OneOrZero Task Management System
Installation and Upgrade Manual

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OneOrZero Requirements

The OneOrZero Task Management System can be installed and run successfully on PHP enabled web servers with MySQL version 4.1 and higher.

The following outlines the components to run OneOrZero MySQL Edition

- PHP 4.1 or higher.
- MySQL 4.1 or higher
- Web Server (IIS/Apache/other) that supports PHP
- Optional Email Server
- Optional SSL for secure web transactions
- Optional Forum Software
- Optional LDAP server for LDAP authentication
- Optional PEAR and mime_Decode.php for incoming automated email

Please visit http://devzone.zend.com/manual for detailed instructions regarding the installation and configuration of PHP and MySQL on multiple operating systems and web servers.

Installation and Upgrade Tasks

Installing the OneOrZero Files

This section describes how to install the OneOrZero files.

NOTE: If you are upgrading and you have customized a previous version of OneOrZero, backup your existing OneOrZero files as they will be overwritten. If you are upgrading you MUST read the included upgraded readme.txt file for additional information.

Copy the OneOrZero Files to your server

- If you are using Apache extract the OneOrZero zip contents to the appropriate document root directory (e.g. /usr/local/**apache**/htdocs). Configure an alias in the http.conf file for your OneOrZero installation folder.
  You can extract the contents of the OneOrZero zip file to the root of your htdocs folder if you require an address such as www.youroneorzero.com without having an alias after the domain.

  If you are using IIS extract the OneOrZero zip contents to the home directory of the root web server (e.g. default web) or if you are using a virtual web extract the contents of the OneOrZero zip file to your virtual web home directory.

  NOTE: If you use FTP to upload OneOrZero the upload method should be AUTO however to be specific, all files should be in ASCII except for the content in the images folders, which should be BINARY.

Set the Correct Folder and File Security

For OneOrZero to function correctly in Linux based environments the following permissions must be set for the Web Server User:

OneOrZero Edition	OneOrZero Directories/Files	Security Rights
MySQL	Attachments	Read/Write
MySQL	Configuration	Read/Write/Execute
MySQL	Other Files and directories	Read/Execute

Windows installs should have the following permissions on folders and files in the OneOrZero folder against the user your web server is running under (e.g. IIS uses the IUSER_XXX account):

OneOrZero Edition	OneOrZero Directories/Files	Security Rights
MySQL	Attachments	Read/Write
MySQL	Configuration	Read/Write/Execute
MySQL	Other Files and directories	Read/Execute

If your attachment directory is a part of your OneOrZero install folder (as in the zip file release) it is advisable that directory listing is disabled in IIS and a .htaccess file is used to disable directory listing for your OneOrZero installation directory.

You can change the location of the attachments directory so it is located outside of the web servers document root. This will ensure attachments cannot be accessed via the web.

Confirm PHP.ini Settings are Correct

In your PHP.INI set the following:

- register_globals = off

  If you HAVE to have register_globals = on OneOrZero will still work however you should set this to off for maximum site security.

- Ensure your session.save_path is valid

  We use SESSIONS all throughout the application. For the application to work properly this path must be valid.

- error_reporting = E_ALL & ~E_NOTICE

  If this setting is incorrect you will receive Notice messages in your logs (these can be ignored).

- File Uploads section
  Make sure this section has adequate limitations/directory paths set. OneOrZero allows you to configure the maximum attachment size however this is dependent on the PHP.ini settings where you can also specify the maximum file upload limit.

- Mail function section
  If you select the OneOrZero SMTP option 'PHPConfig' then OneOrZero will use the php.ini settings to send email. You can configure your SMTP server in the php.ini file under the smtp_server section – this is the easiest way to setup email on both Windows and Linux.

  NOTE: You can view all of your current php.ini settings by clicking the 'Check Your PHP Settings' link in the setup server page. See the coming section 'Run the OneOrZero Setup Server Page' for more information.

Confirm Web server Configuration Settings are Correct

We do not provide specific web server configuration settings. You will need to review your web server's documentation to make sure the appropriate configuration is set.

If you are unsure please post a question to our forum @ www.oneorzero.com/smforum and review the documentation that comes with PHP, MySQL and Web Server installations.

OneOrZero Server Settings	
Settings:	**Value:**
Server DNS Name:	localhost
One Or Zero Web Alias (One Or Zero Directory) :	eclipse/workspace/oozv17
Maximum Attachment Size (Mb):	16
Document Root (Required for IIS, optional for Apache):	C:/webserver/xampp/htdocs
Attachment Directory (Full Path):	C:/webserver/xampp/htdocs/attachments
Database Type: ** Note: If you have MySQL 5 and have used the old_password() funtion to make passwords MySQL 4 compliant use the MySQL 4 or Earlier option	MySQL 5
MySQL Host Name:	localhost
MySQL Username:	root
MySQL Password:	********
MySQL Database Name (if applicable):	ooz
OneOrZero Tablename Prefix:	ooz_nt

WARNING !

When you make changes your OneOrZero site will not function unless your configured settings are already setup on the web server and the database...

Submit Changes

Check Your PHP Settings

Run the OneOrZero Setup Server Page

- In your web browser open the OneOrZero Setup Server page http://www.youroneorzero.com/<oneorzerodirectory>/utilities/setup_server.php (example).
- Set your OneOrZero server settings and setup the database parameters.

  NOTE: If you are upgrading you should not need to complete this step.

Server Settings continued on the next page...

The following table describes each setting

Settings	Value
Server DNS Name	The full domain name of your web server e.g. the name the whole world uses to get to your web server Example: www.oneorzero.com
OneOrZero Web Alias (OneOrZero Directory)	If you extracted the contents of the OneOrZero zip file to the root of your web server leave this empty otherwise enter the name of the OneOrZero install directory relative to the root of the web server Example: For www.oneorzero.com/oneorzero enter oneorzero, for www.oneorzero.com leave blank and for www.oneorzero.com/testwebs/oneorzero enter testwebs/oneorzero
Maximum Attachment Size	The largest attachment that can be uploaded to OneOrZero (megabytes). This must not exceed the value set in the File Uploads section of the php.ini file
Attachment Directory	The full path to the directory where the attachments will be stored. By default this is under the OneOrZero installation folder however you can locate wherever you deem appropriate and we advise you locate the directory outside of your web servers document root.
Document Root (required for IIS, optional for Apache)	This is the base folder where your web server stores files i.e. c:\inetpub\www (IIS) or ../htdocs (Apache). Apache does not require this field to be set and IIS may not however it is advisable to use this field for IIS installs.

Continued…

Database Type	Select the database you wish to use
MySQL Hostname	The name of your MySQL server
MySQL Username	The username given rights to the OneOrZero database
MySQL Password	The password for the OneOrZero MySQL database user account
MySQL Database Name	The name of the OneOrZero database
OneOrZero Table name Prefix	This allows you to prefix OneOrZero database tables

Installing a New OneOrZero Instance

Create the MySQL Database

Create a database in MySQL, ensuring you create using the **UTF-8** character set option (this is mandatory), provide proper permissions to a OneOrZero user account that will be accessing your database.

For first time MySQL users, change the variables (web_user, and password) below and simply copy and paste the commands into your MySQL SQL script tool.

---

create database <enter database name here>;

grant all privileges on <enter database name here>.* to user@yourhost identified by 'password';

For example;

create database oneorzero_database;

grant all privileges on oneorzero_database.* to root@localhost identified by 'mypassword';

Refer to the MySQL documentation for more information

(http://www.mysql.com/documentation)

Run the OneOrZero Install Page

- In your web browser open the page http://www.youroneorzero.com/<oneorzerodirectory>/utilities/install.php(example). Read the license page and confirm you have met the pre-requisites and click Next (this creates the MySQL tables).
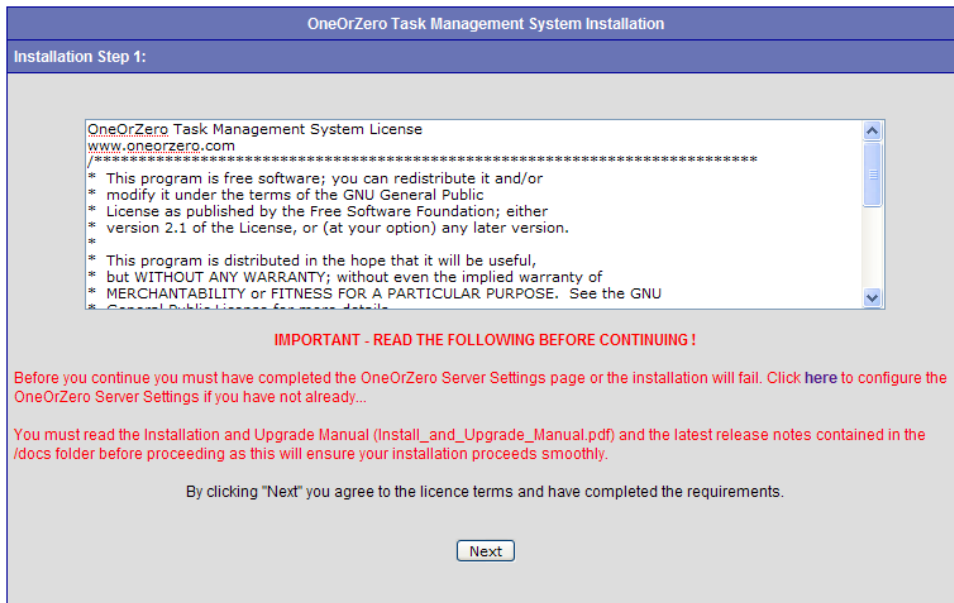
- Setup your OneOrZero Administrator account details and click Next.

OneOrZero Task Mangement System Installation		
Installation Step 2: Administrator Account Setup		
Admin First Name:	Joe	*Required*
Admin Last Name:	Black	*Required*
Admin User Name:	joe	*Required*
Admin Email Address:	joe@black.com	*Required*
Admin Password:	***	*Required*
Admin Password Again:	***	*Required*
Admin Office Location:	The World	*Required*
Admin Phone Number:	123456	*Required*

Please go to your user profile after installation and set your secret question and answer (for password retrieval)

[Next]

Progress
Tables Created Successfully.

- You can now go to the OneOrZero Control panel and setup your OneOrZero Task Management System!

    Before setting up OneOrZero, we recommend that you add you name to our product update mailing list to receive the latest updates regarding patches, security warnings and new versions.

OneOrZero Task Management System Installation

Finishing Up:

You're all finished installing OneOrZero Task Management System, however there are a few more things to look at...

- Visit our forums to find out more about the product, it's uses and utilise our support areas
- Join our product updates mailing list to recieve product updates and software release notifications
- Support our project and get great benefits by becoming a member, and keep the project alive ! Click here for more information

To begin using the software remove the utilities directory and begin configuring your OneOrZero settings in the control panel.

Progress

Tables Created Successfully.

Administrator Account Created Successfully.

Welcome to One Or Zero Task Management System !

Upgrading an Existing OneOrZero Instance

Upgrade the MySQL Database – Upgrade Step A

NOTE: It is mandatory that you read the upgrade readme.txt file included with all releases of OneorZero as they include specific upgrade information for each release that complements this documentation.
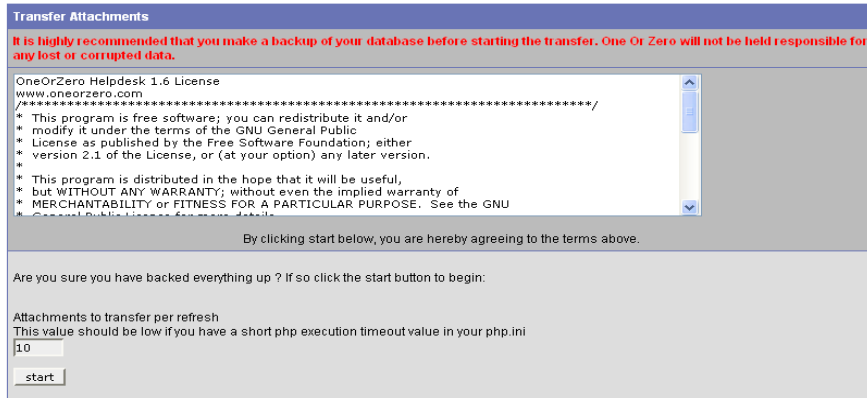
1. Backup your existing OneOrZero installation, including your database and file structure

2. Copy the 'server_settings.php' and 'website_settings.php' files in your configuration folder to a temporary location for later use.

3. Compare the files in the new version of OneOrZero to your existing one if you have modified the installation. Merge any modifications from your old version into the new version.

4. Replace your existing OneOrZero version with the new version you modified (if applicable) in step 3.

5. Take the files you copied in step 2, and place them in the configuration folder. You should be prompted to overwrite existing files, do so as you are restoring your server and website settings.

6. Open the upgrade.php page in the utilities directory in your browser.

7. Click the Version number you wish to upgrade from to upgrade the database. The upgrade process is sequential. You may have to run the upgrade.php page multiple times if you are a number of versions behind selecting each subsequent version until you have completed all available upgrade options.

   NOTE: If the version you are upgrading to is not in the upgrade list, it does not require a database upgrade.

8. If the upgrade completes without errors continue to 'Transfer Attachments – Upgrade Step B' if you are upgrading from a version earlier than V1.6.0, otherwise continue from 'Configure the OneOrZero Task Management System Settings – Upgrade Step C'

Transfer Attachments – Upgrade Step B

- The Transfer Attachments page requires that you have the correct directory permissions on the attachments directory (set in the server setup part of this document). If these permissions are incorrect this page will fail.

As it can take a long time to transfer all attachments (depending on the numbers and sizes of your attachments) the Transfer Attachments page will only transfer a limited number of attachment files at any one time, however when it has completed that transfer it will continue to the next batch of files to transfer.

Batch transferring is used to avoid PHP script timeouts that can occur if the transfer runs for too long.

Select the number of attachments to move out of the database and into the attachments directory. Typically you have 90 seconds to run a PHP script before it times out so normally you can set the number to transfer to a high number e.g. 200, however if you have a slow server ,low PHP timeout value or very large attachments set the value to 50 and click Start.

Each time a batch of file transfers has completed a status page will indicate how many attachments need to be transferred.

When the transfer is complete a success page is displayed.

NOTE: You can terminate the transfer at any time by closing the page and restart later.

Configure OneOrZero Settings – Upgrade Step C

- Open the OneOrZero Control Panel, and click the OneOrZero Settings link.
- Go through the settings and update them for your environment as the new software version may include additional options that require configuration.
- Make sure you click the 'Submit Changes' button to upgrade your settings file.

Restore the Default Templates – Upgrade Step D

- Open the OneOrZero Control Panel, and click the Templates link.
- Copy each of your existing templates to (for example) a notepad file for backup purposes, if you have customized the templates.
- Click the 'Restore Templates' button. This will update the templates to be compliant with the current version of software.
- Examine the new templates and update with your customizations where required.

Final Security Steps

Remove the utilities directory

You must remove or move the utilities directory out of the OneOrZero directory before logging on to OneOrZero to start creating / updating tasks etc.

The utilities directory contains valuable tools which allow you to modify your server settings at any time; however it is also a security risk as others can run these files.

NOTE: OneOrZero will not start if this directory exists and will produce and error message indicating the utilities directory needs to be removed.

Add Secret Question and Answer to User Profile

A password retrieval feature has been introduced that requires that users have set a Secret Question and Answer in their profile.

When they try to retrieve their password they are prompted for the Secret Answer. If this is correct a new password will be sent to the user so they can log on to the system.

1. If you create user accounts for your users in any situation you MUST inform the user that they should update their Secret Question and Password immediately as it is set to 'Please set me !' by default. As the retrieval page will always send the new password to the users email if your user forgets to do this there is still a layer of security however not as much as there should be.

2. If you allow users to register for their own account the Secret Question and Answer fields are setup during this process.

Appendixes:

Support Information

OneOrZero provides one to one support to Platinum Members, including support for installation, configuration and issues with the product during the life of the membership. Platinum membership is available at http://www.oneorzero.com/?controller=main_membership;

Our community forum is also available at www.oneorzero.com/smforum.

User Manual

A complete user manual can be found here;

http://documentation.oneorzero.com