

OptiTune Server Setup Guide

Introduction

This guide gives you step by step instructions for setting up the OptiTune Management Server (OTMS) on a Windows Server.

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System Requirements

The OptiTune management server requires the following

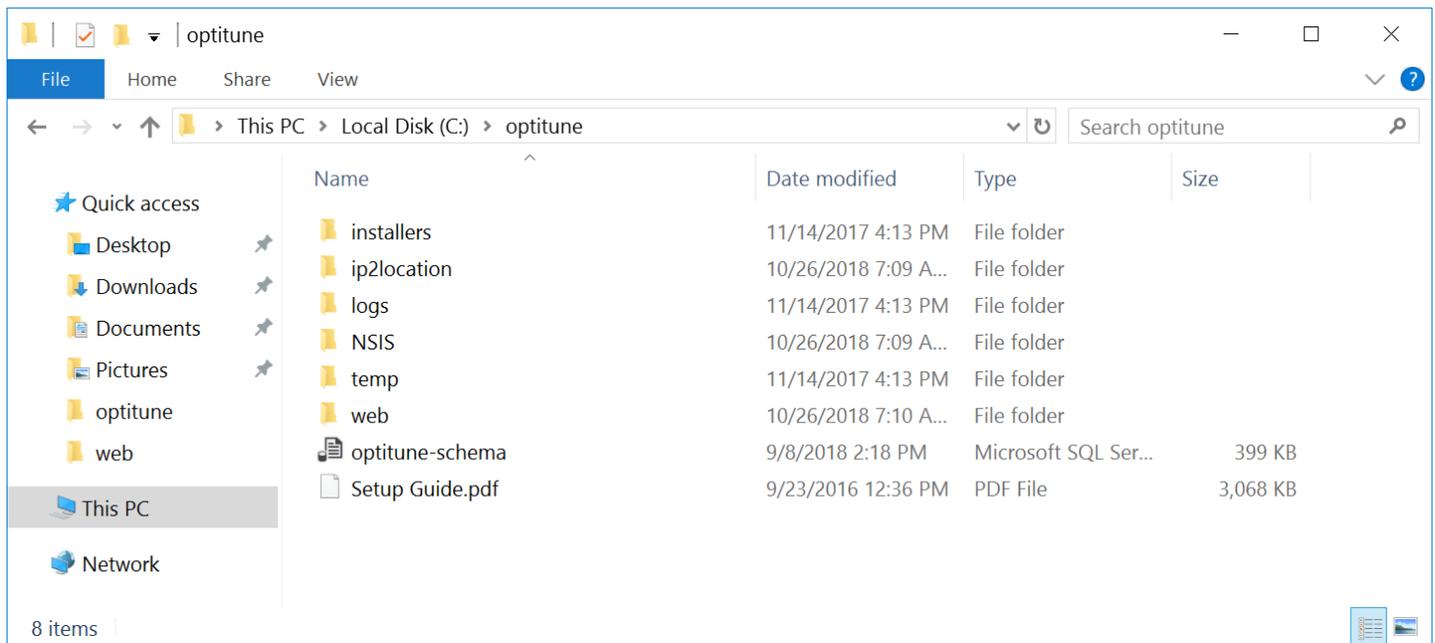
- Windows Server 2016
- Microsoft SQL Server 2017 (Express or Standard)
- Xeon class CPU
- 8GB RAM (16 GB recommended)
- 25GB Free Hard Disk Space

It is recommended to install the SQL Database on an SSD, preferably a PCI Express NVMe SSD if one is available.

Setup Instructions

A sales or customer support representative will give you a link to download the OptiTune Management Server binaries, usually in zip file format. Expand the zip file to the following directory on your hard drive: C:\optitune

Once expanded, the contents of C:\optitune should look like the following:



IIS Website Setup

First, you will need to install an IIS Website for OptiTune.

IIS Role Installation

If you have not already installed the IIS role on the server, you need to do so.

Start the "Server Manager" from the desktop

The screenshot shows the Server Manager Dashboard. At the top, there is a navigation bar with 'Server Manager' and 'Dashboard' labels, and a 'Manage' button. A left sidebar contains a 'Dashboard' menu and three server group entries: 'Local Server', 'All Servers', and 'File and Storage Services'. The main content area is titled 'WELCOME TO SERVER MANAGER' and features a 'QUICK START' section with a numbered list of five tasks: 1. Configure this local server, 2. Add roles and features, 3. Add other servers to manage, 4. Create a server group, and 5. Connect this server to cloud services. Below this is a 'ROLES AND SERVER GROUPS' section with a summary 'Roles: 1 | Server groups: 1 | Servers total: 1'. It displays three server group cards: 'File and Storage Services' (1 role), 'Local Server' (1 role), and 'All Servers' (1 role). Each card lists roles: Manageability, Events, Performance, and BPA results. The 'Local Server' and 'All Servers' cards also show a '3' in a red box next to the 'Services' role. The bottom right of the cards shows the timestamp '10/26/2018 12:45 AM'.

Go to the “Manage” link at the top right and select “Add Roles or Features”

Add Roles and Features Wizard

DESTINATION SERVER
EC2AMAZ-482GODT

Before you begin

- Before You Begin
- Installation Type
- Server Selection
- Server Roles
- Features
- Confirmation
- Results

This wizard helps you install roles, role services, or features. You determine which roles, role services, or features to install based on the computing needs of your organization, such as sharing documents, or hosting a website.

To remove roles, role services, or features:
[Start the Remove Roles and Features Wizard](#)

Before you continue, verify that the following tasks have been completed:

- The Administrator account has a strong password
- Network settings, such as static IP addresses, are configured
- The most current security updates from Windows Update are installed

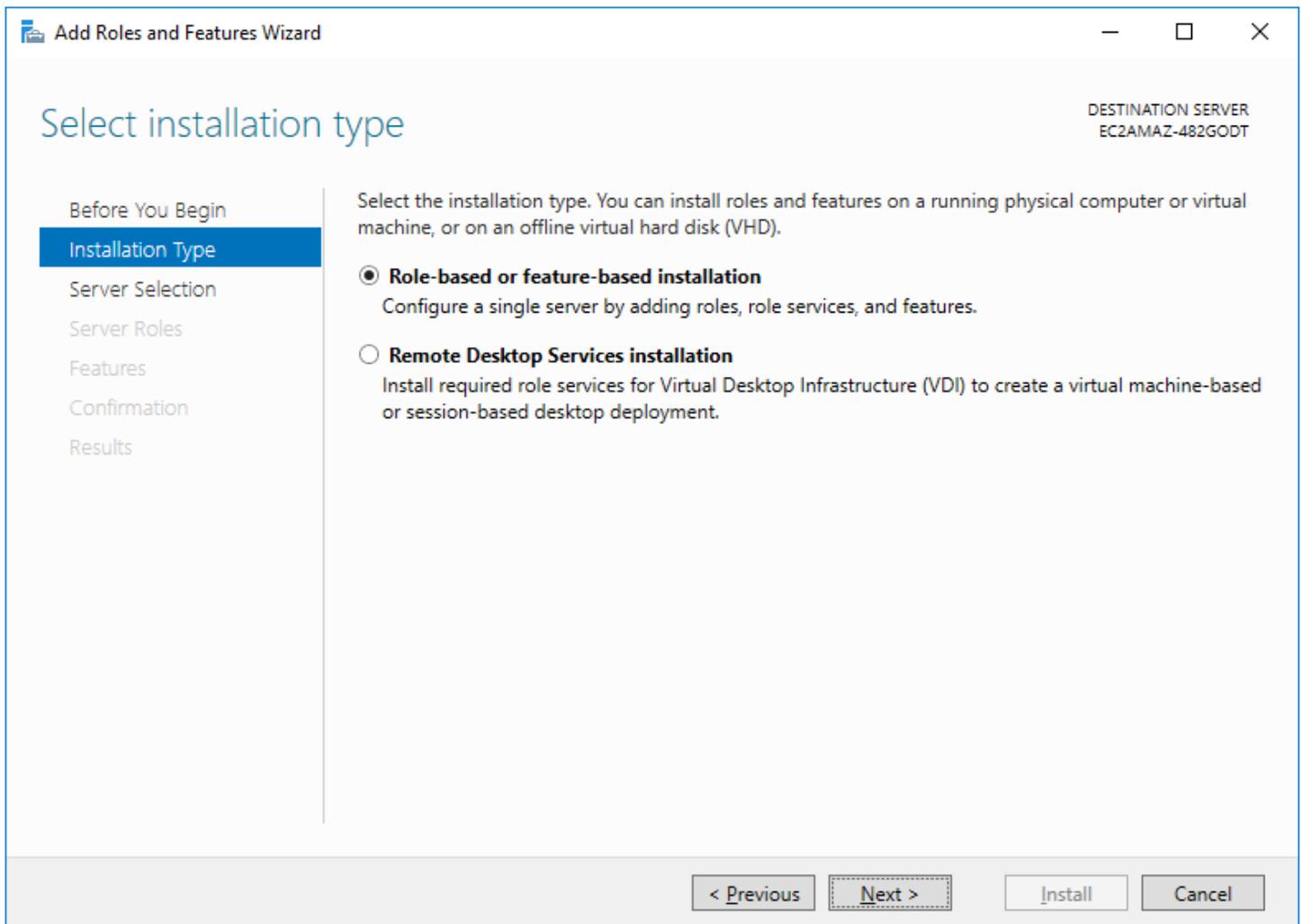
If you must verify that any of the preceding prerequisites have been completed, close the wizard, complete the steps, and then run the wizard again.

To continue, click Next.

Skip this page by default

< Previous Next > Install Cancel

Click Next



Click Next

Add Roles and Features Wizard

Select destination server

DESTINATION SERVER
EC2AMAZ-482GODT

Before You Begin
Installation Type
Server Selection
Server Roles
Features
Confirmation
Results

Select a server or a virtual hard disk on which to install roles and features.

Select a server from the server pool
 Select a virtual hard disk

Server Pool

Filter:

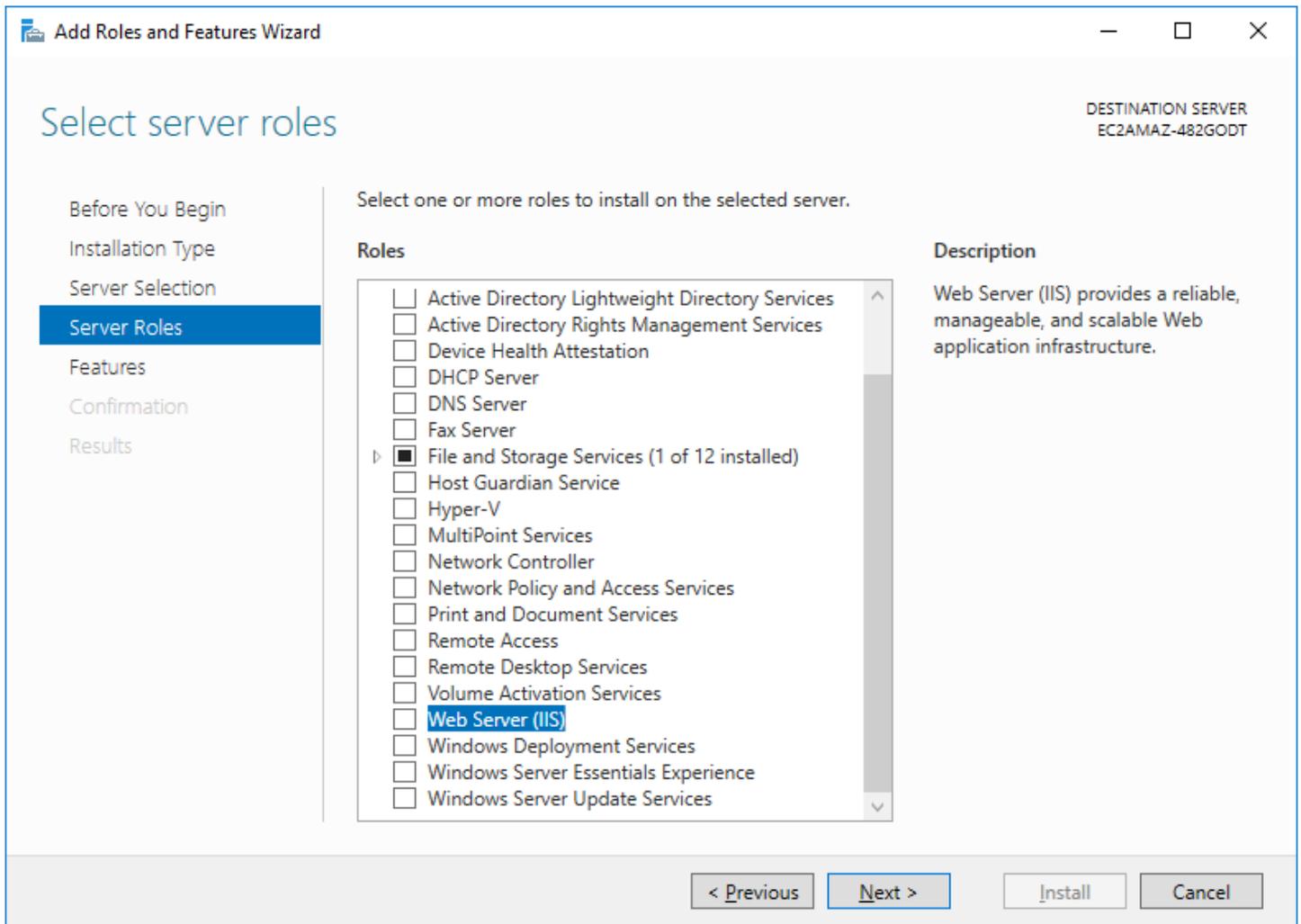
Name	IP Address	Operating System
EC2AMAZ-482GODT	172.30.4.241	Microsoft Windows Server 2016 Datacenter

1 Computer(s) found

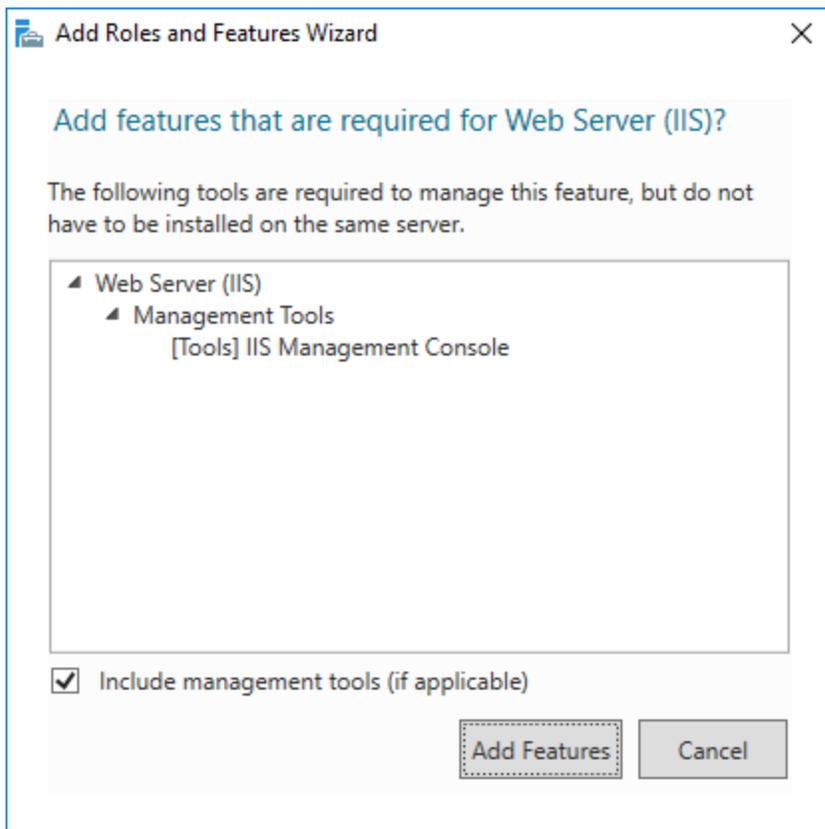
This page shows servers that are running Windows Server 2012 or a newer release of Windows Server, and that have been added by using the Add Servers command in Server Manager. Offline servers and newly-added servers from which data collection is still incomplete are not shown.

< Previous Next > Install Cancel

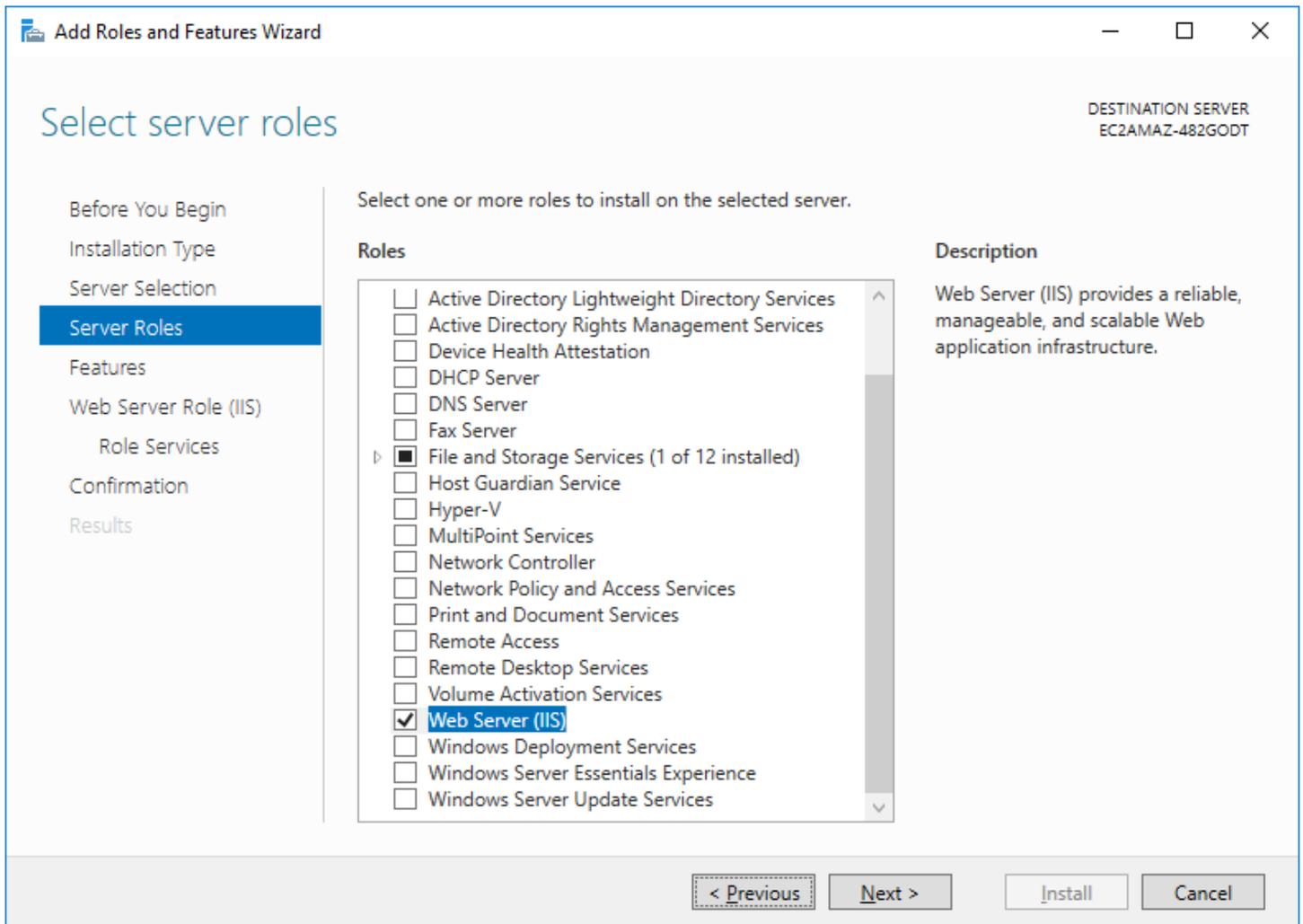
Click Next



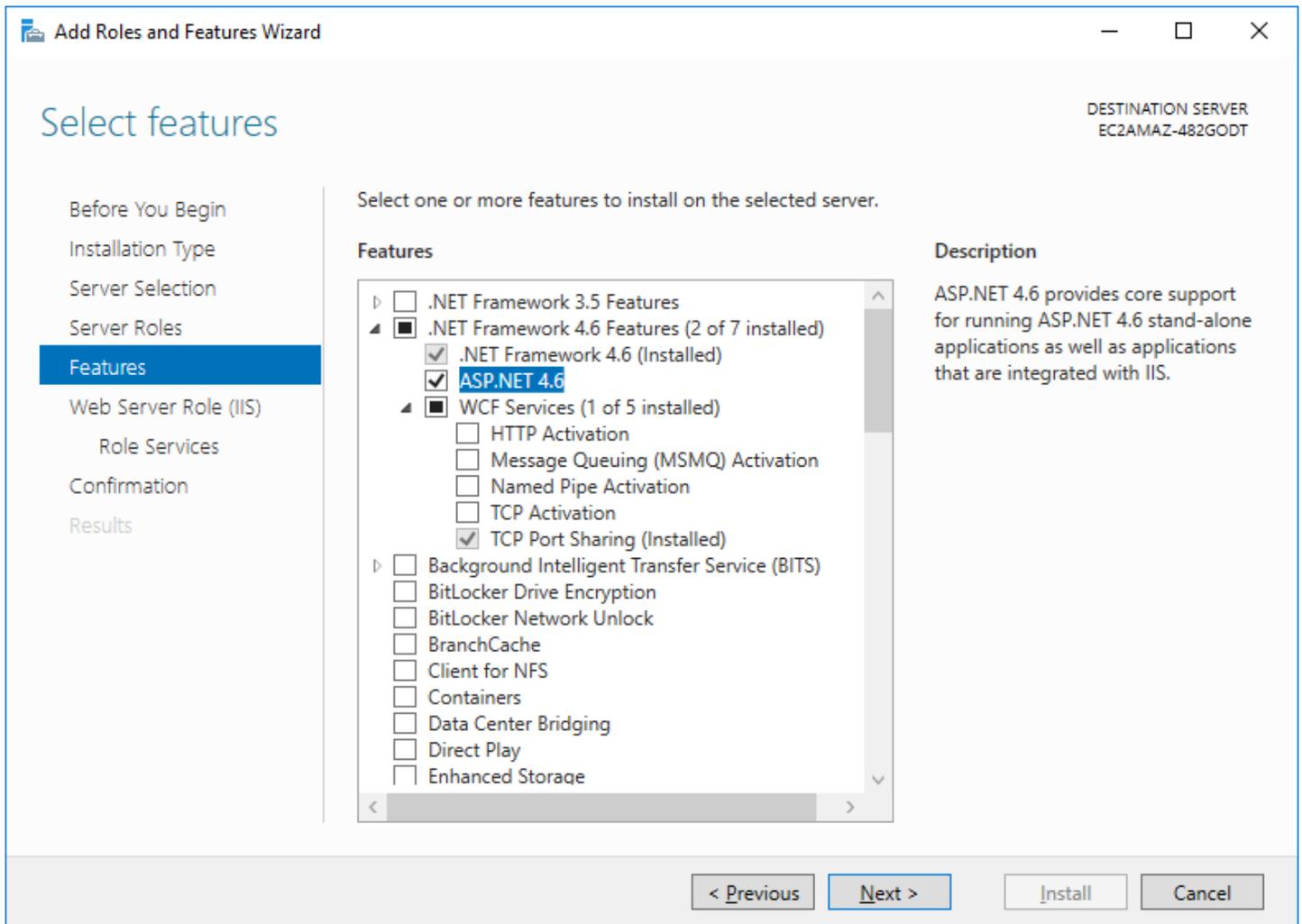
Click the checkbox next to “Web Server (IIS)”



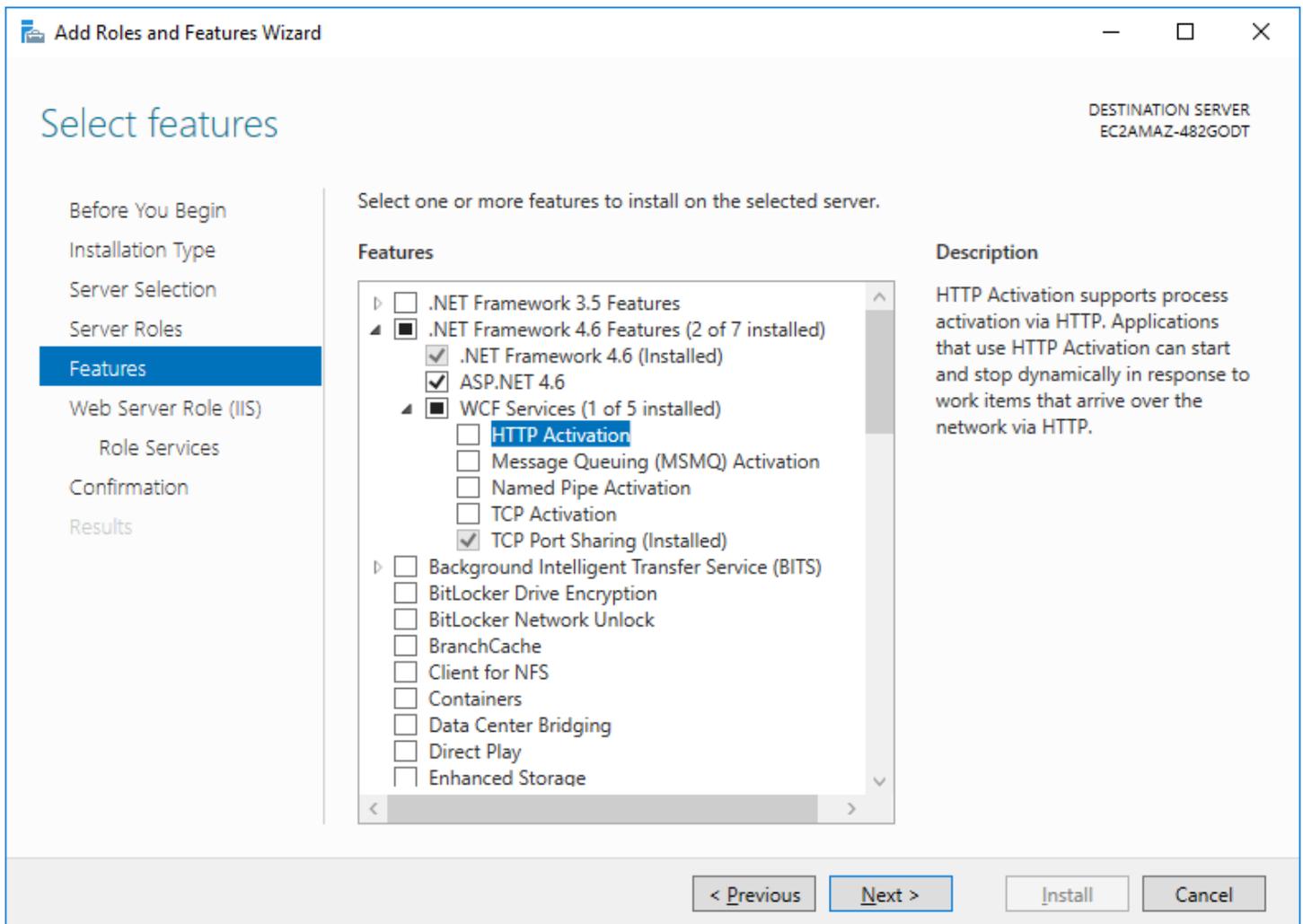
A dialog box will come up, click “Add Features”.



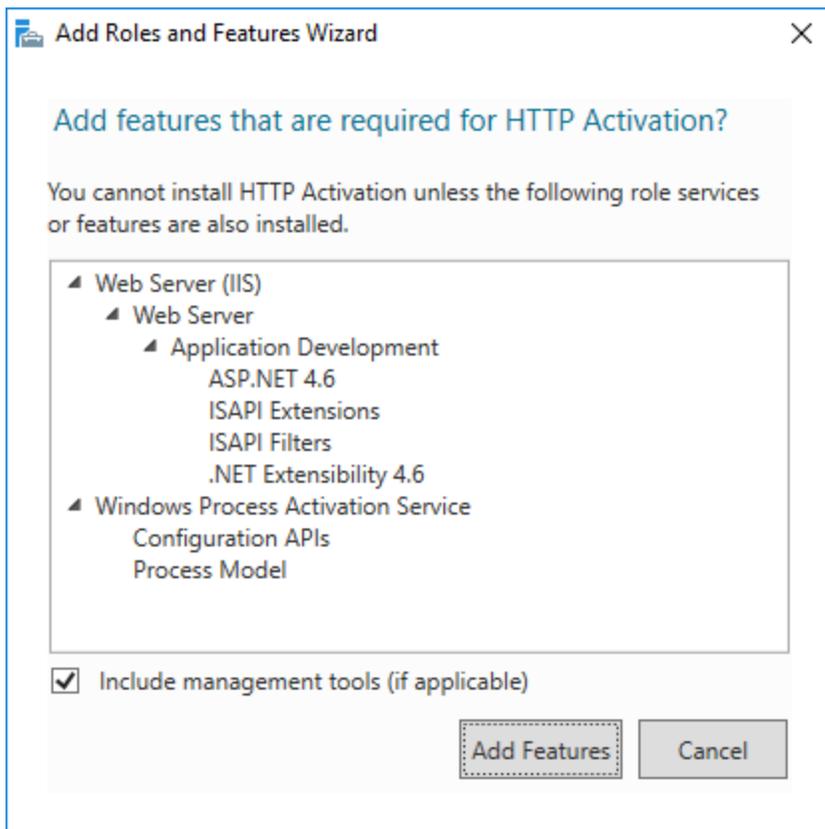
Click Next



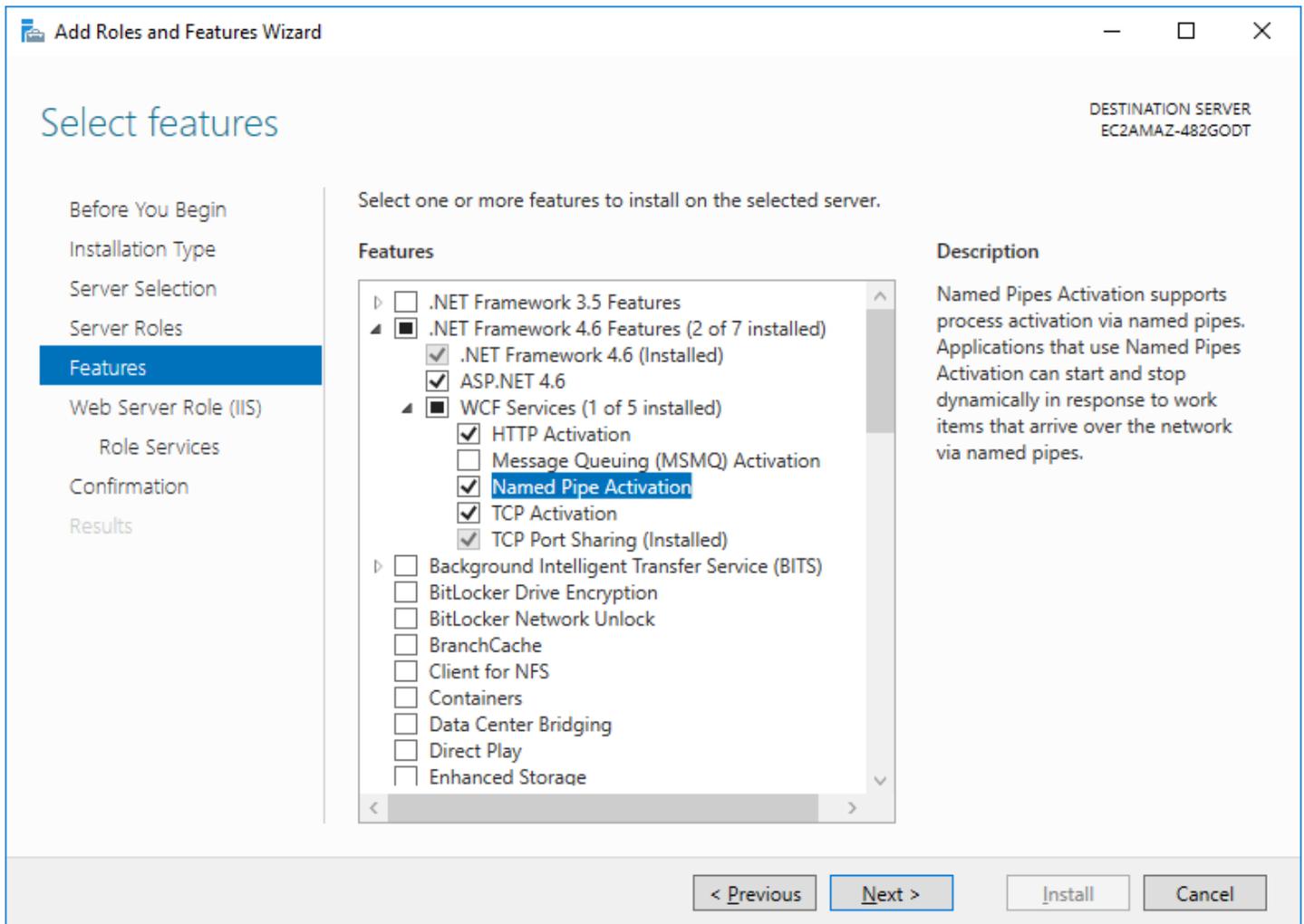
Select "ASP.NET 4.6".



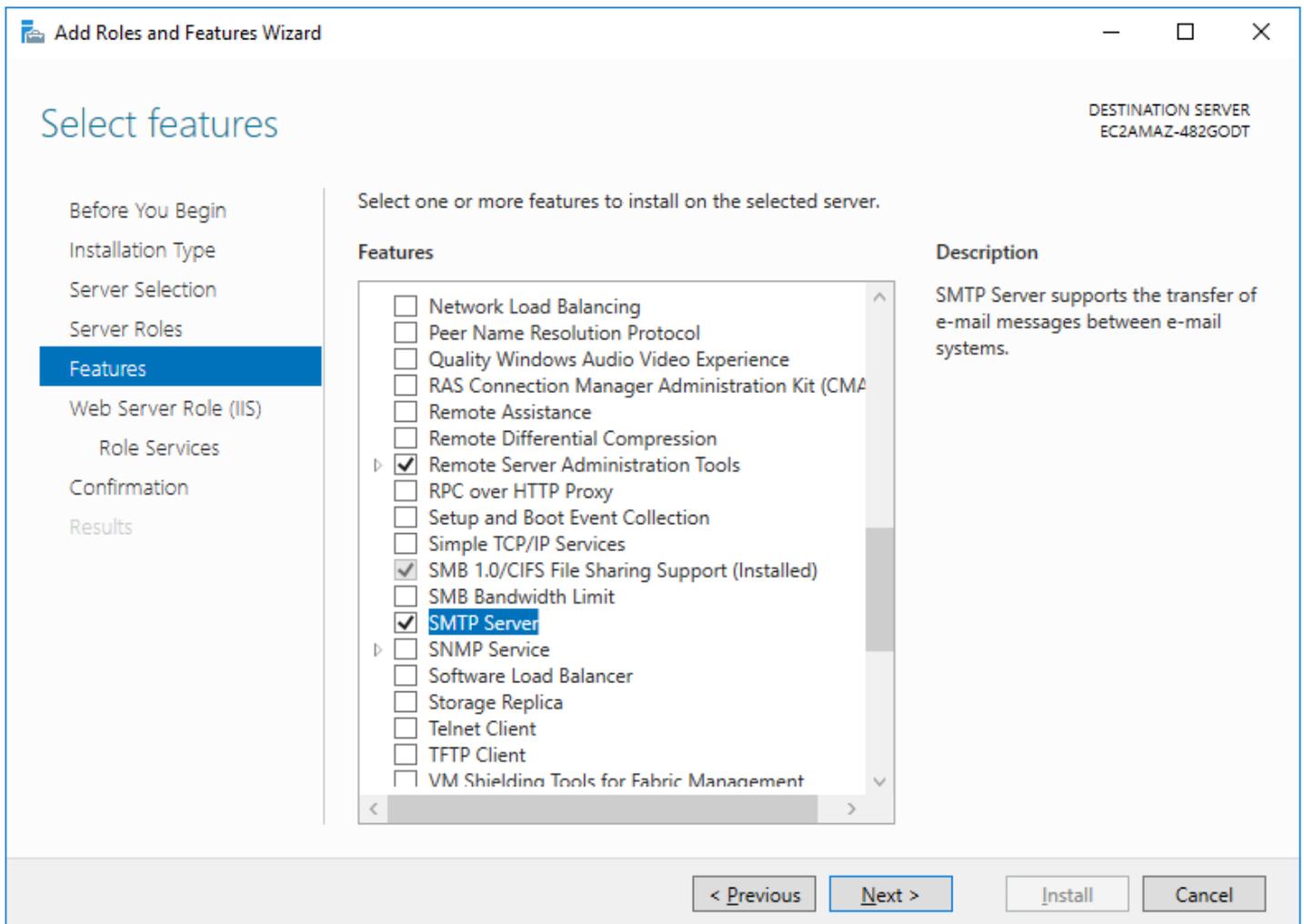
Expand WCF Services, and select "HTTP Activation"



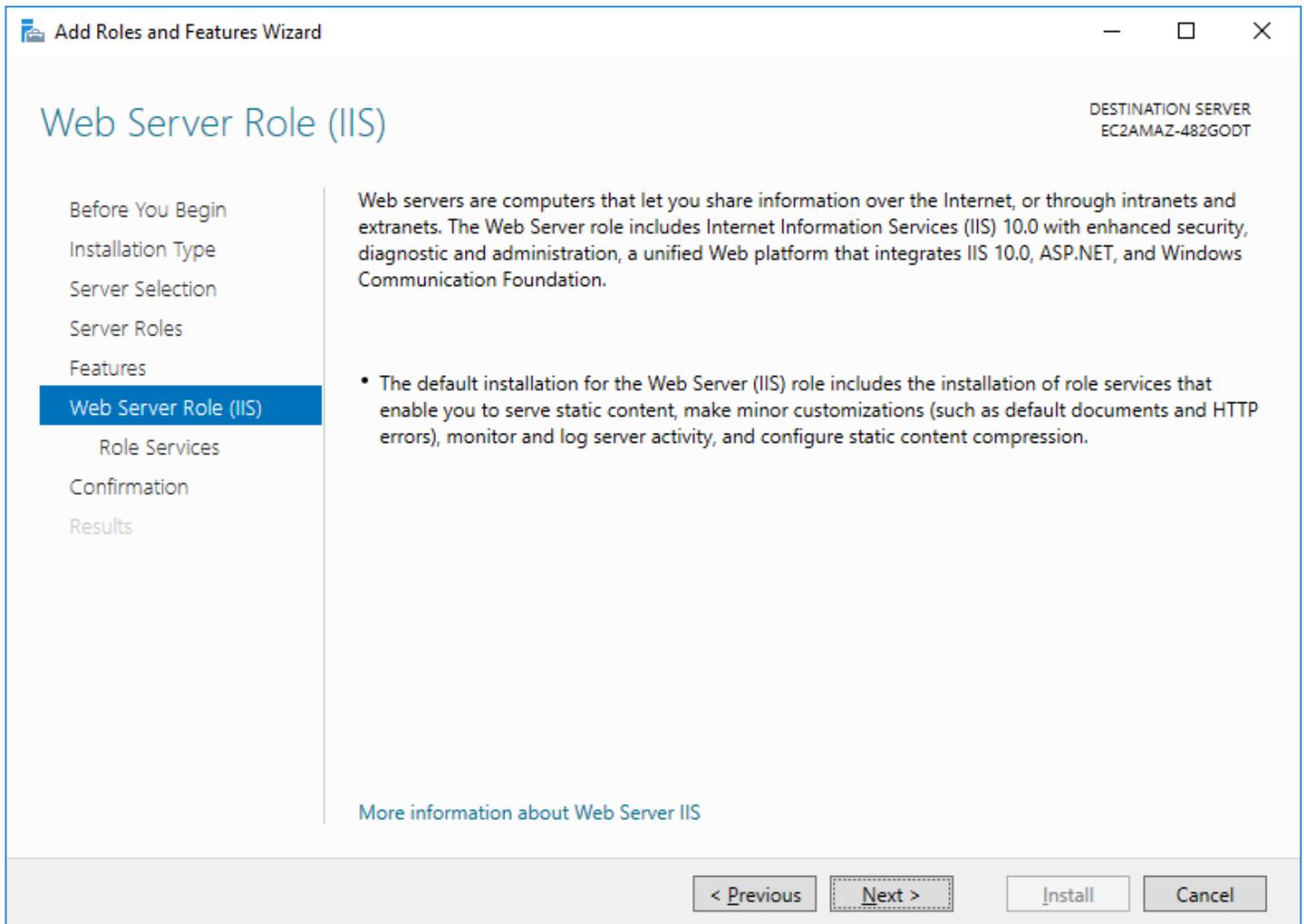
Click "Add Features"



Select "Named Pipe Activation", and "TCP Activation" as well



Scroll down and also select “SMTP Server”, if you are going to use the built in SMTP server on the windows server. Accept the defaults for the dialog box that comes up. Finally, click “Next”.



Click Next

Select role services

DESTINATION SERVER
EC2AMAZ-482GODT

Before You Begin

Installation Type

Server Selection

Server Roles

Features

Web Server Role (IIS)

Role Services

Confirmation

Results

Select the role services to install for Web Server (IIS)

Role services

- ▲ **Web Server**
 - ▲ Common HTTP Features
 - Default Document
 - Directory Browsing
 - HTTP Errors
 - Static Content
 - HTTP Redirection
 - WebDAV Publishing
 - ▲ Health and Diagnostics
 - HTTP Logging
 - Custom Logging
 - Logging Tools
 - ODBC Logging
 - Request Monitor
 - Tracing
 - ▲ Performance
 - Static Content Compression
 - Dynamic Content Compression
 - ▲ Security
 - Request Filtering
 - Basic Authentication
 - Centralized SSL Certificate Support
 - Client Certificate Mapping Authentication
 - Digest Authentication
 - IIS Client Certificate Mapping Authentication
 - IP and Domain Restrictions
 - URL Authorization
 - Windows Authentication
 - ▲ Application Development
 - .NET Extensibility 3.5
 - .NET Extensibility 4.6
 - Application Initialization
 - ASP
 - ASP.NET 3.5
 - ASP.NET 4.6
 - CGI
 - ISAPI Extensions
 - ISAPI Filters
 - Server Side Includes
 - WebSocket Protocol
 - ▲ FTP Server
 - FTP Service
 - FTP Extensibility
 - ▲ Management Tools
 - IIS Management Console
 - ▶ IIS 6 Management Compatibility
 - IIS Management Scripts and Tools
 - Management Service

Description

Web Server provides support for HTML Web sites and optional support for ASP.NET, ASP, and Web server extensions. You can use the Web Server to host an internal or external Web site or to provide an environment for developers to create Web-based applications.

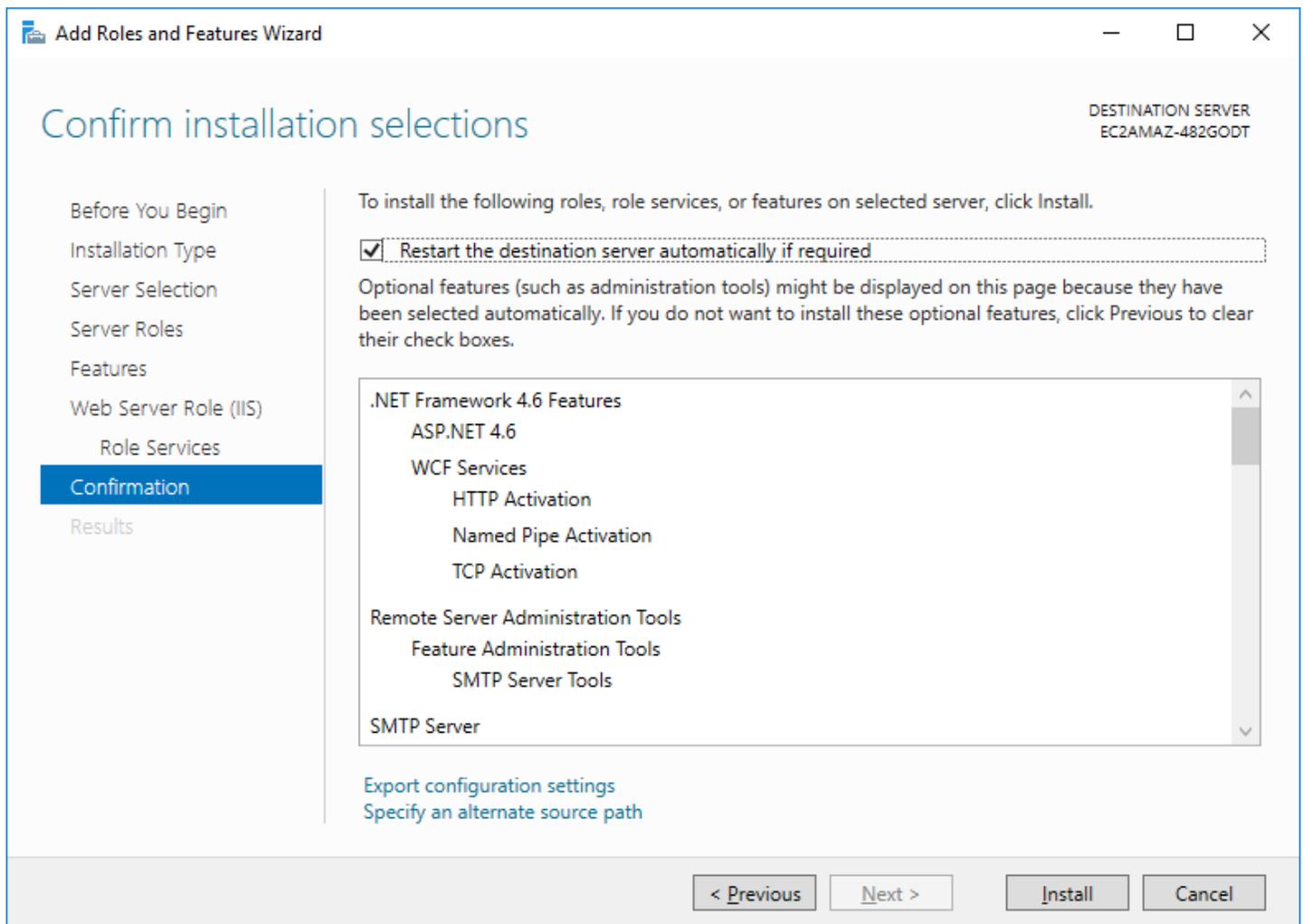
< Previous

Next >

Install

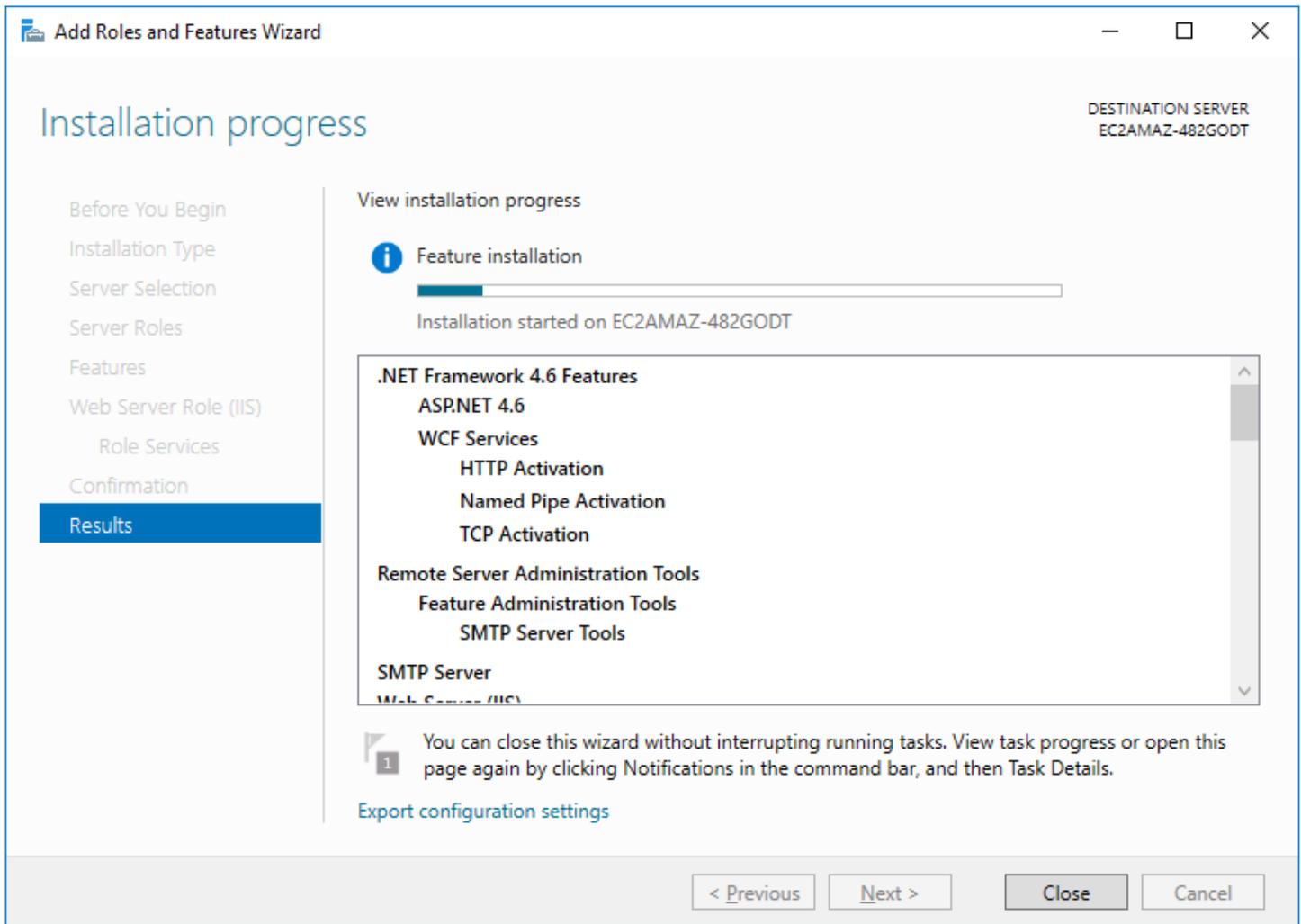
Cancel

Important - click on every single checkbox (including their child checkboxes), but leave FTP Server blank, and the defaults for “Management Tools”. The selection should match the image above when you are done. You will be prompted with several popups while clicking on the checkboxes, and you should accept the defaults. Finally, click Next.

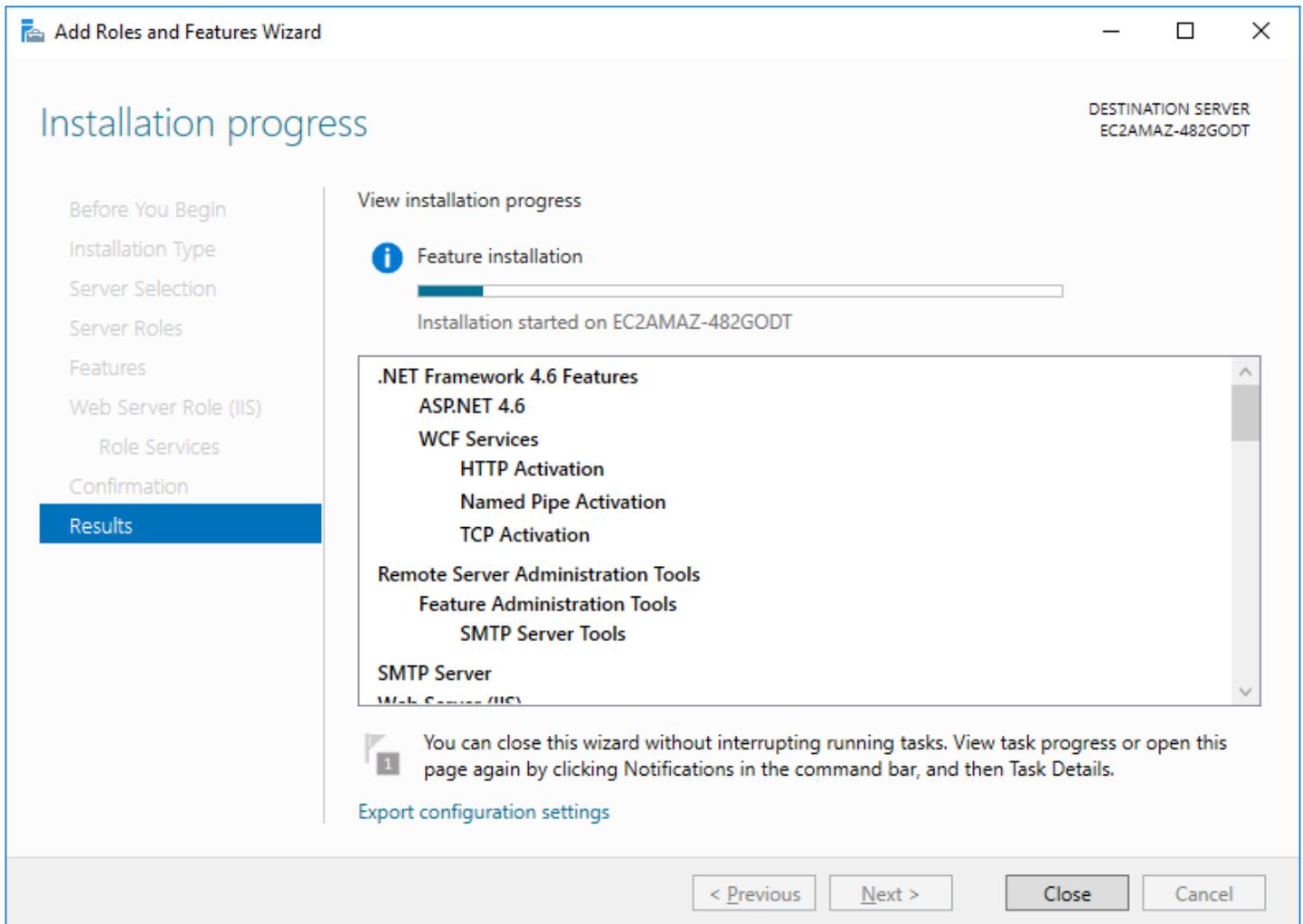


Finally, click on the “Restart the destination server automatically if required” checkbox, and click on “Install” to add the IIS Role and SMTP server on the Windows Server.

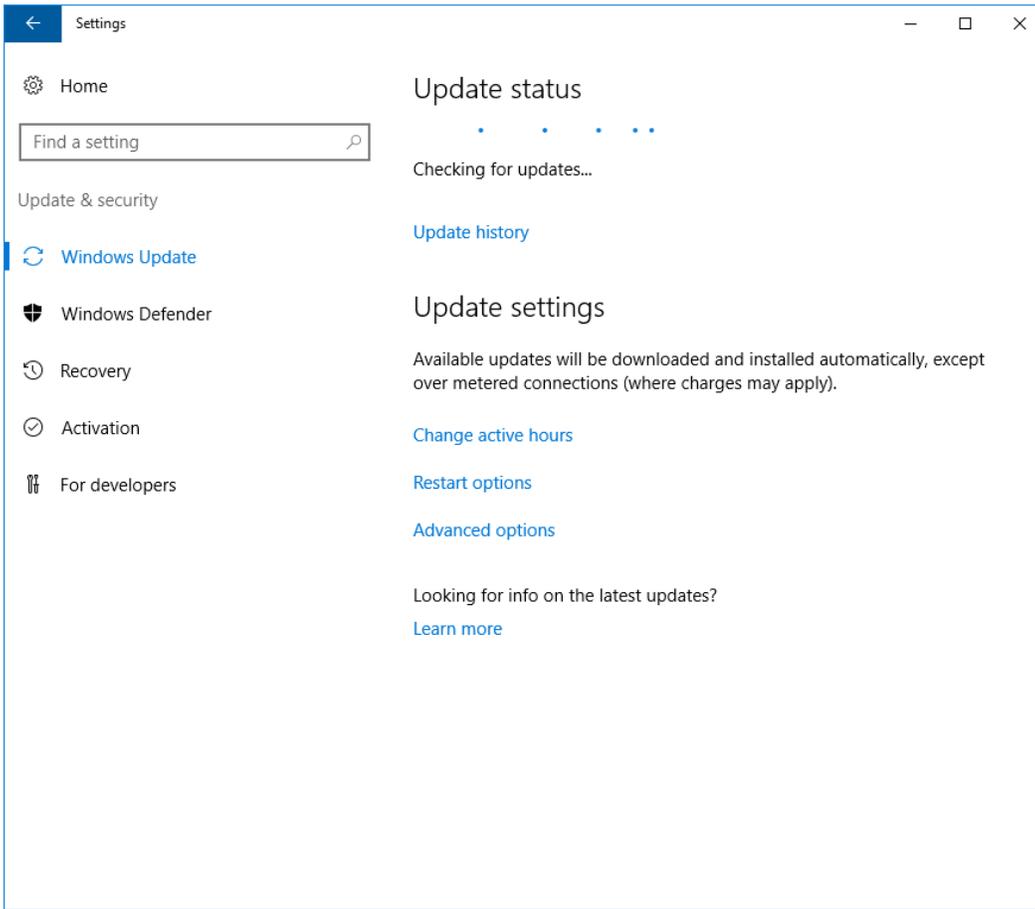
The computer may restart after the installation has finished.



Wait for the installation to complete.



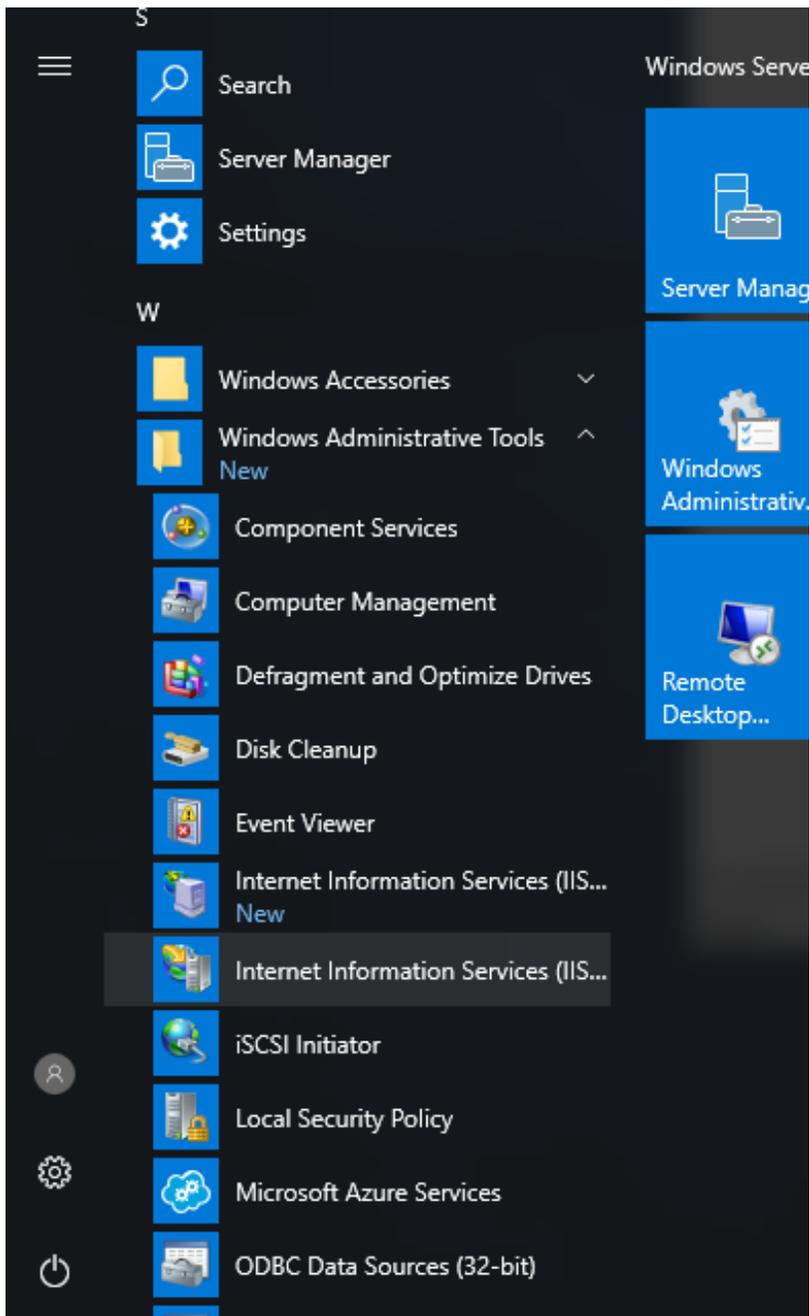
Once the installation has finished, click on “Close”

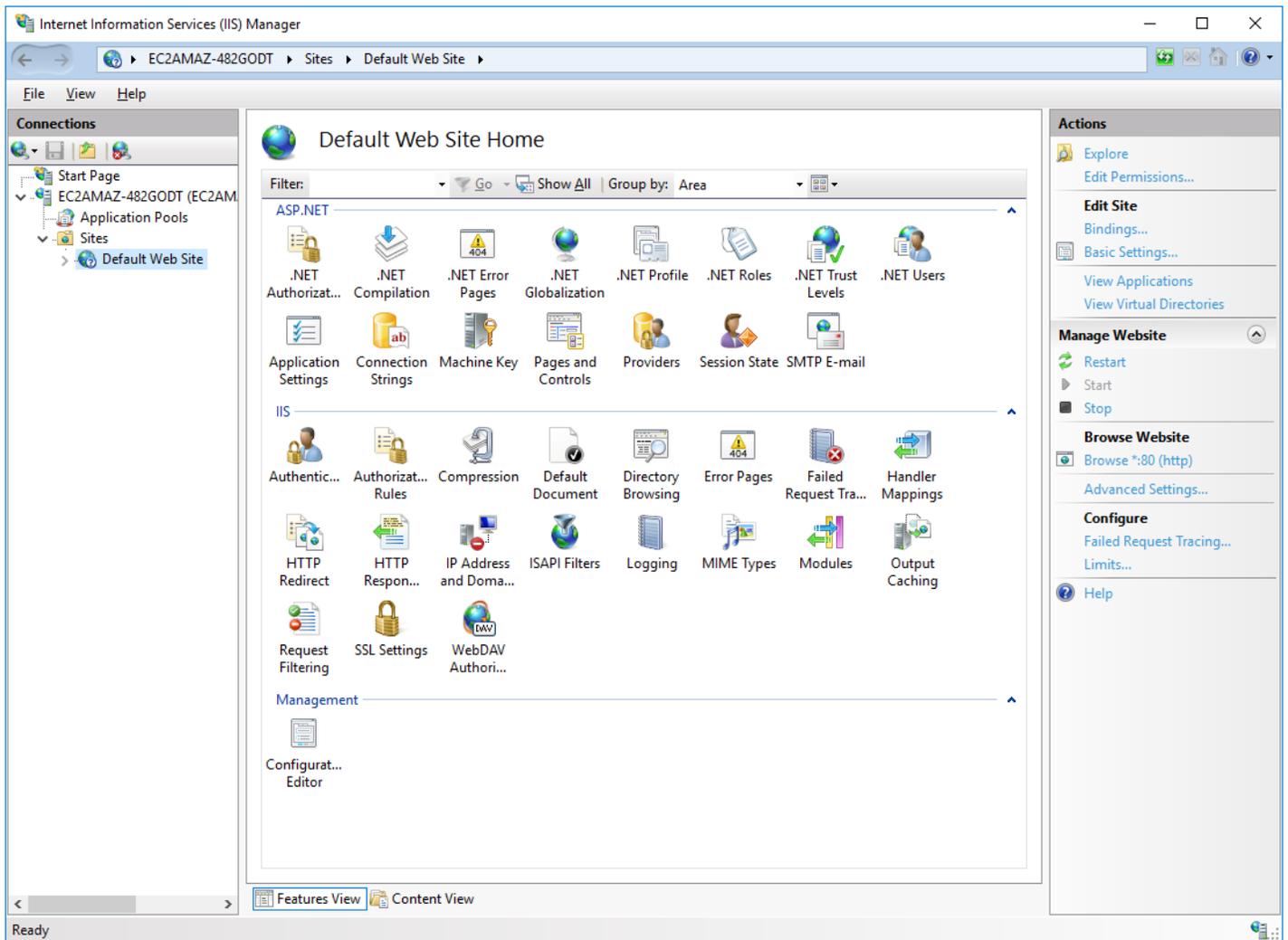


Go to the Start Menu, select “Settings”, and then select Windows Updates. Check for Windows updates, and make sure all the latest updates are installed.

OptiTune Website Setup

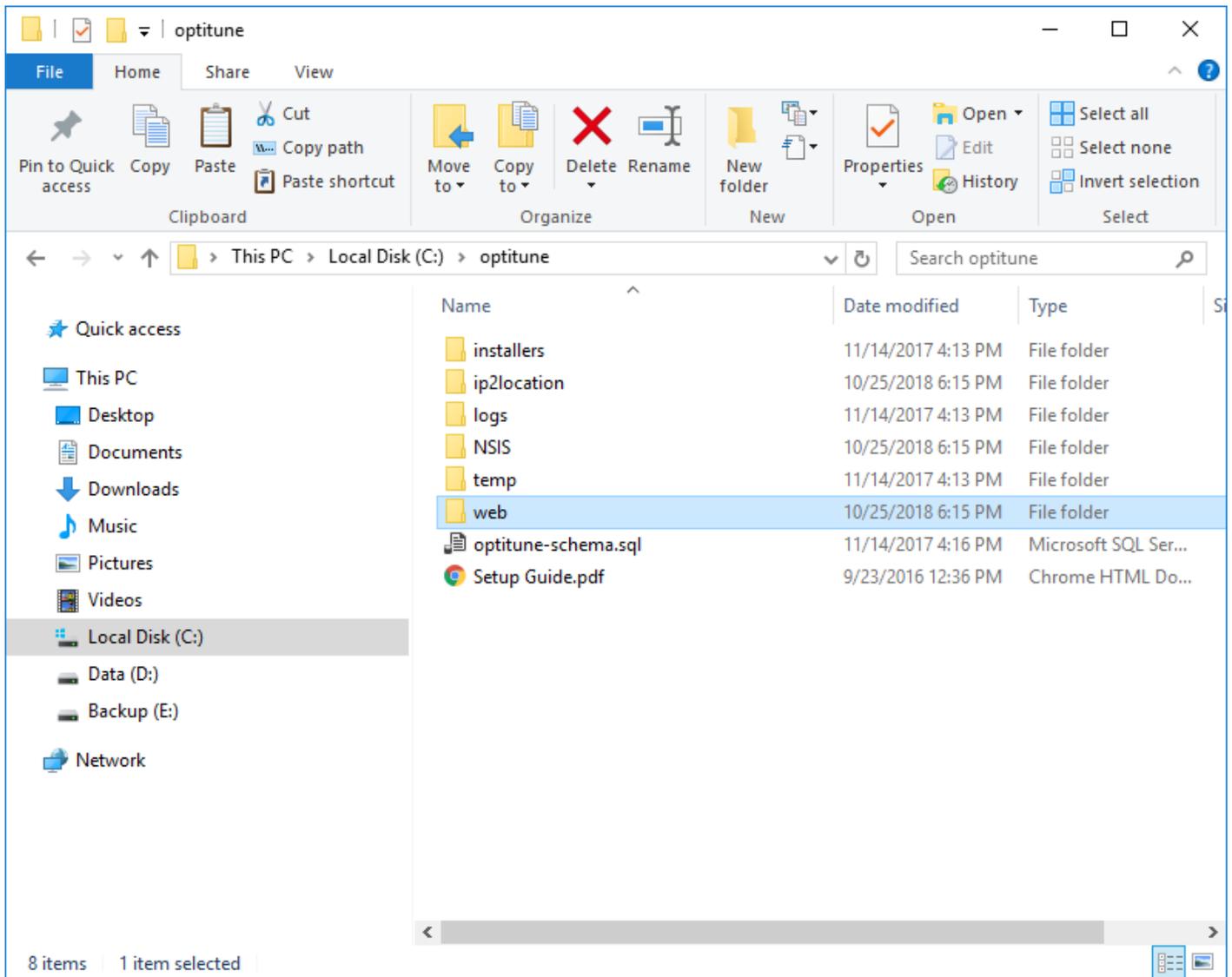
Finally, start “IIS Manager” (not the 6.0 version, but the latest one):





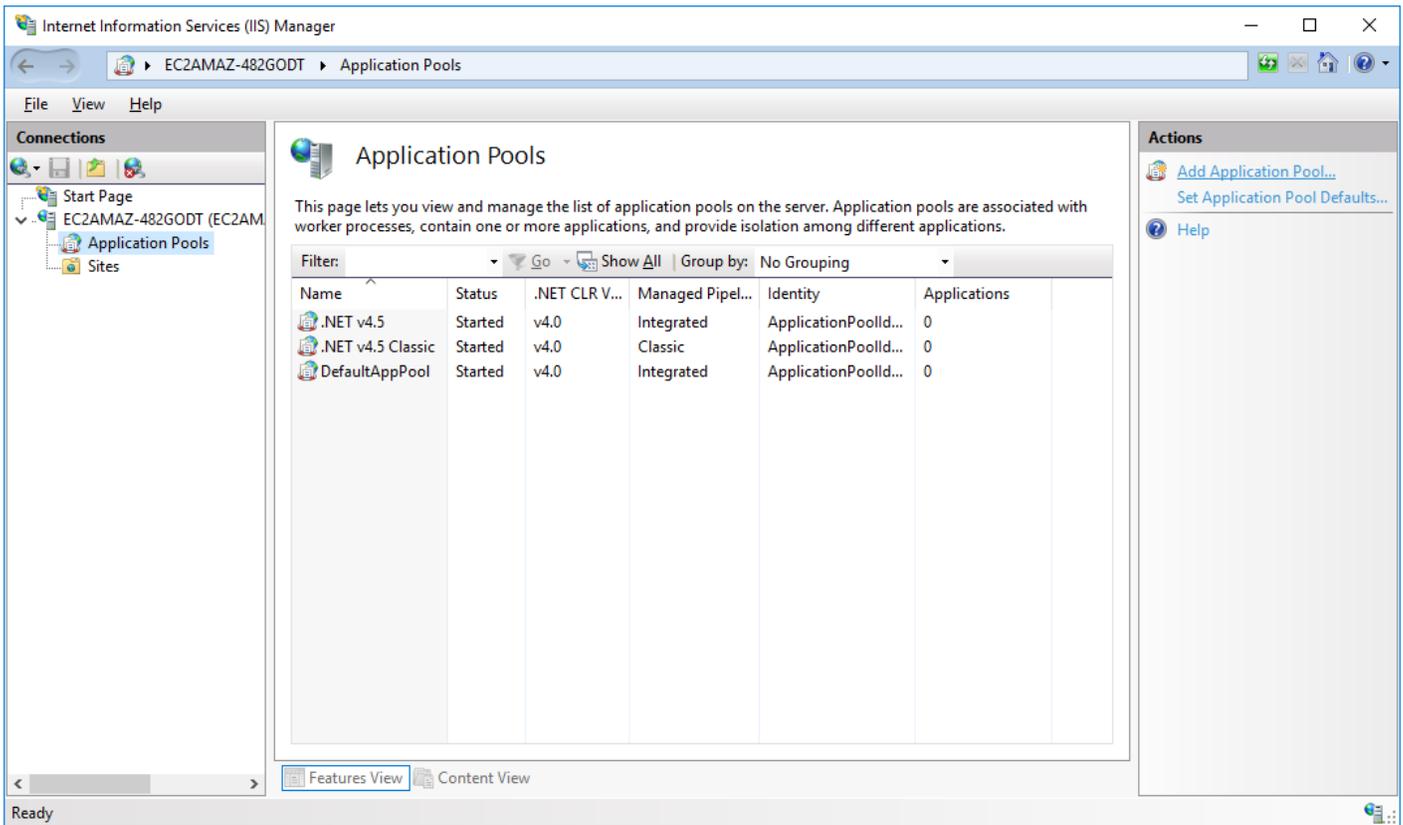
You will see a Default Web Site already created. Right click on it, and select "Remove", and answer "Yes" to confirm the removal of the default site.

Next, you will need to copy the Opti Tune server binaries to a new directory on your computer. The recommended location is C:\optitune, but you can choose a different location if needed.

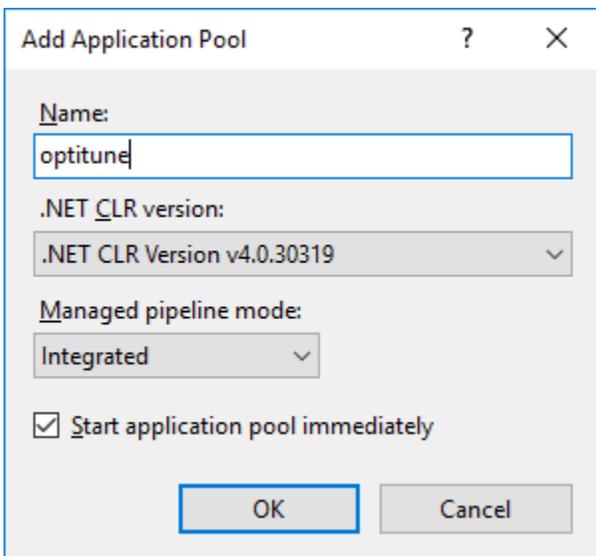


The C:\optitune directory should look like the above image.

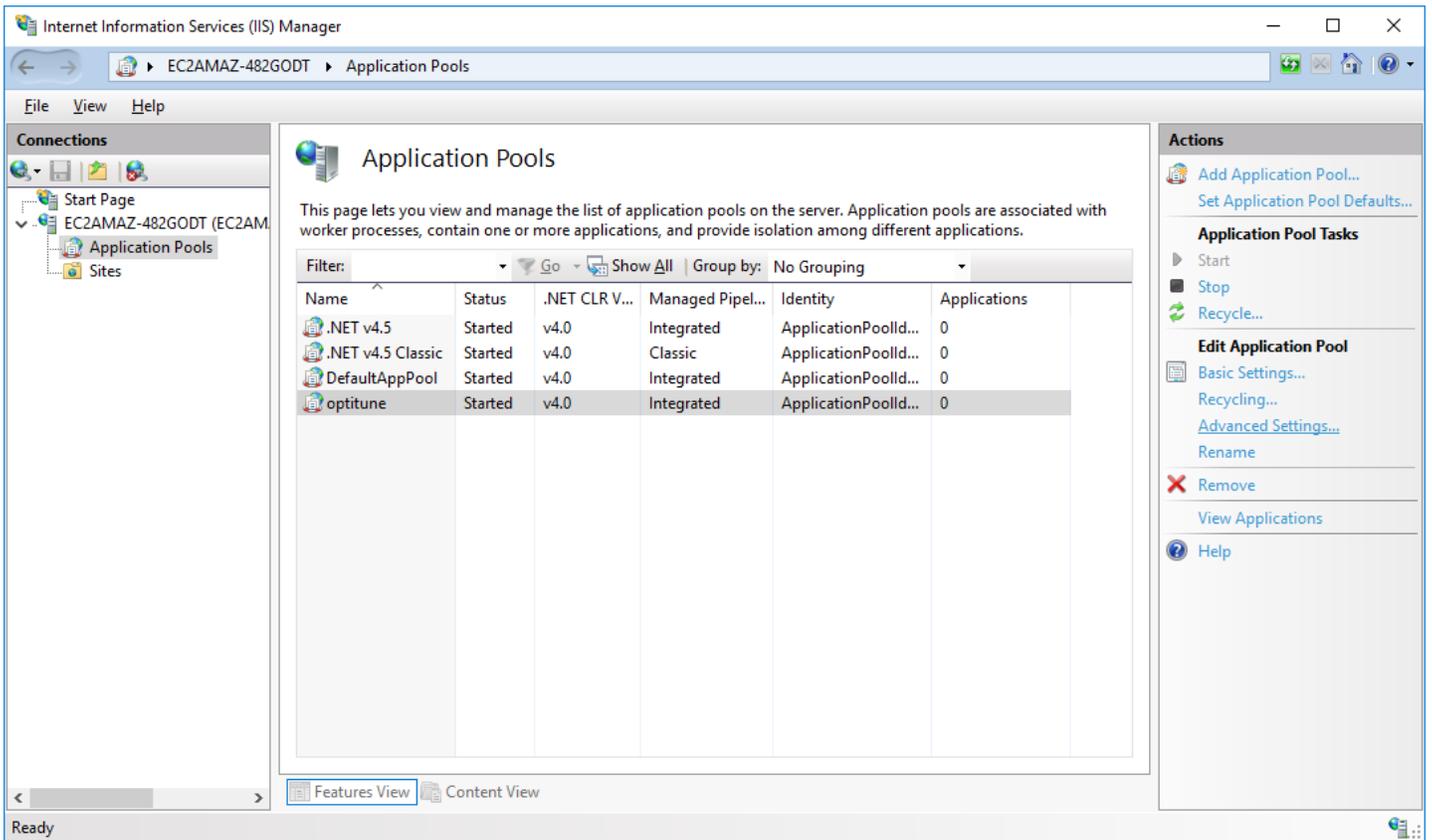
Next, go back to IIS, and you will need to add an App Pool and IIS Website.



Click on “Application Pools” at the top left, and then click on “Add Application Pool” at the top right



Enter “optitune” for the name of the application pool, and click OK



Click on the new “optitune” application pool, and then click on “Advanced Settings...” on the right

▼ (General)

.NET CLR Version	v4.0
Enable 32-Bit Applications	True
Managed Pipeline Mode	Integrated
Name	optitune
Queue Length	1000
Start Mode	AlwaysRunning

▼ CPU

Limit (percent)	0
Limit Action	NoAction
Limit Interval (minutes)	5
Processor Affinity Enabled	False
Processor Affinity Mask	4294967295
Processor Affinity Mask (64-bit option)	4294967295

▼ Process Model

> Generate Process Model Event Log Ent	
Identity	ApplicationPoolIdentity
Idle Time-out (minutes)	0
Idle Time-out Action	Terminate
Load User Profile	True
Maximum Worker Processes	1
Ping Enabled	True
Ping Maximum Response Time (second)	90
Ping Period (seconds)	30
Shutdown Time Limit (seconds)	90
Startup Time Limit (seconds)	90

▼ Process Orphaning

Enabled	False
Executable	
Executable Parameters	

▼ Rapid-Fail Protection

"Service Unavailable" Response Type	HttpLevel
Enabled	True
Failure Interval (minutes)	5
Maximum Failures	5
Shutdown Executable	
Shutdown Executable Parameters	

▼ Recycling

Disable Overlapped Recycle	True
Disable Recycling for Configuration Ch	False
> Generate Recycle Event Log Entry	
Private Memory Limit (KB)	0
Regular Time Interval (minutes)	5760
Request Limit	0
> Specific Times	TimeSpan[] Array
Virtual Memory Limit (KB)	0

Disable Overlapped Recycle

[disallowOverlappingRotation] If true, the application pool recycle will happen such that the existing worker process exits before another worker process is created. Set to true if ...

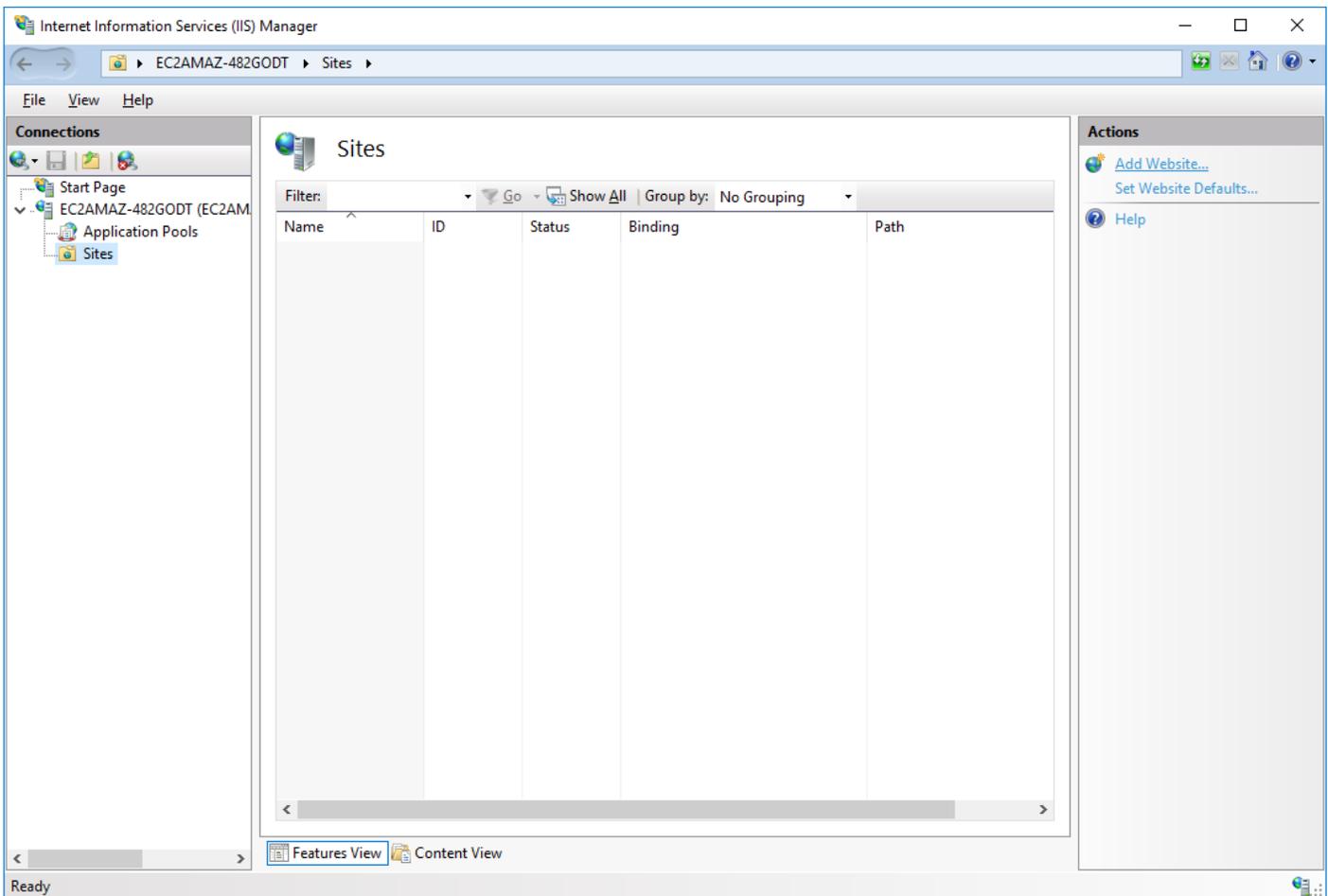
OK

Cancel

- Change “Enable 32-Bit Applications” to “True”
- Change “Start Mode” to “AlwaysRunning”.
- Change “Idle Time-out (minutes)” to “0”
- **Change “Load User Profile” to True**
- Change “Disable Overlapped Recycle” to True
- Change “Regular Time Interval (minutes)” to “5760”

Finally, press OK to save the changes

Now, we will create the OptiTune website.



Right click on “Sites”, and select “Add Website”

Add Website ? X

Site name: Application pool:

Content Directory

Physical path:

Pass-through authentication

Binding

Type: IP address: Port:

Host name:

Example: www.contoso.com or marketing.contoso.com

Start Website immediately

Enter “optitune” for the site name

Select Application Pool ? X

Application pool:

Properties:

.Net CLR Version: 4.0
Pipeline mode: Integrated

Click on “Select...” next to the application pool, and select the “optitune” application pool you created earlier. Press OK.

Add Website

Site name: Application pool:

Content Directory

Physical path:

Pass-through authentication

Binding

Type: IP address: Port:

Host name:

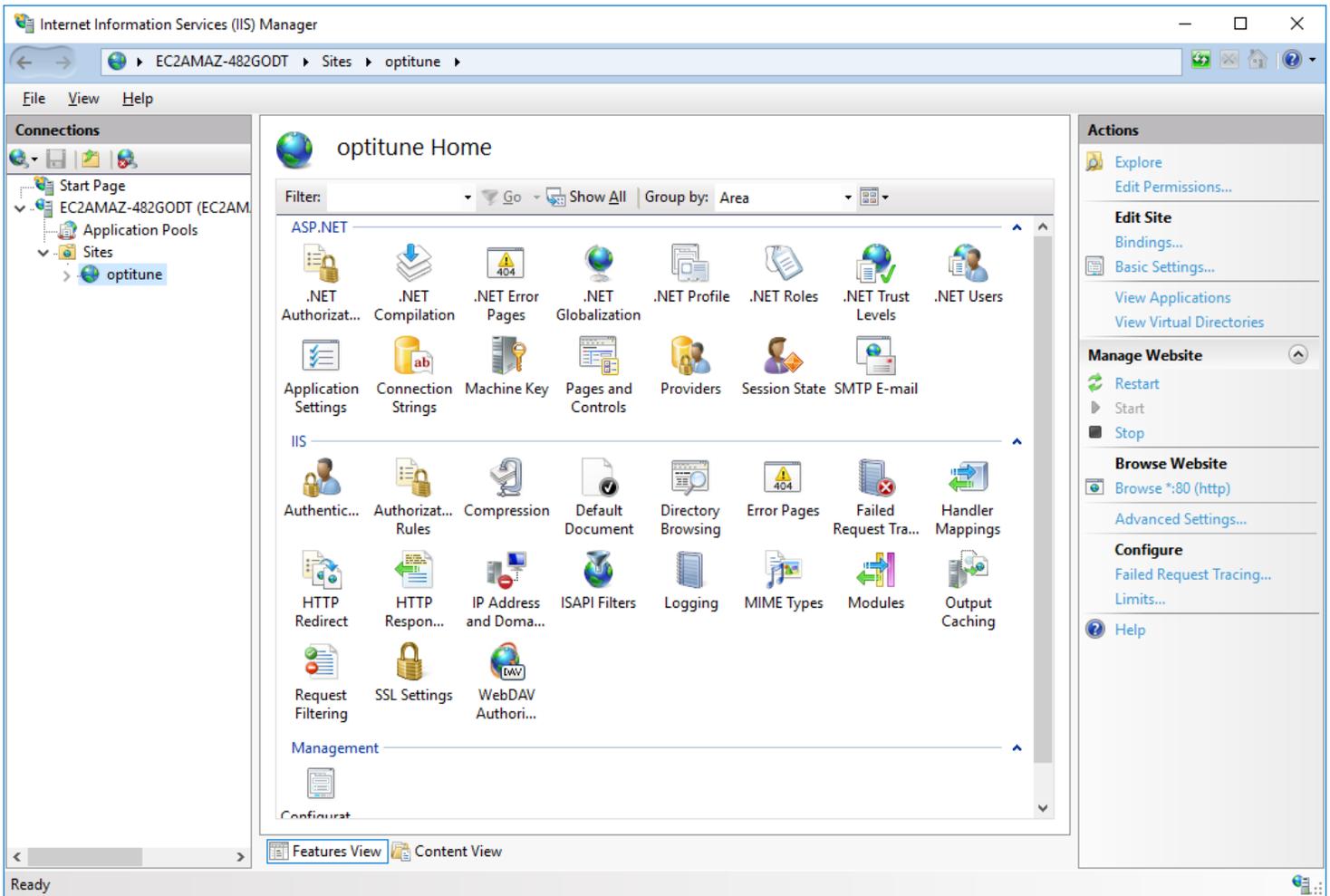
Example: www.contoso.com or marketing.contoso.com

Start Website immediately

Select the path where you copied the OptiTune website files (C:\optitune\web in this case), and finally press OK.

Important OptiTune requires the use of an SSL certificate. If you have one ready and already installed in IIS, you can change the binding type to HTTPS in the above dialog, and select it here.

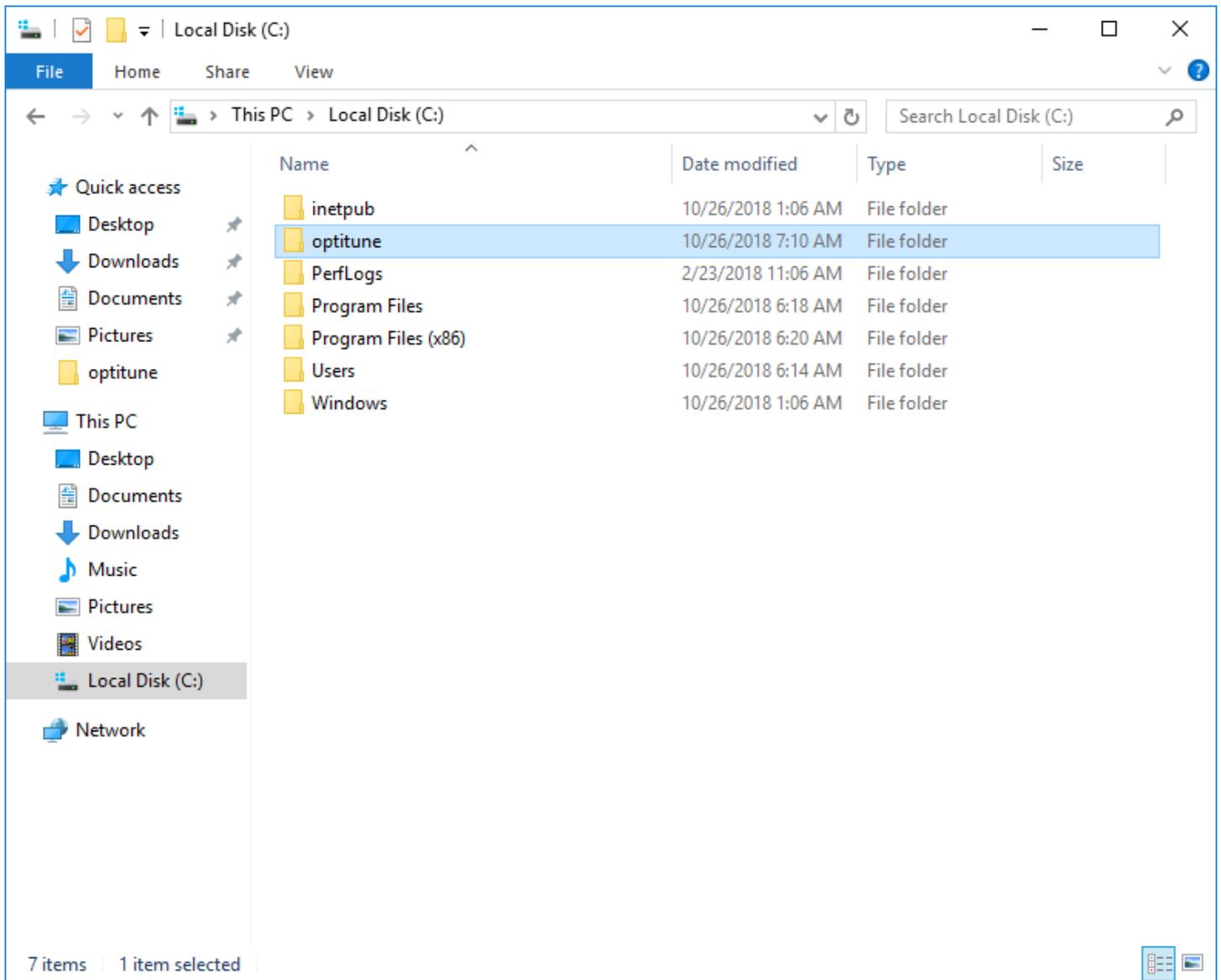
Otherwise, you will need to install an SSL certificate later, and change the binding of the website to only have the HTTPS protocol with your website certificate on port 443. Otherwise, the OptiTune agent will not be able to connect to the OptiTune server.



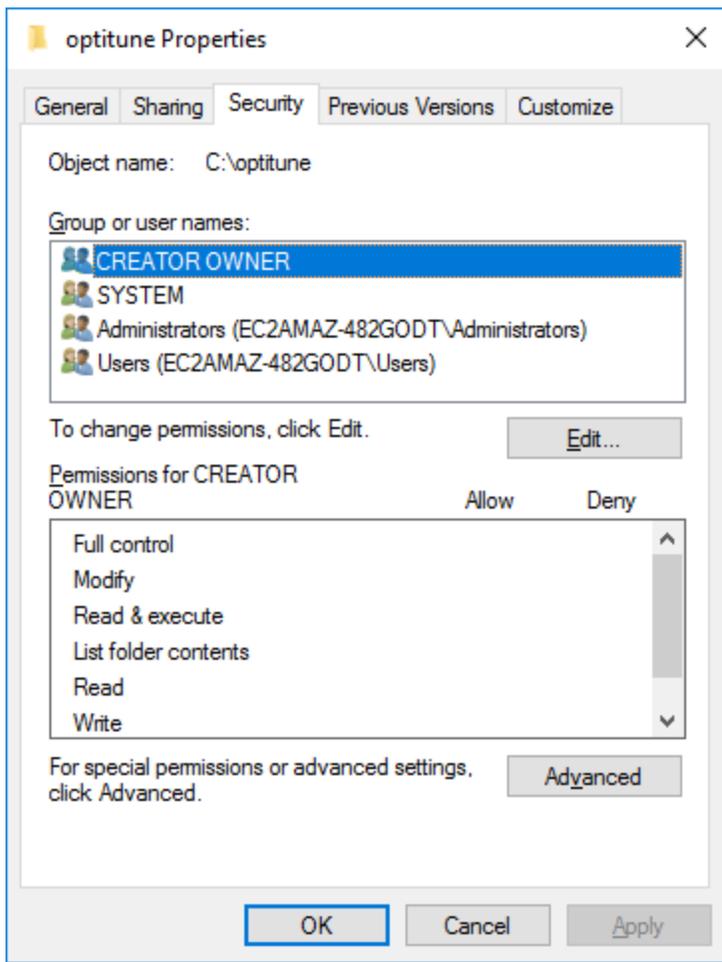
The “optitune” website has now been created, but we still have to setup SQL Server and the OptiTune database in order for it to function.

Folder Permissions

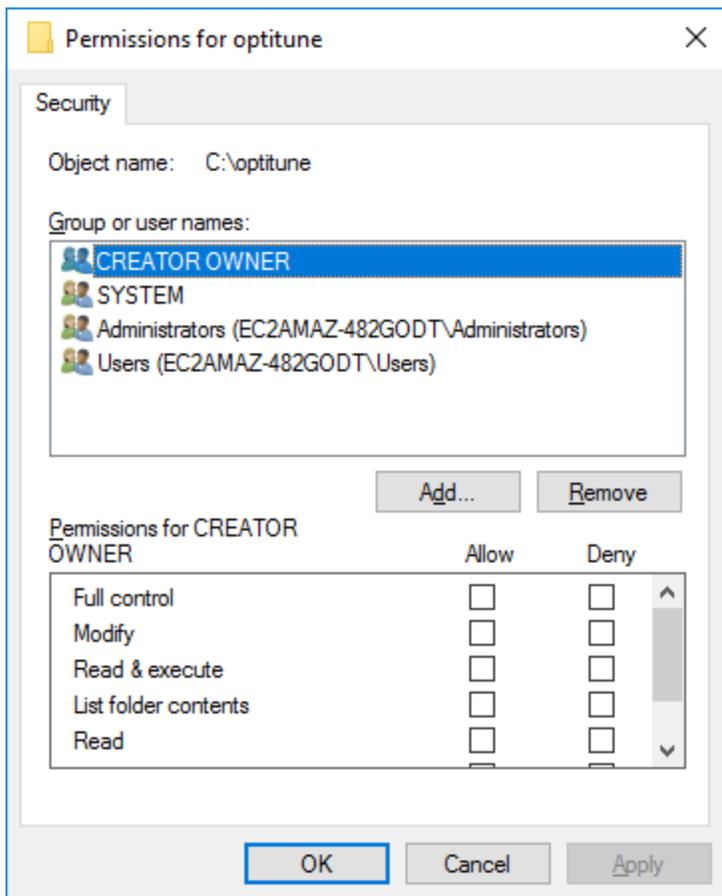
After creating the website under IIS, you will need to setup appropriate folder permissions.



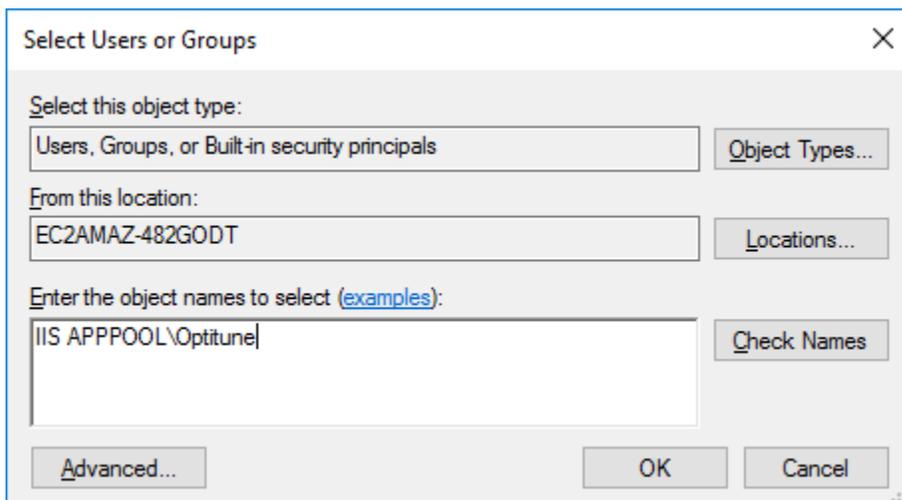
In File Explorer, navigate to the C Drive and click on “optitune”. Right click on it, and select “Properties”.



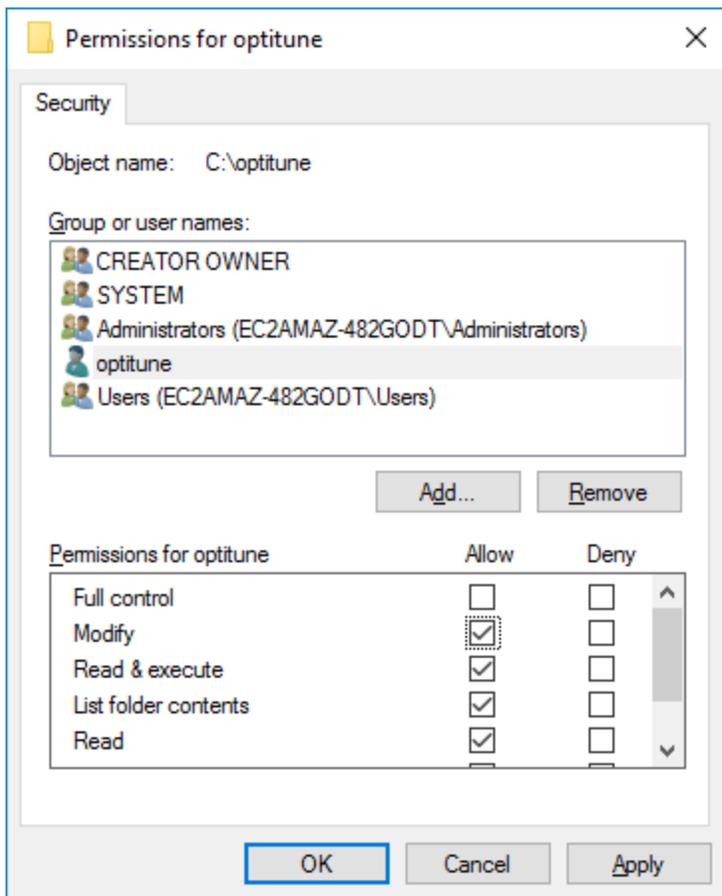
Click on the “Security” tab, and then click “Edit”.



Click on "Add..."



Type in "IIS APPPOOL\Optitune" without quotes and press OK.



Click on the new “optitune” user, and then make sure the “Modify” permission is allowed. Finally, press OK.

The application pool “optitune” you created before will now have write access to the “C:\optitune” folder.

SQL Server Database Setup

You will need the latest MS SQL 2017 Database Server. If you don’t have a paid version, you can download and install the free version (SQL 2017 Express), which can support databases up to 10GB in size.

<https://www.microsoft.com/en-us/sql-server/sql-server-editions-express>

Also, you will need to install the management tools for SQL Server:

<https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>

Once you have installed SQL Server and SSMS (using the default installation options), start up SSMS to create the OptiTune database.

SQL Server Setup

Visit the following webpage to download and run the SQL Server 2017 Express Edition setup

<https://www.microsoft.com/en-us/sql-server/sql-server-editions-express>

The image shows a browser window displaying the Microsoft website for SQL Server 2017 Express edition. The browser's address bar shows the URL <https://www.microsoft.com>. The page header includes the Microsoft logo, the text "Data platform", a "More" dropdown menu, and a "Try SQL Server 2017" button. The main content area features a dark background with a grid pattern and a white box containing the following text:

SQL Server 2017 Express edition

Build small, data-driven web and mobile applications up to 10 GB in size with this free, entry-level database.

Below the text are two buttons: "Download now" with a download icon and "More editions" with a right-pointing arrow.

Why choose the Express edition?

At the bottom of the page, there is a URL: <https://go.microsoft.com/fwlink/?linkid=853017>.

Express Edition

Select an installation type:

Basic

Select Basic installation type to install the SQL Server Database Engine feature with default configuration.

Custom

Select Custom installation type to step through the SQL Server installation wizard and choose what you want to install. This installation type is detailed and takes longer than running the Basic install.

Download Media

Download SQL Server setup files now and install them later on a machine of your choice.

SQL Server transmits information about your installation experience, as well as other usage and performance data, to Microsoft to help improve the product. To learn more about data processing and privacy controls, and to turn off the collection of this information after installation, see the [documentation](#)

14.1805.4072.1

Choose “Custom”

SQL Server 2017

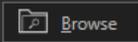


Express Edition

Specify SQL Server media download target location

MEDIA LOCATION

C:\SQLServer2017Media



MINIMUM FREE SPACE

6616 MB

DOWNLOAD SIZE

283 MB

Close

< Previous

Install

14.1805.4072.1

Press "Install"

SQL Server 2017



Express Edition

Downloading install package...



Acquiring setup files... 80.004 MB / 710.855 MB 217.423 Mbps

Getting Started with SQL Server

Thank you for installing Microsoft SQL Server. If you are connecting to SQL Server from a remote machine, then you need to complete the prerequisites mentioned in the "Before you get started" file located in the Resources folder.

Pause

Cancel

14.1805.4072.1

Wait for it to download the installation files

SQL Server 2017



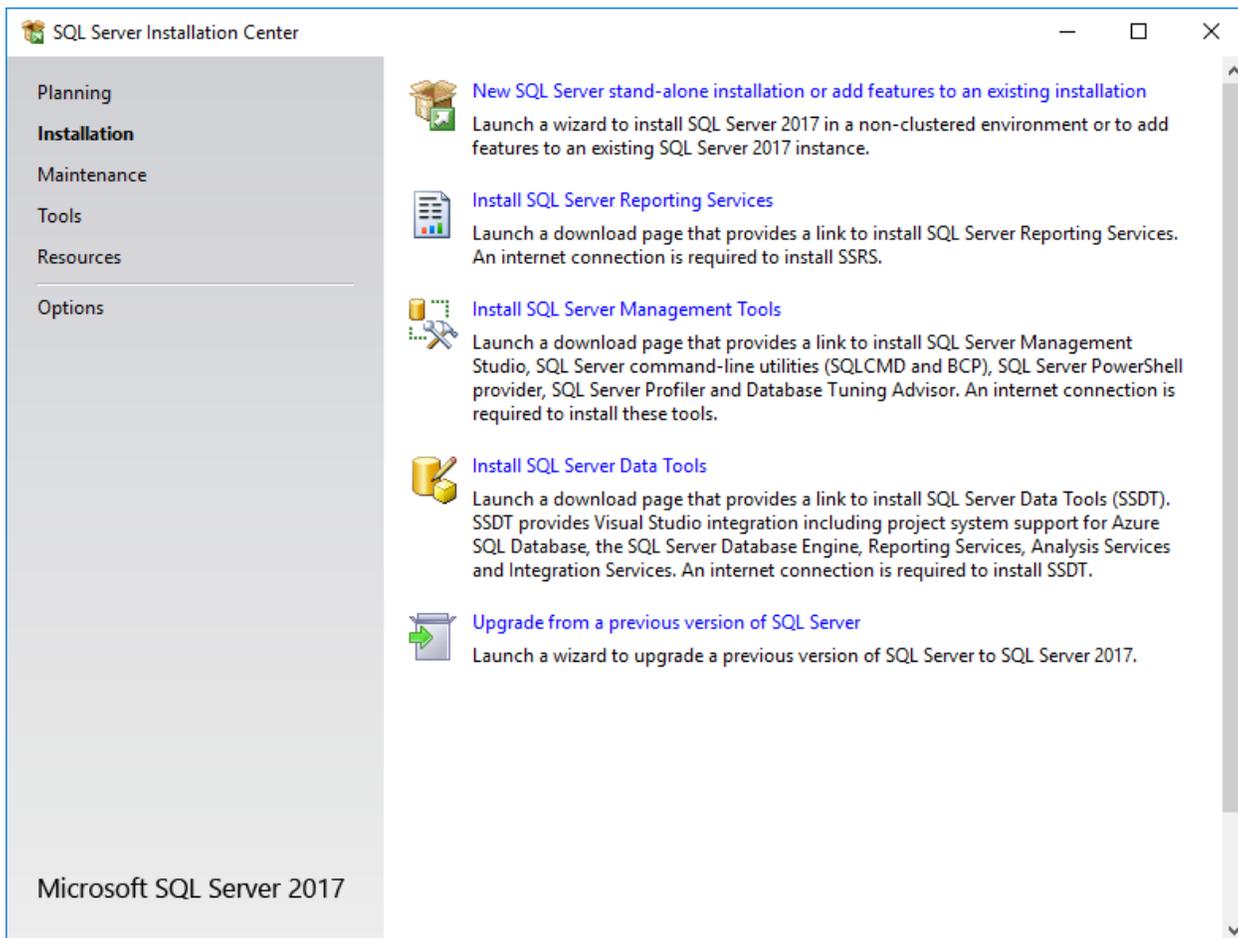
Express Edition

Download successful!

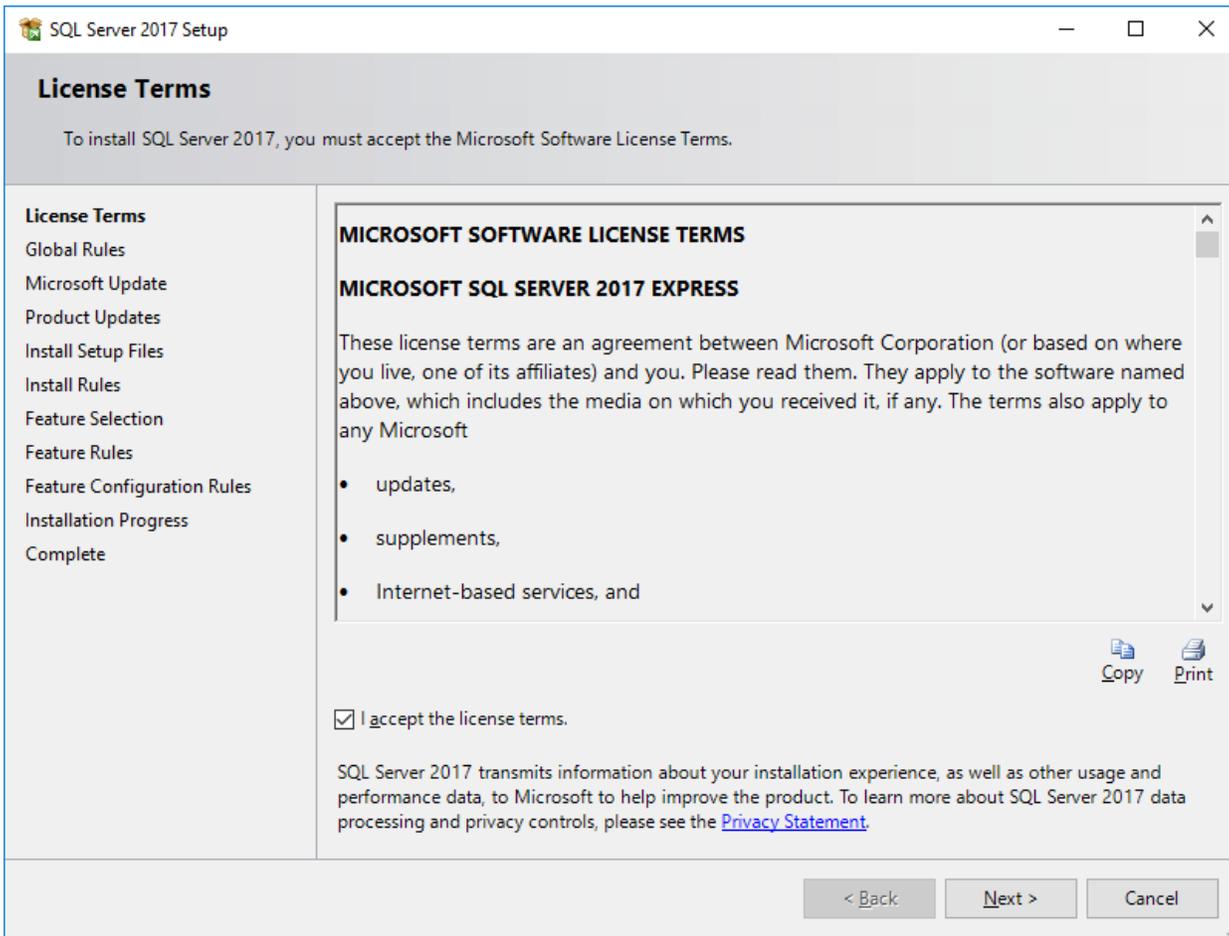
Your SQL Server installation will begin shortly...

14.1805.4072.1

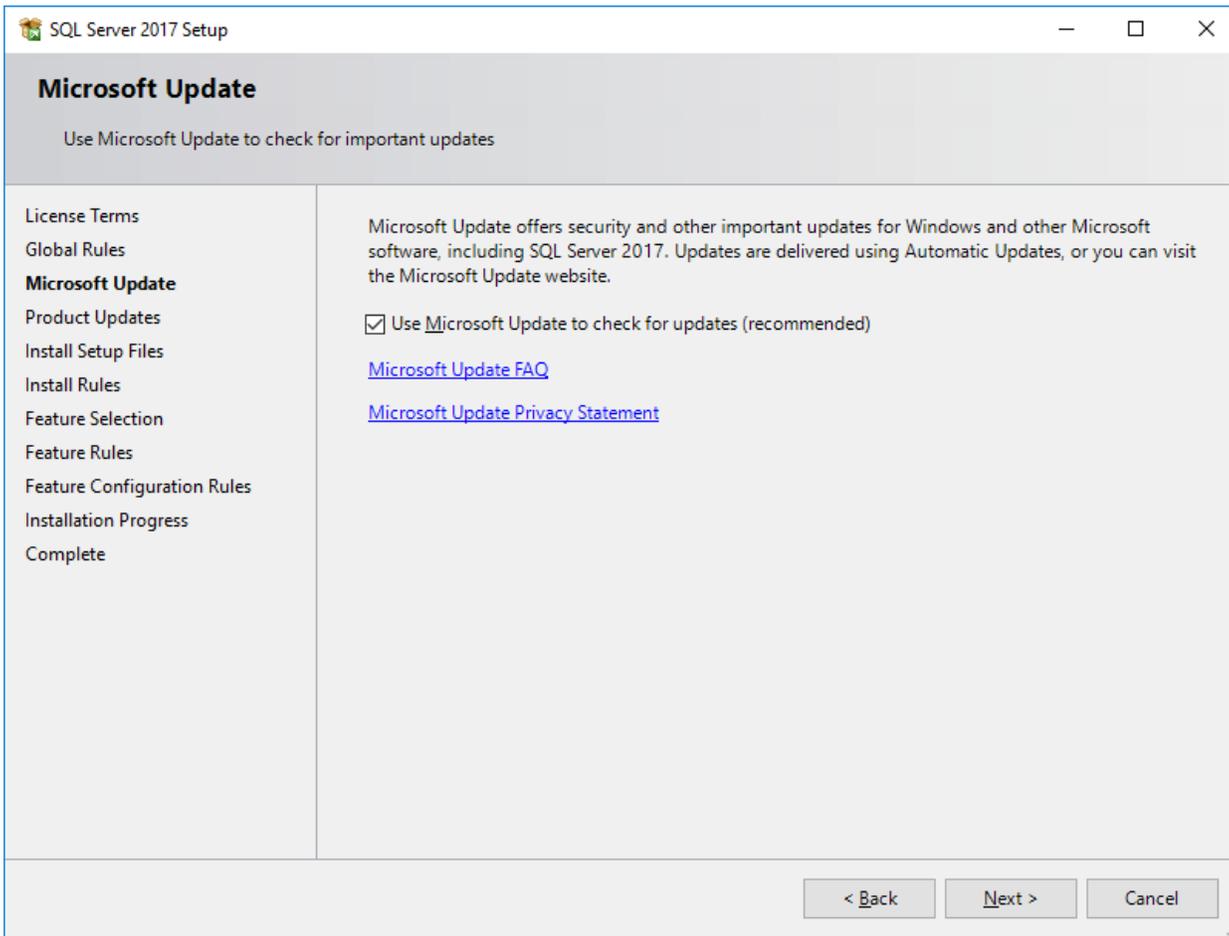
The SQL setup wizard will launch:



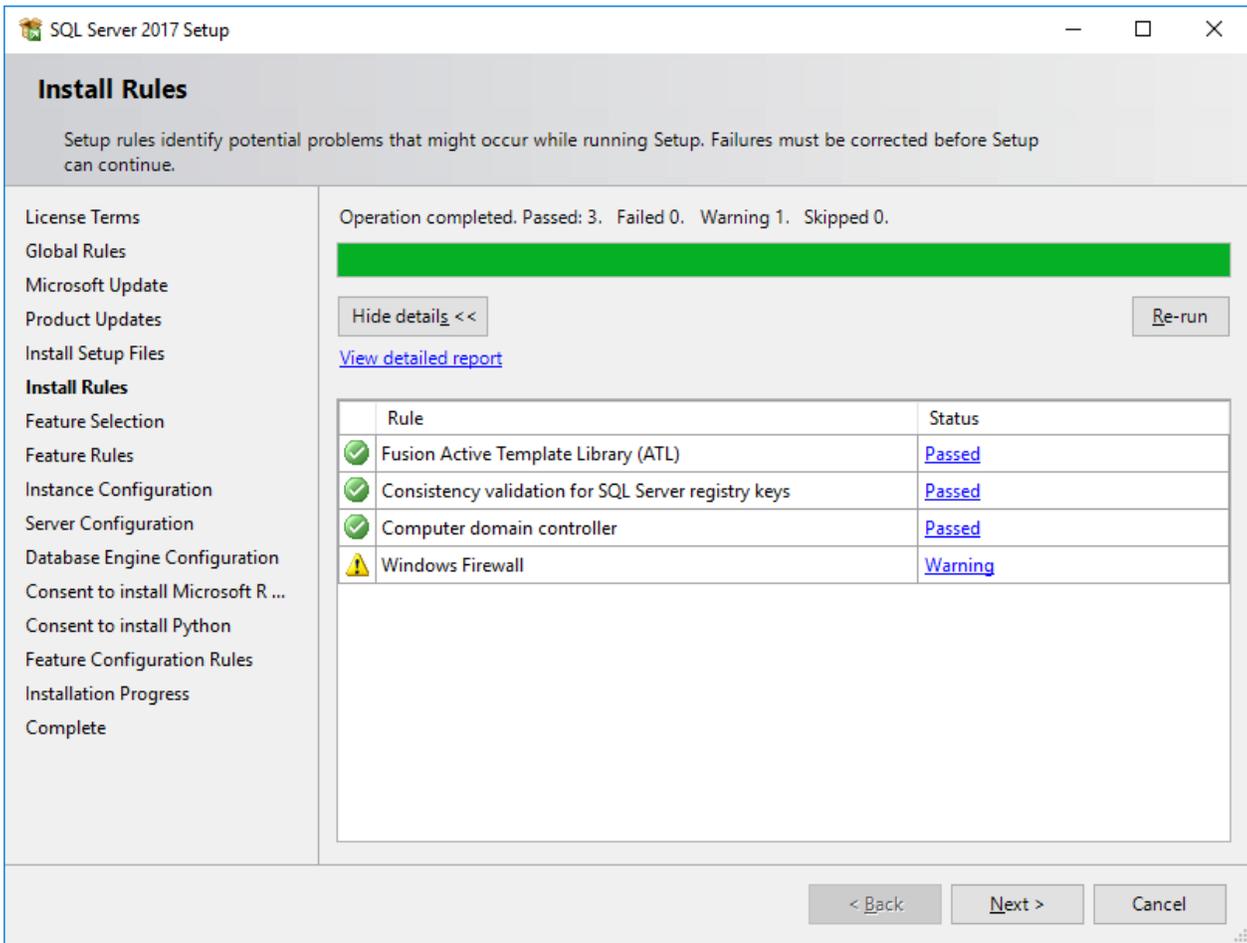
Select "New SQL Server stand-alone installation..." at the top



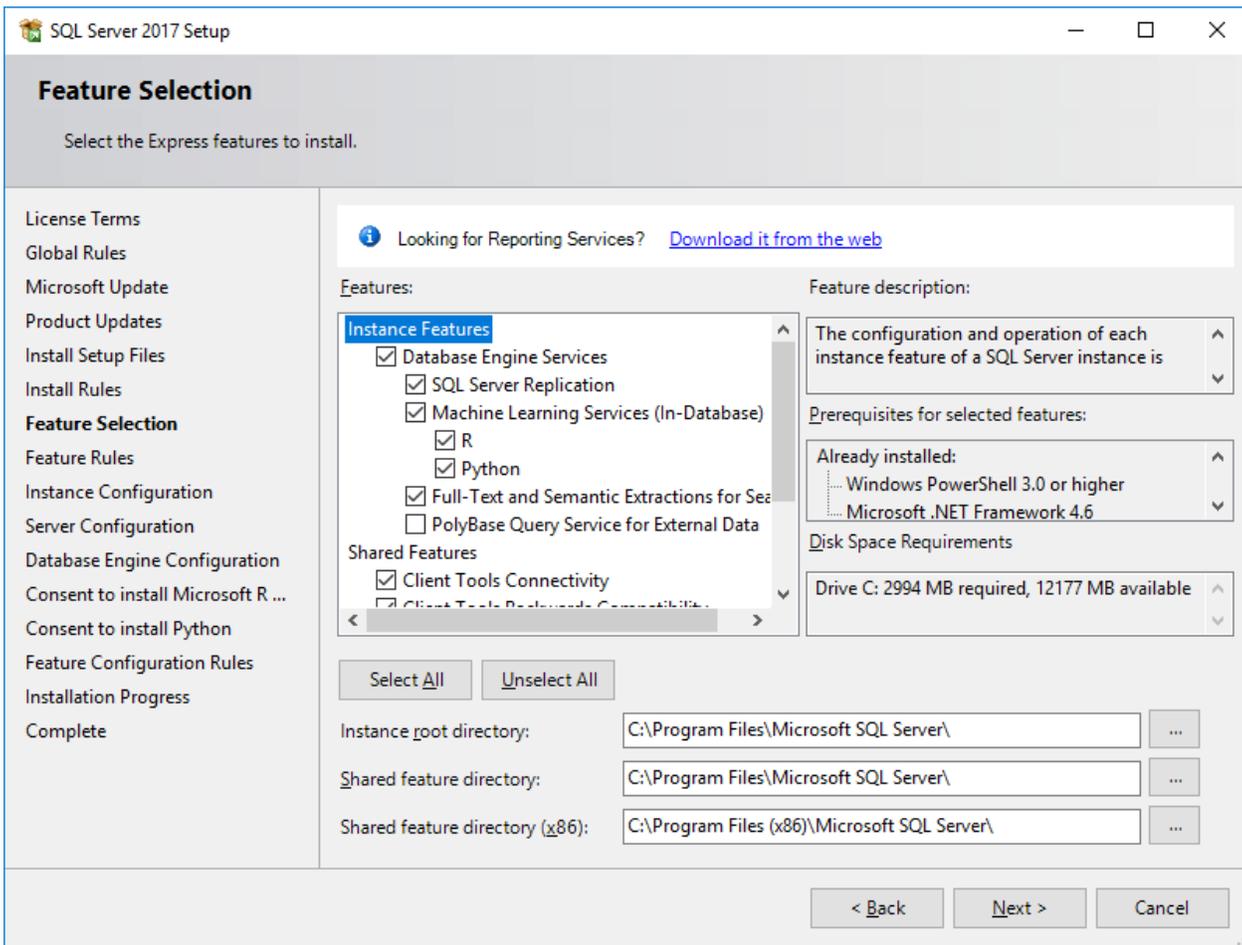
Read and accept the EULA, and click “Next”



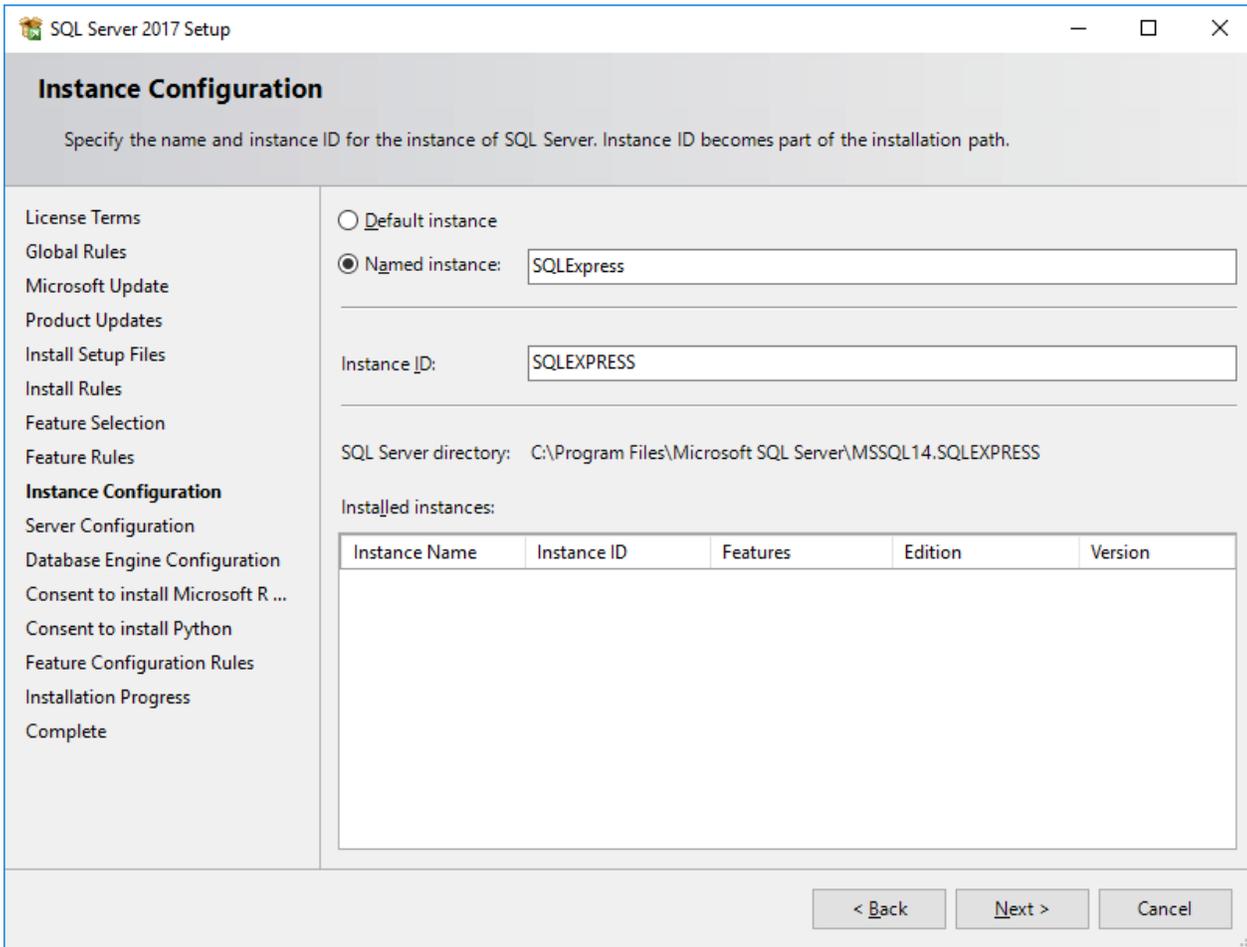
Click “Use Microsoft Update to check for updates” and click “Next”



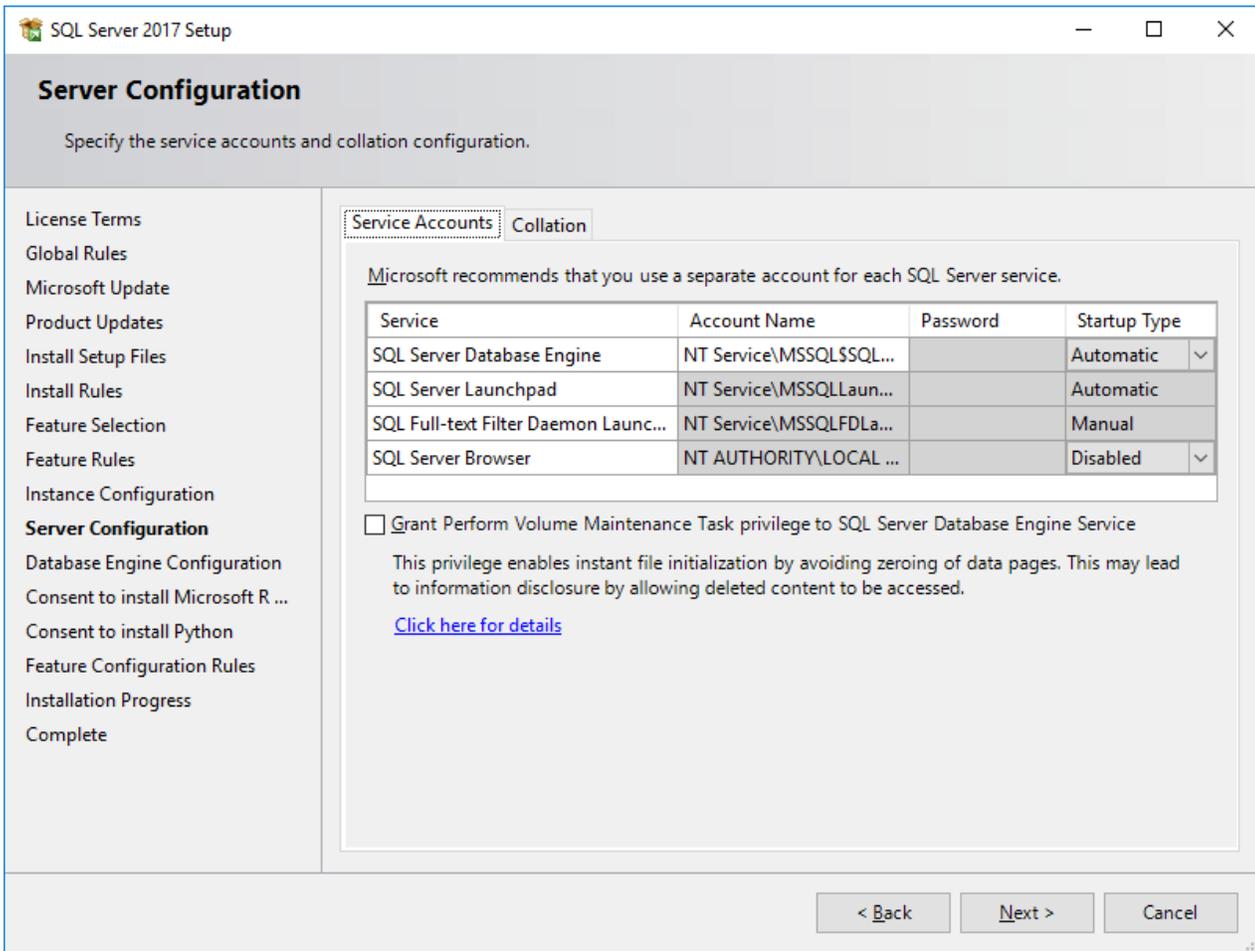
Click Next



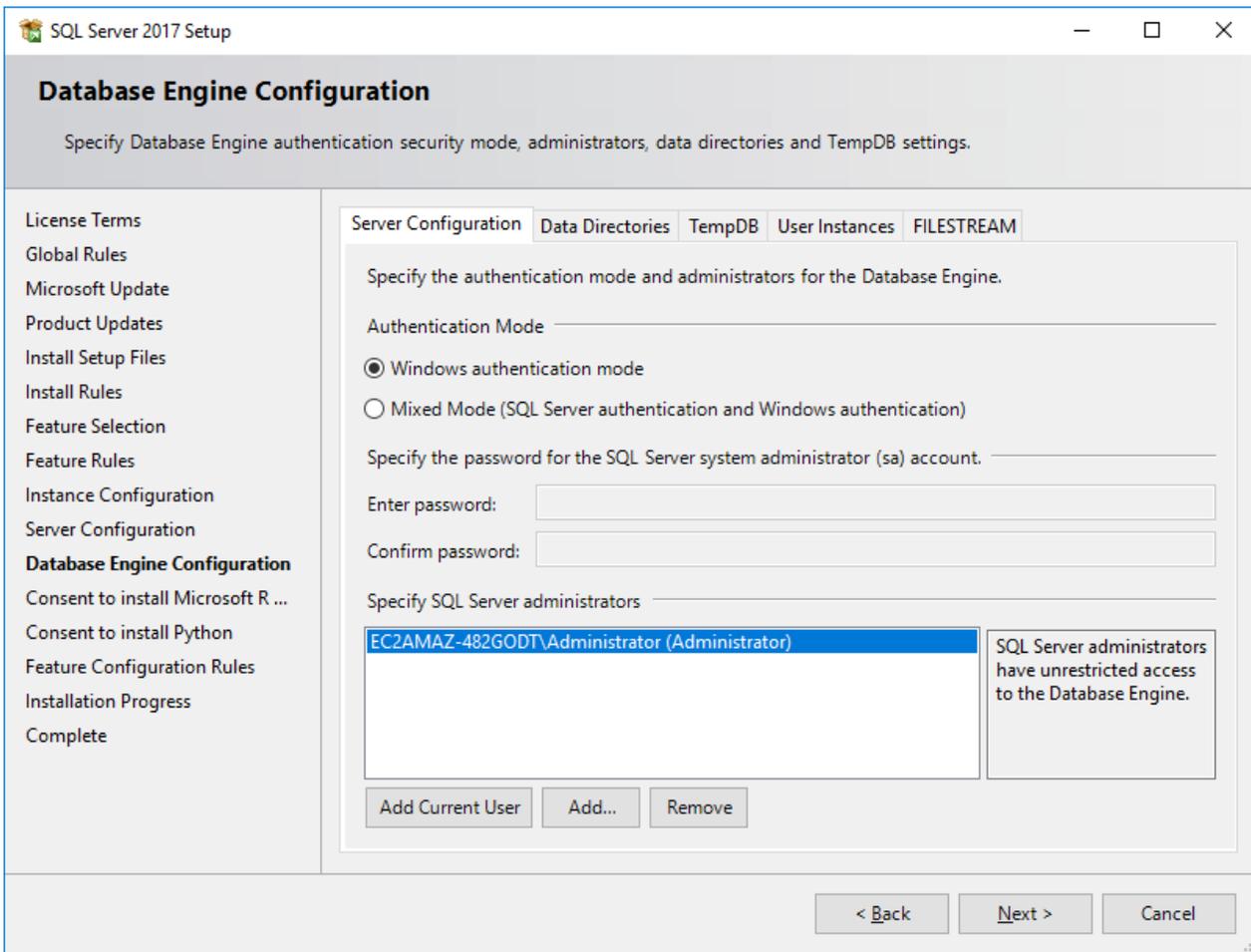
Leave the default install options as is, and click Next



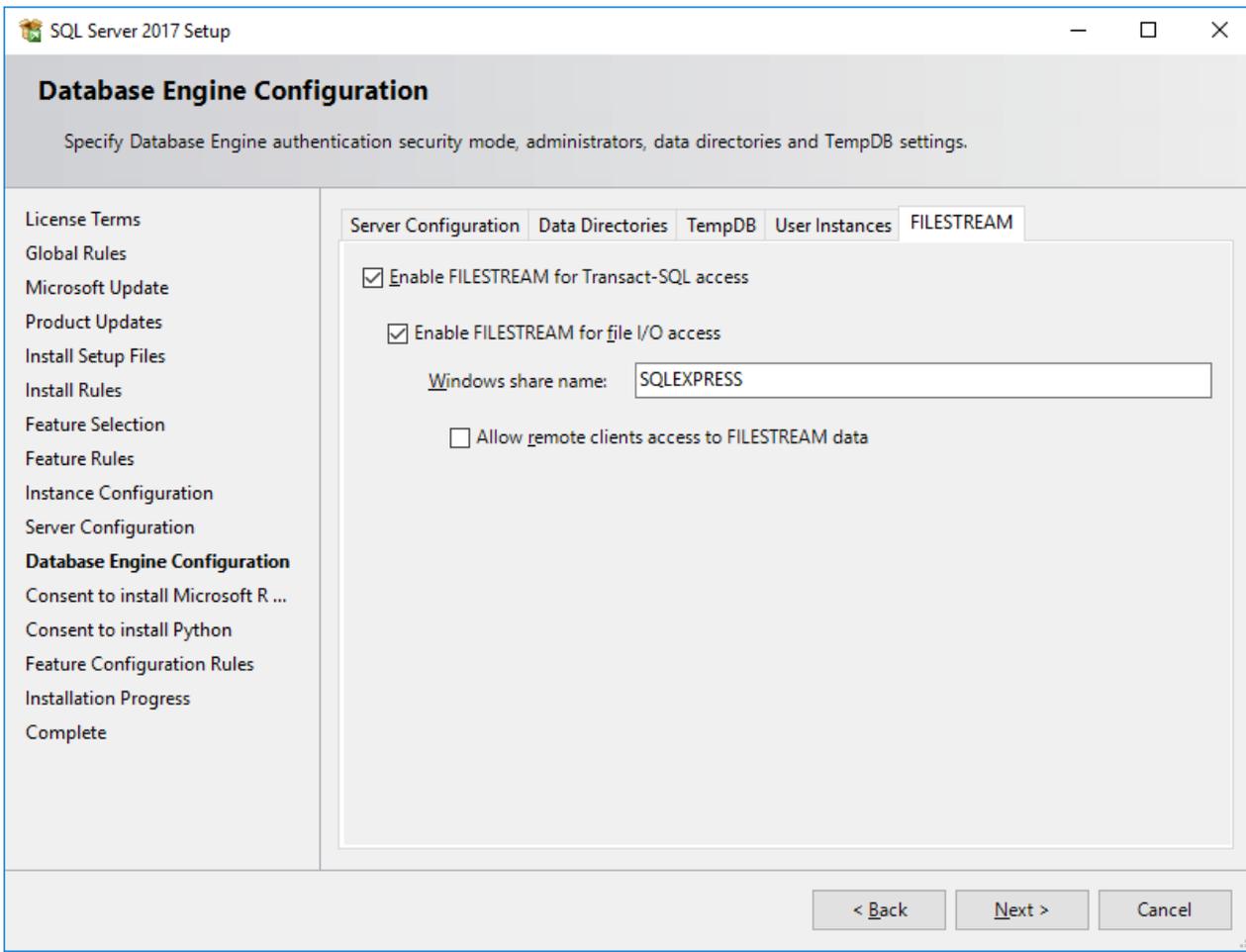
Leave the default options, and click Next



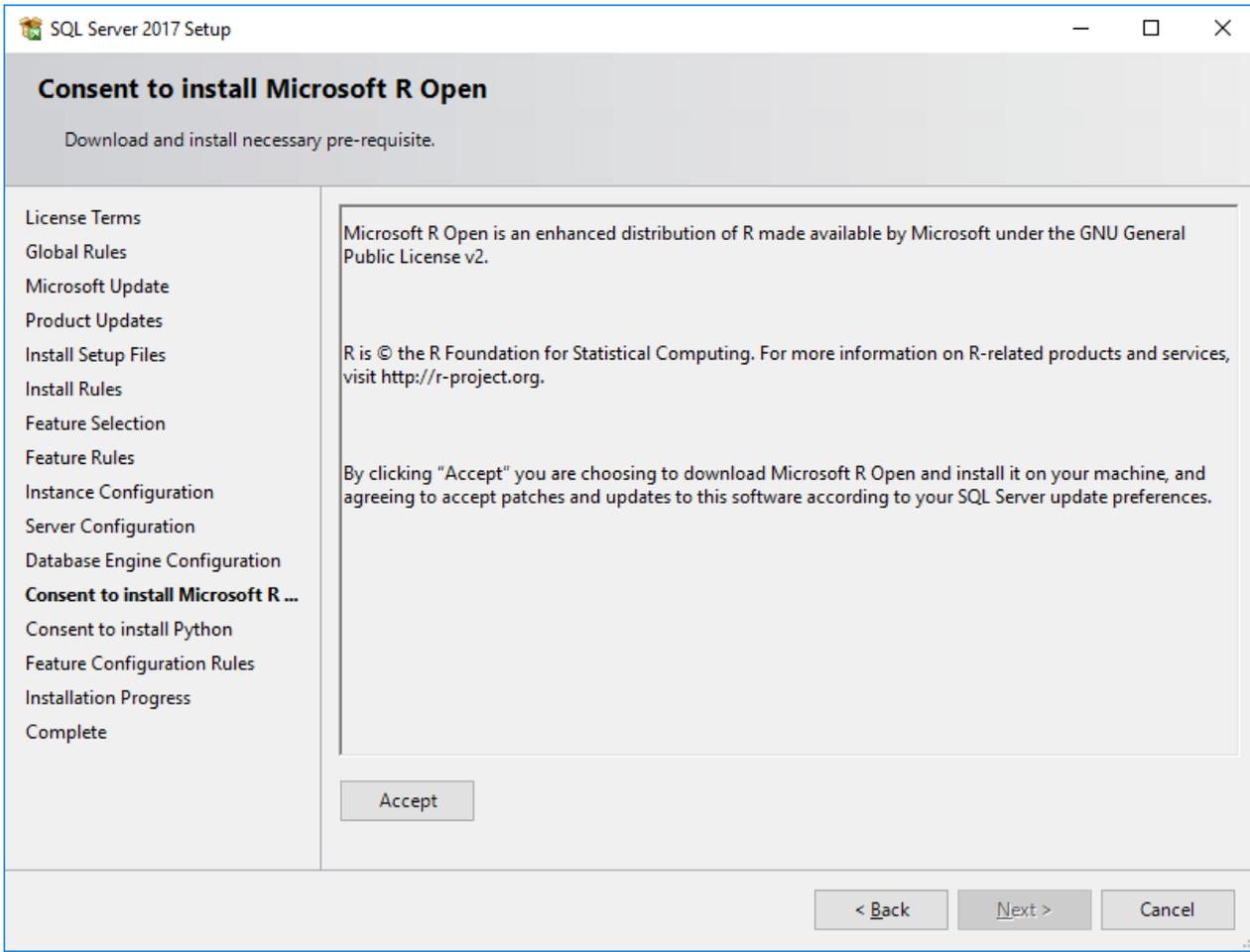
Leave the default options, and click Next



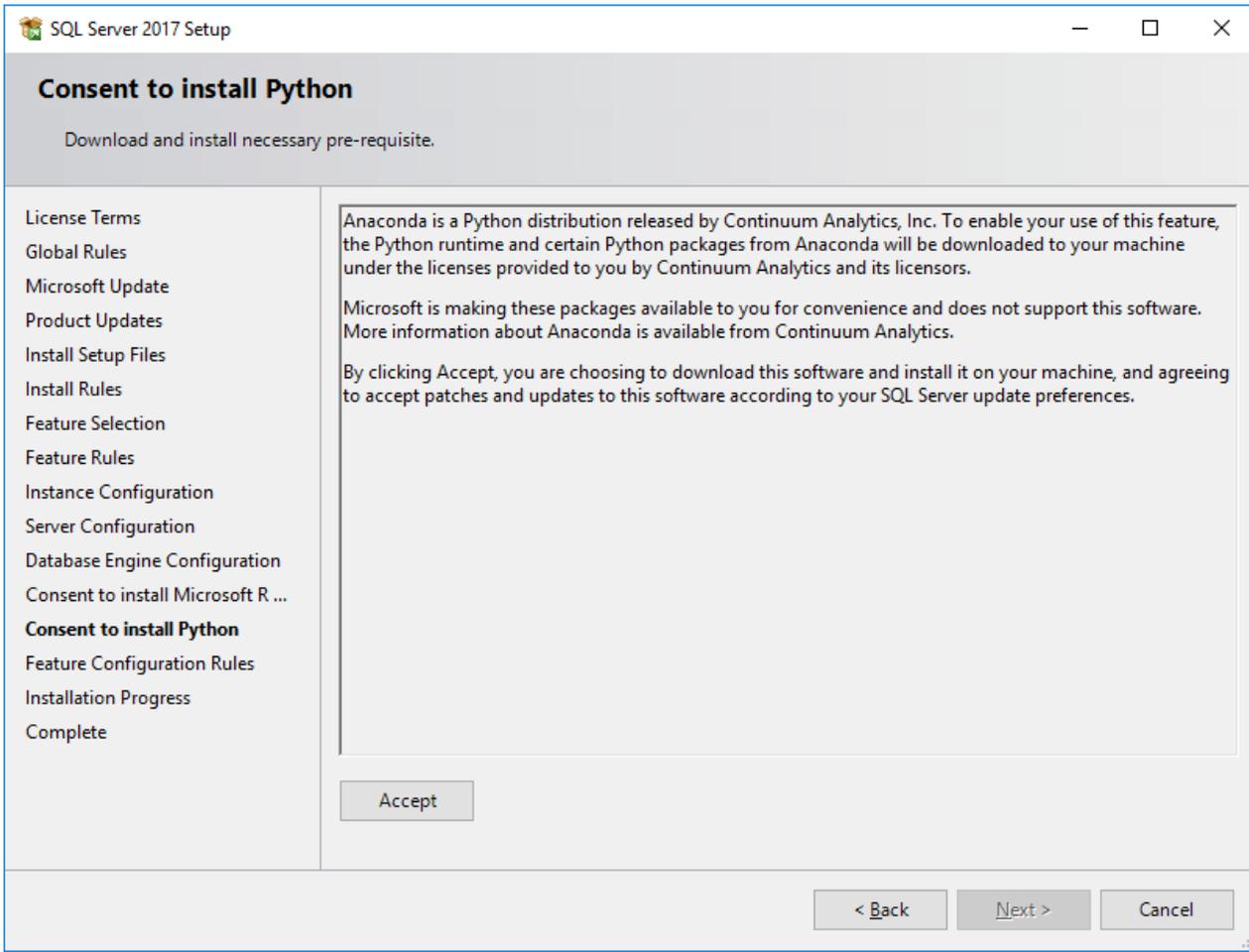
Press the “Add Current User” button to add the current user, if it has not already been done.



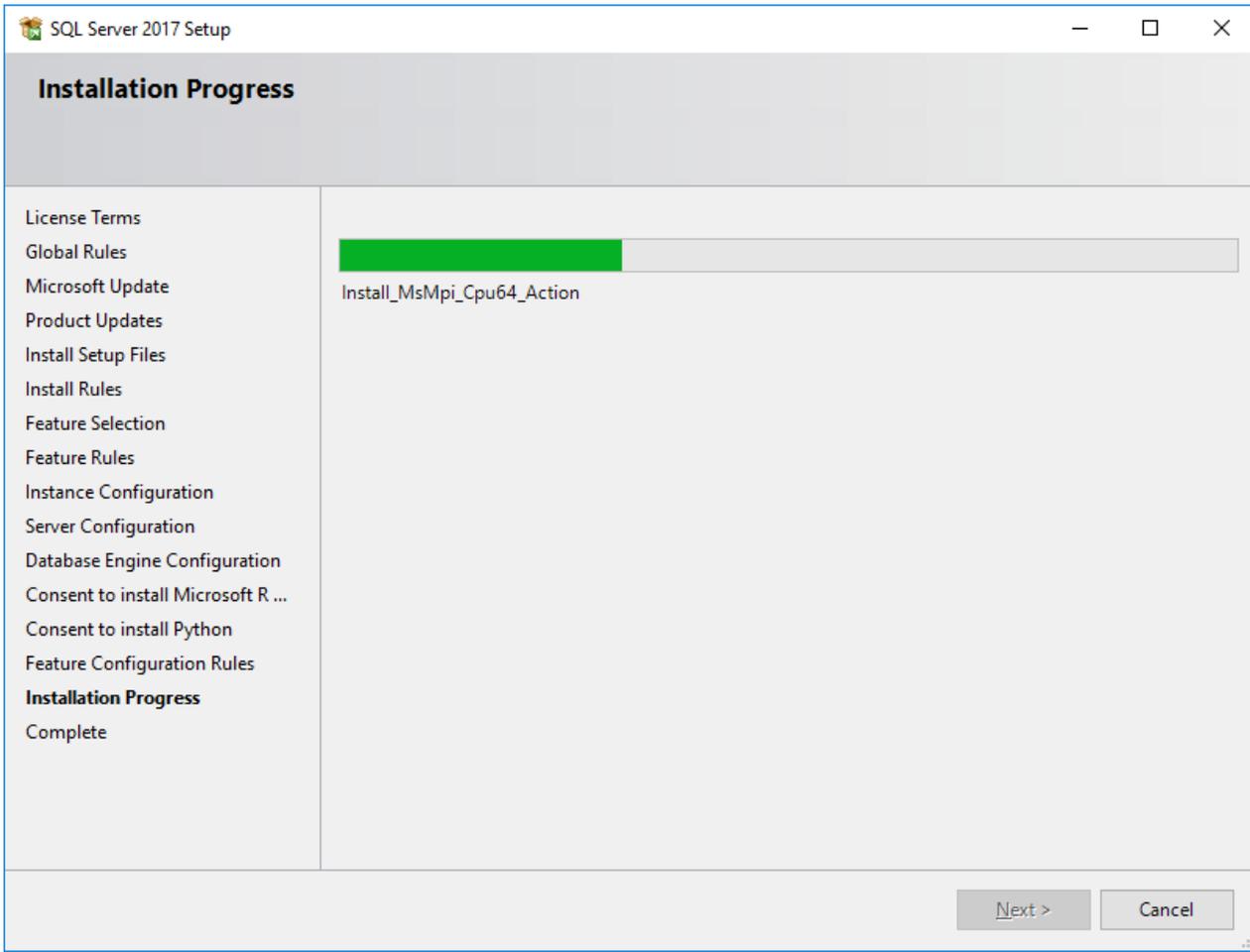
Press the “FILESTREAM” tab, and check the first two checkboxes. Then, press Next



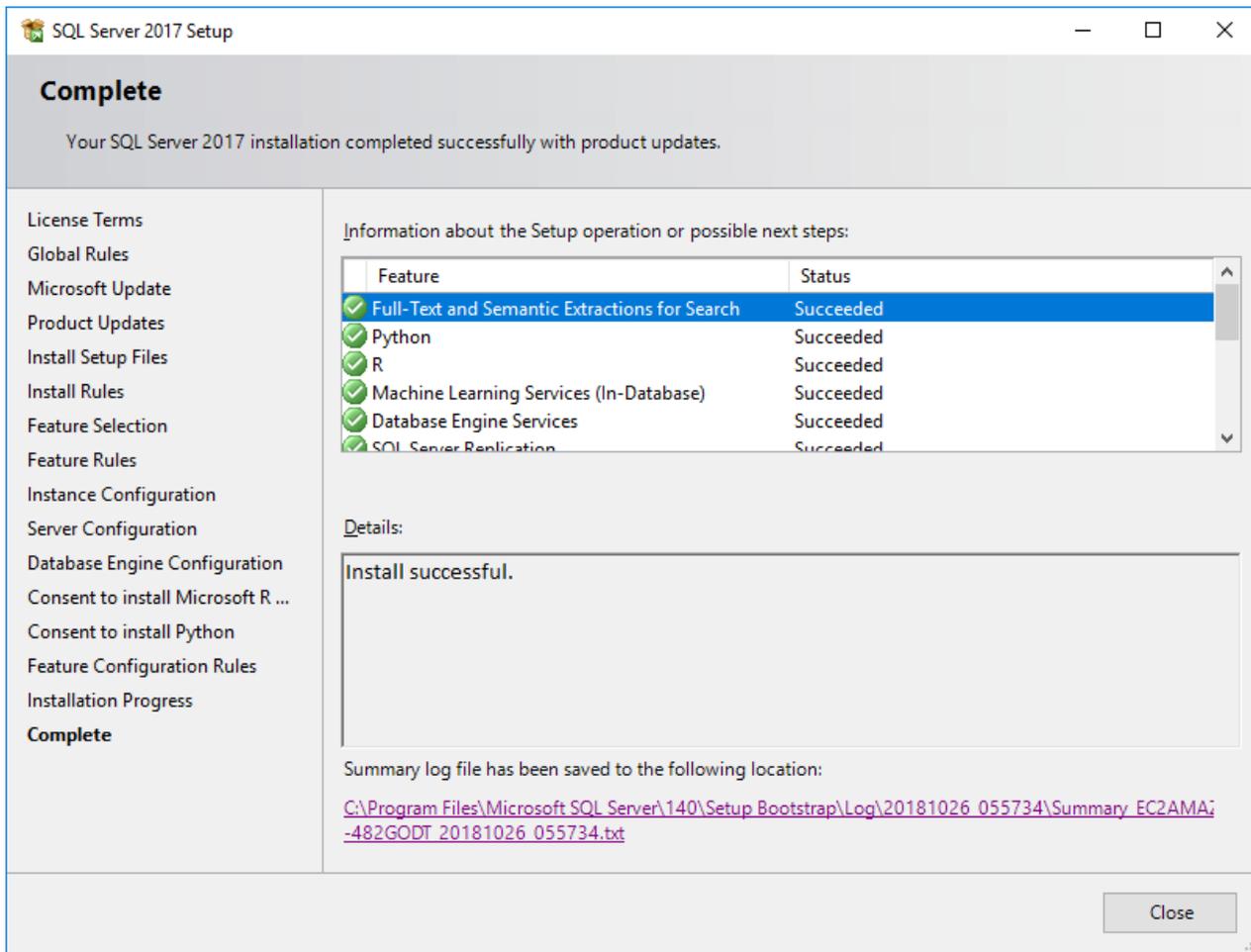
Accept the agreement, and press Next



Accept the agreement, and press Next



Wait for the installation to complete



Press Close

Install SQL Server Management Studio (SSMS)

If you have not already installed SSMS, download and run it from:

<https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms>



RELEASE 17.9

Microsoft SQL Server Management Studio

Welcome. Click "Install" to begin.

By clicking the "Install" button, I acknowledge that I accept the [License Terms](#) and [Privacy Statement](#).

SQL Server Management Studio transmits information about your installation experience, as well as other usage and performance data, to Microsoft to help improve the product. To learn more about data processing and privacy controls, and to turn off the collection of this information after installation, see the [documentation](#).

Install

Close

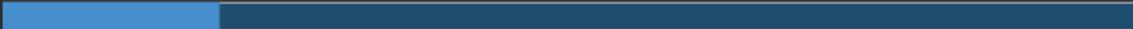
Click "Install"



RELEASE 17.9

Microsoft SQL Server Management Studio

Loading packages. Please wait...



Cancel



RELEASE 17.9

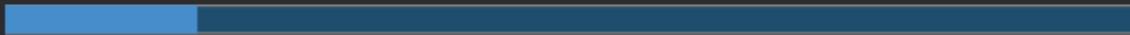
Microsoft SQL Server Management Studio

Package Progress



Microsoft SQL Server 2017 Policies

Overall Progress

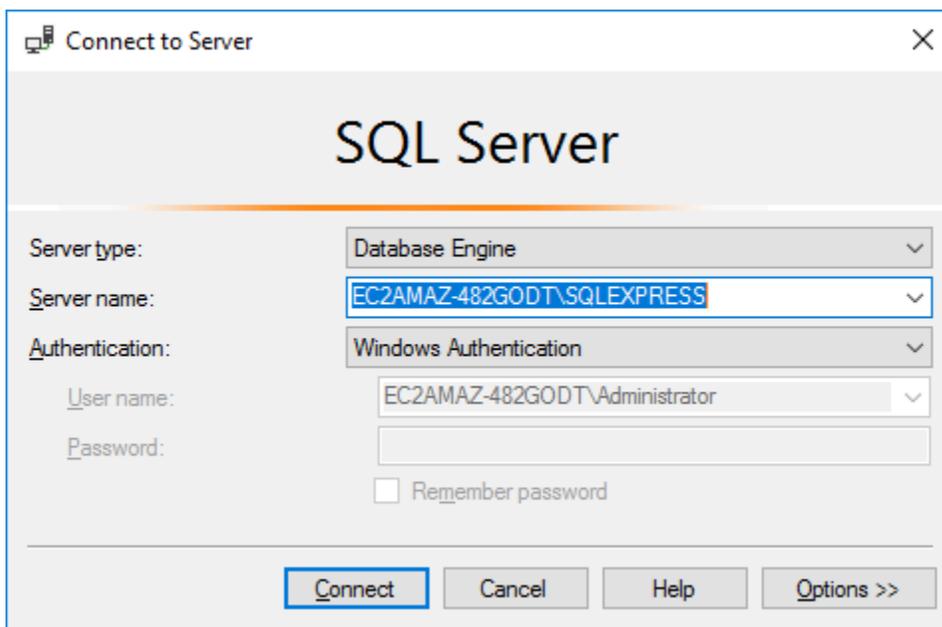
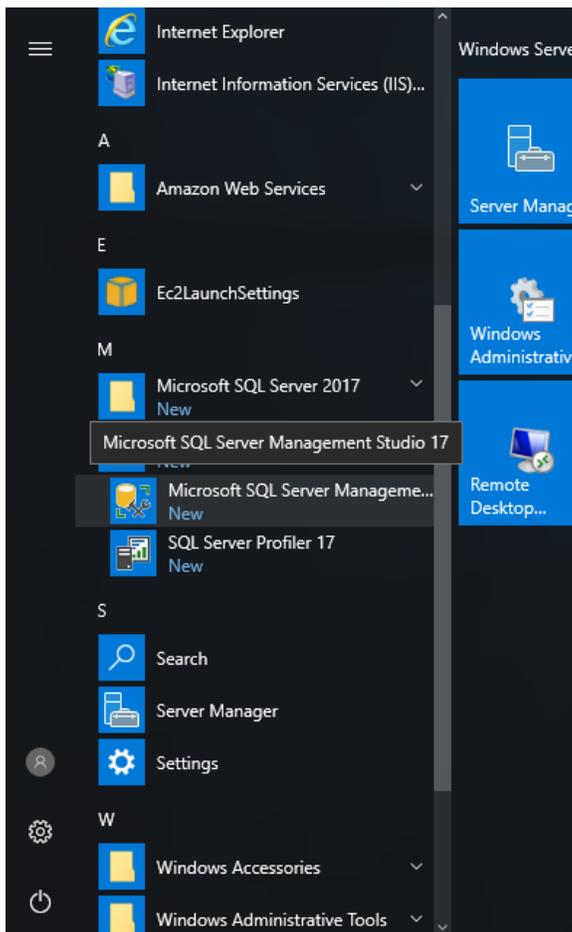


Cancel

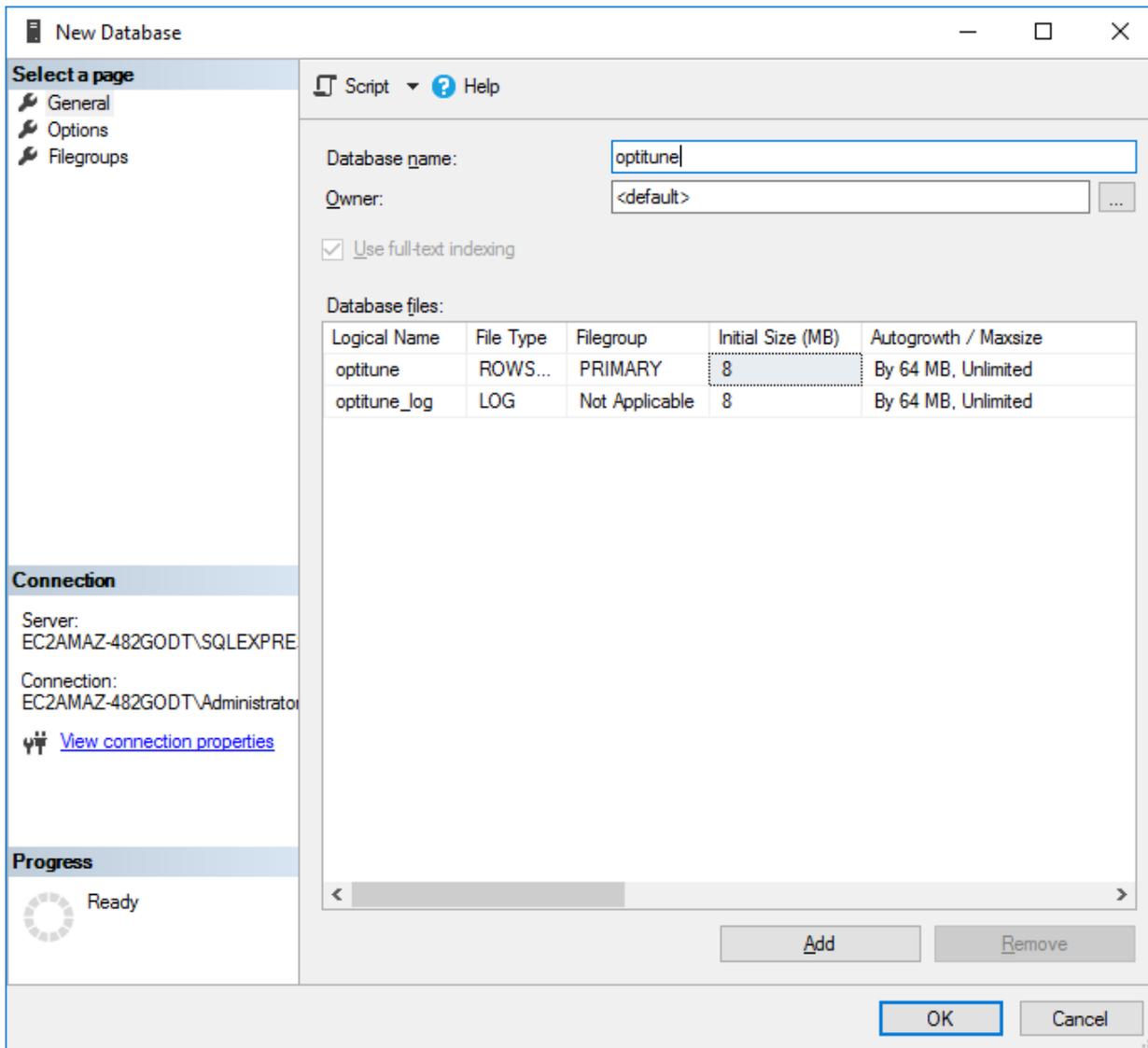
Wait for the install to finish

Opti Tune Database Setup

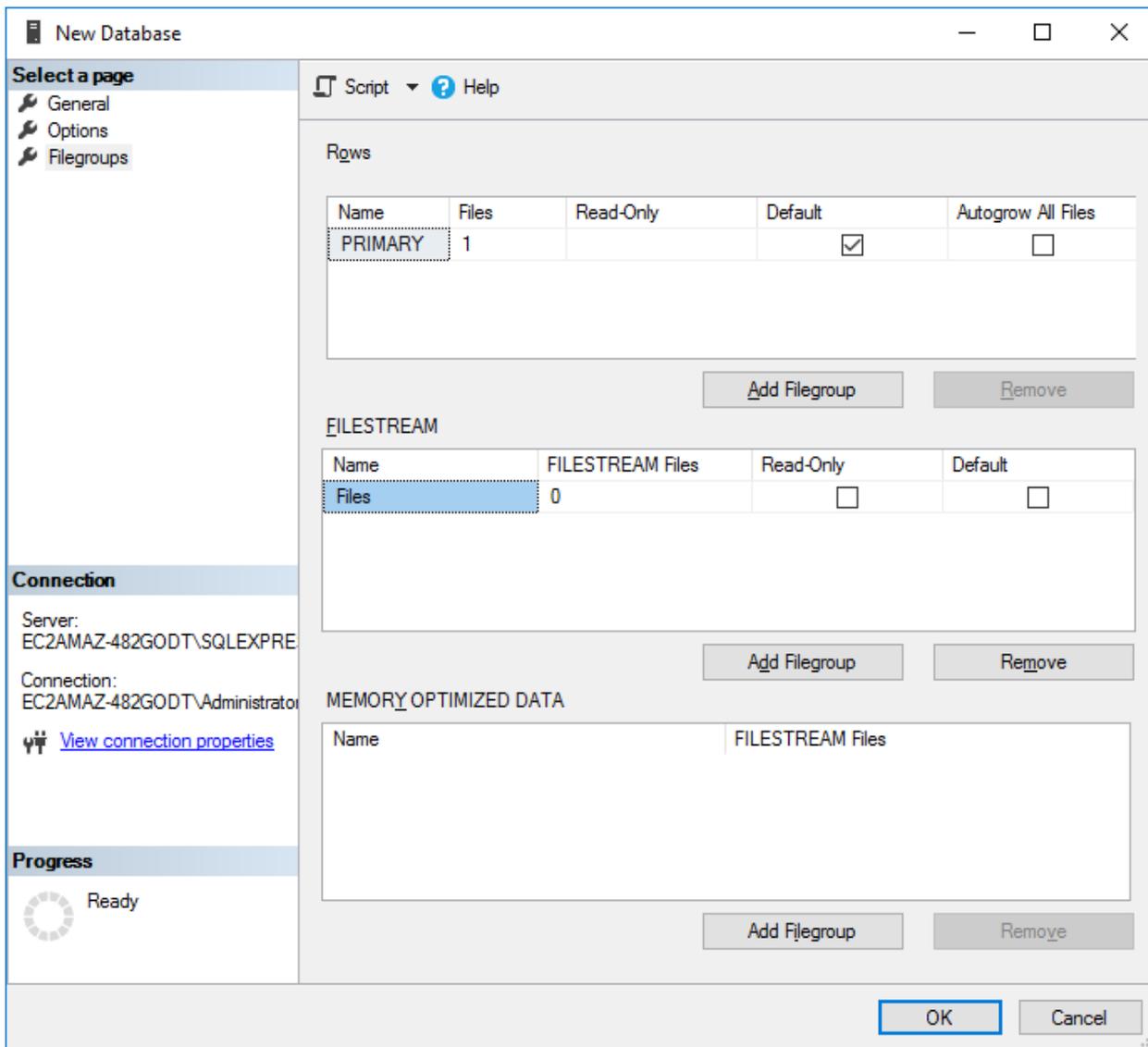
Start SSMS



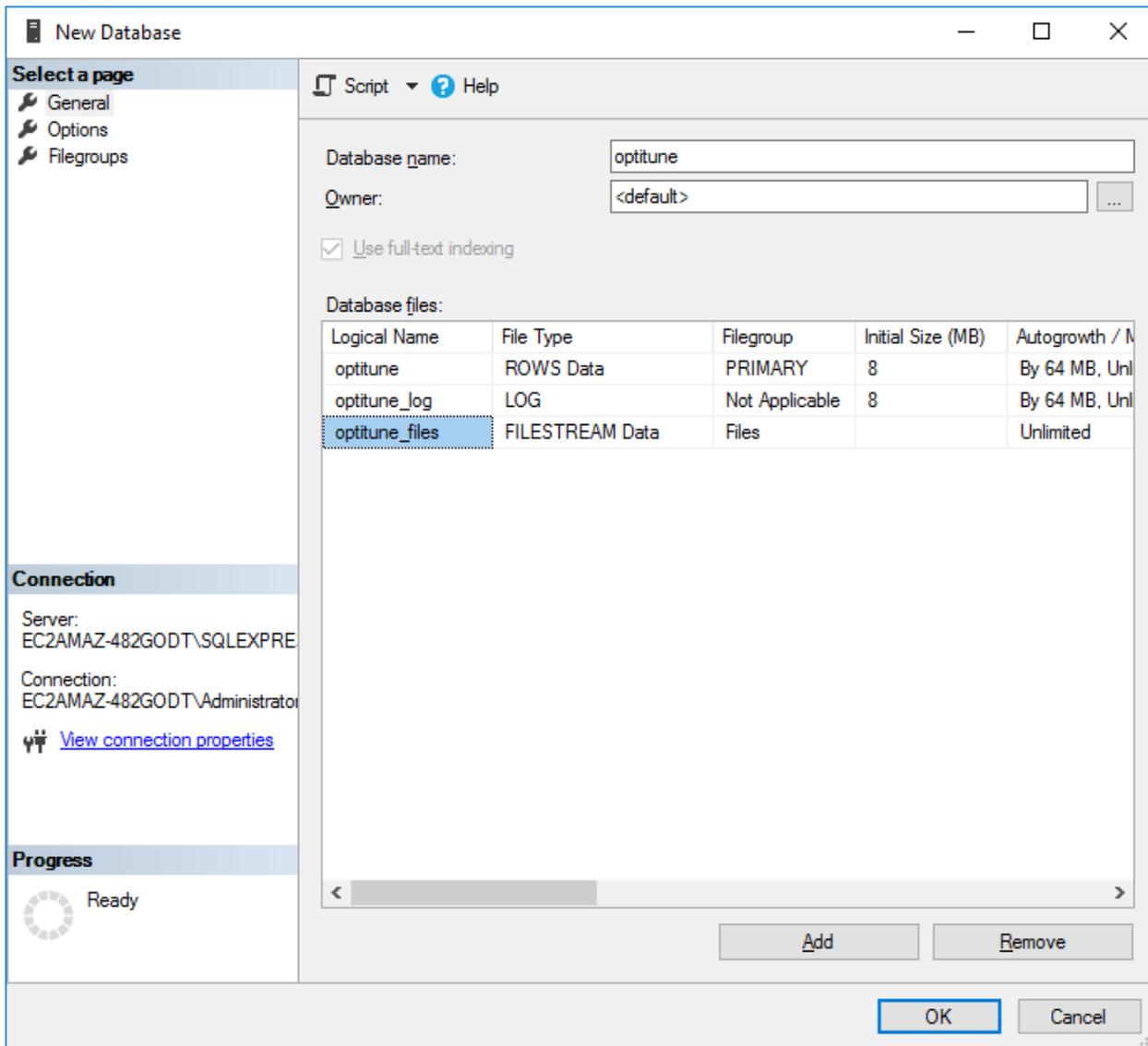
Hit "Connect"



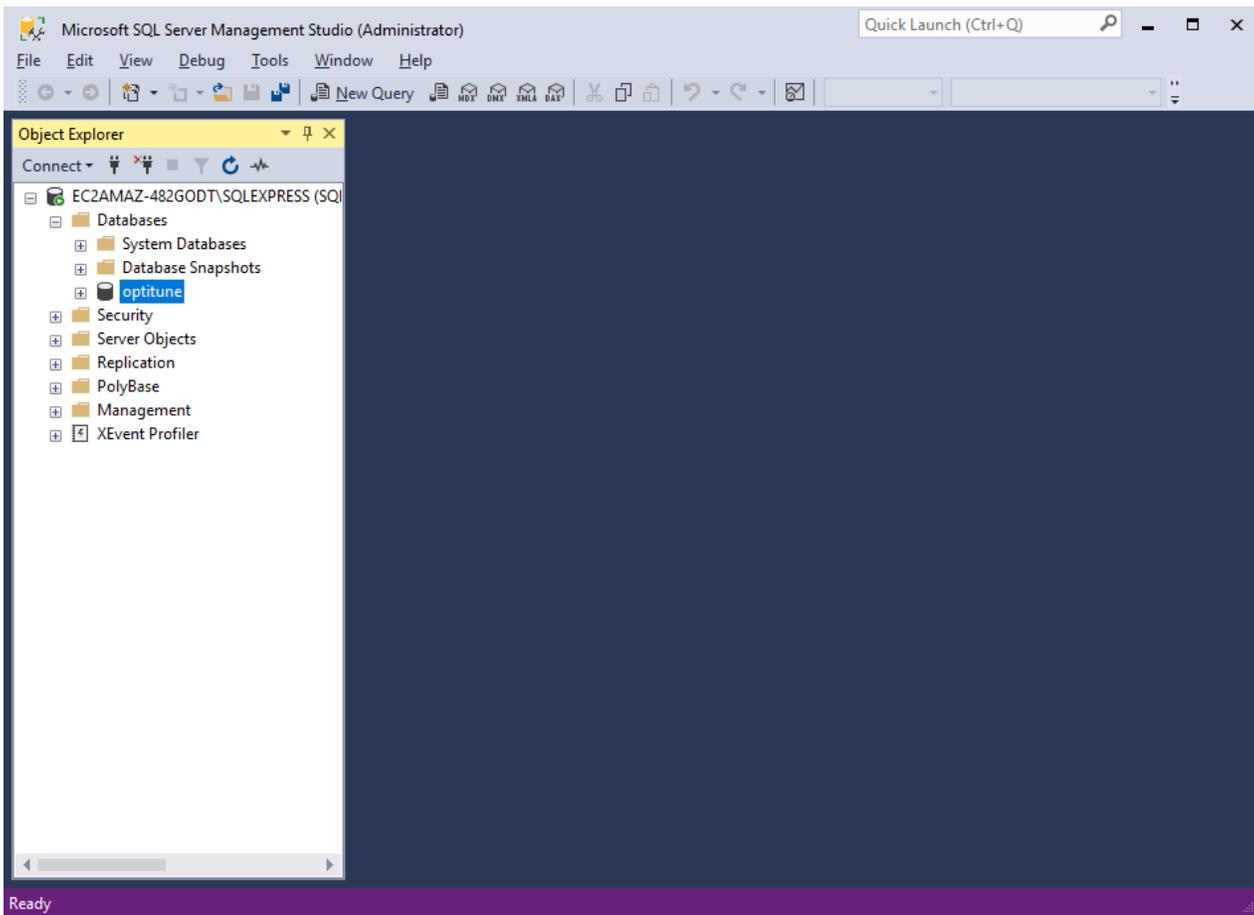
Enter the name “optitune”, and click on the “Filegroups” icon at the top left.



Press the “Add Filegroup” button, and under the name type “Files”. The screen should match what is shown above.

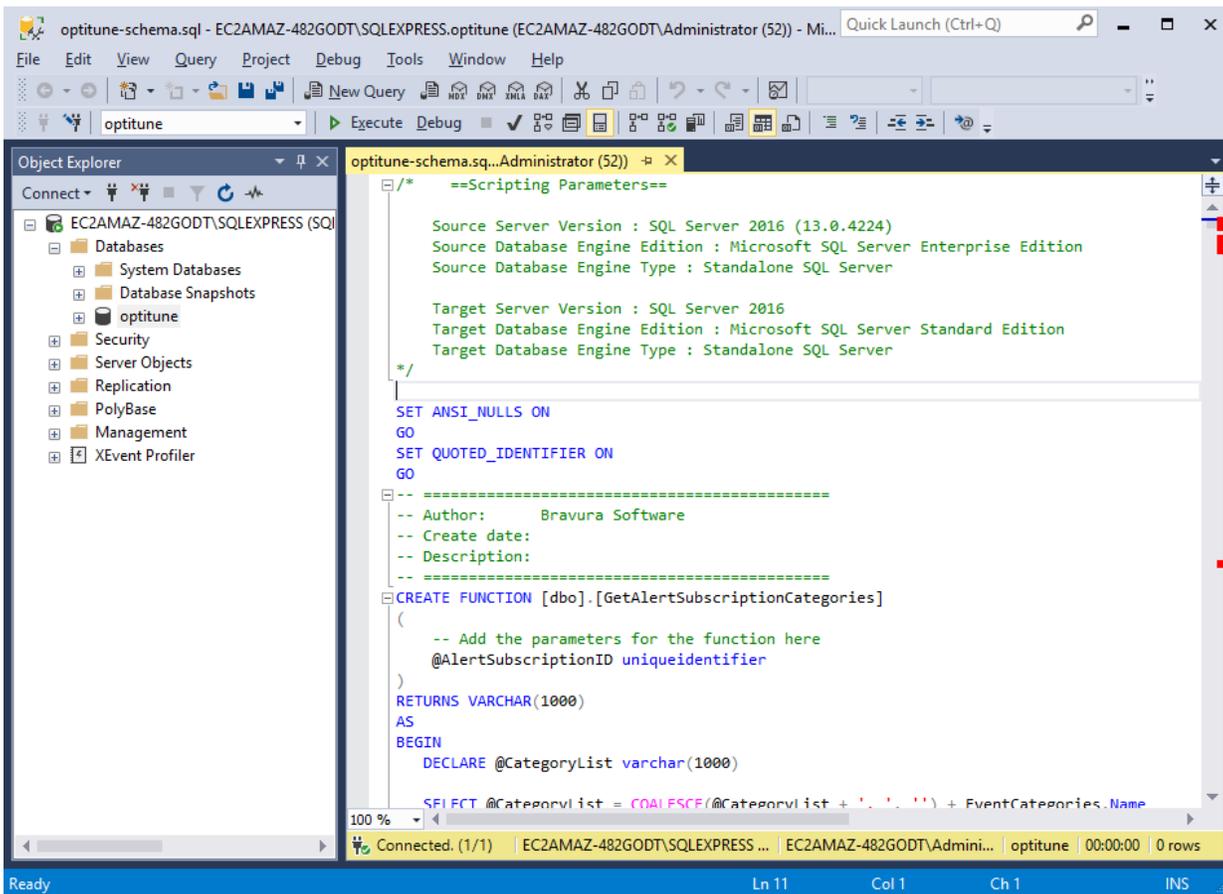


Go back to the General page, and click “Add” at the bottom. Enter “optitune_files” for the name, and select “FILESTREAM Data” for the type. Finally, press OK to create blank database.

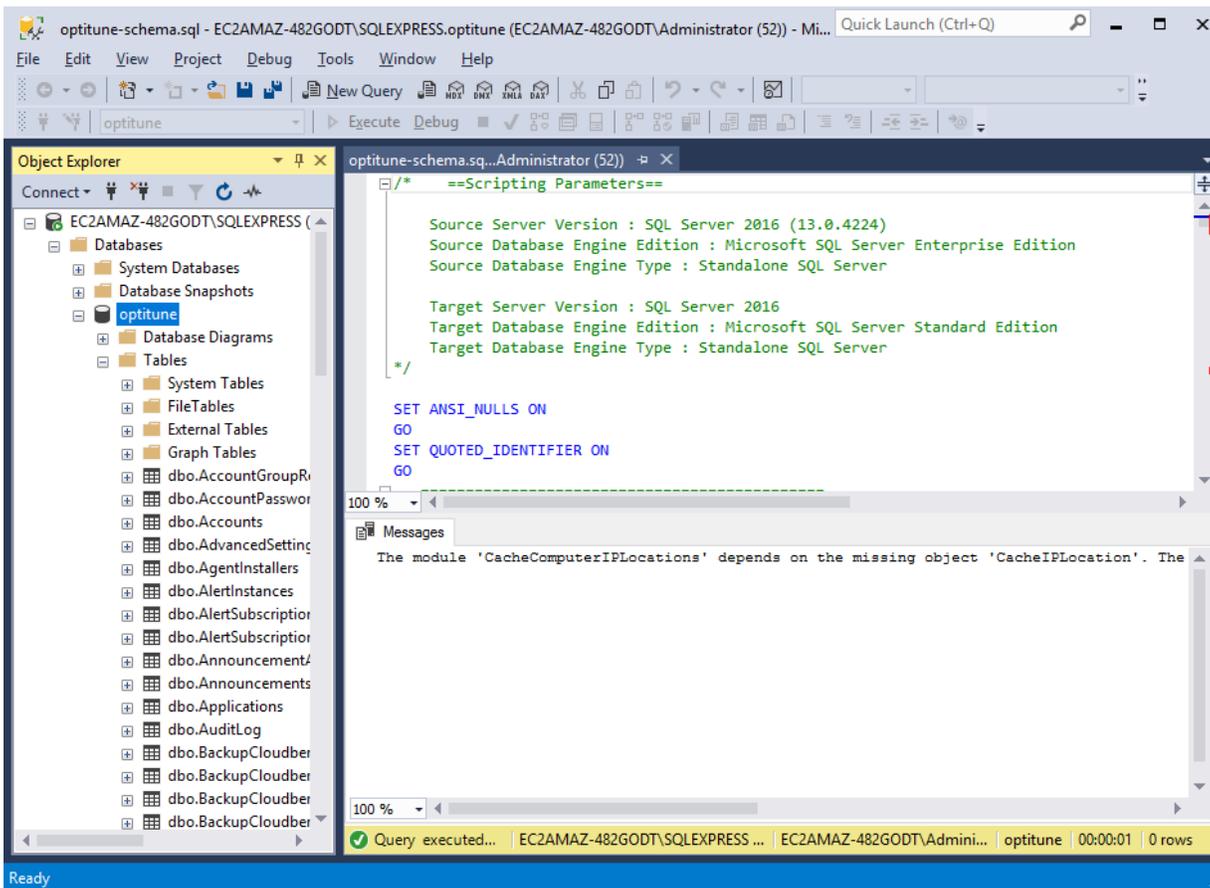


Select the “optitune” database on the left

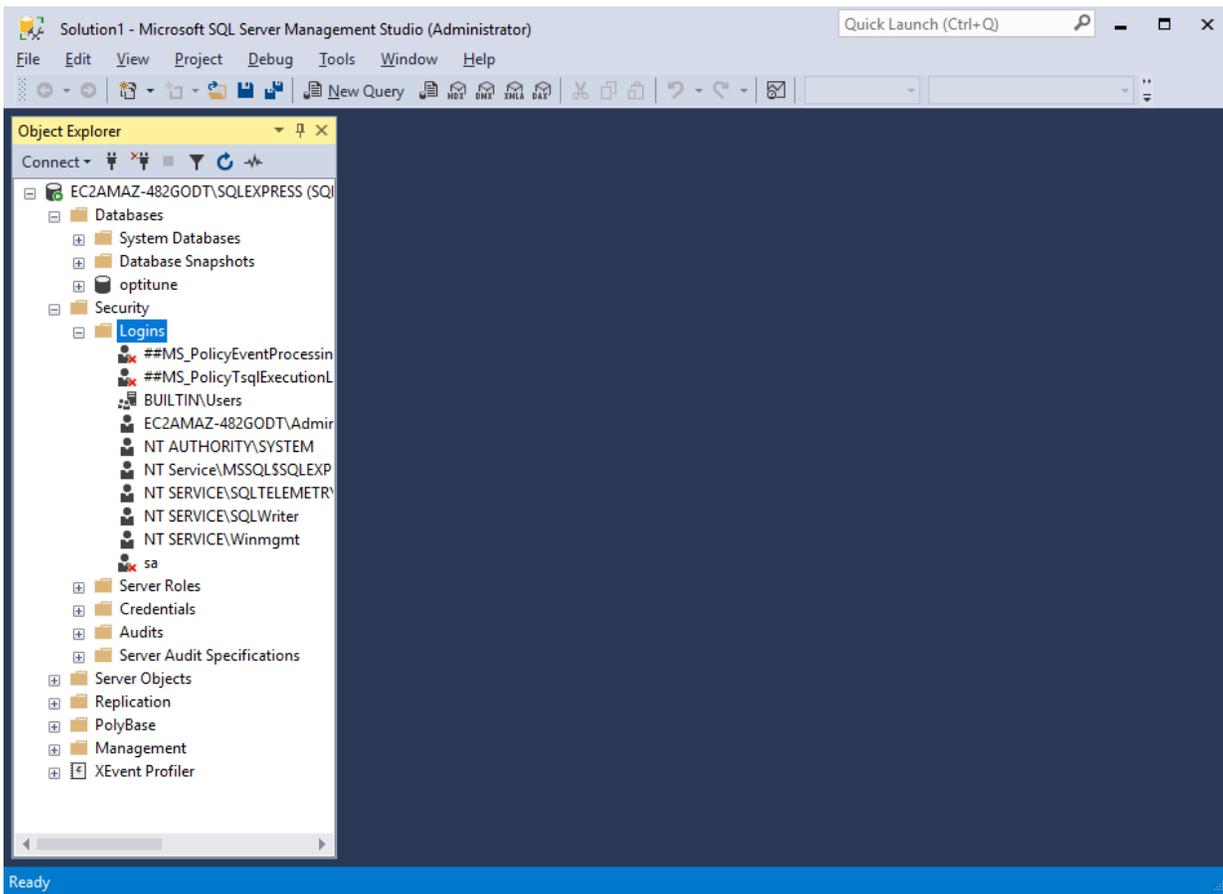
Press the “open” icon, and select the schema script that is included in the OptiTune install package, which would typically be: c:\optitune\optitune-schema.sql



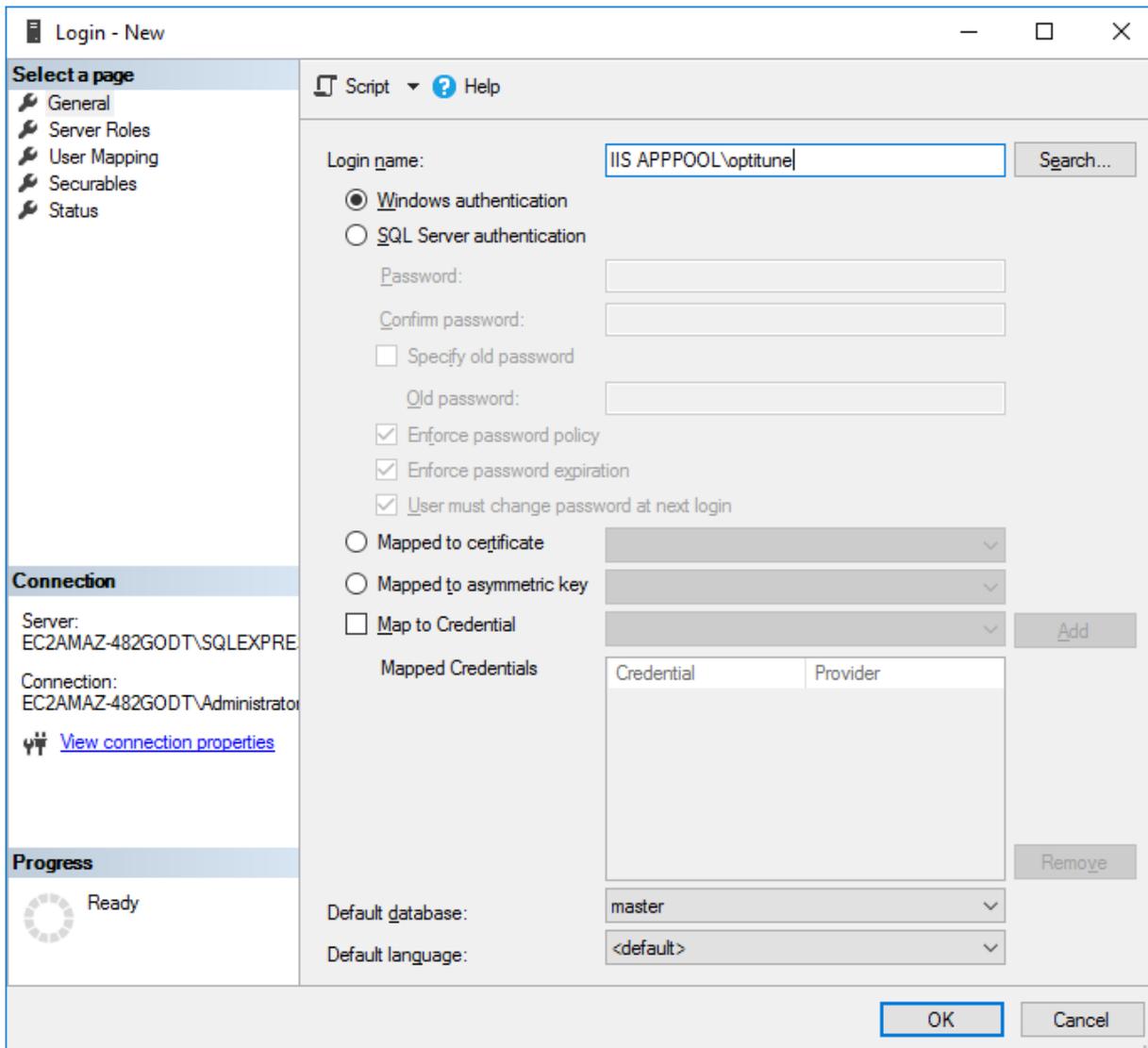
Important – make sure the “optitune” database is selected in the drop down in the top left (to the left of the “execute” button), and then click on “Execute” to create the optitune schema.



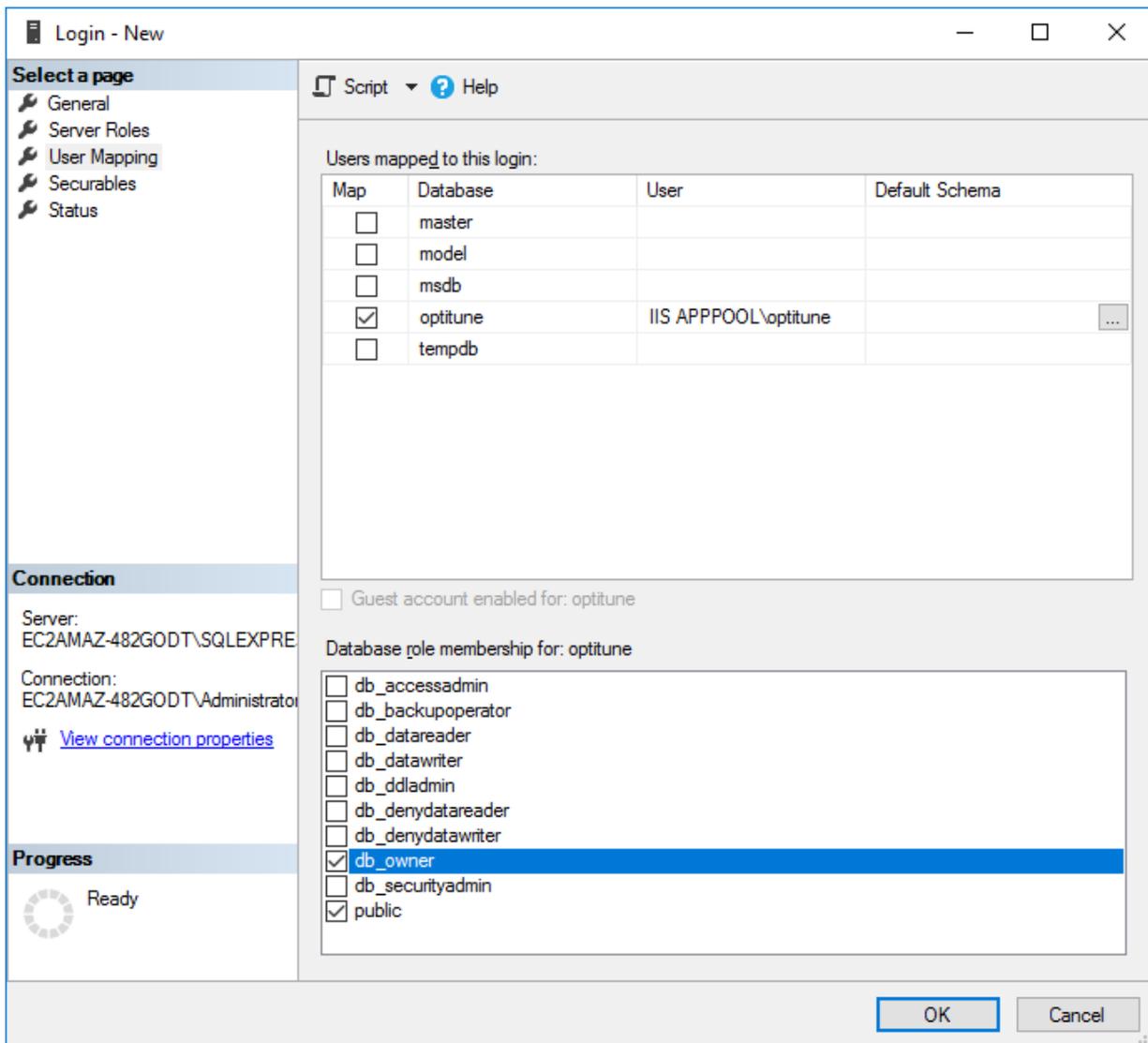
Verify that you can expand the “Tables” folder of the database, and that you see some new tables that were created by the script.



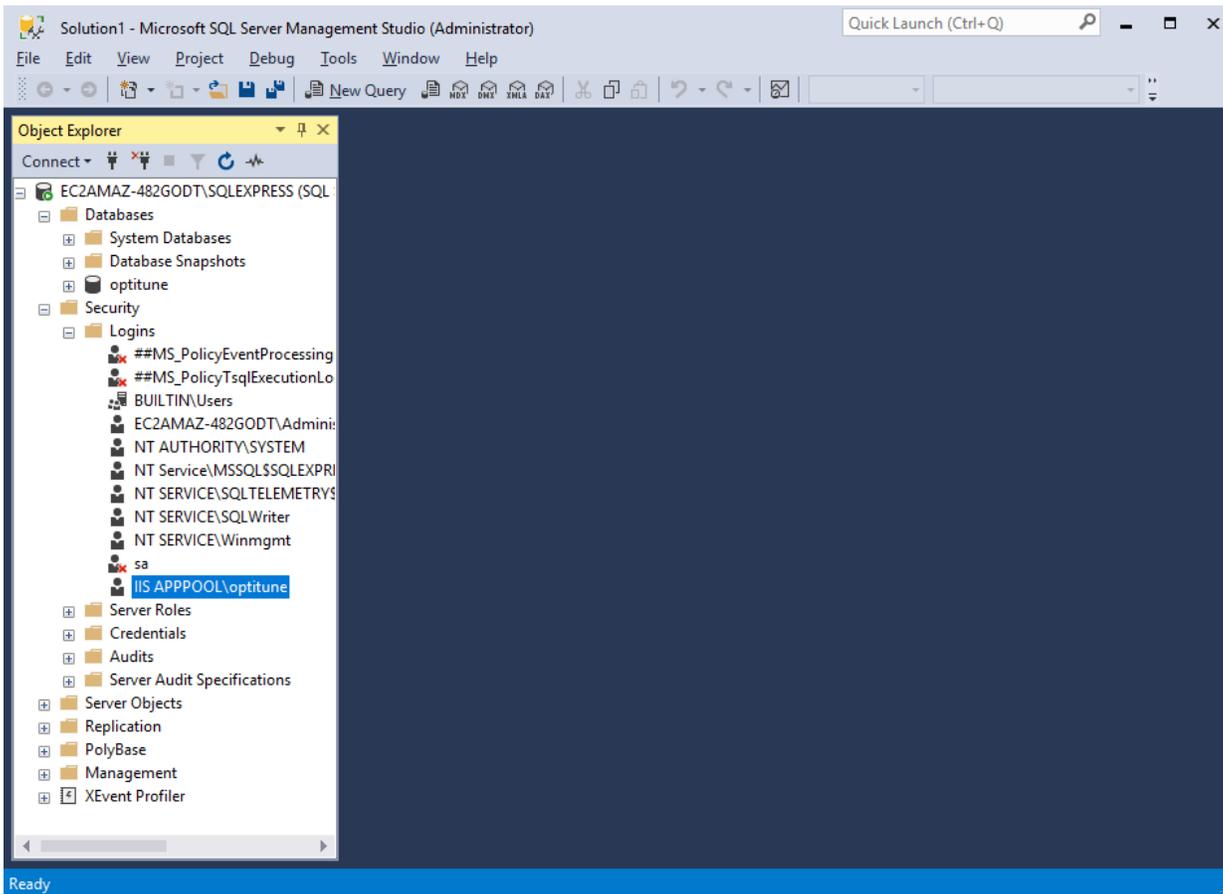
Next, right click on the “Logins” folder under “Security”, and select “New Login”



Type in "IIS APPPOOL\optitune" (without quotes) in the Login Name text box.



Click on “User Mapping” on the left, and then click on the “optitune” checkbox in the top right section of the screen. Click on “db_owner” as well. Finally, press OK to add the IIS App pool user to SQL server, mapped to the OptiTune database.



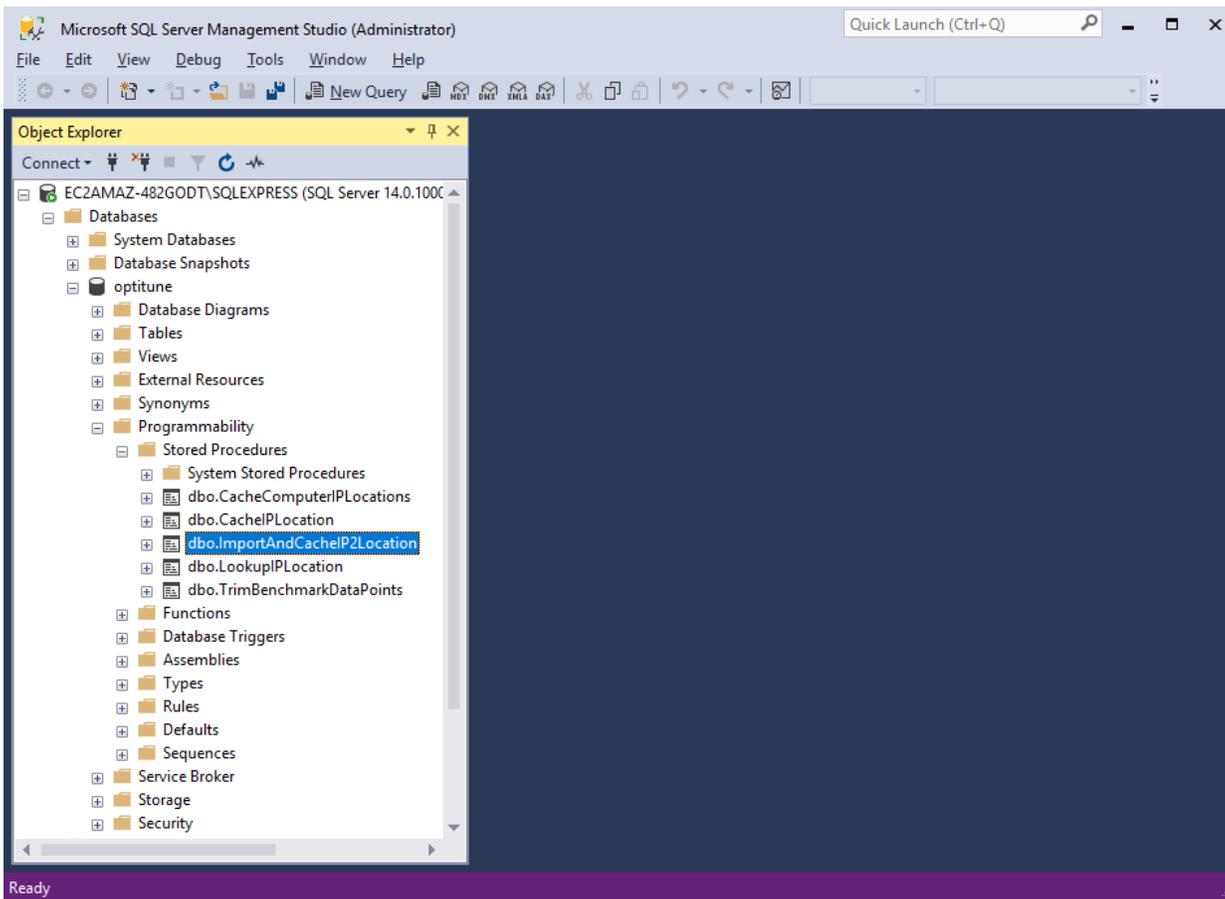
You should then see the new IIS App Pool user added to SQL server.

Geo Location Setup

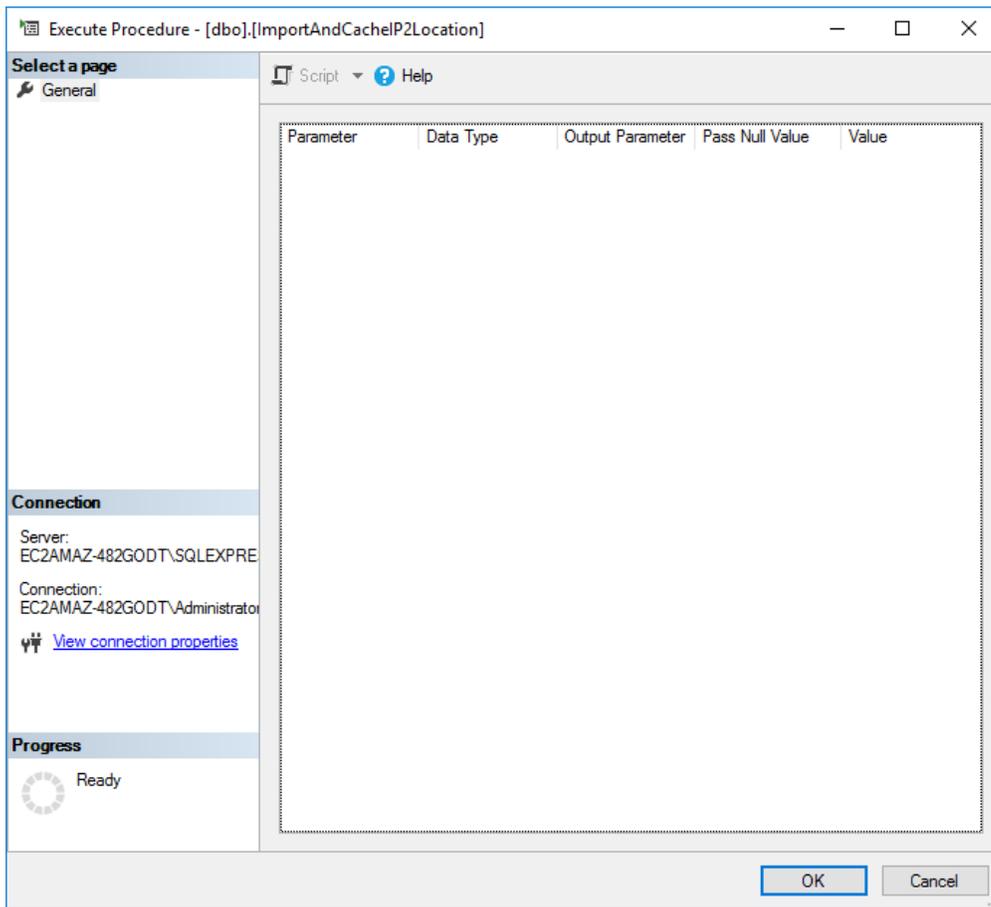
OptiTune includes the ability to perform basic geo location of computers based on IP address.

You will need to sign up for an account at <https://lite.ip2location.com/> and download the DB11 CSV database to c:\optitune\ip2location\IP2LOCATION-LITE-DB11.CSV before starting the import. You can repeat this process every few months, as this geo location database will be updated periodically.

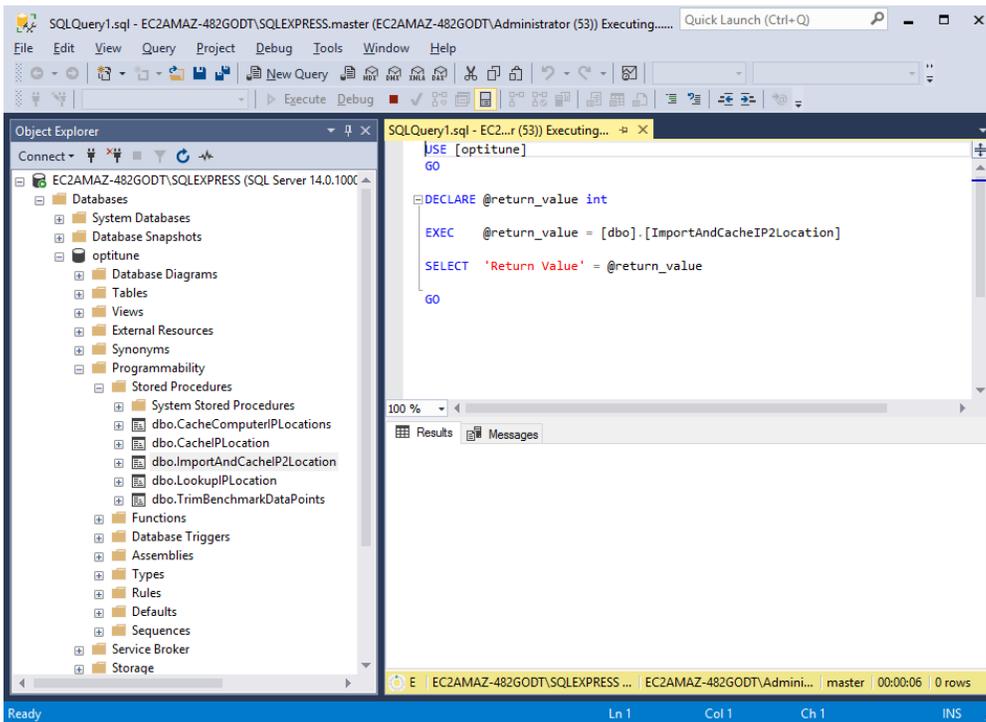
To start the import, open SSMS and navigate to the OptiTune database.



Go to Databases > optitune > Programmability > Stored Procedures, and click on dbo.ImportAndCacheIP2Location.



Right click on `dbo.ImportAndCacheIP2Location`, and select “Execute stored procedure...” Press OK to begin importing location data from `c:\optitune\ip2location`. If you are not using `C:\optitune`, you will need to modify the stored procedure with the correct path before executing the stored procedure.



It will take several minutes to complete.

Web.Config Customization

Finally, once you have setup the OptiTune Database and OptiTune Website, you will need to further edit the web.config file located at C:\optitune\web\Web.config

Here is an example web.config, note that it will vary depending on your version of the OptiTune management server. The areas highlighted in yellow must be examined and customized as needed. You can also search for ****customize**** to find settings that can be customized.

```
<?xml version="1.0" encoding="UTF-8"?>
<!--
  For more information on how to configure your ASP.NET application, please visit
  http://go.microsoft.com/fwlink/?LinkId=169433
-->
<configuration>
  <!-- Define the custom configuration sections in the <configSections> element... -->
  <configSections>
    <sectionGroup name="OptiTune">
      <section name="RelayServers"
type="Optitune.RemoteConnect.RelayServerConfigSection" />
    </sectionGroup>
  </configSections>
  <appSettings>
    <!-- Optitune Settings -->
    <add key="DebugMode" value="2" />
    <add key="DebugDir" value="C:\Optitune\Logs" /><!-- **customize** writeable
location to store logs -->
    <add key="LogFile" value="C:\Optitune\Logs\OptituneSystem.log" /> <!--
**customize** name of OptiTune system log file -->
    <add key="LogCategories" value="31" />
  </appSettings>
</configuration>
```

```

        <!-- Set to "1" to have secure pages check for https protocol initially,
otherwise "0" -->
        <add key="checkhttps" value="1" />

        <!-- The interval in minutes that OptiTune should check for periodic events -->
        <add key="PeriodicEventsInterval" value="15" />

        <!-- Chart Control Settings -->
        <add key="ChartImageHandler"
value="storage=memory;timeout=60;deleteAfterServicing=false;privateImages=false;" />

        <!-- Static Content Settings, used mostly for mail templates -->
        <add key="StaticContentUrl" value="https://manage.opti-tune.com" /> <!--
**customize** the https address of your OptiTune server -->

        <!-- Dynamic Content, webpages, management console, used mostly for mail
templates -->
        <add key="DynamicContentUrl" value="https://manage.opti-tune.com" /> <!--
**customize** the https address of your OptiTune server -->

        <!-- Don't allow autocomplete for the login page -->
        <add key="AllowLoginAutoComplete" value="0" />

        <!-- These values must be specified to allow the compilation of nsis based
installers for the OptiTune agent -->
        <add key="NSISDirectory" value="C:\optitune\nsis" /> <!-- **customize** -->
        <add key="TempDirectory" value="C:\optitune\installers" /> <!-- **customize** -->

        <!-- Twilio Credentials -->
        <add key="TwilioSid" value="XXXX" /> <!-- **customize** -->
        <add key="TwilioAuthToken" value="XXXX" /> <!-- **customize** -->
        <add key="TwilioFromNumber" value="4255555555" /> <!-- **customize** -->

</appSettings>
<!-- Provide the custom configuration settings OUTSIDE of <system.web>. You can have
multiple relay servers. -->
<OptiTune>
    <RelayServers>
        <Servers>
            <add name="relay.opti-tune.com" />
        </Servers>
    </RelayServers>
</OptiTune>

<connectionStrings>
    <!-- **customize** The first line is if you are using a windows account in SQL
server, the second is for an SQL user account -->
    <add name="Optitune"
connectionString="Server=localhost\SQLEXPRESS;Database=Optitune;Trusted_Connection=Yes;Mu
ltipleActiveResultSets=True;Connection Timeout=1200;" />
    <!--<add name="Optitune"
connectionString="Server=localhost;Database=Optitune;User
Id=optitune;Password=myspassword123;MultipleActiveResultSets=True;Connection
Timeout=1200;" />-->
</connectionStrings>

<!-- Content Removed For Clarity... -->

```

```

<system.net>
  <mailSettings>
    <smtp>
      <!-- **customize** Install the SMTP service on this server, or supply
your own SMTP server details here -->
      <network defaultCredentials="true" host="localhost" port="25" />
    </smtp>
  </mailSettings>
</system.net>

<runtime>
  <gcAllowVeryLargeObjects enabled="true" /> <!-- This allows us to allocate
arrays larger than 2GB in size -->
</runtime>

<!-- Console directory permissions -->
<location path="console">
  <system.web>
    <authorization>
      <allow roles="MasterAdmin" />
      <allow roles="Admin" />
      <deny users="*" />
    </authorization>
  </system.web>
</location>

<!-- Content Removed For Clarity... -->
</configuration>

```

The only two fields which **must** be customized in all cases are `StaticContentUrl` and `DynamicContentUrl`. The rest may be left as is if you followed the instructions in this guide carefully.

```

<!-- Static Content Settings, used mostly for mail templates -->
<add key="StaticContentUrl" value="https://manage.opti-tune.com" /> <!--
**customize** the https address of your OptiTune server -->

<!-- Dynamic Content, webpages, management console, used mostly for mail
templates -->
<add key="DynamicContentUrl" value="https://manage.opti-tune.com" /> <!--
**customize** the https address of your OptiTune server -->

```

SMTP Server Setup

If you want OptiTune to be able to send alert emails, you will need to either install the SMTP server on Windows, or provide SMTP server connection details.

```

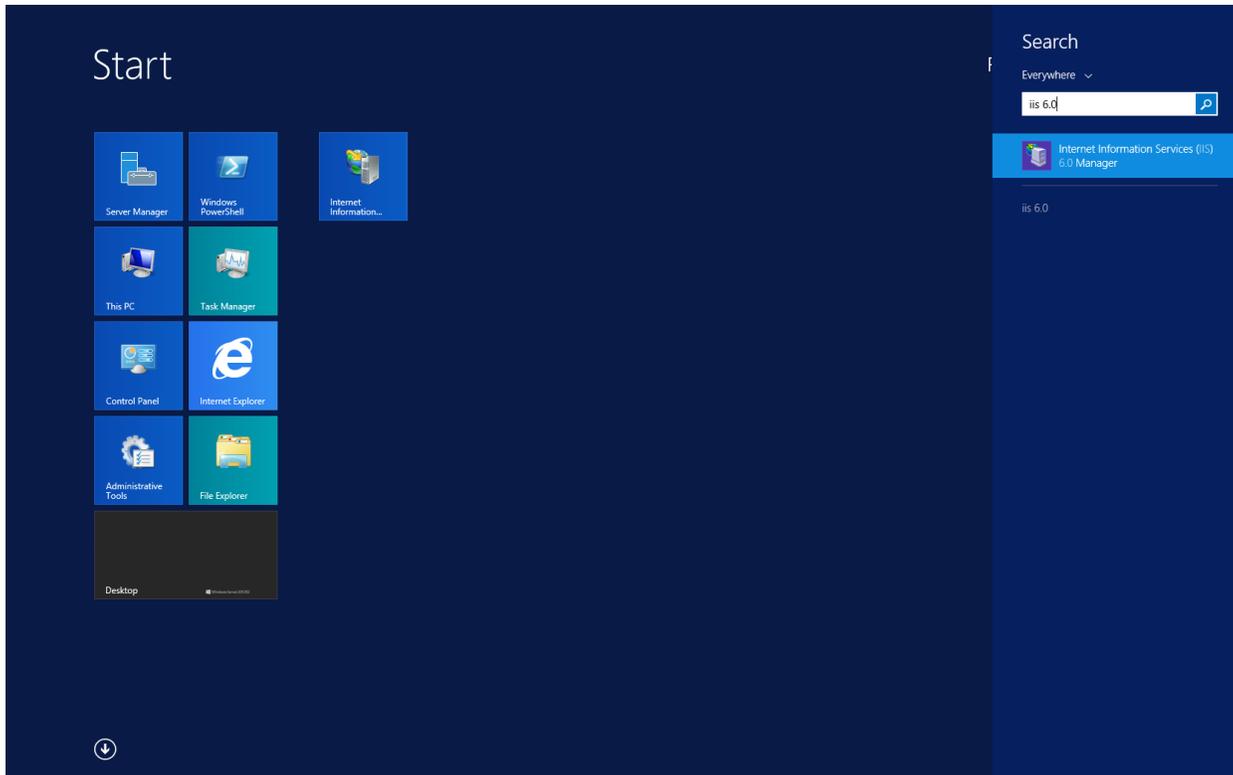
<system.net>
  <mailSettings>
    <smtp>
      <!-- **customize** Install the SMTP service on this server, or supply
your own SMTP server details here -->
      <network defaultCredentials="true" host="localhost" port="25" />
    </smtp>
  </mailSettings>

```

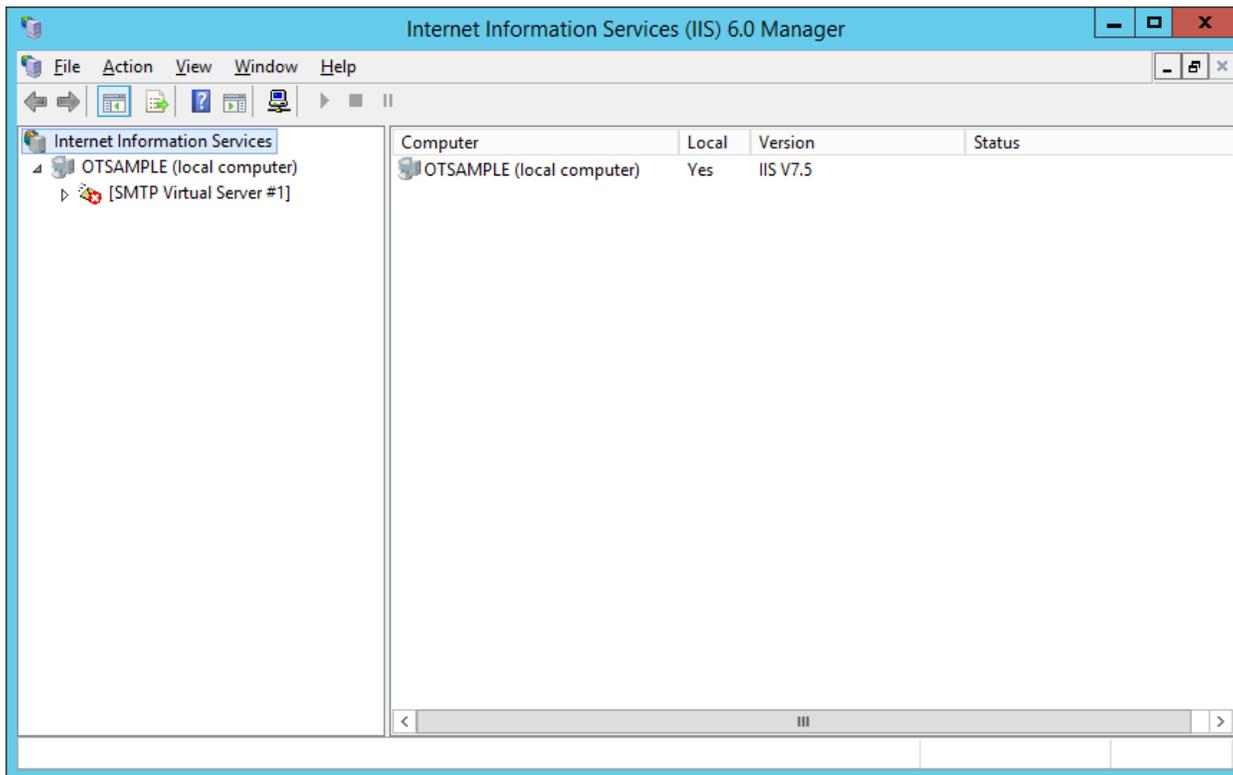
The default settings above assume that there is a local SMTP server running on the same server as IIS hosting the OptiTune website. If you want to use a relay server on a different machine (e.g. gmail), you can find the documentation for this configuration element here: [https://msdn.microsoft.com/en-us/library/ms164242\(v=vs.100\).aspx](https://msdn.microsoft.com/en-us/library/ms164242(v=vs.100).aspx)

Local SMTP Server configuration

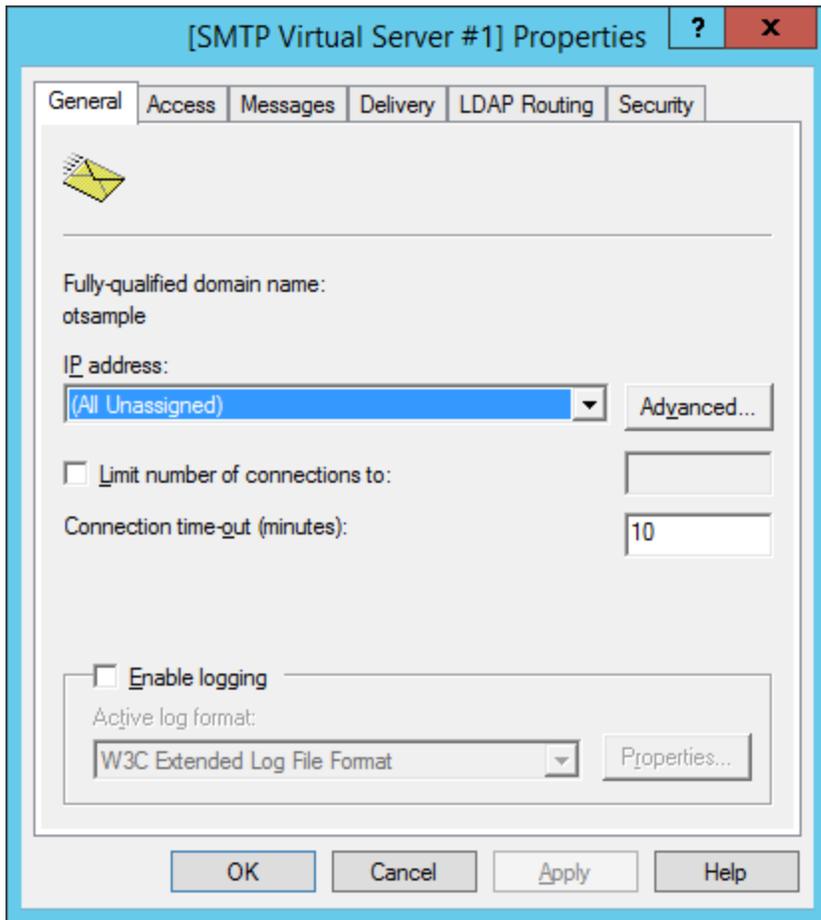
If you elect to use the local Windows SMTP server that is installed on the same server as IIS, follow these instructions to complete the setup of SMTP



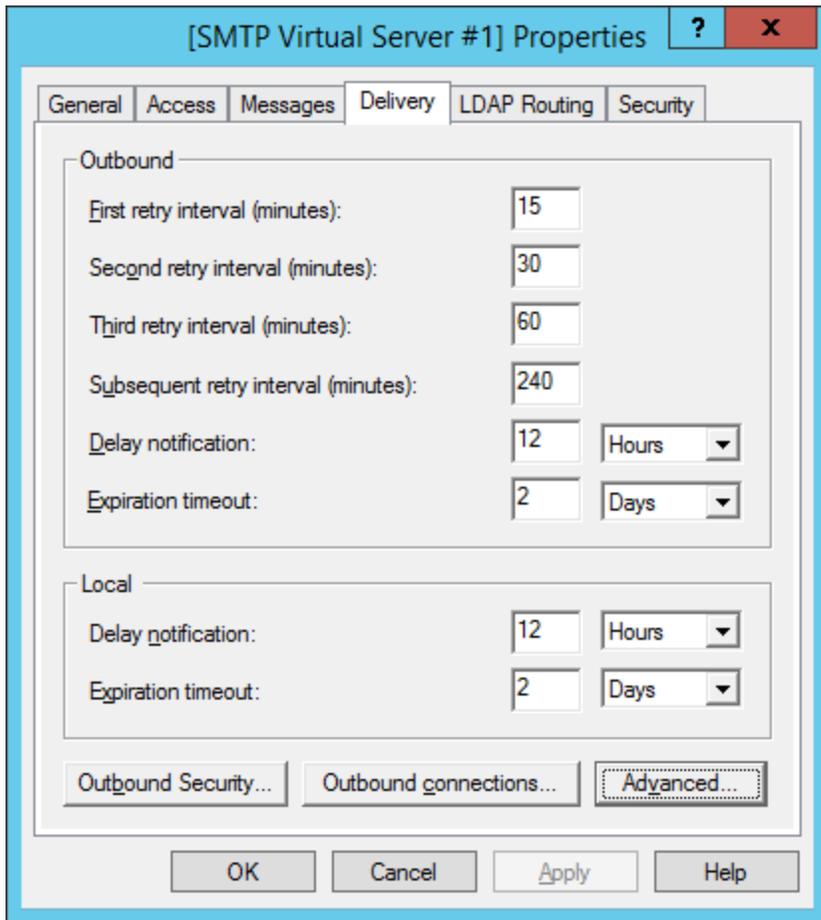
Search for "IIS 6.0", and launch the result found from the start screen



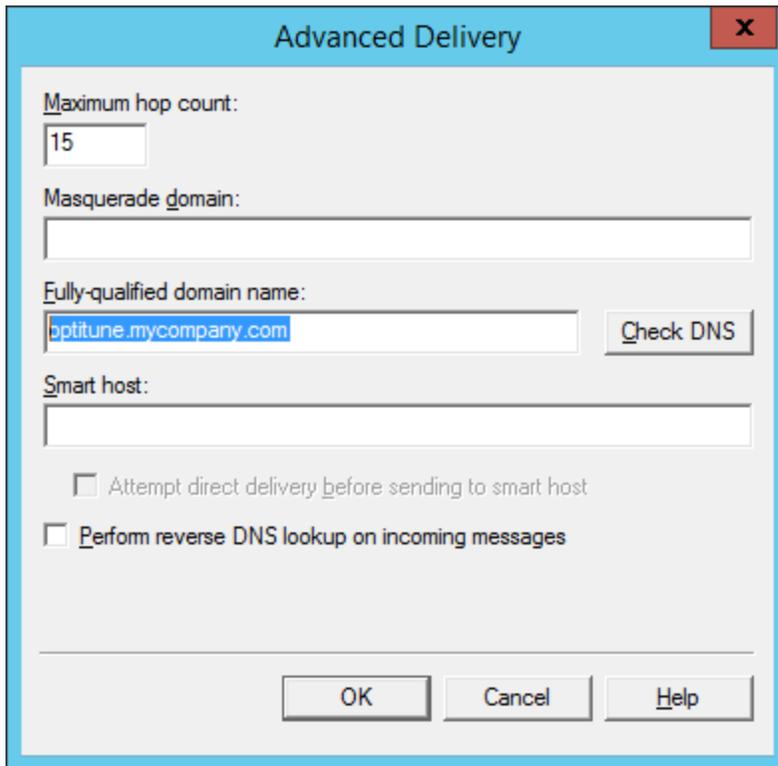
The screen shown above will come up. You will need to enable the SMTP service, and configure it. Right click on "SMTP Virtual Server #1", and select "Properties".



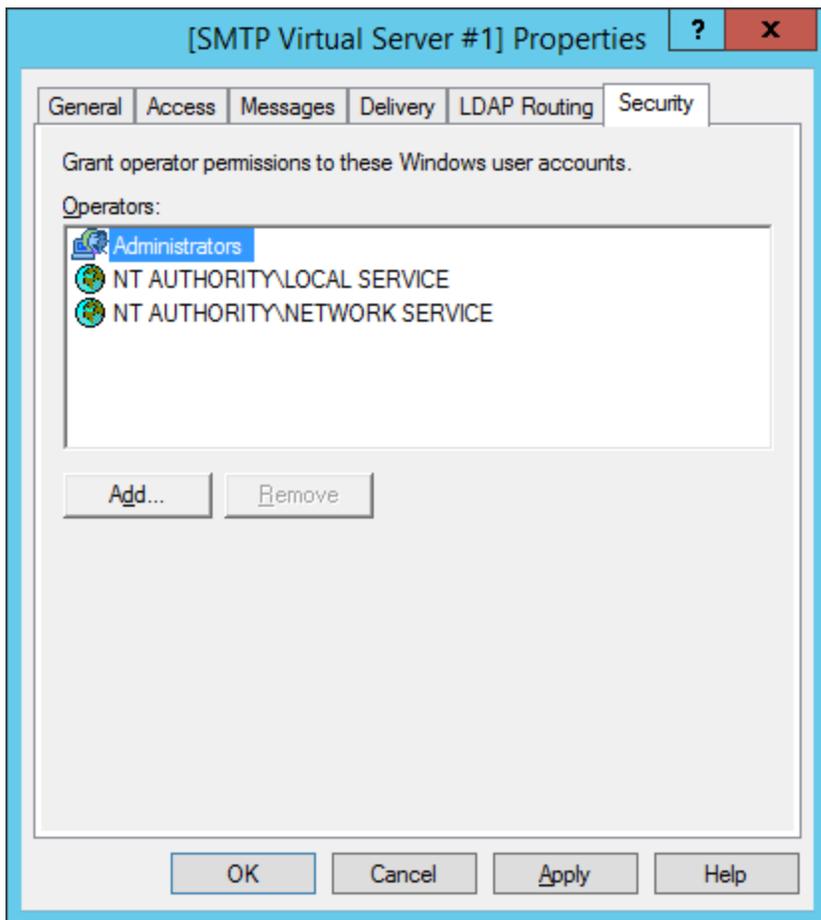
Click on the "Delivery" tab



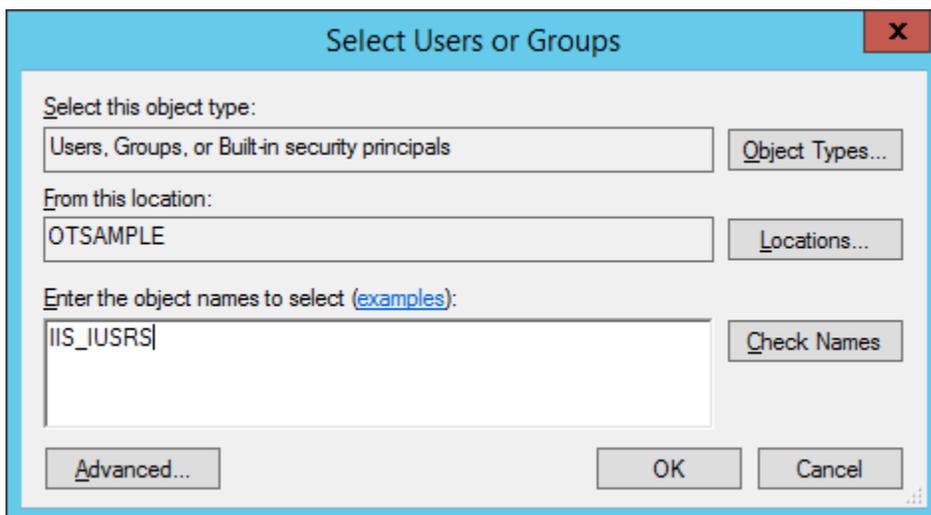
Click "Advanced..."



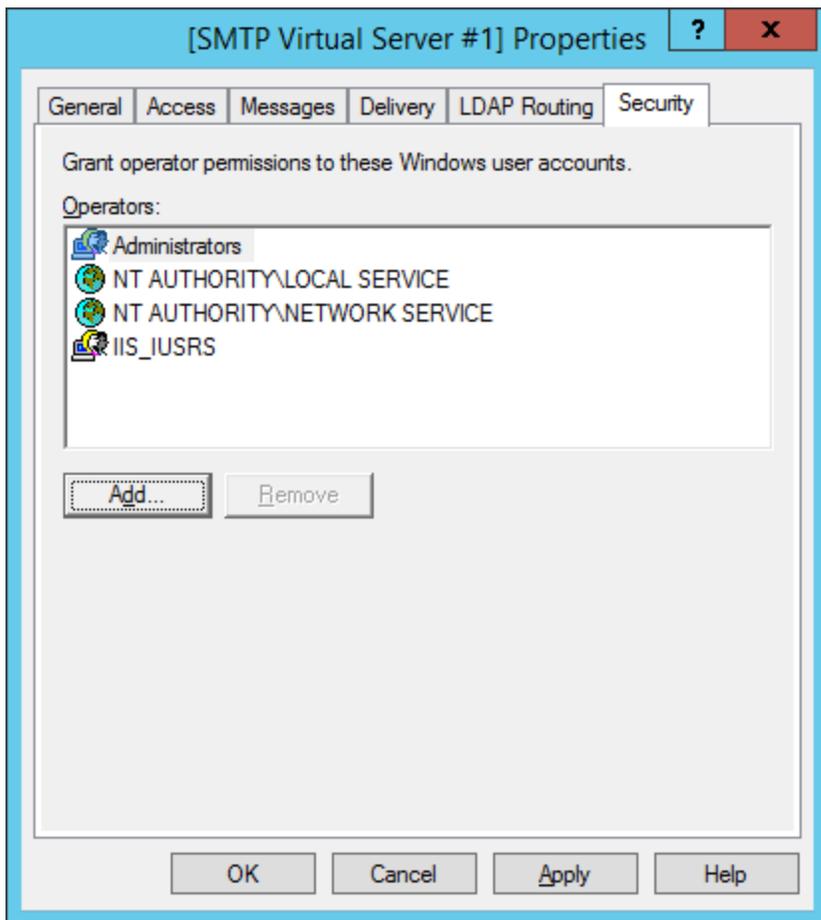
Enter the full DNS name of the optitune website, for example optitune.mycompany.com, and press OK. Then, click on the "Security" tab.



Click Add...



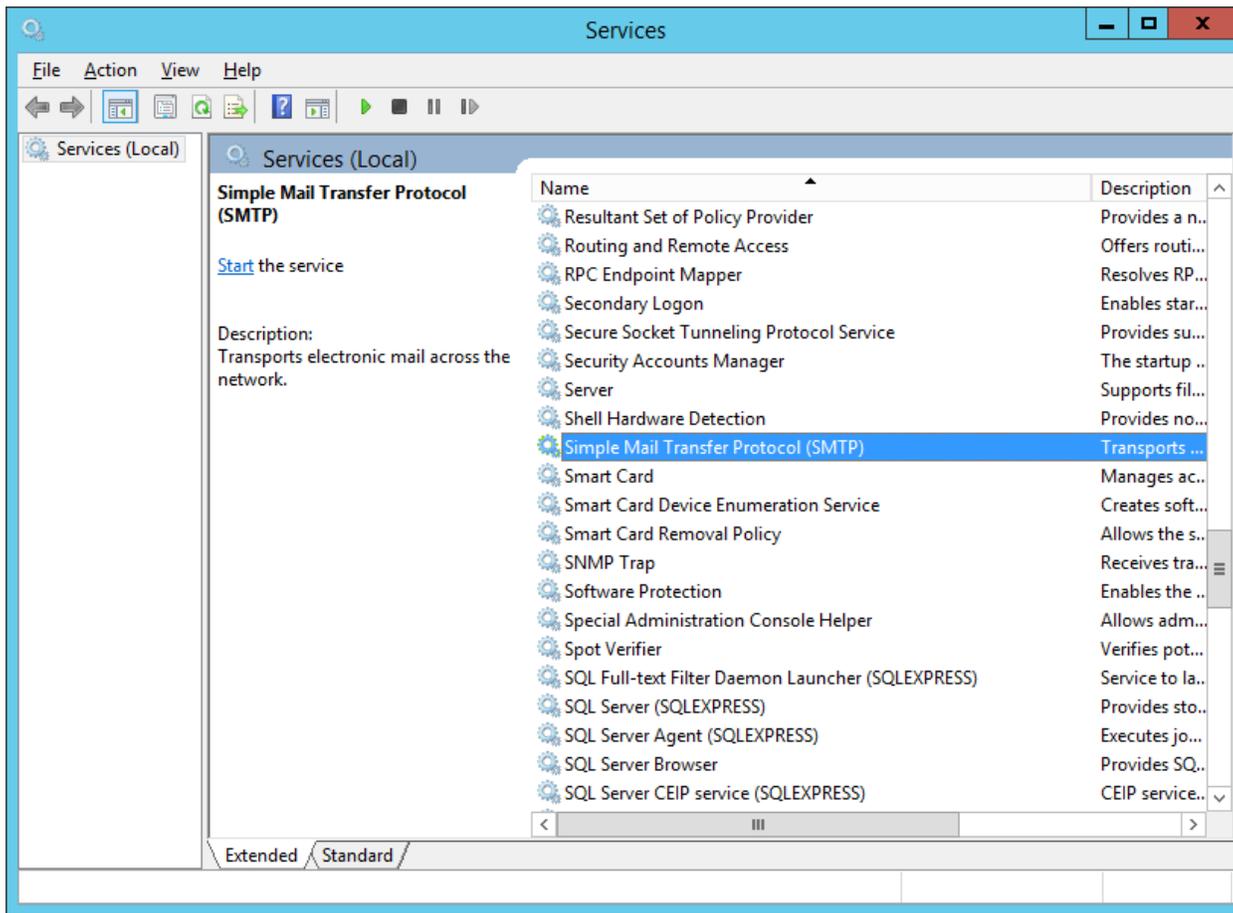
Click on Object Types and click on the Groups checkbox. Then, enter "IIS_IUSRS" Then press OK.



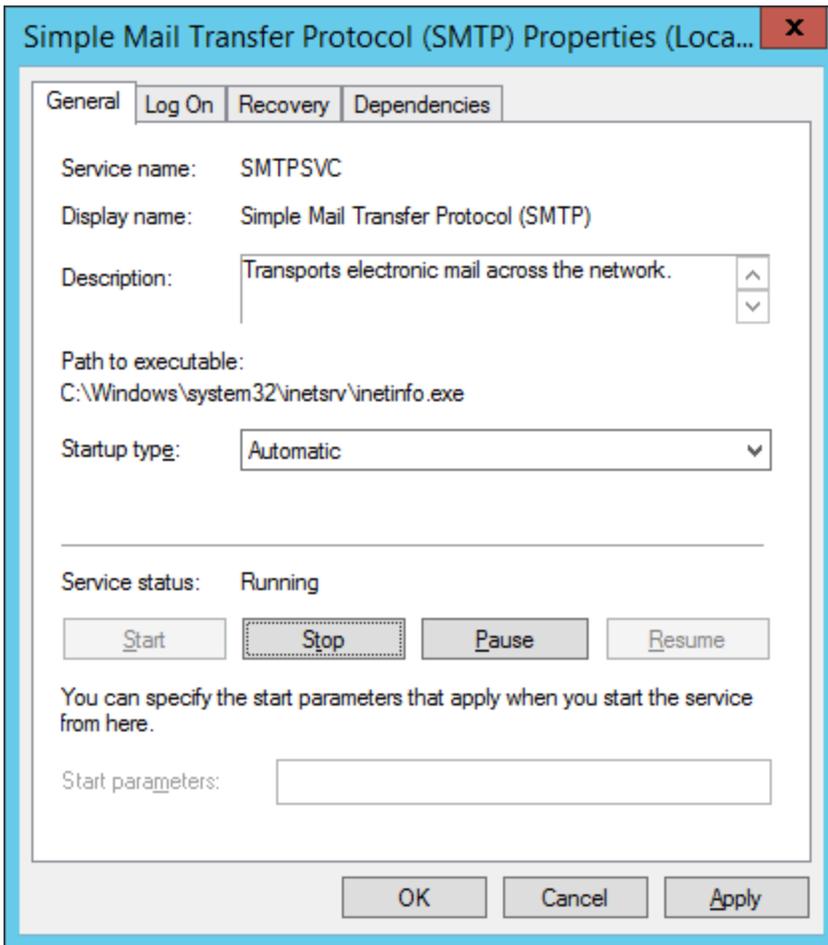
Finally, press OK.

Next, you will need to enable the SMTP service to start automatically, and start the service.

Open the "Services" administrative tool, and locate the "Simple Mail Transport Protocol (SMTP)" service. This was installed above when you added the IIS role to the server.



Right click on "Simple Mail Transport Protocol (SMTP)" and select Properties.



Set the startup type to “Automatic”, and press the “Start” button. Then press OK.

Your SMTP server should be up and running. You can test it from the “mail templates” page in the OptiTune website to see if it works.

Twilio.com Setup

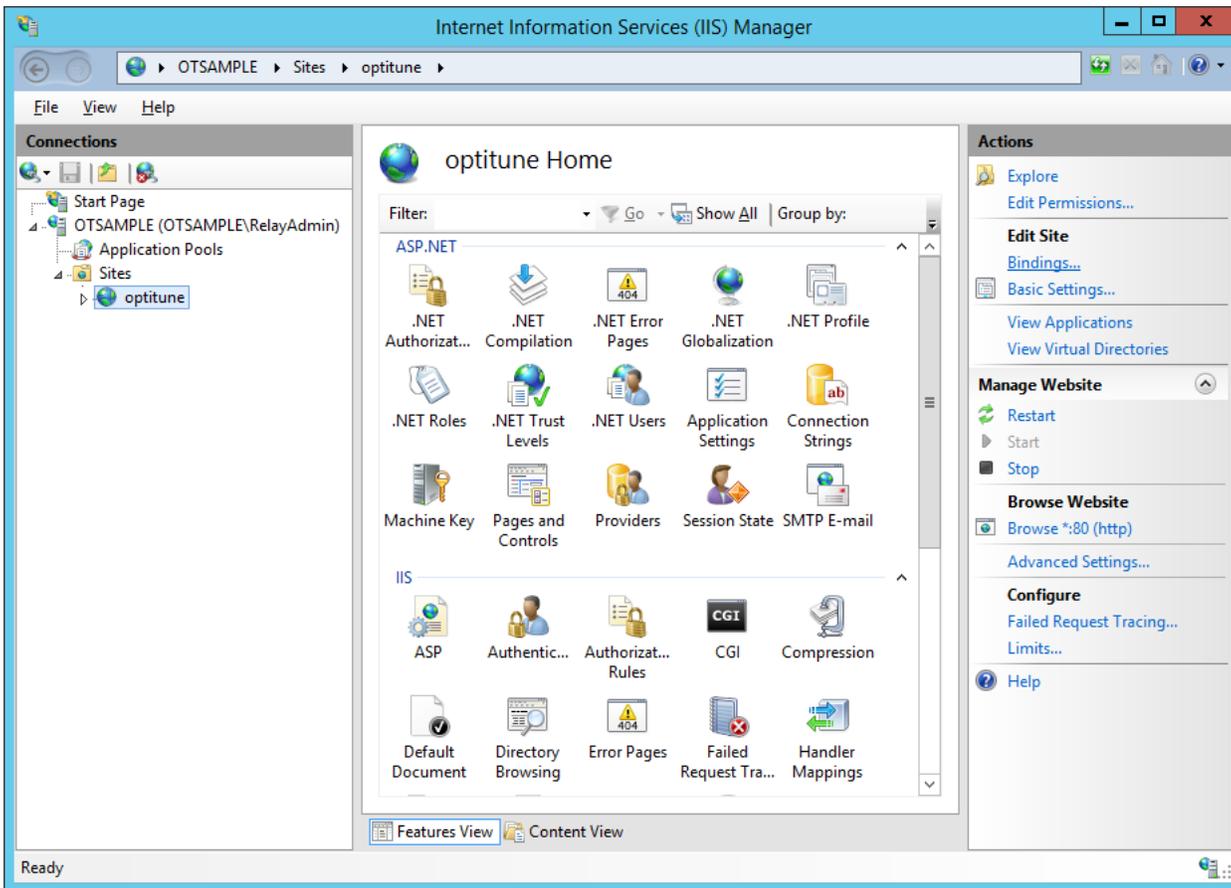
If you want to allow the management server to send SMS text messages, you will need to sign up for an account at <https://www.twilio.com> and fill in the following fields in web.config

```
<!-- Twilio Credentials -->
<add key="TwilioSid" value="XXXX"/> <!-- **customize** -->
<add key="TwilioAuthToken" value="XXXX"/> <!-- **customize** -->
<add key="TwilioFromNumber" value="4255555555"/> <!-- **customize** -->
```

The TwilioSid and TwilioAuthToken are credentials for your Twilio Account, and TwilioFromNumber is the authorized mobile number that will send the text messages, and appear on the caller id.

Post Installation

Importantly, you need to install an SSL certificate for the OptiTune website, and set the “optitune” website to use it in its “bindings”.



In IIS manager, click on the “optitune” website, and then click on “bindings” at the right part of the screen.

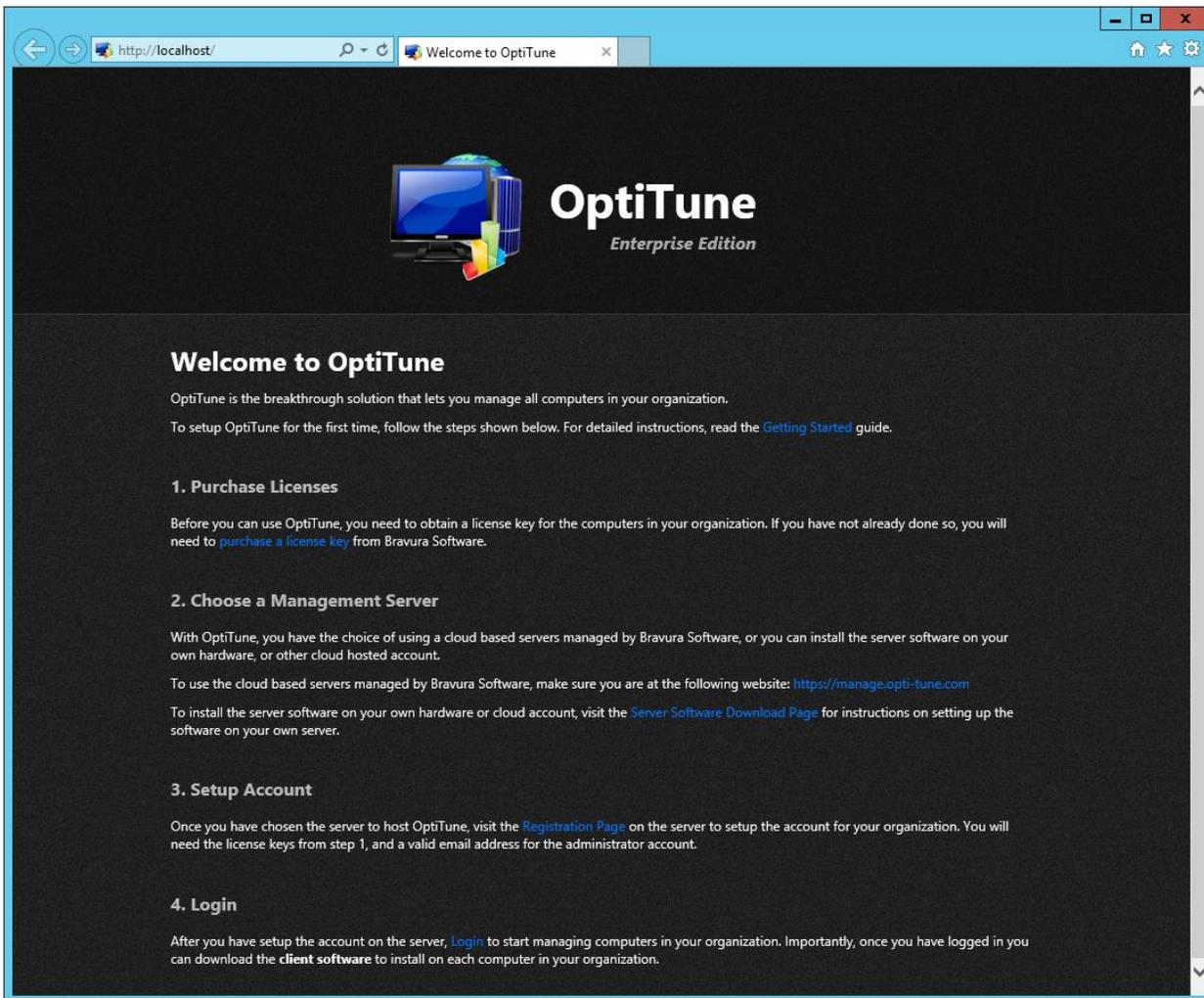
The screenshot shows the 'Add Site Binding' dialog box. The 'Type' dropdown is set to 'https', the 'IP address' dropdown is set to 'All Unassigned', and the 'Port' text box contains '443'. The 'Host name' text box contains 'optitune.mycompany.com'. The 'Require Server Name Indication' checkbox is unchecked. The 'SSL certificate' dropdown is set to 'Not selected', with 'Select...' and 'View...' buttons to its right. At the bottom are 'OK' and 'Cancel' buttons.

Type in the host name, and select the SSL certificate you installed with IIS. The vendor of your SSL certificate will be able to provide you with detailed instructions for generating the certificate request and completing the certificate request in IIS.

Press OK to add the binding for the OptiTune website. Finally, remove the http binding for the OptiTune website, and check that the firewall rules for the server allow HTTPS incoming.

Setting up your account

Finally, navigate to your brand new OptiTune website, using its https:// prefix, for example <https://optitune.mycompany.com>



In this screenshot, we have navigated to the website on the local webserver, for illustration purposes. You will need to remove the http binding, and add the https binding described above, and navigate using the real url to setup your organization. The OptiTune agent needs to access this server using the HTTPS protocol, so you must install an SSL certificate before proceeding.

Click on “Registration Page” under “Setup Account”, and enter the registration code you received when you purchased OptiTune licenses to complete the setup of your first organization in OptiTune.

Summary

To complete the OptiTune installation, all sections of this document need to be followed carefully. If you have any questions or problems deploying the website, please contact us at customer_support@bravurasoftware.com