

# **Purchase Order System**

24 October 2022

Information in this document is subject to change without notice and does not represent a commitment on the part of Semaphore Consulting Pty Ltd. The software described in this document is supplied under a licence agreement. The software may be used or copied only in accordance with the terms of the agreement. No part of these training notes may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, without the written permission of Semaphore Consulting Pty Ltd.

**IMPORTANT:** This document is provided to users of our products on a Commercial in Confidence basis. All material contained herein is subject to Copyright and contains our Intellectual Property. This document and the contents contained herein must not be disclosed, published or communicated to any person, firm or company other than as previously agreed to by us. You must immediately notify us of any circumstances which lead you to believe that there has been a breach of these conditions. Without prejudice to any other rights and remedies otherwise available to us, we reserve the right to seek damages and injunctive relief for any breach of our Intellectual Property rights.

Copyright © Semaphore Consulting Pty Ltd 2008 - 2019. All rights reserved.

MarkBook, Accelerus and XUNO are Registered Trademarks of Semaphore Consulting Pty Ltd.

# Table of Contents

---

- 1. Installation ..... 4
  - 1.1 Before you start .....4
    - 1.1.1 What software is required? .....4
    - 1.1.2 Terms of Use .....4
  - 1.2 Configure IIS .....4
  - 1.3 Create Website .....4
  - 1.4 Configure DNS .....5
  - 1.5 Allow IIS APPPOOL to create database .....6
  - 1.6 Import Purchase Order Licence .....6
  - 1.7 Setup eduHub sync .....6
  - 1.8 Create backups .....8
  - 1.9 Configure Purchase Order System .....8
  - 1.10 System is ready to use .....9

# 1. Installation

---

The Purchase Order System allows schools to create, approve and send purchase orders. Data may be populated from CASES21. This is a stand-alone system. These notes assume that the system is set up at a Victorian Government School.

## 1.1 Before you start

### 1.1.1 What software is required?

In order to use the Purchase Order System you will need the following installed:

- Microsoft Internet Information Services Manager (IIS)
- Microsoft SQL Server (SQL Express is also acceptable – please ensure the additional step is followed in STEP 6:)
  - Ensure you have Named Pipes enabled for your SQL Server Protocols
- Eduhub service -P enabled

### 1.1.2 Terms of Use

- The software is provided free of charge
- There is a 12 month licence
- No support is included
- Any work is charged at \$175/hour
- We can give no warranties on the product. This means that in using the product your school takes full responsibility and all risk arising from its use, and will hold us harmless in any eventuality.

## 1.2 Configure IIS

On the server upon which IIS is installed check the following:

### STEP 1: Configure IIS Settings

- In Server Manager under Add roles and features:
  - Server roles > Web Server IIS > Web Server > Application Development.  
Tick ASP .NET 3.5  
Tick WebSocket Protocol
  - Features > .NET Framework 4.5 Features > .Net Framework 4.5  
Tick ASP .NET 4.6  
Tick WCF Services
  - Web Server Role (IIS) > Role Services > Security  
Tick Windows Authentication

## 1.3 Create Website

### STEP 1: Create Web App folder

- On the IIS computer create the following folders if they do not already exist: C:\Xuno Order\WebApp

### STEP 2: Add files to folder

- Download the PurchaseOrder.zip file
- Unzip the folder to C:\Xuno Order\Web App
- In the Web App folder create another folder called App\_Data

### STEP 3: Create Website

- Open IIS
- Right click on Sites

- Select Add Website
- Enter Details:
  - Site name: XunoOrders
  - Physical Path: C:\Xuno Order\WebApp
  - Host name: orders
  - Note in the binding you may need the full name eg orders.semaphorecollege.com.au
  - Untick Start Website immediately
- Click OK

#### STEP 4: Enable Windows Authentication

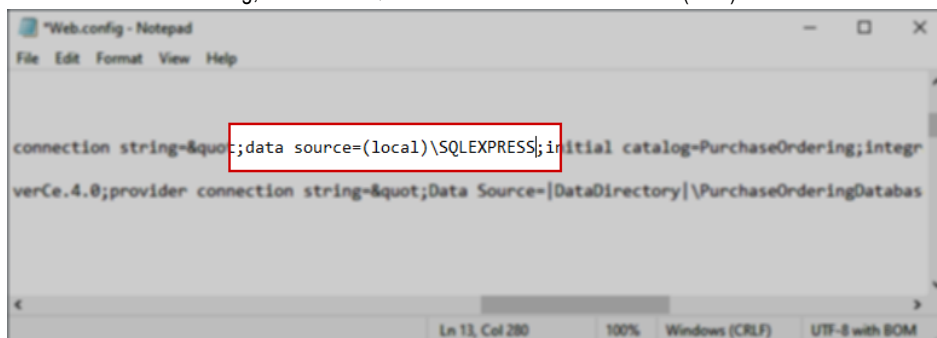
- Click on XunoOrders site
- Double click Authentication under Features View
- Right click on Windows Authentication and select Enable
- Ensure that Anonymous Authentication is Enabled

#### STEP 5: Give IIS APPPOOL permission to appropriate folders

- In C:\Xuno Orders\WebApp, ensure that the IIS APPPOOL\XunoOrders user has Read, Write and Modify permissions to the App\_Data folder
  - Right click the App\_Data folder
  - Click Properties
  - Click the Security tab
  - Where it says "To change permissions, click Edit" – click the Edit button
  - Click Add
  - Next to "From this location", click the Change button
  - Where it says "Enter the object names to select", type IIS APPPOOL\XunoOrders and click Check Names
  - Click OK
  - Ensure Modify, Read and Write are ticked
  - Click OK

#### STEP 6: For SQL Express Servers Only – Edit Web.Config file

- Open C:\Xuno Orders\WebApp\ Web.Config in Notepad
- Locate the connection string, and add "SQLEXPRESS" next to "data source=(local)". It should look like this:



## 1.4 Configure DNS

### STEP 1: Add orders to DNS

The steps will vary from school to school. Here is one way that may work depending on the setup.

- Open the DNS Server.
- Select Forward Look Zones > curric.<schooladdress> eg curric.semaphore.college
- Right click in right panel
- Select New Alias
- Enter correct details:

- Alias name: orders
  - Fully qualified domain name: This will be based on the server that the site is running on.
- Click OK

## 1.5 Allow IIS APPPOOL to create database

### STEP 1: Give IIS APPPOOL\XunoOrders sysadmin permission

- Open SQL Server Management Studio
- Click on Security > Logins
- Right click on Logins and select New Login
- Type Login name IIS APPPOOL\XunoOrders – Do not click Search
- Click Server Roles in the left panel. Tick sysadmin
- Note: this is temporary – it is only necessary initially to create a new database and will be reverted in a later step

### STEP 2: Create database

- Go back to IIS and run the XunoOrders website
- Log in using your Windows credentials. This will create the PurchaseOrders database in SQL server
- Check that you can see the XUNO Purchase Orders window

### STEP 3: Remove sysadmin permission from IIS APPPOOL\XunoOrders user

- Go back to SQL Server Management Studio
- Check there is now a database called PurchaseOrders
- Under Security >Logins, right click on the IIS APPPOOL\XunoOrders user and select Properties
- Under Server roles remove sysadmin
- Click OK

## 1.6 Import Purchase Order Licence

A new licence is required each year. Contact support for a current licence.

### STEP 1: Import Licence

- Run the Purchase Order Website
- Select Configuration
- Click on Primary Details
- Select Import New Licence.
- Copy the licence details emailed to you and paste into the pop-up window
- Click Import
- This will now display your school's name. If the name is incorrect, contact support for a new licence as this name will appear on all purchase orders.

## 1.7 Setup eduHub sync

The eduHub Sync must be done on the Admin File Server. This step cannot be done on the curriculum network.

### STEP 1: Configure hosts file admin server?

- On the Admin Server open Notepad as an administrator
- Go to File > Open
- Select C:\Windows\System32\drivers\etc
- Select View All files
- Highlight and open the hosts file
- At the bottom of the file type in the IP address of the IIS server followed by a tab and the word orders  
eg 10.0.0.1\_orders
- Copy this line

- Save and close the file

#### **STEP 2: Configure hosts login file**

- On the Admin Server open Notepad as an administrator
- Go to File > Open
- Select D:\Logon
- Select View All files
- Highlight and open the hosts file
- At the bottom of the file, paste the text you copied in the earlier step
- Save and close the file

#### **STEP 3: Download the Purchase Order eduHub Sync exe**

- On the admin file server, open a browser and type orders. This should open the order page
- Log in using your windows credentials
- Click Configuration > CASES21 Synchronisation
- Click Download Client. This will download the file to your Downloads folder. Note you may need to add the site to trusted sites in order to log in.
- Create a folder on D:\ called Xuno Orders
- Copy the POS.eduHubSync.exe file from the downloads folder into this folder

#### **STEP 4: Run Purchase Order eduHub Sync**

- Open a command prompt (Go to Run > cmd, or type cmd into the search bar)
- Type cd\
- Press Enter
- Type d:
- Press Enter
- Type cd "Xuno Orders"
- Press Enter
- Type POS.eduHubSync.exe
- Press Enter
- Once finished you should see – "Synchronisation Completed Successfully. Press any key to close"

#### **STEP 5: Check that the sync was successful**

- In File Manager go to D:\eduhub and check that you have files that are \*\_D.csv. This should be available
- Refresh the order site and go to CASES21 Synchronisation. There should be updated data that a synchronise occurred.

#### **STEP 6: Create scheduled tasks**

- On the Admin File Server go to Computer Management > Task Scheduler > Task Scheduler Library
- Click Create Task
- Enter the Name: Xuno Orders eduHub Sync
- Click Change User or Group
- Select NT AUTHORITY\SYSTEM > Click OK
- Select Triggers > New
- Enter the following details:
  - Daily Every 1 days at 5:00:00:AM
  - Begin the task: On a schedule
  - Weekly Start 6:46:00 AM
  - Recur every 1 weeks on Monday - Friday
  - Repeat task every: 1 hours for a duration of 12 hours
  - Do not tick Stop all running tasks at end of repetition duration
- Click OK

- Select Actions
- Click New > Start Task > D:\Xuno Orders\POS.eduHubSync.exe
- OK
- Right click Run
- Refresh the orders site. This should now show a sync run by the NT AUTHORITY\SYSTEM user

## 1.8 Create backups



It is the responsibility of the school to ensure that adequate backups are created and kept. At a minimum the following two areas must be backed up:

- The Purchase Orders SQL Database
- The App\_Data folder in C:\Xuno Orders\WebApp. This folder contains all generated purchase orders

## 1.9 Configure Purchase Order System

Configuration of the Purchase Order System ensure that the correct people have access to the right areas. Before beginning, it is recommended that you check that all users who may use the system have an email address entered against their active directory account.

### STEP 1: Set up Email Server

- Click on Configuration > Email Server
- Enter the school SMTP details eg smtp.edumail.vic.gov.au
- Enter the email address to send emails from eg [semaphore.college.orders@edumail.vic.gov.au](mailto:semaphore.college.orders@edumail.vic.gov.au)
- Enter the Subject Prefix: Xuno Orders:
- Click Save

### STEP 2: Enter Proxy Server Details

- This is required to use the ABN Lookup Service
- Click Configuration > Proxy Server
- Enter the school details
- Click Save

### STEP 3: Set up Permissions

- Click Configuration > Permissions
- Add in anyone who will have full permissions to the system eg Business Manager, Technician etc.
- Give them appropriate permissions
- At this stage, you may leave the remaining permissions to be users with full permission to setup, or setup all user permissions.
- The remaining steps may then be setup by either the technician or anyone else with full permissions

### STEP 4: Enter School Details

- Click on Configuration > Primary Details
- Enter the following details:
  - ABN
  - Primary Address (this will appear on the order form)
  - Contact Details – it is recommended that the area code is included in the phone and fax numbers ie (03) 11112222
- Click Save Changes

### STEP 5: Import School Logo

- Click on Configuration > Organisation Logo
- Click Browse and select the school logo. This logo will appear on order forms

### STEP 6: Enter Order Number

- This sets the first order number to be used by the Purchase Order System. Typically, it should be the number following the last one used on the current system
- Click on Configuration > Order Number



- Enter the number
- Click Save

#### **STEP 7: Enter Delivery Addresses**

- Click on Configuration > Delivery Addresses
- When adding an address ensure that the name of the school is included in the actual address box.
- Click Save

#### **STEP 8: Update Quote Thresholds**

- Click on Configuration > Quote Thresholds
- Update thresholds as required
- Click Save

## **1.10 System is ready to use**

Once all of the above has been done, the system may now be used by teachers.