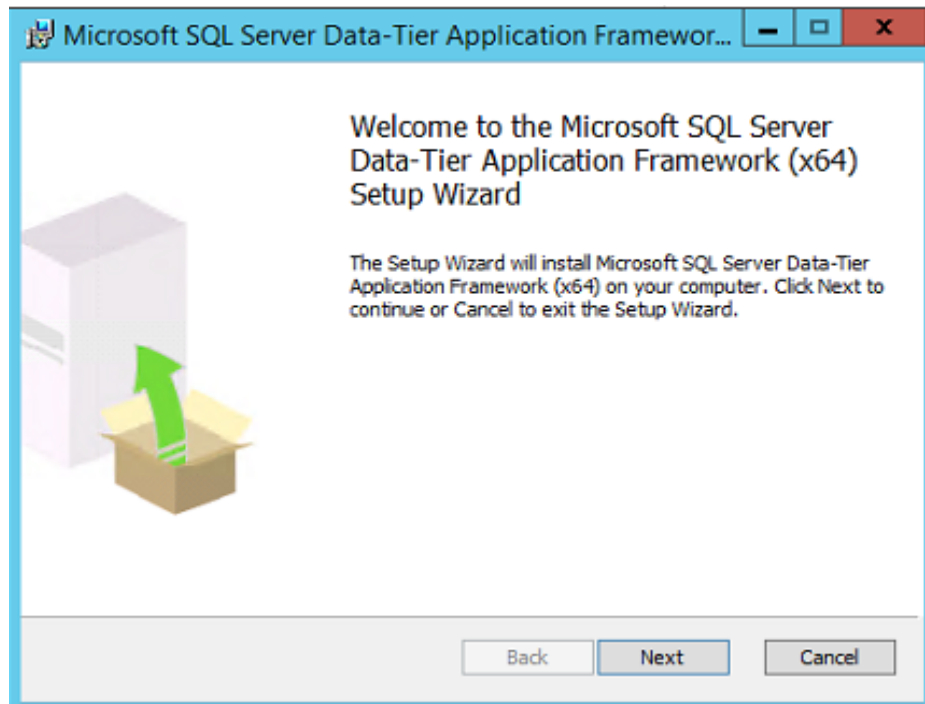


Figure 34 Install Microsoft® SQL Server® Data-Tier Application Framework (June 30 2016)

5. Click **Finish** upon a successful installation, then exit.

- Ensure that `SqlPackage.exe` exists at the location shown in the figure below. When you deploy the App Installer, ensure that the **Where is sqlpackage.exe located?** field (on the Actions page) points to this directory, if this field is active.

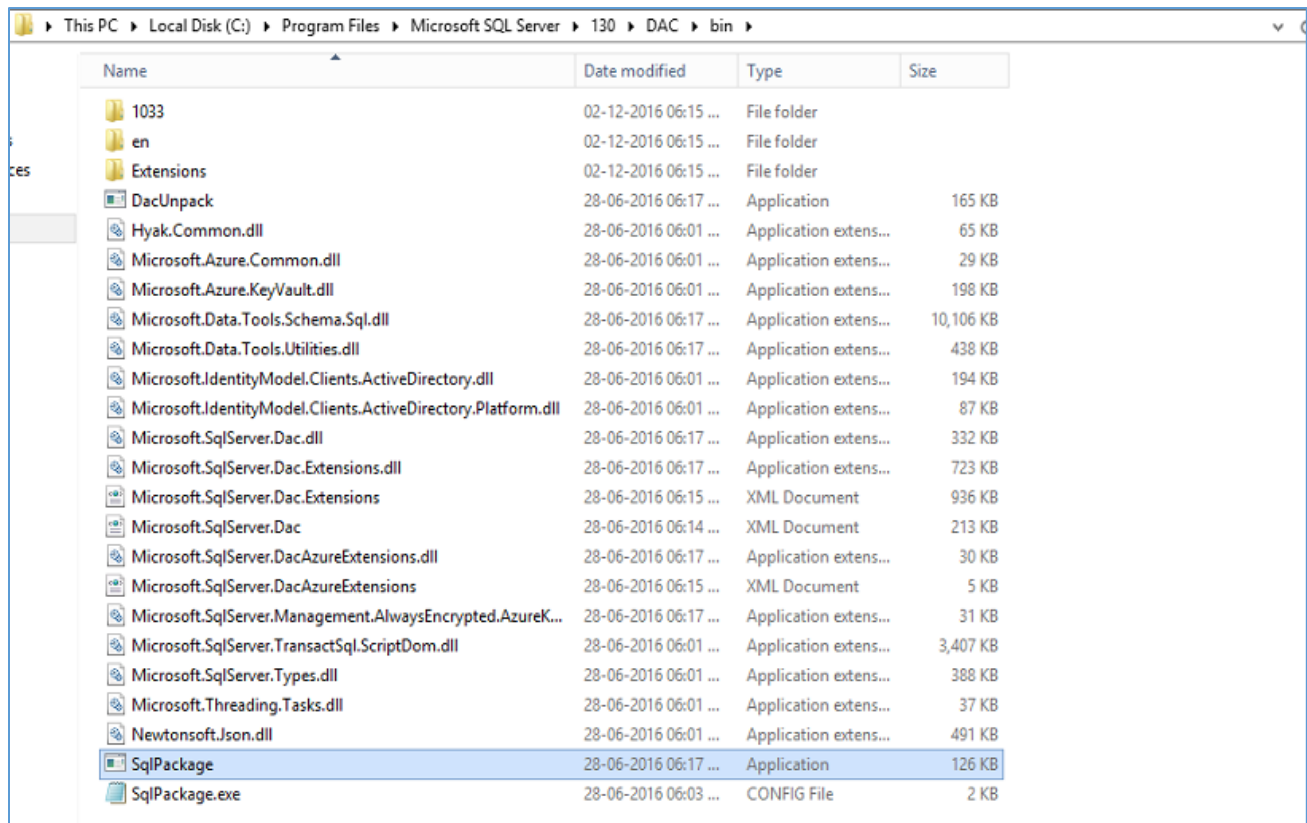


Figure 35 `SqlPackage.exe` Location