INSTALLING AND UPDATING RHO365Engine

This article will walk you thru the process of installing the RHO365Engine: the RedHorse CRM Outlook 365 Engine. It will also walk you thru the process of updating an existing installation.

Prerequisites

RHO365Engine is compatible with the CRM and Business Manager editions of RedHorse version 8.4 and higher.

Choosing an Installation Location

RHO365Engine is a Windows Service. It can be run on any Windows workstation (XP Pro or higher) or server operating system (Server 2003 or higher) given the correct permissions to run.

It is not necessary to have RHO365Engine installed on the machine where RedHorse is running. It is only necessary to have access to the path (local physical drive or network) where RedHorse is installed.

RHO365Engine can be installed on the server where RedHorse is installed, but if high volume is expected, better performance might be achieved by installing on a dedicated machine.

Step 1: Run the Installer

Browse to the folder on the server where RedHorse is installed. Do not attempt to run from a mapped drive, as the installer will not be able to start a service in windows to a mapped drive.

Run the file o365setup.exe file that is located in the RedHorse folder. When running on a workstation operating system, it may be necessary to log into the machine as Administrator or select "Run as Administrator" to have proper permissions for installing a service.

Step 2: Set Service Permissions

RHO365Engine is initially set to log on as the Local System Account. If this account does not have sufficient permissions to start services, this must be changed before you can start the service. In Windows, go to Start, Administrative Tools, Services. Locate RHO365Engine and double click to open the Properties window. Use the Logon tab to set the proper logon for the service.

Step 3: Start O365Manager

When RHO365Engine is installed, a shortcut to O365Manager.exe is put into the Startup folder in Windows. When logging into Windows, this tray application will start automatically. To run this application manually, it can be launched from the Start menu. It may be necessary to select to "Run as Administrator" when starting O365Manager. This application must have sufficient permissions to start and stop services.

Step 4: Start the RHO365Engine Service

To start the RHO365Engine service, choose Start when editing the service in Windows Services, or right click the tray application O365Manager and choose Start.

Document Management Path Settings

If you are syncing emails from Outlook 365 to RedHorse, you must configure the RedHorse Document Management Path as a local drive (single user system) or a UNC path (network installation). The login used by the O365Engine service will not have access to the mapped drive and email sync will fail. See this Microsoft Knowledgebase article for more information about services and mapped drives.
http://support.microsoft.com/kb/180362

Updating to a New Version of RHO365Engine

New versions of RHO365Engine are distributed with updates to RedHorse, though all updates to RedHorse might not include a new version of o365setup.exe. After installing an update to RedHorse, a new version of o365setup.exe may be found in the folder where RedHorse is installed. Updating to a new version of RHO365Engine follows the same process outlined above, where you will run the same O365setup.exe that is used for a new installation. You will be reminded by the installer to exit the O365Manager tray application prior to installing. You may restart this again manually after the installation completes.

Please contact support if you experience any issues during the installation process.

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