

Cerenade FormsServer Version 5.1 Installation Manual

May 2009

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Introduction

Using this manual

This Installation Manual contains procedures for installing the Cerenade FormsServer. Cerenade eForms Designer and ToolBox User Manual, also in electronic format and installed during Designer installation process, provides detailed information on creating forms for use with the Cerenade FormsServer.

This preface provides an overview of the Cerenade FormsServer Installation Guide, explaining conventions used in this manual.

Conventions

As you work with Cerenade FormsServer and its manual, remember that the text format indicates a specific action or meaning. The following table lists the conventions used in this manual.

Convention	Meaning
Bold	In procedures indicates text that you type or the name of screen objects such as icons or buttons
>Bold	Identifies a procedure
SMALL CAPS	Refers to keys, such as SHIFT, CONTROL, or TAB
"Quotation marks"	Web links and folder names

Technical Support

You may obtain technical support for Visual eForms family of products via our Website, Phone, e-mail and fax.

Before contacting Cerenade for technical support, be sure to check our Knowledgebase on our Website for some common problems and their solutions.

Our Website also hosts our Online Download Center which allows you to obtain updates to the latest versions of Visual eForms components.

Internet:	support@cerenade.c	om
Web:	www.cerenade.com	
Tech Support:	310-645-0598	8am to 5pm PST
Fax:	310-645-0599	

Server-side Installation

System Requirements

The following table provides the minimum Server-side requirements for installing Cerenade FormsServer:

Hardware:

- Intel® Pentium® III processor or higher
- Minimum 256 MB of RAM
- 100 MB hard disk space for installation

IIS:

• Microsoft IIS 6.0 or higher

NOTE: enable ASP.NET and ASP For More Information See "Enable and Verify ASP.Net Settings" section.

• .NET 2.0.50727 Framework

Operating System:

- Windows 2003 Server
- Windows 2000 Server (Service Pack 3)

Database:

- Microsoft SQL Server 2000 or 2005
- Oracle 8i, 9i or higher
- Email notification requires SMTP mail server where email can be submitted

Internet Explorer 6.x or higher.

Pre-Installation Notes

It is always a good idea to peruse this Installation Manual in its entirety prior to proceeding with running the installation program. In doing so, you can predetermine all the configuration parameters required by installation program. Note that the installation program requires the operator to possess a fair familiarity with the organization's infrastructure.

If you are running this installation program on an existing instance of Cerenade FormsServer, in order to minimize inconvenience imposed on your end-users, it is advisable to perform the installation during off hours in addition to disabling end-users' access to Cerenade FormsServer for the duration of the installation.

- For new installations, the installation program automatically creates SQL Server databases.
- A SQL user account with Dba and Systems privileges must be created prior to installation on SQL server.
- If you are planning to have Oracle as your backend database, the database needs to be created prior to running this installation program.
- Prior to running Cerenade FormsServer installation program, make sure that you are logged in with full administrative privileges in order to provide the installation program with the required access rights to system resources.
- SQL Security should be set to a mixed-mode: SQL Authentication and Window Authentication.

The next section of this Installation Manual will provide you with a step-by-step explanation of the installation procedure.

Installation Procedure

Insert the Cerenade FormsServer CD into CD-ROM Drive. This CD is Auto-Run Enabled but if you wish to launch the installation program manually simply double-click the file "setup.exe" on the CD.

Alternatively, if you have downloaded the installation file from our web site, double-click on "CerFSSetup.EXE".

Upon execution of the installation program the following screen will be displayed:

Step 1:

Type in your installation password to start the configuration process. Click **Next** on the Welcome screen.



Figure 1

Step 2:

Read and accept the license agreement and then click **Next** in the License agreement window.

Cerenade Forms Server Setup	
License Agreement You must agree with the license agreement below to proceed.	CE
CERENADE END-USER LICENSE AGREEMENT	-
Cerenade Forms Server 5.1	
IMPORTANT-READ CAREFULLY: This End-User License A ("EULA") is a legal agreement between you (either an individual entity) and Cerenade for the Cerenade software product identifi- which includes computer software and may include associated m materials, and "online" or electronic documentation ("Product"). amendment or addendum to this EULA may accompany the Pro-	Agreement or a single ed above, nedia, printed An oduct. YOU
I gocqept the license agreement I do hit accept the license agreement	
Reset < Back Next >	Cancel

Figure 2

Step 3:

Select the root folder where you want to install all modules of Cerenade FormsServer.

🙀 Cerenade Forms Server Setup		
Destination Folder Select a folder where the applicat	tion will be installed.	CE
The Wise Installation Wizard w following folder. DDTo install into a different fol You can choose not to install 0 Wise Installation Wizard.	ill install the files for Cerenade Fo der, click the Browse button, and Cerenade Forms Server by clickin	rms Server in the select another folder. g Cancel to exit the
Destination Folder C:\Cerenade\		Btowse
Wise Installation Wizard (R)	< Bock	Nept > Cancel

Figure 3

Step 4:

Screen on Figure 4 lets you choose the components you wish to install (All components are selected by default.)

- Complete	Feature Description:
	This feature will be installed on the local hard drive.
Current location:	This feature requires 7578KB on your hard drive. It has 5 of 5 subfeatures selected. The subfeatures require 31MB on your hard drive.
C:\Cerenade\	brgwse
Ise Installation Wizard (R)	

- Client Interface is the ASP.NET user interface for Cerenade
 FormsServer
- Administrative Console is the ASP administrative interface for Cerenade FormsServer
- Database Settings option will create the database (SQL Server only) and create the necessary tables, views and indexes (SQL Server, Oracle). Note that the database can be located on a server different from the one you are running the installation program on.

NOTE: Selecting this option requires access to the database server using an existing SQL user account with proper Admin access privileges (SYSADMIN Role).

- **Component Services** option will display a list of additional components and options used to extend the capabilities of Cerenade FormsServer:
 - Archiver is a middleware component of Cerenade FormsServer intended to provide connectivity to Document Management systems such as Laserfiche, FileNet, Documentum and DocFusion for archival purposes. Upon final approval of transactions, this component converts forms and attachments to TIFF or PDF documents in addition to generating index files containing indexing information extracted from form data.
 - **NOTE:** For a detailed discussion about integration with Laserfiche EDMS, please see "Connectivity with Laserfiche.pdf"

Step 5:

The installation program can create the database if you are running SQL Server. If you are running Oracle, the database needs to be created prior to running this program.

Enter database parameters. Click browse to select SQL machine from within the network.

NOTE: absolute name of the target SQL Server must be entered here. When running this program on the same machine as your target SQL server, use the name of the machine rather than (local) or ".".

	🔞 Cerenade Forms Server Setup	
	SQL Server Connection Select the SQL server and security credentials to be used for SQL se execution during installation.	oript
	SQL Server Name:	
	DMOSCANSRV	Browse
	Database Name:	
	esdotnet	
DO NOT USE NT Authentication	C Windows NT Authentication	
An existing DB user with	SQL User Name: [esdotnetsa] SQL Password:	
	Wise Installation Wizard (R)	
	< Back Ne	od > Cancel

Figure 5

Step 6:

Configuring Web Applications components for both Administrative Console and Client Interface.

Click Next to proceed

🕞 Cerenade Forms Server Setup	
Web Resources Configuration	C.
This dialog marks the beginning of a series of dialogs t sites and virtual directories will be installed to a Micros Server (IIS). Which dialogs appear and which options which edition of IIS is present.	hat let you specify how Web off Internet Information are available depend on
The options are identical to those within the Internet Se options, see the documentation on IIS, or see your We	ervices Manager. For help on b Server administrator.
Wise Installation Wizard (R)	
< Bac	k Next> Cancel
Figure 6	ý.

Step 7:

Enter a virtual directory name and select the destination folder for Cerenade FormsServer <u>Administrative</u> Console. Default values are recommended.

🖟 Cerenade Forms Server Setup	
New Virtual Directory	C
Virtual Directory Name:	
CerFsAdmin	
Virtual Directory Parent:	
	×
Physical Directory	
C:\Cerenade\EsAdmin\	Browse
Nse Installation Wizard (R)	
	<back nert=""> Cancel</back>

Figure 7

Write the "Virtual Directory Name" you used on this step in the box below. You will need this information at a later time.

Admin Console Virtual Directory:

Step 8:

Enter a virtual directory name and select destination folder for Cerenade FormsServer <u>Client</u> Interface.

Default values are recommended.

Click Next to continue

C
-
Browse
< Back Nerd > Cancel

Figure 8

Write the "Virtual Directory Name" you used on this step in the box below. You will need this information at a later time.

Client Access Virtual Directory:

Step 9:

Click **Next** to Begin Installation.

Step 10:

Please wait while Installer is copying files and configuring your system.

Step 11:

Click Finish



After completion of the installation you may login to Cerenade FormsServer using the following links:

Client:

http://<web server name>/<Client Access Virtual Directory>

Admin Console:

http://<web server name>/<Admin Console Virtual Directory>

NOTE: An Admin account with the following parameters already exists in the system:

Username : <u>admin@cerenade.com</u> Password : admin

It is strongly recommended that you login and change the default administrator user account as soon as this installation is completed.

IMPORTANT:

Login to IIS and check the ICP port for the Default Web Site.

	Default Web Site Properties	×
	Directory Security HTTP Headers Custom Errors ASP.NET Server Extensions 200 Web Site Performance ISAPI Filters Home Directory Documents	02 ;
	Web site identification Description: Default Web Site	
,	IP address: (All Unassigned) Advanced	
	ICP port: 80 SSL port:	
	Connections Connection timeout: 120 seconds Enable HTTP Keep-Alives	
	Image: Enable logging Active log format: W3C Extended Log File Format	
	OK Cancel Apply Help	

If ICP port is set to anything other than 80, then URL for accessing Client or Admin Console should be formatted as:

Client:

http://<web server name>:Port #/<Client Access Virtual Directory>

Admin Console:

http://<web server name>:Port #/<Admin Console Virtual Directory>

Also, login to Administrative Console and change the following URL parameters: Settings | System Settings | Form Folder URL Settings | System Settings | Website URL



Post-Installation Notes

After the installation of Cerenade FormsServer is completed, use the following check-list to make sure that other parameters within your environment are configured properly.

Login to Administrative Console

Using your Web Browser, login to Admin/Management console of Cerenade FormsServer and follow these instructions (note that the installation program will allow for creation of a shortcut on the server's desktop for access to Admin/Management console of Cerenade FormsServer. Alternatively, you can manually enter the URL associated with the Admin/Management console in the Browser by using the following parameters typed in **Step 7** of this Installation Manual:

http://<Web Server Name>/<Administrative Virtual Directory> OR http://<Web Server Name>:ICP Prot #/<Administrative Virtual Directory>

Configure System Settings

Available through FormsServer Administrative Console

Settings | System settings

- Make sure "Form Folder URL" and "Web Site URL" parameters are set correctly
- Make sure "Form Path" and "Site Path" parameters are correct

NOTE: If ICP port for Default web site is set to anything other than 80, then above URL parameters must be set using the Port #.

Configure Application Settings

Available through FormsServer Administrative Console

Settings | Application settings

Browse through "Date/Time Format", "Components Activation" and "Settings"

sections to configure the system to match your requirements

Application Pool Configuration

Available through IIS Manager

If .NET 1.0 and .NET 2.0 Framework are present on the server, .NET 1.0 will be used, by default, by FormsServer. To change this default behavior please follow these instructions:

1) Create a new application pool called "Cerenade":

- Access IIS Manager
- Right-click on "Application Pools" and select "New"
- Set "Application Pool ID" to "Cerenade"

2) Set "Application Pool" for CerFS website to "Cerenade"

- Access IIS Manager
- Open "Default Web Sites" folder
- Open Properties of "CerFS" Web Site
- Set "Application Pool" to "Cerenade"
- Click "Apply", Click "Ok" to exit

Create Form Categories

Available through FormsServer Administrative Console

Category | Add a Category

From Admin/Management console of Cerenade FormsServer, create Categories

for Forms. Form Categories are meant to facilitate the process of searching and

finding Forms for your end-users.

Cerenade Server-side E-Forms Component

Cerenade Server-side E-Forms component must be properly registered so that Administrator can Add and Update E-Forms; and that end-users can Open and View E-Forms. Follow these instructions to properly register Cerenade E-Forms Component (CerEntServCtl.dll):

- Locate "CerEntServCtl.dll"
- Un-register "CerEntServCtl.dll"
- Start | Run Regsvr32.exe –u "<fullpath>CerEntServCtl.dll"
 Register "CerEntServCtl.dll"

Start | Run Regsvr32 "<fullpath>CerEntServCtl.dll"

Run	<u>? ×</u>
-	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	regsvr32 -u "C:\Program Files\Common Files\Cerena 💌
	OK Cancel <u>B</u> rowse

Add new forms

Available through FormsServer Administrative Console

Forms | Add a Form

If you have designed or converted forms and they are ready to be published,

from Admin/Management console of Cerenade FormsServer use the Add new

forms option to deploy these forms for the use of your end-users.

IMPORTANT: If **CerEntServCtI.dll** is not registered on the Application Server

the system will generate an error messages when you try to **Add** a form.



Enable and Verify ASP.Net Settings Available through IIS Manager

- Open IIS Manager
- Click to Open "Web Service Extensions"
- Set "Status" of "ASP.NET v2.0.50727" to "Allowed"
- Set Status of "ASP.NET v1.1.4322" to "Allowed"



Wrapping CerEntServCtl.dll in a COM+ application

Applies to when installing FormsServer on Windows 2003 Servers

The application, in most cases, works without the need to wrap "CerEntServCtI.dll" in a COM+ application. IF this is the case, skip to the "Client-Side Installation" section.

4(A) Run "Administrative tools | Component services"



4(B) Expand Component Service | Computers | My Computer | COM+ Applications



- 4(C) Right Click on COM+ Applications
- 4(D) Click on New and then Application. Click Next.



4(E) Click "Create an empty application"

Welcome to the COM+ Application Install Wizard				
Install or Create a New Application Please choose whether you want to install a pre-built application or create an empty application.				
	Install pre-built application(s).			
****	Create an e <u>m</u> pty application.			
Computer:	My Computer			
	< Back Next > Cancel			

4(F) Enter application name (i.e. Cerenade), Choose "Server Application" and then click **Next**.

Welcome to the COM+ Application Install Wizard	×
Create Empty Application Please specify the name of the new application.	
Enter a name for the new application:	
cerenade	
Activation Type Library application Components will be activated in the creator's process. Server application Components will be activated in a dedicated server process	
< <u>B</u> ack <u>N</u> ext > Cancel	

4(G) Choose "This User" and enter a service account parameters. Note that this account should be member of the Local

Administrative Group.

Welcome to the COM+ Appli	ication Install Wizard 🗙 🗙
Set Application Identity Please specify the appli	cation identity.
Account The application identity will will run under this account. applied to each application C Interactive user - the c C Local Service - Built Network Service - Built (This user) User: Password:	I be set to the following account. Components in the application If you are creating more than one application, this setting will be a urrent logged on user service account. this service account with network access
<u>C</u> onfirm password:	
	< <u>B</u> ack <u>N</u> ext> Cancel

Velcome to the COM+ Application Insta Add Application Roles Please add application roles.	all Wizard
Roles CreatorOwner	<u>R</u> emove
	< <u>B</u> ack <u>N</u> ext > Cancel

4(H) Click Next

4(I)	Click Next
------	------------

Welcome to the COM+ Application Install Add Users to Roles Please add users to roles.	Wizard 🛛 🔀
	<u></u>
🕀 比 CreatorOwner	Add
	Tennove
	< <u>B</u> ack <u>N</u> ext> Cancel



4(J) Click "Finish"

4(K) Under "COM+ Applications" container locate the application name (i.e. Cerenade). Right Click the application name and select "properties"



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cerenade Prope	rties		? ×
Advanced General	Dump Security Identity	Pooling & F Activation	Recycling Queuing
Name	: cerenade		
Description:			
Application ID:	(86CD91D8-6070-40	59-9567-8FB487E	860EF}
	OK	Cancel	Apply

4(L) Move to the "Security" Section. Uncheck "Enforce access checks for this application" and then click "OK".

renade Properties				
Advanced Dump Pooling & Recycling General Security Identity Activation Queuing				
Authorization				
Security Level C Perform access checks only at the process level. Security property will not be included on the object context. COM+ security call context will not be available.				
 Perform access checks at the process and component level. Security property will be included on the object context. The COM+ security call context is available. 				
Software Restriction Policy				
Apply software restriction policy				
Restriction Level:				
Authentication Level for Calls:				
Packet 💌				
Impersonation Level:				
Impersonate				
OK Cancel <u>A</u> pply				

4(M) Expand the application container and right click on the "Components" sub-container, click "New" and then "Component".





4(N) Click "Install new component(s)".





4(O) Browse the local system folder and select the file CerEntServCtI.dll.

4(P) Click Next

Welcon	elcome to the COM+ Component Install Wizard					
Inst	Install new components Please specify the file(s) that contain the components you want to install.					
	Click Add to choose the file(s) that contain the components you want to install. Files to install:					
	File		Content	s	<u>A</u> dd	
	U:\WINDUWS\SYSTEM32	\CerEntServ.	compon	ents, typeLib		
					<u>R</u> emove	
	Components found:					
	Component	Properties	Interfaces	Installed	✓ Details	
	Archiver	COM+	found	No		
	FAR2PDFCt	COM+	found	No		
	FillerLti	COM+	found	NO Na		
	00	COM+	Touna	NU		
	r					
			< <u>B</u> ack	k <u>N</u> ext	> Cancel	

4(Q) Click "Finish"



Administrative Console Remote Access

In order for any PC, other than the server, to properly connect to FormsServer's Administrative Console, Cerenade Filler must reside on that PC.

Cerenade Filler can be installed using a standard downloadable installation program (**fillersetup.exe**) which installs the filler components on the client PC. The Browser security requirements for this mechanism are: ActiveX Run and ActiveX Scripting. This installation program, is located at

www.cerenade.com/controls/fillerupdate