



Installation Guide

Product: TAB FusionRMS, All Editions

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1. Before You Begin

TAB FusionRMS

- Microsoft® Access databases are no longer supported.
- Install Microsoft® SQL Server before installing TAB FusionRMS.
- Microsoft® SQL Server software and licensing is **NOT INCLUDED** and must be purchased separately.
- Microsoft® SQL Server Express Edition software and licensing is **NOT INCLUDED** but can currently be downloaded from Microsoft® at no fee. Full Text Search requires the Advanced Edition of SQL Express.
- Ensure the server and workstations have the supported versions of Microsoft® .NET Framework installed.
- Review the minimum system requirements to ensure support compatibility.

TAB FusionRMS Web Access

- Web Access, black and white label printing requires the “Microsoft Print to PDF” or Win2PDF or Win2PDF TSE. Win2PDF or Win2PDF TSE are third party printer drivers for creating PDF files and not included in TAB FusionRMS. Win2PDF or Win2PDF TSE is **NOT INCLUDED** and must be purchased separately.
- Ensure that Microsoft® Information Server® (IIS) that will host TAB Web Access and Microsoft® SQL Server® that will host the database are set to the same time zone.
- Microsoft IIS server should be configured and running before TAB FusionRMS Web Access is installed. The following features and roles must be turned on. Any feature not listed can be turned on or off
 - World Wide Web Services
 - Common HTTP Features
 - Default Document
 - HTTP Errors
 - Static Content
 - Application Development Features
 - .NET Extensibility
 - ASP.Net 4.5
 - Application Server
 - .Net Framework 4.5
 - ASP.net 4.5
 - WCF Services
 - HTTP Activation
 - TCP Activation

Upgrade Information

If you are upgrading from a previous version, please review the following information:

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- TAB FusionRMS 10.1 will upgrade systems from 9.2 and above.
- Once the installation has been started and the progress bar appears, old files will be removed. In order to use TAB FusionRMS, you must continue with the upgrade once it has begun. If you cancel before the installation is complete, you will not be able to use the application without uninstalling manually.

Components

The following is a list of the components that can be installed through the installer:

- **License Server:** This is a required component on a network server. It is used to connect a database in the SLIM Manager or Database Utility with the Microsoft® SQL Server®. It also handles the synchronization of the Active Directory groups. It should only be installed in one location.
- **Service Manager:** This handles retention-related reporting as a service. It is not required and can be installed at any time. It should only be installed in one location.
- **License Manager:** The SLIM Manager provides the TAB FusionRMS administrator an interface to add or modify databases, licenses, and seat counts. It can be installed anywhere the administrator needs it, but it should only be installed in one location.
- **Image Service:** Controls access to the image repository for the retrieval of images and documents for the TAB FusionRMS Attachment Viewer and Orphan Viewer as a Web Service. For imaging customers only.
- **Image Server Web Service:** Manages attachments and documents within IIS for FusionRMS Web Access. If you will be using FusionRMS Web Access Attachment Viewer, select this service instead of the Tab Image Service. For imaging customers only.
- **TAB FusionRMS:** The complete application, including the user interface and the Admin Manager.
- **TAB FusionRMS Web Access:** The web user interface and the Admin Manager.
- **File Tracking:** A standalone application for use with a bar code reader. It can be installed with or without the complete application.
- **Past Due Email Utility:** A utility for sending out past due e-mail notifications.

2. Software Installation

TAB FusionRMS

1. Open the install folder.
2. Double-click the Setup file.
3. The Welcome screen appears. Accept the license agreement by clicking **Agree**.
4. License Server Location. If you know where the license server has been installed, enter the IP address and port number. Double-check your entry to make sure you've entered the correct information. If you do not know the location, you can search the network (Note: This may take several minutes, especially if the license server is not running on the network.) Or, if this is a server, you can skip this step and it will be installed as a component, or, if this is a workstation, you can skip this step and it will not be installed.
5. Select your installation type:
 - Workstation: This is for the general end user. Does not include server components or sample databases.
 - Server: This is for a network server. It will include the License Manager, Service Manager, Image Server Web Service, and License Server. The License Manager (SLIM Manager) does not need to be installed on the server. It can be installed on the TAB FusionRMS administrator's computer for easier access.
 - Server Workstation: Clients without large networks may install all of the server and workstation components on one computer that acts as the server. Users would need access to this computer to open a database.
 - Custom: All components, except the Image Server Web Service and Database Utility.
 - Sales Demo: All components, except the Image Server Web Service.
6. Review and revise the list of components selected for install. In most cases the list will not need to be revised.

Note Selecting an installation type will pre-select the list of components that are needed for that type of installation.
7. Select a new destination folder for the selected components, or click **Next** to accept the default location.
8. If installing the License Server, find and select your license file. (It can be entered later in the SLIM Manager.) Click **Next** to continue.
9. For the services you will be installing, enter valid ports for each one. The default values are already present. Make note of these ports for future reference during installations. Click **Next** to continue.
10. Click **Install**.
11. **Sales Demo/Database Utility ONLY:** Once the installation is finished, the Database Utility can be launched automatically. If you have installed SQL Server Express 2008 before installation, this utility will create a SQL database and connect it to the SLIM Server automatically. Click **Add** to begin this process. The sample database will be added to the SQL Server and the SLIM Manager, TAB FusionRMS will launch, and the database will appear on the log in screen.

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TAB FusionRMS Web Access

1. Open the install folder.
2. Click Next to begin.
3. Read and agree to the Software License Agreement.
4. The installation will attempt to locate the SLIM Server service running on the network. If found, it will appear in the text box. Otherwise, enter the IP address of the SLIM Server.
5. For most installations, it is recommended that port 85 be used so as not to interfere with any previous Websites established on the IIS default port. It is also recommended that you do not enter a host header. The ability to edit both the port and host header is provided for advanced IIS users only.
6. Click Next to install to the default destination folder.
7. Click Install.

Known Issue: ASP .NET web service extension may not be enabled by default. During the install, the service will be enabled automatically. If troubleshooting, check to see that the service has been enabled.

To enable ASP .NET Web Service Extension

1. Open the Internet Information Services (IIS) Manager.
2. Under the name of the server, click the Web Service Extensions folder.
3. Select ASP .NET, and then click Allow.

Web Access Black and White Label Printing

1. Install Win2PDF
2. Open "Web.config" file found in C:\inetpub\wwwroot\TAB\Web Access folder and change the following line from:

```
<add key="PrinterDriver" value="Microsoft Print to PDF" />
```

 To

```
<add key="PrinterDriver" value="Win2PDF" />
```
3. Set the correct permissions on temporary directories
 - a. Press Windows + R (Run), enter "Temp" into the combobox, grant Full Control to (Administrators and IIS_IUSRS Users) to the folder (Windows -> Temp)
 - b. Press Windows + R (Run), enter "%Temp%" into the combobox, grant Full Control (Administrators and IIS_IUSRS Users) for this folder (Windows -> Temp -> 2)
4. Restart IIS from IIS Manager, Click on the Server on the right we can see the Restart

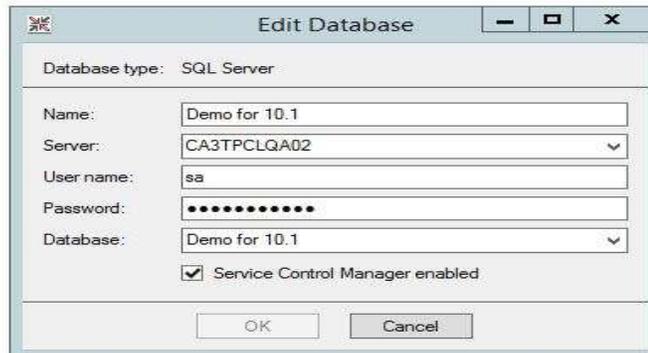
Web Access Background Processing Installation

Follow steps below:

1. Ensure “Service Manager” component is installed, The Service Manager components executes all background processes.



2. Open SLIM Manager, select the appropriate Database, ensure Service Control Manager is selected as shown below, Click OK



3. Open Web Access, navigate to the Administration, enter appropriate Min and Max values for Non - Blocking Operations (Export/Transfer)

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3. TAB FusionRMS License Manager (SLIM Manager)

All databases need to be added to the License Manager (SLIM) before they can be opened in the TAB FusionRMS application.

1. To open SLIM Manager, on the **Start** menu, point to **All Programs**, point to **TAB FusionRMS**, and click **SLIM Manager**.
2. View and select options using the SLIM Server Manager tabs:
 - a. License
 - View Registration and Dealer information
 - View Products, Seats, Features, and Details available with the current license.
 - To change or add a license, on the **Action** menu, click **Acquire From Internet**.
 - To change or add a license without access to the internet:
 - i. On the **Action** menu, click **Load From File**.
 - ii. Locate the License Manager File by browsing to the Extras folder on the installation CD.
Note If you do not have an installation CD and have received the License Manager File by some other means, copy the file into a network share or local folder, and then browse to it in order to select it.
 - To reset the license to Demonstration mode, on the **Action** menu, click **Reset Demo License**.
 - b. Databases
 - To add a database:
 - i. On the **Action** menu, click **Add Database**.
 - ii. Enter the database and server information. (If you are using SQL Authentication, enter the user name and password for that log in. If you are using Windows Authentication, you must have already signed into the computer running the SLIM Manager as an administrator with rights to the SQL Server; leave the fields blank. See above sections on database connection credentials for more information.)
 - iii. Select **Service Control Manager** in order for retention-related reporting, such as the Inactive Records report and Eligible for Destruction report, to be handled as a service.
 - iv. Click **OK**.
Note Do not add the same database twice.
 - To setup access to the database for TAB FusionRMS and Active Directory
 - i. From the column on the left, click the + button, and then select the database.
 - ii. Enable Active Directory.
 - c. Current User Seats
 - View Product, Host, and Time details of logged on users.
 - To reserve a seat for a user
 - i. Click **Current User Seats**.
 - ii. On the **Action** menu, click **Manage Seat Reservations**.
 - iii. Select **Manual Add**.
 - iv. Enter a user name.

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- v. Click the arrow on the right and select the product you would like to associate with the reserved seat.
 - vi. Click **Add**.
 - vii. Continue to add reserved seats for users as necessary. Keep in mind that only one seat may be reserved for a user for each installed application. Also, the number of available seats in the pool for each installed application will be reduced by one for each reserved seat added.
3. Close or refresh the License Manager (SLIM) to enable new or modified settings. On the **File** menu, click **Exit** or **Refresh**.

4. Database upgrade

When upgrading from a previous version of TAB FusionRMS, the data model must be upgraded. To upgrade each database login in to TAB FusionRMS using the FusionRMS Desktop client. On login into the database you will see a message about updating your database to the current version.

5.Active Directory Integration

TAB FusionRMS users and groups can be synchronized with the users of Active Directory. This feature helps administrators with tedious tasks, such as adding large numbers of users, updating e-mail addresses, and disabling user access.

When you perform the integration, you will map all of the Active Directory groups with the groups you create in TAB FusionRMS. When you perform the synchronization, the mapped groups and all user information is brought over to the TAB FusionRMS system. When users log in, they use the same user name, password, and domain name that they would use to log in to their system. TAB FusionRMS will then authenticate this information through Active Directory. If the log in fails, TAB FusionRMS will then attempt to authenticate this information using the TAB FusionRMS information created during synchronization.

The synchronization can be performed manually or scheduled to run automatically. When Active Directory synchronization occurs, only the TAB FusionRMS data is changed. Active Directory data is never altered—it is only queried. This means that if you need to add a user, first add the user in your Active Directory system and then perform a synchronization with TAB FusionRMS. User information should not be added or edited in the TAB FusionRMS system; it will not be passed back to Active Directory.

Before you integrate with Active Directory you will need to set up your TAB FusionRMS groups and set the permissions.

Integrating and Synchronizing Active Directory Groups with TAB FusionRMS

If you enable the Active Directory integration, you must map and synchronize the Administrator group to ensure access to all areas of the system.

To integrate (or map) and synchronize your Active Directory groups with TAB FusionRMS groups

1. Open the **SLIM Manager**.
2. Click the + button next to Databases.
3. Select your database from the list.
4. Select **Enable**.
5. If found, your Active Directory domain, organizational units, and AD groups will load. If the wrong domain has been found, enter a new one.
6. Select your organizational unit.
7. Select your Active Directory group.
8. Select the corresponding TAB FusionRMS group.
9. Click **Map selected groups**.
10. Continue to map your Active Directory groups and corresponding TAB FusionRMS groups.
11. If you make a mistake, select the item from the synchronization map, and then click **Delete Mapping**.
12. If you would like to create temporary tracking users if one does not exist in the tracking table, select **Create tracking employee**. You can then select whether this should occur for all groups or a selected AD group. This is a temporary entry that is created for the session at log in.
13. When you are finished, click **Synchronize**.

Active Directory with the FusionRMS Web Access Module (Web Access)

In order to use the Active Directory settings with Web Access, you will need to make the following Internet Information Services (IIS) setting changes where the database is published.

1. On the **Start** menu, point to **Administrative Tools**, and then click **Internet Information Services**.
2. Under Web Sites, right-click **Default Web Site**, and then click **Properties**.
3. Select the **Directory Security** tab.
4. Under **Authentication and access control**, click **Edit**.
5. If selected, clear **Enable anonymous access**.

Synchronization: Manual and Automatic

If you need to force a synchronization because of important changes to your Active Directory system, you can open the SLIM Manager, select your database, and then click Synchronize. Otherwise, the synchronization will occur automatically every 30 minutes by default.

ADVANCED: The synchronization time can be edited. In the Program Files > TAB > SLIM Server folder, open the slimService.exe.config file. The file will open in Microsoft Visual Studio Tools. Locate the line

<add key="SynchronizationInterval" value="30" />. Edit the number in minutes. Save and close.

- 0 (zero) means that the synchronization as a service will never run. All syncs will need to be performed manually in the SLIM Manager.
- It is recommended that you allow at least five minutes per database when setting the number of minutes. Generally, the synchronization completes in just a few seconds or less, but depending on the amount of server traffic, you should allow adequate time for the process to complete.

6. Web Access Attachment Configuration

Completing installation of HTML attachment viewer

- Navigate on wwwroot directory and find "serviceConfig.json" file.
- Open file and set value in "serviceHost" to "WebAccessURL + : Port number".
 - "serviceHost": "http://cordoso.com:85",
- Navigate in wwwroot folder and open "local.config" file. (Intepub -> Web Access Folder)
 - Search for "It.Cache.Directory"
 - Modify the value of It.Cache.Directory to reflect the folder location where temporary images are stored. The default setting is:
 - `<add key="It.Cache.Directory" value="C:\inetpub\wwwroot\TAB\Web Access\HTML5Cache"/>`
 - Ensure user IIS_IS has full control permission the HTML5Cache folder.

Image Repository

The service responsible for managing the image repository will need read/write permissions. When hosting the service in IIS, the ASP.NET account will need permission. When running as a Windows Service, the system account will need permission.

Image Service File Type Exclusions

Each service has a config file containing a list of file types that are not processed for pages or a preview image.

The list is stored in **Tab.RecordsManagement.Imaging.Export.dll.config**.

For the Web Service, the config file is located in **[Install Directory]\ImageServer\Bin**.

For the Windows Service, the config file is located in **[Install Directory]\Image Service**. In both cases, the list is stored in the

configuration\applicationSettings\Tab.RecordsManagement.Imaging.Export.MySettings\setting[name='Exclusions']\value section as a comma-delimited list. Files of these types can still be used as an attachment and opened in the native application; however, they will not have a preview.

7. Silent Installation

Either by using a network logon script or by leveraging Microsoft's SMS capabilities, TAB FusionRMS can be "pushed" out to as many workstations as needed.

The flexibility of the silent installation capability allows any group of FusionRMS to be pushed out; from installing TAB FusionRMS Desktop only to installing all components (i.e. SLIM Manager, Image Service, etc). This is accomplished by specifying one or more of the following variable names on the command line.

There is no concept of an install role when installing in silent mode, you must specify which features you want install.

Variable names that can be set from the command line:

- LICENSE_FILE_NAME – the path to the license file.
- LICENSE_SERVER_PORT – the port that will be used by slim. Required event though the port is available in the SLIM_Network_Address. For example, 4343.
- SLIM_NETWORK_ADDRESS – the address of license server on the network, including the port. For example, dbsdlkivwsu101.svrn.acme.com:4343
- IMAGE_SERVER_PORT – windows image service port.
- IMAGE_WEB_SERVICE_PORT – web image service port.
- INSTALLDIR – the directory where files will be installed to.
- ADDLOCAL – comma separated list of features:
 - i. License_Server_Files – License Server
 - ii. Service_Manager_Files – Background processing service
 - iii. License_Manager_Files – License Server user Interface
 - iv. ImageServiceFiles – Image Service (windows based service)
 - v. Image_Server_WebService_Files – Image Service (web based service)
 - vi. SmeadSoft_RMS_Files – TAB FusionRMS Desktop
 - vii. Bar_code_Files_RMS – Desktop barcode tracking utility
 - viii. Past_Due_Files – Server Past Due Email Utility
 - ix. DatabaseUtility – Server Database Utility

Note the EULA is accepted without any interaction when running in silent mode.

Note silent installation does not remove previous versions of FusionRMS. The previous version must be removed beforehand as part of the SCCM package, login script, etc:

```
msiexec /x <Product.msi | ProductCode>
```

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Example commands:

To install TAB FusionRMS Desktop only:

```
<msiName (including path)> /passive /l*vx c:\tab.log LICENSE_SERVER_PORT="4343"  
SLIM_NETWORK_ADDRESS="dbsdlkivwsu101.svrn.acme.com:4343" INSTALLDIR="C:\Program Files  
(x86)\TAB\FusionRMS" ADDLOCAL=SmeadSoft_RMS_Files
```

To install TAB FusionRMS and the Past Due Email Utility:

```
<msiName (including path)> /passive INSTALLDIR="C:\Program Files\TAB\FusionRMS"  
ADDLOCAL=SmeadSoft_RMS_Files,Past_Due_Files
```

You can also do a silent install from the setup.exe by using InstallShield's passthrough feature:

```
<setup.exe (including path)> /v"/passive INSTALLDIR="C:\Program Files\TAB\FusionRMS"  
ADDLOCAL=SmeadSoft_RMS_Files,Past_Due_Files"
```

8. Program Maintenance

Once you have installed the TAB FusionRMS application and re-run the setup to add or remove extra components, it's important to understand the Custom Setup options. Once past the Welcome screen, select **Modify**. On the **Custom Setup** screen, you can select the components you would like to upgrade and/or install.

- The components listed with the computer image next to them were found on your local machine and will be upgraded.
- The components listed with the red X were not found on your local machine. No action is required.
- If you select one of the components installed locally and switch it to the red X, that component will be removed completely from your local machine.
- If you select one of the components with the red X and switch it to the computer image, it will be installed.

9. Temporary file clean up

On a regular basis the contents following directories should be deleted from the server hosting TAB FusionRMS Web Access so as not to fill up the available space:

- C:\inetpub\wwwroot\TAB\Web Access\HTML5Cache
- C:\inetpub\wwwroot\TAB\Web Access\ImportFiles
- C:\inetpub\wwwroot\TAB\Web Access\LabelData

10. Troubleshooting

Troubleshooting TAB FusionRMS

Full Text Search: If no results are returned with a search or an error appears, you may need to set the FDHOST Launcher (MSSSLFDLauncher) Service Account for full-text search capabilities in the SQL Server Configuration Manager.

Troubleshooting Attachments

No Images in Attachment Viewer: If you receive a message on the Attachment Viewer that there are no attachments to display, but the header contains the correct title for the attachment, try to re-register ASP.NET for IIS. The command prompt can be slightly different based on your operating system:

.Net 2.0 (32-bit): C:\Windows\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe -i -enable

.Net 2.0 (64-bit): C:\Windows\Microsoft.NET\Framework64\v2.0.50727\aspnet_regiis.exe -i -enable

Once you have finished re-registering ASP.NET, reset IIS. You can use the same command prompt and enter:
iisreset

500.0 Error: If you receive a 500 error, uninstall and then reinstall the web service.

404.3 Error: WCF needs to be registered. A batch file is available in the Extra folder > ImageServerWebService. Right-click the file and select Run as administrator.

11. Database Utility

Database Utility

This is an optional utility for adding databases to a local SQL Server and connecting them with SLIM. If your database is already on SQL Server, you can use the Existing Database feature in Database Utility to connect the database to SLIM.

ADVANCED USERS: This utility can be used to build and attach a database file, restore a database backup file, or execute a SQL script on a local or network server. Use the **Browse** button to locate your file. Enter your server name\SQL instance. To populate the list with network servers, on the **Tools** menu, click **Options**, and then select **Show Network Servers**. Enter your authentication credentials (see below). Enter a Display Name. (This is the name you will see on the Log in screen database list.) You can use the Display Name to name the SQL database, or you can enter a unique database name. Click **Add**. These advanced features are not intended to be a substitute for SQL Server Management Studio.

One-Time Database Connection Credentials

The credentials entered at the time of database connection are what the SLIM Server uses to create or communicate with the TAB FusionRMS database on SQL Server without Active Directory Integration.

With Windows Authentication:

This simple process only requires that the user logged into the computer running the connection process have administrative rights to the SQL Server and the Active Directory groups.

- In the **SLIM Manager**, leave the fields blank.
- In the **Database Utility**, select **Windows** under Authentication.

With SQL Authentication:

This process requires that you enter a Login with the correct permissions created within SQL Server.

- In SQL Server, create a Login with SQL Server authentication selected.
- For the default database, select the TAB FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value master.)
- Under **Server Roles**, select **sysadmin**.
- Under **User Mapping**, select the TAB FusionRMS database, and then grant the following memberships: **db_datareader**, **db_datawriter**, and **db_owner**. (Skip this step if you are using the Database Utility.)

In the **SLIM Manager**, enter the Login. In Database Utility, select SQL and then enter the Login.

Database Connection Credentials For Initial Connection and Subsequent Active Directory Synchronization

The SLIM Server handles the automatic synchronization process of the Active Directory groups and must have access to both the Active Directory system and the database on the SQL Server through either a fixed Windows Authentication or a fixed SQL Authentication Login user. (Note: The Windows Authentication method is recommended since it will handle any password changes that may occur; however, the authentication on the SLIM Server will still need to be changed manually. The SQL Authentication behaves in the same manner as the Windows Authentication, but any password changes will need to be updated at all levels.)

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With Windows Authentication (recommended):

This process begins with the initial database connection and continues repeatedly at a set interval or by the administrator to update the Active Directory Integration. (For information on manual and automatic synchronization, see “Synchronization: Manual and Automatic” on page 12. A fixed login/user will need to be created in Active Directory, SQL Server, and then entered as a user for the SLIM Server service.

1. Create a user in Active Directory with rights to Active Directory, SQL Server, and the SLIM Server service.
2. In SQL Server, create a Login with Windows Authentication for this user.
 - For the default database, select the TAB FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value **master**.)
 - Under **Server Roles**, select **sysadmin**.
 - Under **User Mapping**, select the TAB FusionRMS database, and then grant the following memberships: **db_datareader**, **db_datawriter**, and **db_owner**. (Skip this step if you are using the Database Utility.)
3. Add this user to the SLIM Server service. In Services, locate the **SLIM Server**. Right-click the service, and then click **Properties**. On the **Log On** tab, select **This account**, and then enter the user.

With SQL Authentication:

This process begins with the initial database connection and continues repeatedly at a set interval or by the administrator to update the Active Directory Integration. (For information on manual and automatic synchronization, see “Synchronization: Manual and Automatic” on page 12. A fixed login/user will need to be created in Active Directory, SQL Server, and then entered as a user for the SLIM Server service.

1. Create a user in Active Directory with rights to Active Directory, SQL Server, and the SLIM Server service .
2. In SQL Server, create a Login with SQL Server Authentication that shares the same user name and password that was created for Active Directory.
 - For the default database, select the TAB FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value **master**.)
 - Under **Server Roles**, select **sysadmin**.
 - Under **User Mapping**, select the TAB FusionRMS database, and then grant the following memberships: **db_datareader**, **db_datawriter**, and **db_owner**. (Skip this step if you are using the Database Utility.)
3. Add this user to the SLIM Server service. In Services, locate the **SLIM Server**. Right-click the service, and then click **Properties**. On the **Log On** tab, select **This account**, and then enter the user.