

**SIMPLIFY
ACCESS &
CONTROL**

Intelli-Site 4.2
Security Management Software
Installation Guide

Intelli-Site 4.2 Installation Guide

Intelli-Site 4.2

Security Management Software

Installation Guide

For Windows 11 Pro and Enterprise,
Server 2019, and
Server 2022

Intelli-Site 4.2 Installation Guide

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C'est la volonté expresse des parties que la présente convention ainsi que les documents qui s'y rattachent soient rédigés en anglais.

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Technical Support Assistance

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Technical Support

Technical support is available via telephone or email. Contact Technical Support 8:00 AM to 5:00 PM Central Standard time. When calling after hours, please leave a detailed voice mail message, and someone will return your call as soon as possible.

Email: support@ossi-usa.com

When calling, please be at the computer prepared to provide the following information:

- Product version number, found by selecting the  **About** button from the Intelli-Site Application Menu.
- The type of computer being used, including operating system, processor type, speed, amount of memory, type of display, etc.
- Exact wording of any message that appears on the screen.
- What was occurring when the problem was detected?
- What steps have been taken to reproduce the problem?
- It is highly recommended that the user generate a support package for transmission to Intelli-Site technical support staff. To generate the package, run the Intelli-Site Configuration Utility. *Create Support Package...* is the last option in the **Tools** menu.

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Introduction

The Intelli-Site software is a scalable, PC-based system designed to integrate, control, and manage electronic security components and subsystems. Intelli-Site integrates electronic security products and subsystems from multiple manufacturers into a single functionally enhanced, centrally controlled security system.

Intelli-Site allows for integration of the following types of subsystems:

- Access control systems and field panels
- Closed circuit television matrix switchers
- Digital video multiplexers
- IP DVRs with action controls
- Fire alarm systems and panels
- Proximity Sensors
- Intercom systems (microprocessor based)
- Radio paging systems
- Burglar alarm digital receivers
- Programmable logic controllers (PLCs)

Intelli-Site incorporates a user-defined point and click windows graphical user interface (GUI) that can be configured to meet the unique needs and skill level of each user. In addition, Intelli-Site has a web browser interface that can be enabled or disabled.

Intelli-Site utilizes a Tree window display that supports full graphical drag-and-drop configuration and setup. The system administrator, via password-controlled user profiles, assigns system features.

The Intelli-Site GUI allows the user to add site, building and floor plan map graphics or control diagram graphics to support alarm annunciation, device control and device monitoring that is uniquely suited to the user's requirements. Intelli-Site supports Screen Objects (smart Icons) that graphically show the status of each device utilizing an infinite number of states. These user-defined Screen Objects allow the operator to control and monitor devices using a mouse or optional touch screen.

Many common functions of the Intelli-Site GUI have been combined into Views that greatly simplify programming, maintenance, and daily use.

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Key Features

Integration support for existing and future equipment – Intelli-Site is a true “open architecture” software package that can incorporate previously installed and future electronic security equipment from different manufacturers into a single, fully integrated, multi-user security management system.

Two Client Interfaces – The Intelli-Site system has two client interfaces: the traditional desktop client and a web interface. The Intelli-Site Web Service allows the User to access the Intelli-Site system via standard web browsers on computers and handheld devices.

Multiple Client Platforms – The Intelli-Site Web Service allows the User to access the Intelli-Site system via standard web browsers on computers and handheld devices such as tablets and smart phones.

Views – Formerly known as Modes, the Views combine common functionality into simple, graphical, intuitive interfaces. There are Views for Access Management, Hardware Management, Reports, Documentation, Scheduled Events, Activity, Video as well as the  **Design View** and  **Live View** from previous versions of Intelli-Site. There is also a view to manage and monitor Accutech systems.

User-defined functionality – Intelli-Site allows the user to pre-define the actions to be executed upon the occurrence of each system event. Previously defined actions can be changed at any time - as often as necessary - using “point and click” menus and selections. Multiple events are processed simultaneously in a multi-tasking, multi-threaded environment.

User-defined alarm and event processing – Intelli-Site allows the user to customize messages, priorities, colors, audio sounds (.wav files), video events, functionality, and Screen Objects associated with alarm and event conditions.

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User-defined graphical user interface (GUI) – Intelli-Site provides a user-defined GUI that can be designed and configured to meet the unique needs and skill level of each user. The GUI is comprised of standard windows tool bars, Node Trees, Dialog Boxes, and graphic images. User defined graphic images are designed and produced utilizing industry-standard graphics software packages that support a broad-range of image formats.

Text-to-Speech (TTS) – Intelli-Site’s TTS software feature allows activation of a computer-synthesized voice that speaks to the user. It can announce cardholder names, system events and actions, as well as provide command verification and special instructions. The user hears the name and the action taken by cardholders, as well as confirmation of the user’s actions, and system instructions. In order to utilize the TTS software module, a Windows Server Class- or Windows XP Professional-compatible sound card and speakers are required

User controlled access – Intelli-Site uses its own user database to restrict and manage access to modules and functions (internal passwords) or can make use of Windows Users and User Groups security services. All access to the Intelli-Site system is controlled by password as defined by the system administrator.

Operating System – Intelli-Site runs under the Microsoft Windows Server Class and several versions of Windows. See [Minimum System Requirements](#) for a complete list. Following good security practice, we recommend you keep current with ongoing Microsoft released OS security updates. Such updates should not interfere with Intelli-Site operations.

Database – Intelli-Site utilizes PostgreSQL.

Reports – Intelli-Site includes a built-in report generator to provide quick, pre-defined reports that include data specific to system operations.

Multi-Lingual User Interface – Not Yet Implemented Intelli-Site employs a built-in language string translation table to provide the end user with the ability to translate the operator interface pages into a virtually unlimited number of languages. The language presented to an operator will be automatically selected based upon the operator’s Windows logon credentials and localization settings.

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Network – Intelli-Site uses TCP/IP to provide an integrated, networked system. Intelli-Site integrates into existing networks, reducing overall installation and maintenance costs. The Intelli-Site Administrator can add new Workstations to enhance overall system control and monitoring.

Optional Features

Access Management (AM) – The AM feature allows the system to support card access control operations. The Card Management System module allows the user to add, modify, and delete cardholder data, time zones, access levels and access groups utilizing a user-defined point-and-click GUI. Intelli-Site allows the system administrator to add and delete database fields and graphically design individual on-screen data entry forms to meet the unique needs of each facility.

Video Badging (VB) – The VB feature allows the user to capture and store a digital picture image, graphically create and produce multiple badge designs to meet user-specific requirements as well as print photo ID badges for use with card access operations.

Live Video (LV) – The LV feature allows a user to program a live video picture from a camera to automatically display upon detection of a user-defined event within the Intelli-Site system, such as an alarm condition or card access event.

Video Recording (VR) – **Not Yet Implemented** The VR feature allows Intelli-Site to record video from a camera on demand or in response to an alarm. Both post-alarm & pre-alarm video recording are available.

Engine Redundancy (ER) – The ER feature allows multiple Intelli-Site Engines to be configured as a hot-standby Engines to an existing Intelli-Site Engine to minimize downtime due to any computer/network failure (e.g. hard drive failure on the primary computer). The secondary Engines will wait offline ready to replace the primary Engine in the case of a failover event, whether planned (e.g. Engine maintenance) or not. These redundant Engines must of course reside on a separate host computer.

SQL Server Database (SQL) –The SQL feature allows an MS-SQL Server to be used for Intelli-Site's database.

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Oracle Database (ORL) – Not Yet Implemented The ORL feature allows an Oracle database to be used for Intelli-Site’s card holder database.

Door Construct (DC) – The DC feature allows a central configuration point for doors. From here, you can drag and drop panel I/O Points into a door to simplify programming. Included in this feature is the ability to build Interlock Groups. Doors are configured to be members of an interlock group so that access attempts to doors within the interlock group will be denied should any door belonging to the interlock group be open.

Alarm Zone (AZ) - The AZ feature allows a central configuration point for alarm zones. From here, you can drag and drop panel I/O Points into an alarm zone to simplify programming. Included in this feature is the ability to build multiple-sensor alarm zones that have the capability of combining different types of sensor signals and determining alarm response to direction, multiplicity of sensor alarms, types, etc. The Alarm Zone Construct also allows for assignment of video assessment systems (cameras) on a zone-by-zone basis.

Anti-Passback (AP) – The AP feature provides a means to strengthen access control. By defining Anti-Passback zones & doors, access to other zones is restricted by both access permissions and cardholder presence. Depending on the Anti-Passback zone setting (hard or soft), you can deny access or just log violations. Mustering is included with this feature. This feature requires the Door Construct.

Multi-Queue (MQ) – The MQ feature provides a means to send alarms to a user created Queue. As such, the master alarm queue of the Information Manager can be hidden, but certain alarms and I/O Point states can still be seen and managed. These queues can be configured to pop up automatically whenever there is a new alarm or I/O Point state change.

Database (DB) –The DB feature provides additional database functionality beyond that which is included by default. With this feature, you can add database tables and create screens to manage those tables in  **Live View**.

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System Requirements

Operating System:	Windows 11 (Pro or Enterprise), Windows Server 2019 Windows Server 2022
CPU (Processor):	Minimum: Intel I7 Quad Core 2.8 GHz
RAM (Memory):	Minimum: 16GB DDR2 800 MHz Recommended: 32GB DDR4 SDRAM
HDD (Disk Space):	Minimum: 200GB & 1TB SATA Secondary Drive Recommended: 1TB
VGA (Video):	Minimum: 1GB VRAM @ 700Mhz Recommended: 4GB VRAM DDR3 @ 700MHz
Display:	17" VGA (Touch screen optional)
Input Devices:	Mouse, keyboard
Network & Protocols:	1Gb network adapter with Windows TCP/IP v4

Note: OSSI will continue to support existing systems that conform to the previous system requirements including Windows 10 (Pro or Enterprise) 64-bit. Everyone is encouraged to migrate to the new system requirements.

A Windows compatible sound device or card is recommended on the Client systems so that alerts and other sounds may be heard.

Display Settings

The minimum supported display setting is 1024x768 with small icons in the taskbar. All Views and screens have been designed for this display setting with a mind to be compatible with most handheld devices. There are a couple dialogs that are only used in configuration and programming that require 1920x1080. These dialogs are not intended to be used during normal day-to-day operations once the system has been configured and programmed at which point the minimum supported display applies.

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Symbols and Conventions

Notes, Tips, and Cautions

Special comments, or areas that demand extra-close attention, are flagged throughout this manual with separating lines and a boldface keyword, as shown below.

Note: *When scanning a set of instructions, pay attention to information separated by lines, as shown here. It may save some time or help avoid common mistakes.*

Fonts

Words or phrases that appear as display buttons, keyboard keys, or Nodes appear in **bold**. Words or phrases that appear in drop-down or context menus appear in *italics*.

Display Buttons

In general, when the manual refers to a graphic screen button, the button name and its graphic will be displayed. For example: the  **Design View** button located in the Application Menu. The text buttons will be displayed as they appear in the software (e.g. ).

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Installation Guide

Installing Intelli-Site is a simple process but one that requires planning. Because the software is an object-oriented collection of linked software components it is important to understand what each component is before installing. Once you understand the components and have planned where to install each, then installation can begin.

Software Components

Intelli-Site is an object-oriented collection of linked software components that communicate using an industry standard, socket interface.

Intelli-Site has five main software components:

- Intelli-Site Engine
- Intelli-Site Driver Service
- Intelli-Site Database
- Intelli-Site Web Service (optional)
- Intelli-Site Client
- Intelli-Site Client Manager Service (optional)

The socket interface allows each software component to reside on the same computer or on several different computers. This gives Intelli-Site extensibility and flexibility.

The Desktop Client will often be installed on more than one computer as there will be more than one physical location where the software is to be used and managed. Distributed hardware systems and redundancy will also cause components to be installed on multiple computers. This guide will walk you through installing on a single computer without redundancy or distributed systems. Contact technical support for help if you have a redundant system.

Note: See the OSSI Knowledge Base Article [“Quick Start Guide for Configuring Redundancy in Intelli-Site 4”](#) for help in setting up redundancy.

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Operating System Prerequisites

There are a couple prerequisites to installing the Intelli-Site software.

- Internet Information Services (IIS) Components (if the Web Service is to be installed)
- Microsoft .NET Framework 4.6.x

Internet Information Services (IIS) Components

If the Web Service is going to be installed, the required Internet Information Services (IIS) components must be enabled before Intelli-Site is installed. The following sections are broken out by Windows version.

If .NET Framework 4.6 was installed before the components were enabled, Microsoft provides a program to run that will register ASP.NET for IIS.

Windows Server 2012 R2 and Later

To manage the IIS components, run the **Server Manager**. One of the easiest ways to click on the "Server Manager" icon in the tray. If it is not in the tray, click on the start menu then click the "Server Manager" button. The **Server Manager** opens, displaying the Dashboard.

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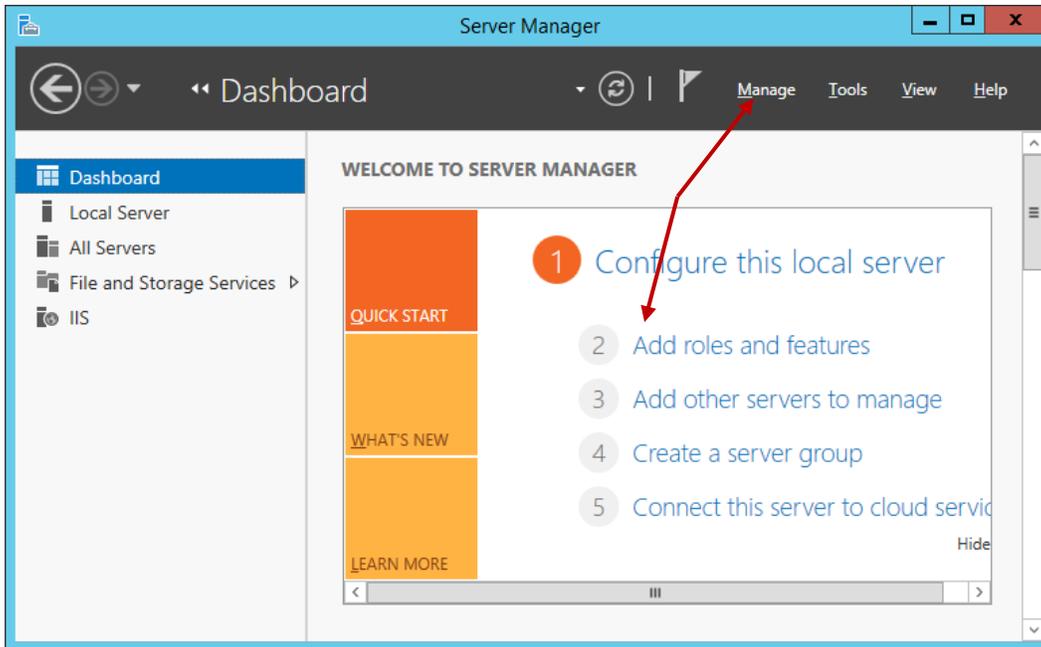


Figure 1 - Server Manager

If the Dashboard is not displayed, locate the Manage menu at the top of the window and choose the "Add Roles and Features" option, or click on Add roles and features. The **Add Roles and Features Wizard** window displays. Work through each page until you get to "Server Roles".

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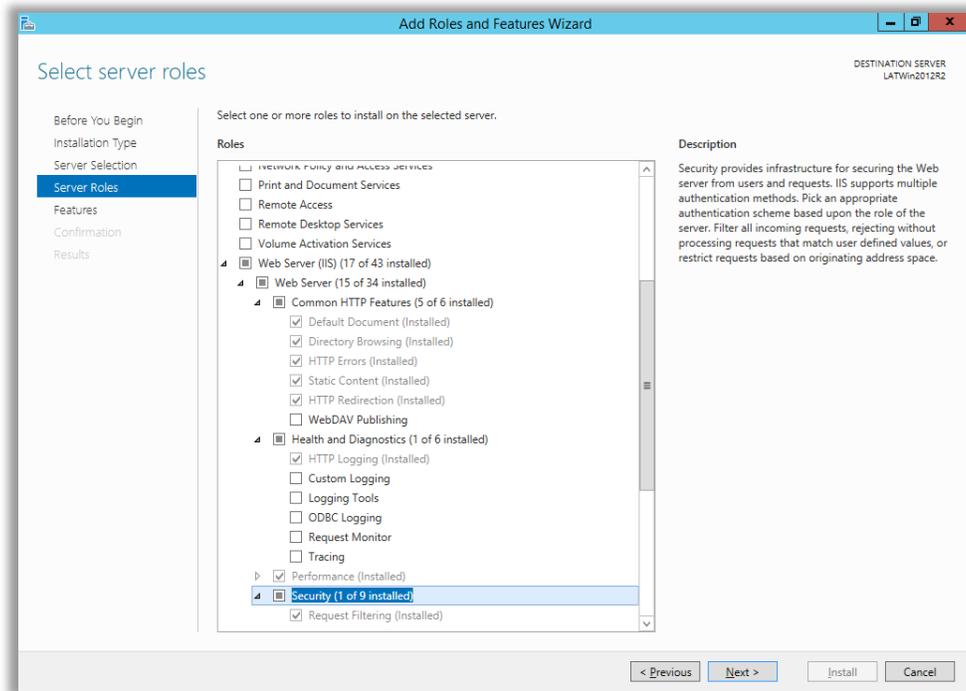


Figure 2 – Windows Server 2012 R2 Server Manager Add Server Roles

In the list of **Roles**, locate “Web Server (IIS)”. The following are the server role features that must be enabled for the Web Service to function properly. If even one of them is missing, the Web Service will not work as expected if at all.

Note: If other role services are currently enabled, DO NOT disable them. Other software on your system may need them.

- ✓ Web Server
 - ✓ Common HTTP Features
 - ✓ Default Document
 - ✓ Directory Browsing
 - ✓ HTTP Errors
 - ✓ Static Content
 - ✓ HTTP Redirection
 - ✓ Application Development
 - ✓ .NET Extensibility 4.5
 - ✓ ASP.Net 4.5
 - ✓ ISAPI Extensions
 - ✓ ISAPI Filters
 - ✓ Application Initialization
 - ✓ Web Socket Protocol

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- ✓ Health and Diagnostics
 - ✓ HTTP Logging
- ✓ Security
 - ✓ Request Filtering
- ✓ Performance
 - ✓ Static Content Compression
 - ✓ Dynamic Content Compression
- ✓ Management Tools
 - ✓ IIS Management Console
 - ✓ IIS Management Scripts and Tools

Windows 11 and Other Desktop Versions

Since Windows 11 is not a Server, the IIS features must be managed through **Settings**. Open **Settings** and search for “Turn Windows features on or off”.

Note: Desktop versions of IIS have a limit of 10 concurrent connections.

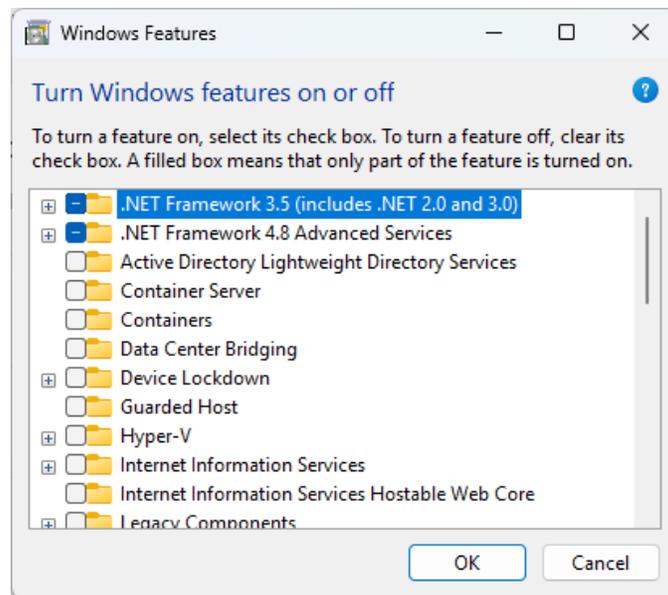


Figure 3 - Windows 11 Windows Features dialog

The following are the features that must be enabled for the Web Service to function properly. If even one of them is missing, the Web Service will not work as expected if at all.

Note: If other features are currently enabled, DO NOT disable them. Other software on your system may need them.

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All of the required features are found under the **Internet Information Services** node. Be sure to check this node as well.

- ✓ Web Management Tools
 - ✓ IIS Management Console
 - ✓ IIS Management Scripts and Tools

- ✓ World Wide Web Services
 - ✓ Application Development Features
 - ✓ .NET Extensibility 4.8
 - ✓ ASP.Net 4.8
 - ✓ Application Initialization
 - ✓ ISAPI Extensions
 - ✓ ISAPI Filters
 - ✓ Web Socket Protocol
 - ✓ Common HTTP Features
 - ✓ Default Document
 - ✓ Directory Browsing
 - ✓ HTTP Errors
 - ✓ HTTP Redirection
 - ✓ Static Content
 - ✓ Health and Diagnostics
 - ✓ HTTP Logging
 - ✓ Request Monitor
 - ✓ Performance Features
 - ✓ Dynamic Content Compression
 - ✓ Static Content Compression
 - ✓ Security
 - ✓ Request Filtering

Registering ASP.NET with IIS

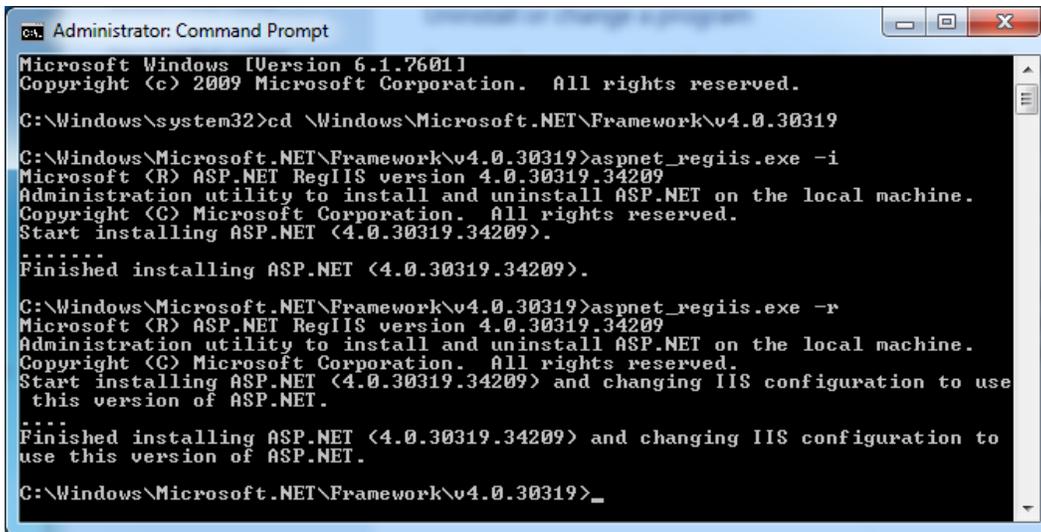
If .NET Framework 4.6.x was installed before the components were enabled, Microsoft provides a program that will register ASP.NET for IIS. The program is **aspnet_regiis.exe** and can be found in the following directory:

C:\Windows\Microsoft.NET\Framework\v4.0.30319

Run it twice, once with the `-i` option. The second time with `-r`.

Note: Administrator privileges are needed to run the program `aspnet_regiis.exe`.

Intelli-Site 4.2 Installation Guide



```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7601]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Windows\system32>cd \Windows\Microsoft.NET\Framework\v4.0.30319
C:\Windows\Microsoft.NET\Framework\v4.0.30319>aspnet_regiis.exe -i
Microsoft (R) ASP.NET RegIIS version 4.0.30319.34209
Administration utility to install and uninstall ASP.NET on the local machine.
Copyright (C) Microsoft Corporation. All rights reserved.
Start installing ASP.NET (4.0.30319.34209).
*****
Finished installing ASP.NET (4.0.30319.34209).

C:\Windows\Microsoft.NET\Framework\v4.0.30319>aspnet_regiis.exe -r
Microsoft (R) ASP.NET RegIIS version 4.0.30319.34209
Administration utility to install and uninstall ASP.NET on the local machine.
Copyright (C) Microsoft Corporation. All rights reserved.
Start installing ASP.NET (4.0.30319.34209) and changing IIS configuration to use
this version of ASP.NET.
****
Finished installing ASP.NET (4.0.30319.34209) and changing IIS configuration to
use this version of ASP.NET.

C:\Windows\Microsoft.NET\Framework\v4.0.30319>_
```

Figure 4 - Command Prompt window after running aspnet_regiis.exe

Microsoft .NET Framework 4.6.x

Ensure that Microsoft .NET Framework 4.6.x is installed. This software may be downloaded via “Windows Update” or directly from the [Microsoft Download Center](#). If it is not installed, the Intelli-Site installer will detect its absence and halt the installation with an explanation.

Installing Intelli-Site Software

The following walks through the standard installation process for Intelli-Site. Most facilities will install all software components on the same host computer. See section [Installing on Multiple Computers](#) for those instructions.

Verify that your hardware meets minimum system requirements as described in [Minimum System Requirements](#).

There are three major parts of the installation process:

- The Intelli-Site Installer which installs the Intelli-Site software
- PostgreSQL Database installation using the Intelli-Site Configuration Utility
- Project Creation and Web Service installation using the Intelli-Site Configuration Utility

Intelli-Site 4.2 Installation Guide

The Intelli-Site installer will set the Configuration Utility to automatically run on restart which will perform Intelli-Site setup and create the Project.

Intelli-Site Installer

To begin installing Intelli-Site, run the Intelli-Site installer. The Windows **User Account Control** dialog appears asking if you want to allow this app to make changes to your device. Click **Yes**. The **Preparing to Install...** screen will appear.

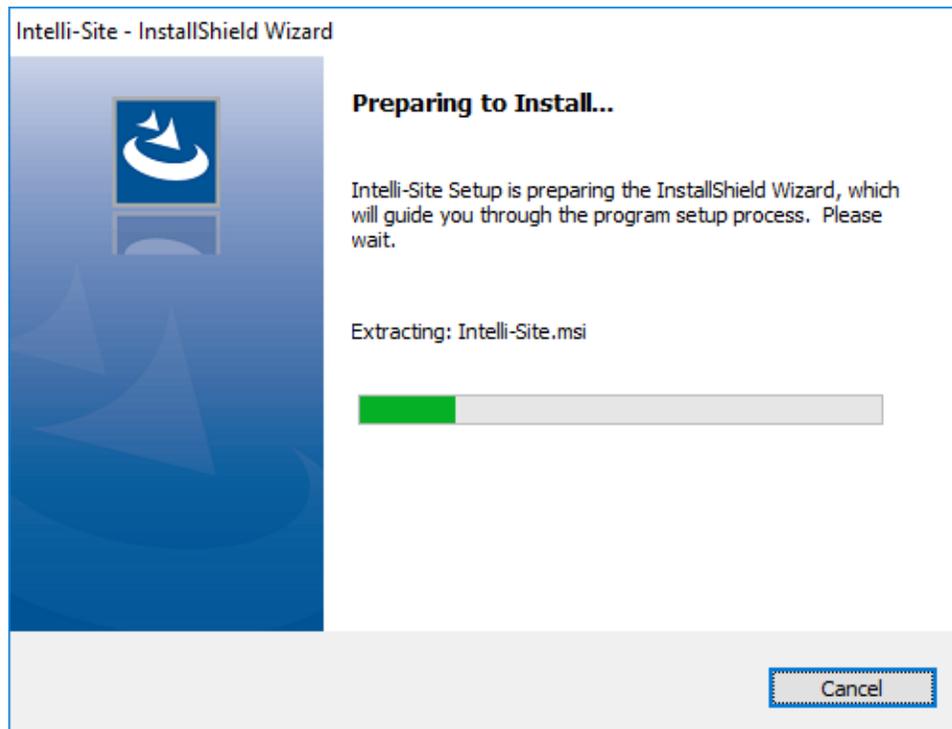


Figure 5 - InstallShield Preparing to Install... screen

This displays while the installation MSI is being extracted then runs it. The next screen is the **Welcome** screen.

Intelli-Site 4.2 Installation Guide

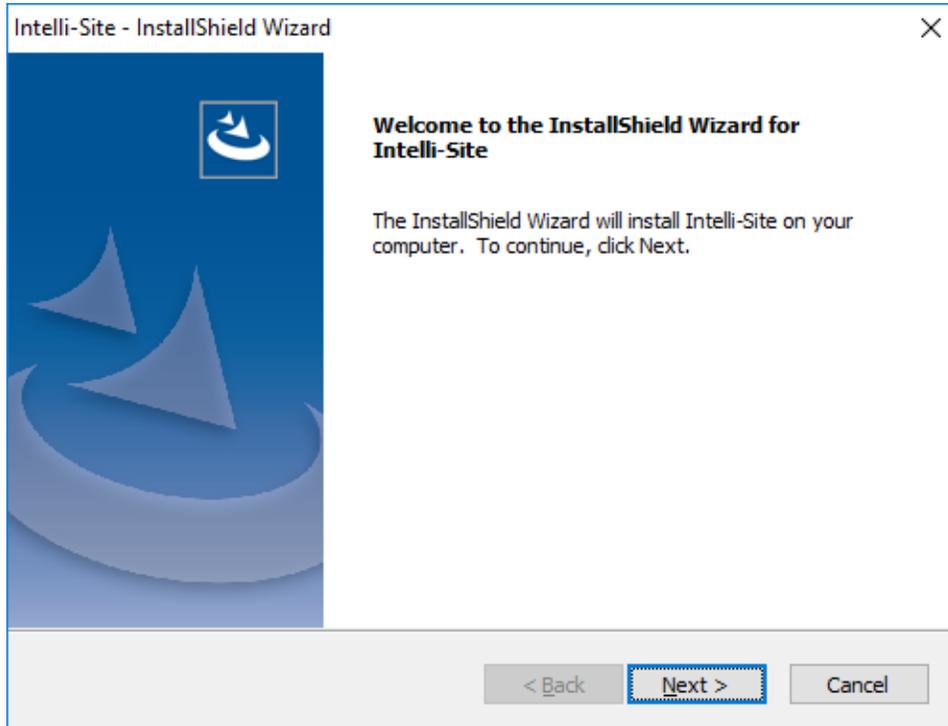
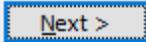


Figure 6 – InstallShield Welcome window

Click the  button. Next is the **License Agreement**.

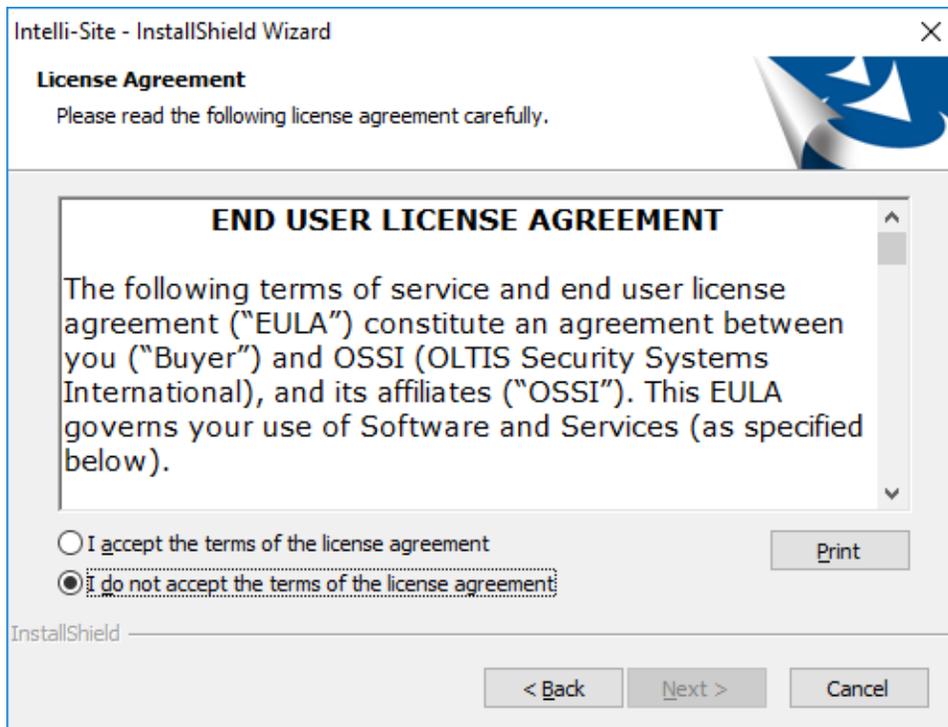
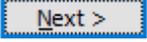


Figure 7 – License Agreement screen

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The installation will not continue until the “**I accept the terms in the license agreement**” checkbox is checked. Please read the End-User License Agreement (EULA) carefully. You may choose to print the EULA. You will be able to read the EULA in the future within the Desktop Client using the  **About** option.

Once the checkbox is checked, the  button is enabled. Click it to continue.

The next window is the **Setup Type** window.

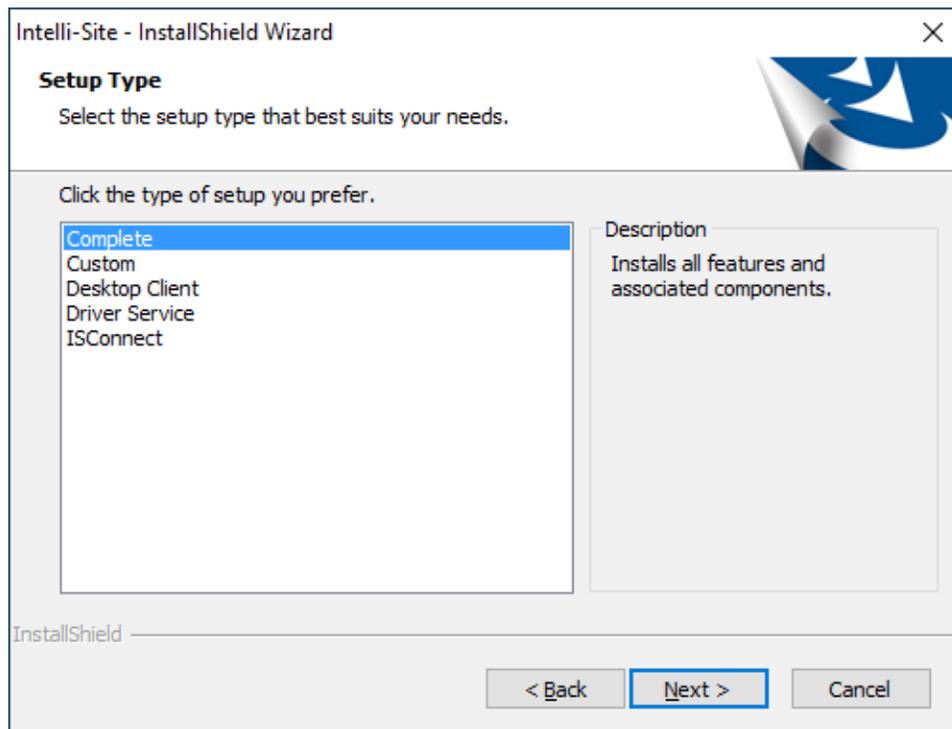


Figure 8 - Setup Type screen

There are four (4) options.

Complete – Installs all features and associated components

Custom – Allows you to specify which features to install; recommended for advanced users only

Desktop Client – Installs the Desktop Client application only

Driver Service – Installs the Driver Service and associated components

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Note: *ISConnect is a desktop application to create configurations and import data from external sources (files and/or SQL databases).*

Highlight the desired setup type and click **Next >**. If **Custom** was highlighted, the **Select Features** screen appears allowing the user to specify the desired components. After this and for all other setup types, the **Select Drivers** screen displays.

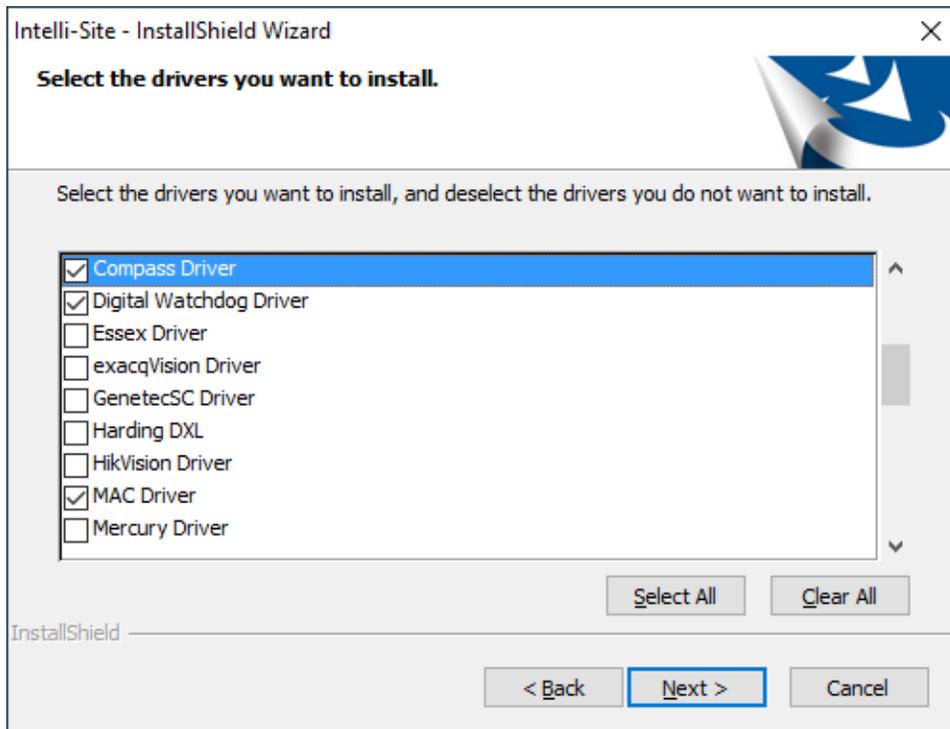


Figure 9 – Select Drivers screen

Note: *The drivers are listed in alphabetical order. You may need to scroll to find the desired driver(s).*

Check the necessary driver(s) then click **Next >**. The **Ready to Install the Program** screen displays.

IntelliCompass and MACIntelliNote: *For the Desktop Client only option, it is necessary to install all the drivers that were installed for the Engine installation, usually a “Complete” install. As a general rule, **Select All** is your friend for “Desktop Client” only installations.*

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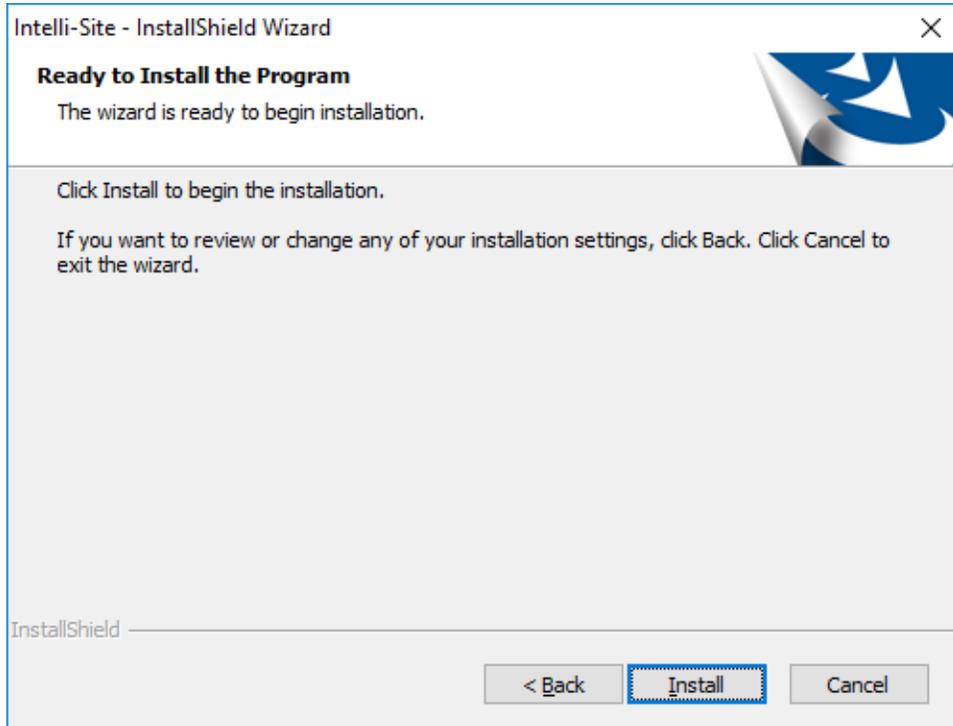


Figure 10 - Ready to install Intelli-Site Screen

This screen gives you the opportunity to go back and change the installation option. Click **Install** to begin the installation.

Intelli-Site 4.2 Installation Guide

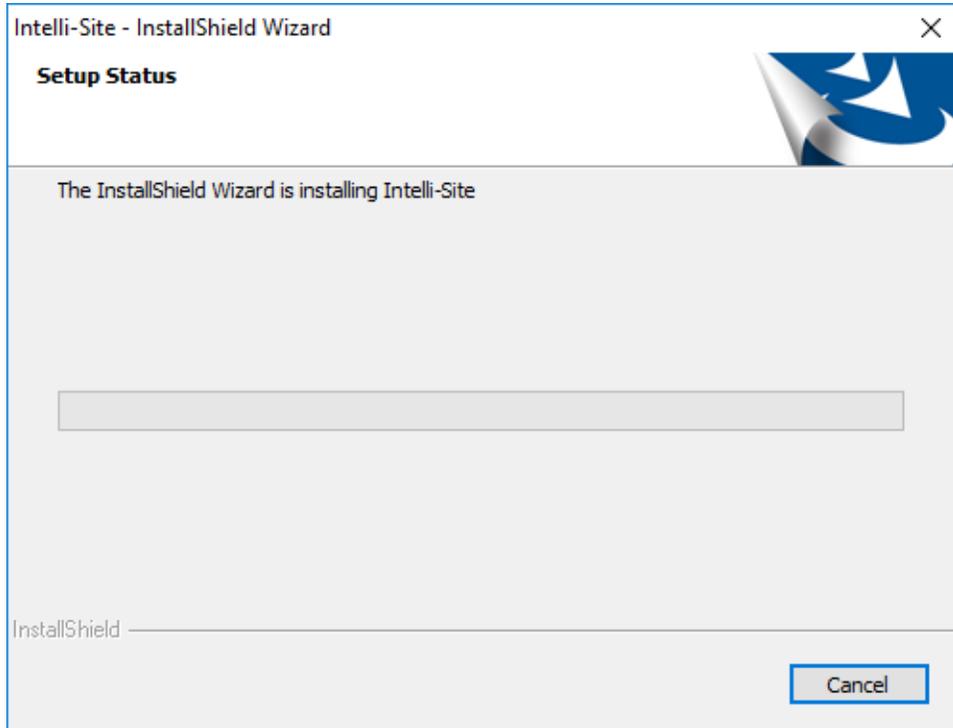


Figure 11 - Installing Intelli-Site screen

The last InstallShield screen displays when the installation is complete.

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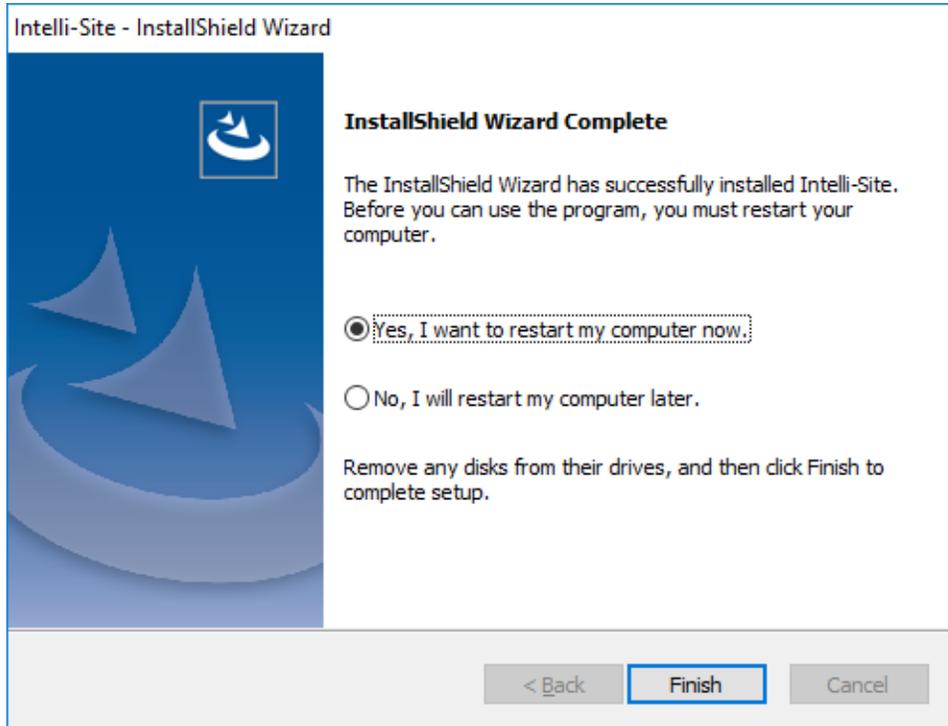
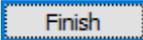


Figure 12 - InstallShield Complete screen

The computer must be restarted. After the computer is restarted, the Configuration Utility will launch which will perform Intelli-Site Setup and create the Project. Click .

Intelli-Site Setup Module

The installer set the Configuration Utility to run on startup and install the database as well as create the first project. The Intelli-Site Setup module installs, and configures PostgreSQL, the default database. During the PostgreSQL installation, Microsoft Visual C++ 2013 Redistributables are installed as well.

Note: *There are startup dependencies for Intelli-Site. Because of this, it may take as long as 2 minutes before the Setup Module appears. It rarely takes this long, but depending on the system it could.*

Once the installation is complete the following screen displays.

Intelli-Site 4.2 Installation Guide

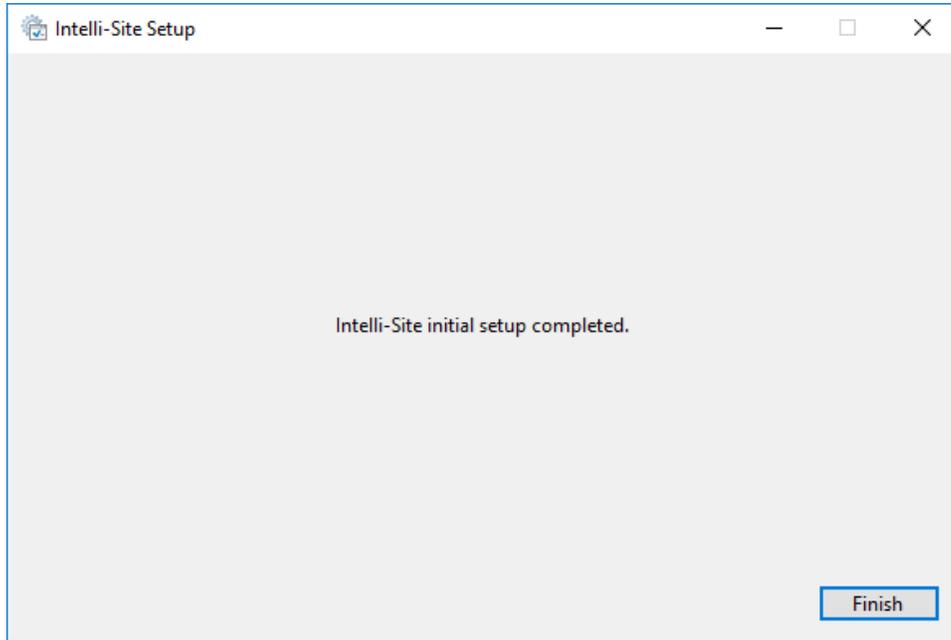


Figure 13 - Final Intelli-Site Initial Setup screen

Click the **Finish** button. The Intelli-Site Configuration Utility main window displays. Because there is no Project, it opens the **Project Setup** dialog. Without a Project, the Engine cannot start.

Project Creation and Web Service Installation

When the Configuration Utility detects no project, it automatically opens the **Project Setup** dialog.

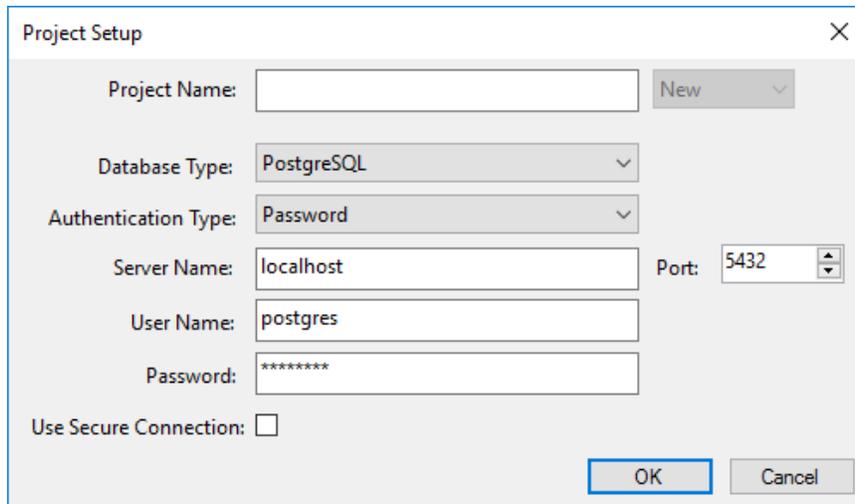
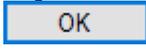


Figure 14 - Project Setup dialog

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Enter the name of the Intelli-Site Project. Please make it descriptive of the Site at which the project will be used, for example: Software Giants, LLC. Click  to create the project.

Note: The User Name and Password are filled in with the default username and password used when PostgreSQL was installed. If for some reason, PostgreSQL was previously installed or if the default username or password has been changed, you will need to enter the correct information.

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Notice that the Web Service is not installed by default.

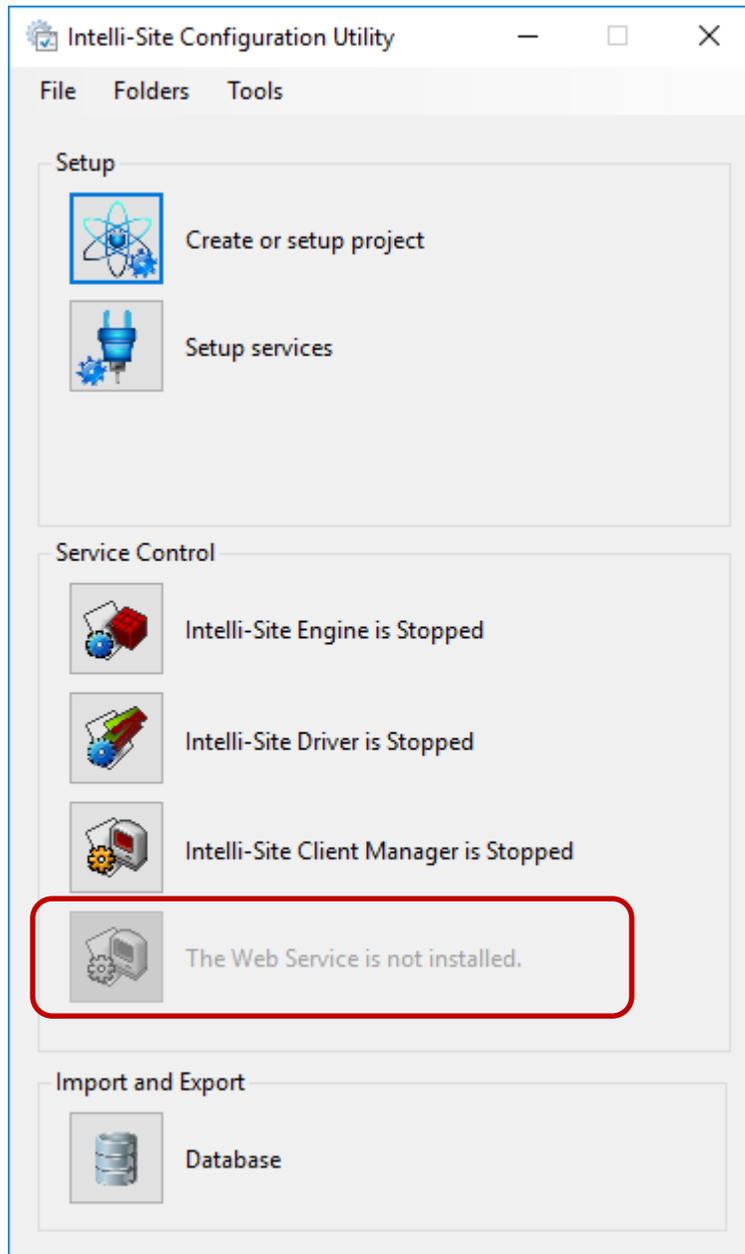


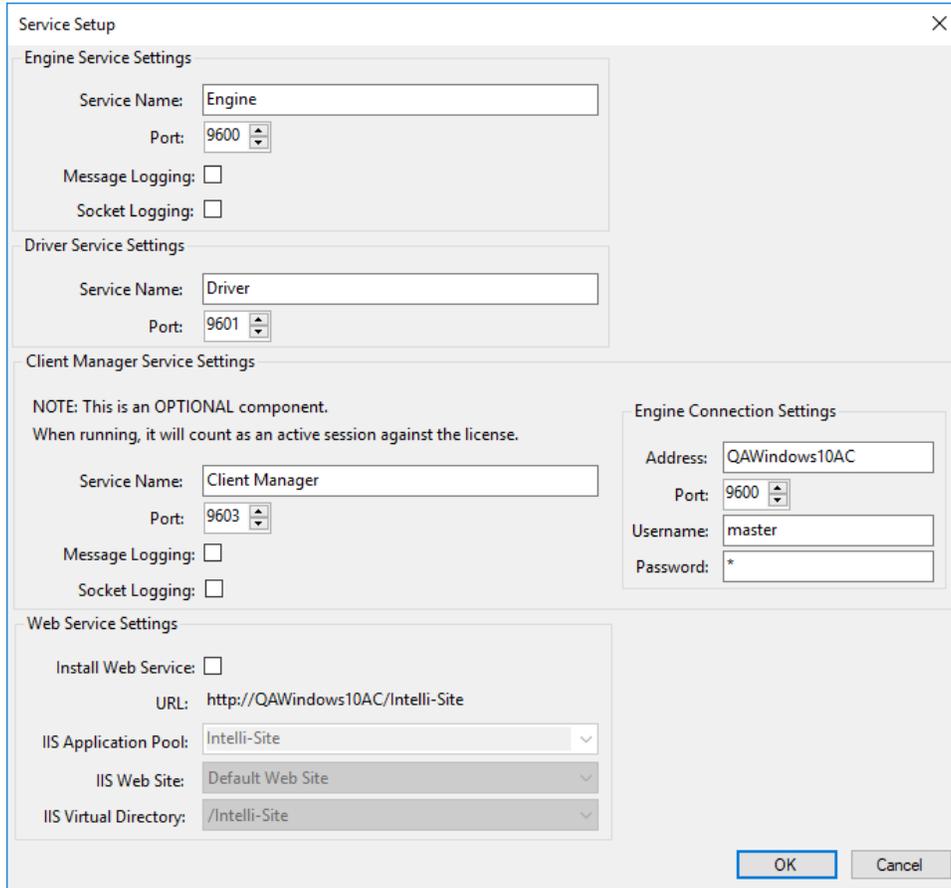
Figure 15 – Configuration Utility after Project creation

If the Web Service component was selected during installation, now would be the time to finish the process.

Note: *Ensure the Internet Information Services (IIS) Components have been enabled. See section [Internet Information Services \(IIS\) Components](#).*

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Click  **Setup services** to bring up the **Service Setup** dialog.



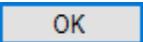
The Service Setup dialog box is divided into several sections:

- Engine Service Settings:** Service Name: Engine, Port: 9600, Message Logging: , Socket Logging:
- Driver Service Settings:** Service Name: Driver, Port: 9601
- Client Manager Service Settings:** NOTE: This is an OPTIONAL component. When running, it will count as an active session against the license. Service Name: Client Manager, Port: 9603, Message Logging: , Socket Logging:
- Engine Connection Settings:** Address: QAWindows10AC, Port: 9600, Username: master, Password: *
- Web Service Settings:** Install Web Service: , URL: http://QAWindows10AC/Intelli-Site, IIS Application Pool: Intelli-Site, IIS Web Site: Default Web Site, IIS Virtual Directory: /Intelli-Site

Buttons: OK, Cancel

Figure 16 - Service Setup dialog

Notice that there are settings for the Engine Service, Driver Service, Client Manager Service, and Web Service. Very seldom will any of these settings need to be changed. If they do need to be modified, it will be at the request of Technical Support. See section Setup Services in the User's Manual for more information about these settings.

The **Web Service Settings** group shows the IIS settings that will be used when the Web Service is installed. This information is important if the host computer has any other web sites. Feel free to share this information with your IT department. It also shows you what the URL for the Web Service will be once it has been installed. To install the Web Service, check **Install Web Service** then click .

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The Configuration Utility will install the Web Service and start it.

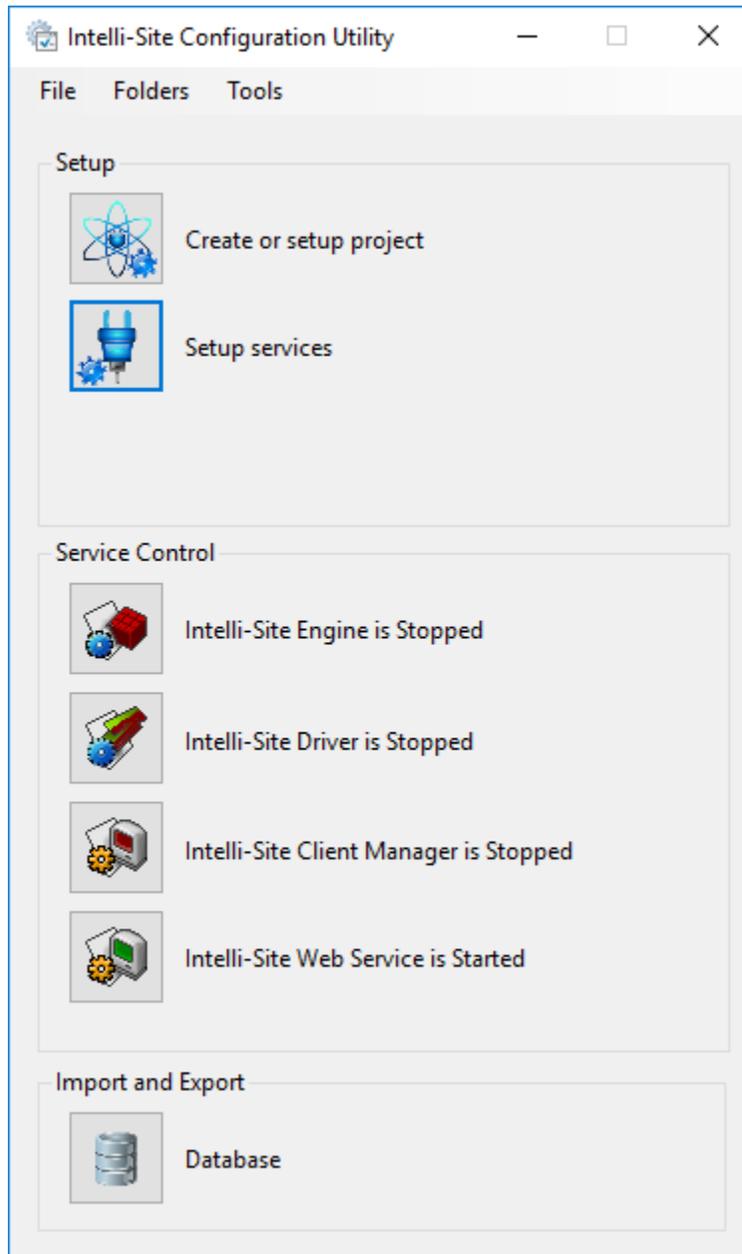


Figure 17 - Configuration Utility after installing the Web Service

Congratulations! Intelli-Site is installed. Next comes licensing the software.

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Licensing Intelli-Site

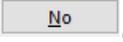
Immediately after installation, Intelli-Site has a simple demonstration license which will allow you to perform basic programming and evaluation of the software. The exact details of the demonstration license are listed on the **License** tab of the  **About** dialog in the Desktop Client.

When the software was purchased, specific quantities, modules, driver classes, and a software maintenance agreement were included in the order. The license will activate the purchased elements.

Before we can activate the license the Intelli-Site Engine must be running. Run the Intelli-Site Configuration Utility.

If the Intelli-Site Engine is stopped, start it by clicking on the  **Intelli-Site Engine** tile. The first time the Engine is started takes a little longer than any other time as there are setup tasks that it does that it won't have to do ever again.

Once the Engine status shows "Intelli-Site Engine is Running", launch the Intelli-Site Desktop Client and logon. The default username is **master**. The default password is **m**.

Since this is the first time you've logged in, backup has not been configured. Intelli-Site will popup a dialog asking if you want to do so now. For now, click . Backup can be configured later.

Click on the  button in the lower left-hand corner to open the application menu. Select  to open the  **About** dialog.

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The details of the license can be found on the **License** tab of the  **About** dialog.

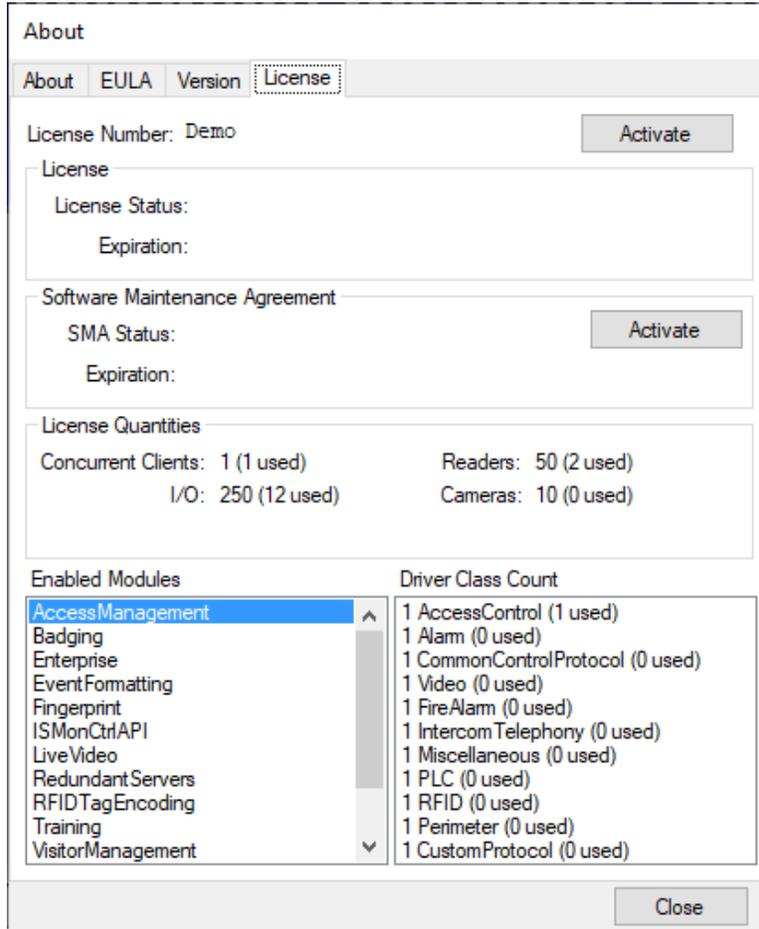


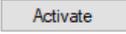
Figure 18 - Default Demo License for Intelli-Site

There are two parts of a license for Intelli-Site. There is the license itself and the Software Maintenance Agreement (SMA). The activation process of the SMA is the same as the process for the license. We will walk through the procedure for the license. Then you will use the same process to activate the SMA.

There are two ways to activate the license. The preferred method is online. But if the Engine does not have access to the internet or you have not been provided and Activation Key, there is an offline method available.

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Online Activation

If the computer running the Engine Service has internet access and you already have an Activation Key from your sales representative, then we can activate it right now. Click the  button to open the **Active License** dialog.

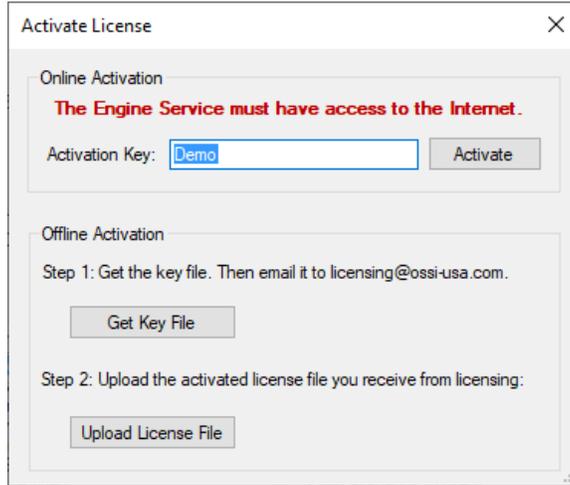
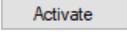


Figure 19 - Activate License dialog

Type in the Activation Key then click the  button. The Engine takes the Activation Key and contacts our secure servers to activate the license.

Repeat this with the SMA key.

Congratulations! You are now the proud owner of a fully licensed version of Intelli-Site. The **License** tab now displays the license details that were purchased and activated. In addition, the status bar at the bottom of the Desktop Client window displays the license state and date including the SMA.

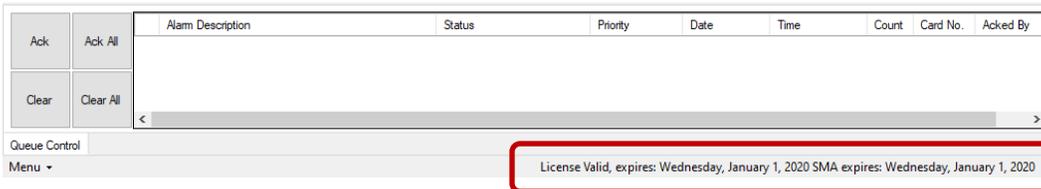


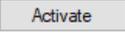
Figure 20 - License Status

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Offline Activation

If the computer running the Engine Service does not have internet access or you don't have an Activation Key from your sales representative, then license must be activated offline. Offline activation consists of creating an activation key file that is emailed to licensing@ossi-usa.com. Then waiting for a license file to be returned via email which you will then upload to Intelli-Site.

Get Key File and Email It

In the **About** dialog, click the  button to open the **Active License** dialog.

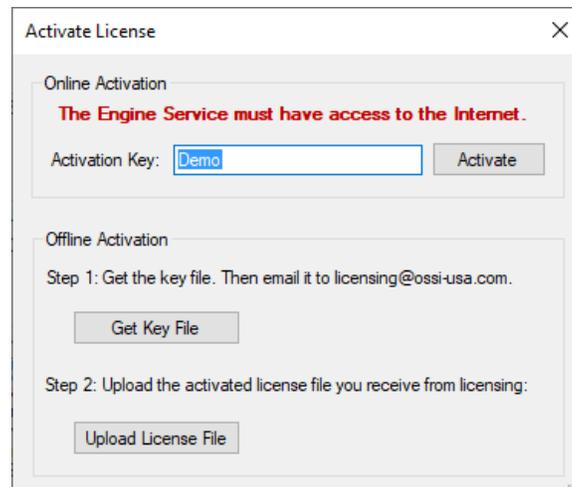


Figure 21 - Activate License dialog

To generate the Activation Key request, click the  button. The **Save Key File as...** dialog appears. The name of the file is the name of the project with the .key extension.

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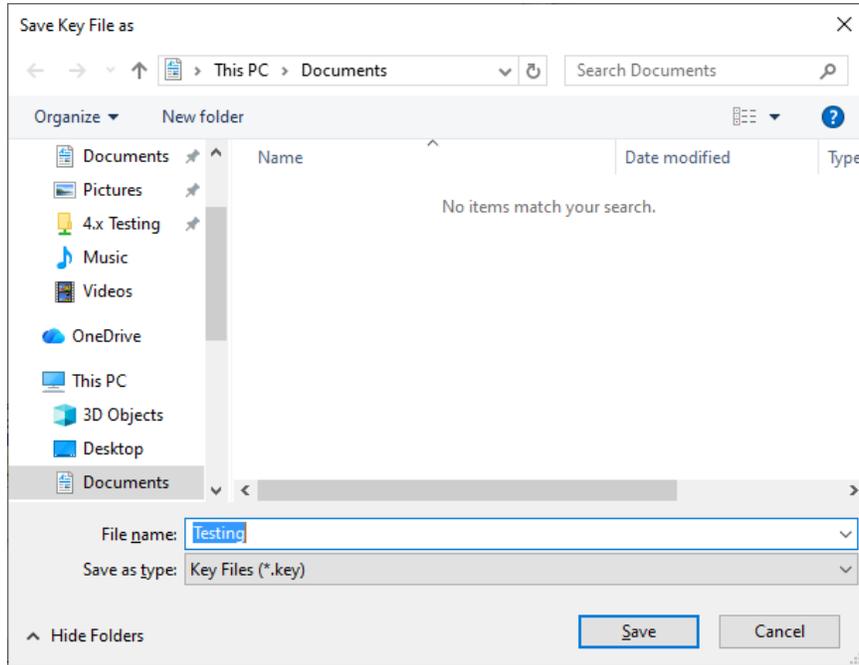


Figure 22 – Save Key File as... dialog

Save the file. Email this file to licensing@ossi-usa.com along with the PO number of your order.

Load the License File

When OSS I sends the license file to you, copy this file to the computer running the Intelli-Site Engine.

Launch the Desktop Client, logon, and return to the **License** tab of the **About** dialog. Click on **Upload License File** button again.

In the **Open** dialog, locate the activation file (*.lic) that OSS I sent. Select it and click **Open**. The Engine will load the file and activate the license accordingly.

Congratulations! You are now the proud owner of a fully licensed version of Intelli-Site. The **License** tab now displays the license details that were purchased and activated. In addition, the status bar at the bottom of the Desktop Client window displays the license state and date including the SMA.

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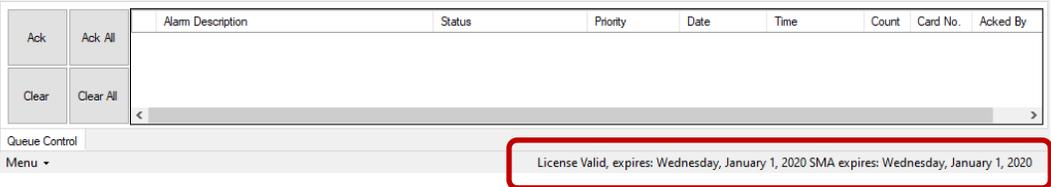


Figure 23 - License Status

Note: For a quick introduction to using Intelli-Site, please see the separate Quick Start Guide.

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Figure 23 - License Status43

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Revision History

2025-10-28 Created