



cerenade

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.com
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.



Figure 2

Step 3:

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



Figure 3

Step 4:

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



Figure 4

- **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 ".".

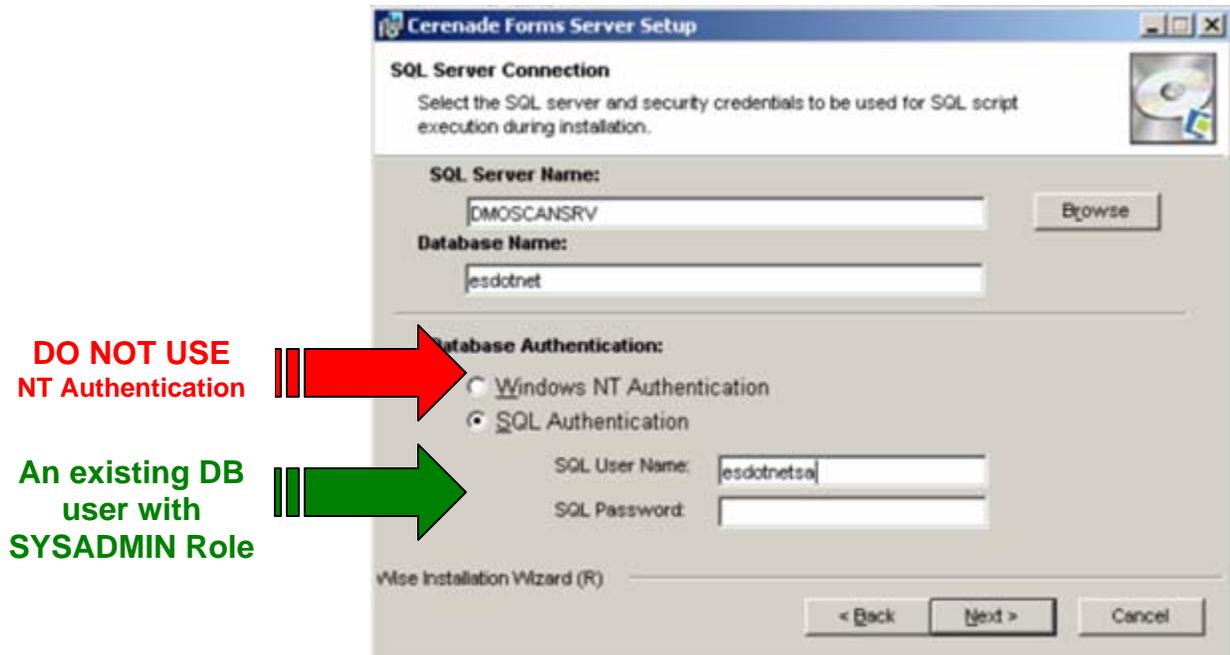


Figure 5

Step 6:

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

Click **Next** to proceed

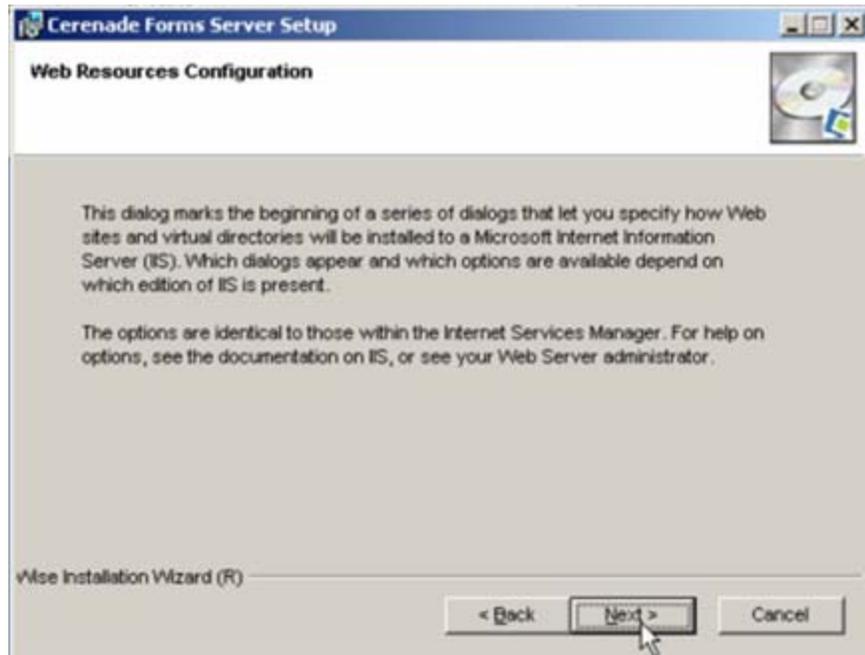


Figure 6

Step 7:

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

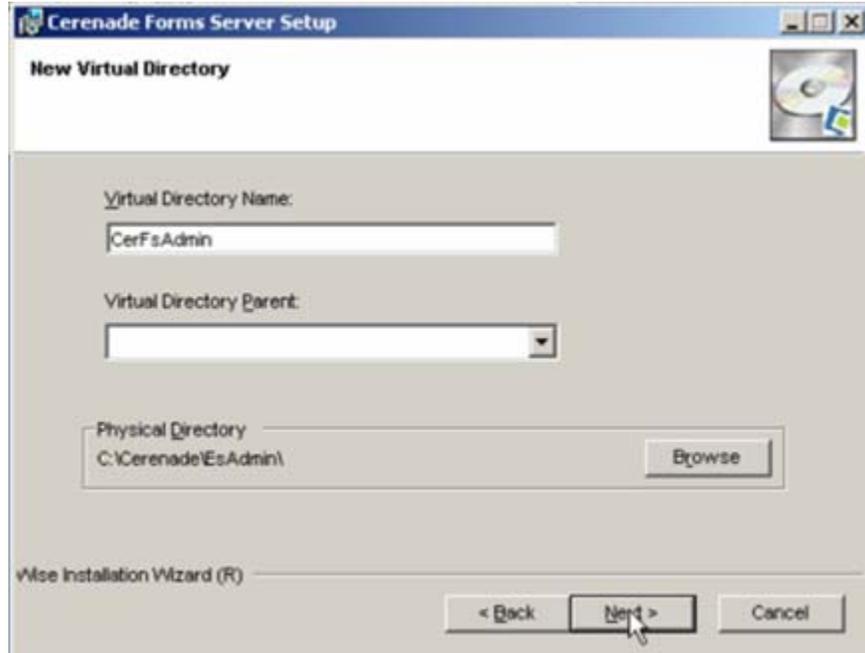


Figure 7

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 Client Interface.

Default values are recommended.

Click **Next** to continue

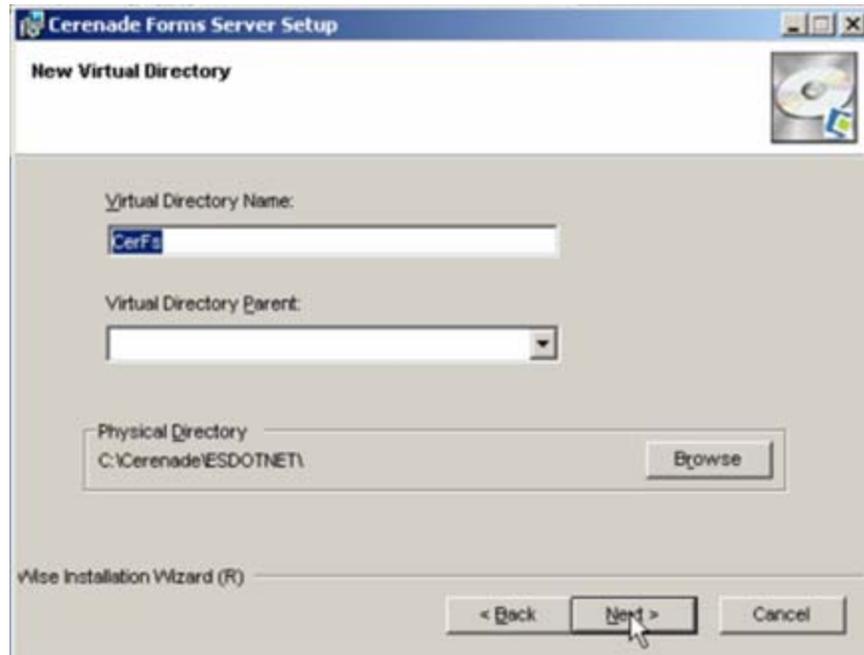


Figure 8

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:

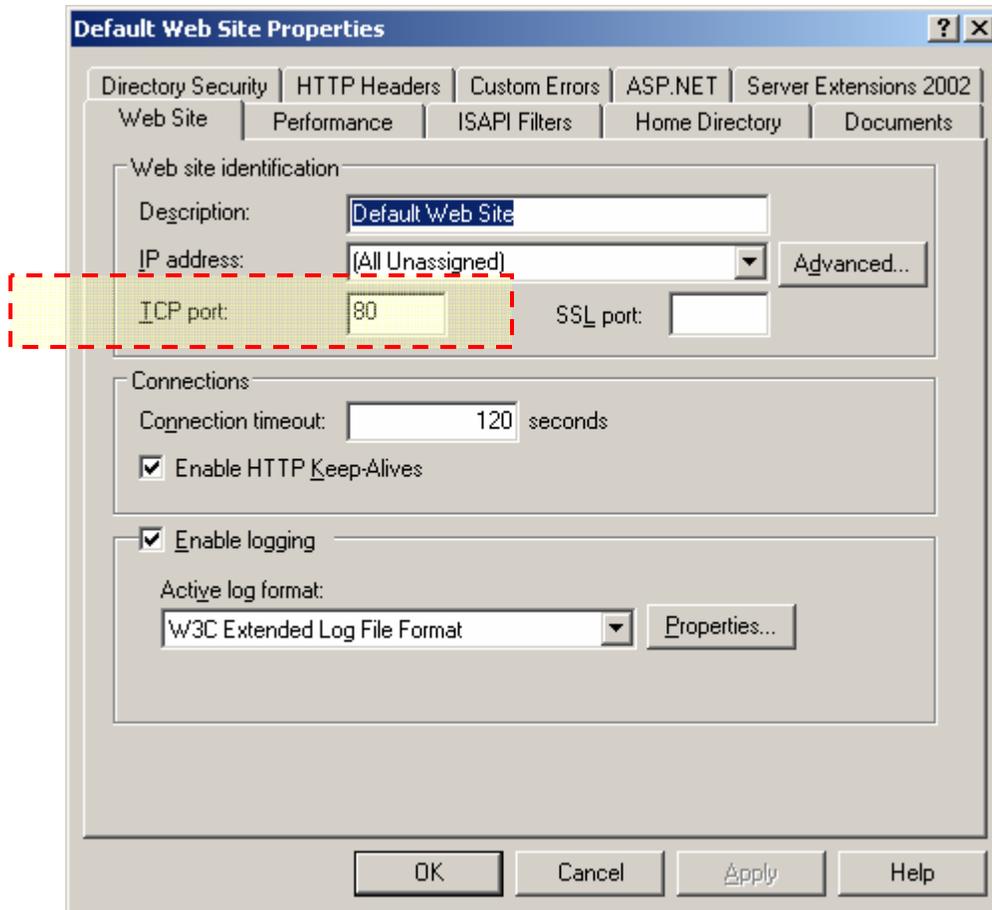
Username : admin@cerenade.com

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.



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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>

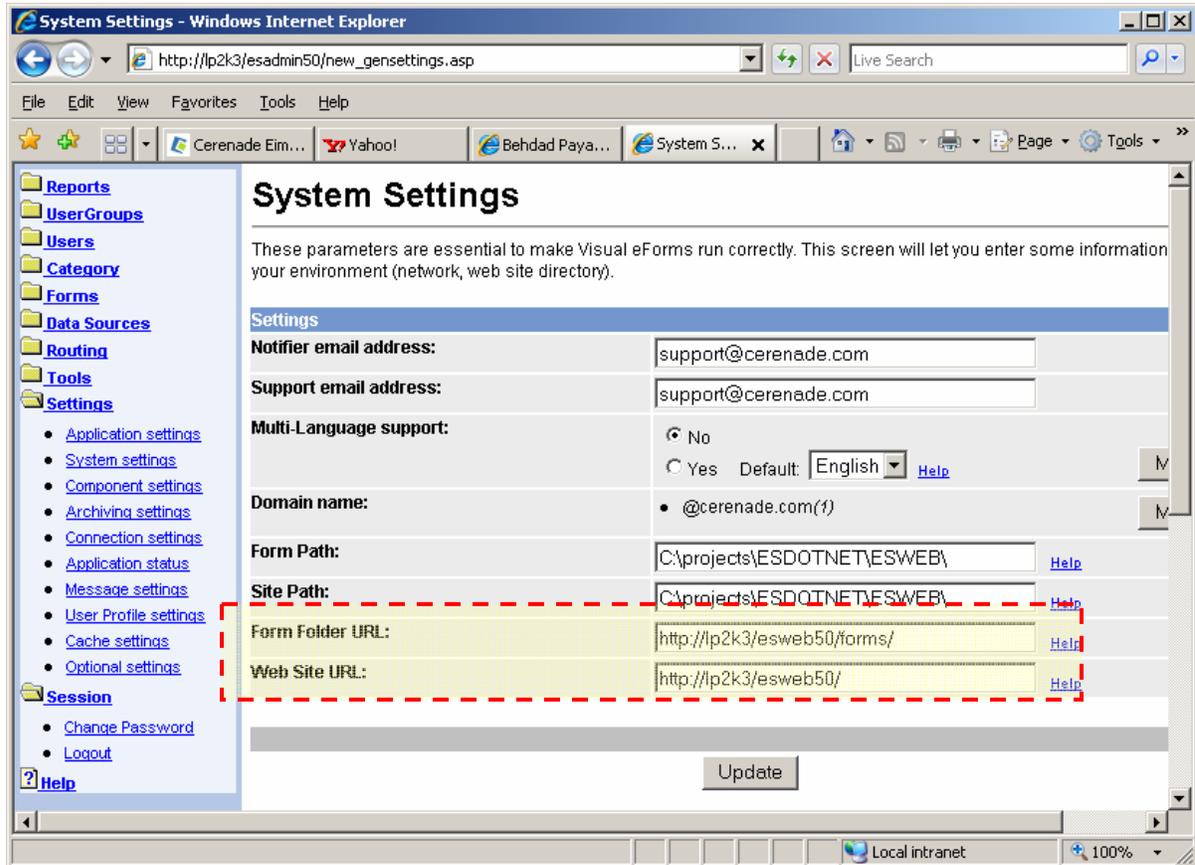
Admin Console:

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

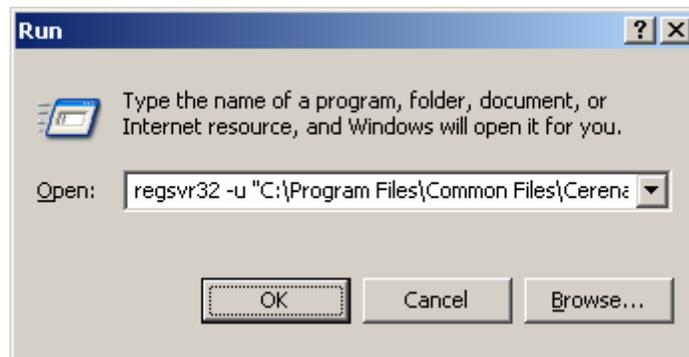
Category | Add a Category

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"



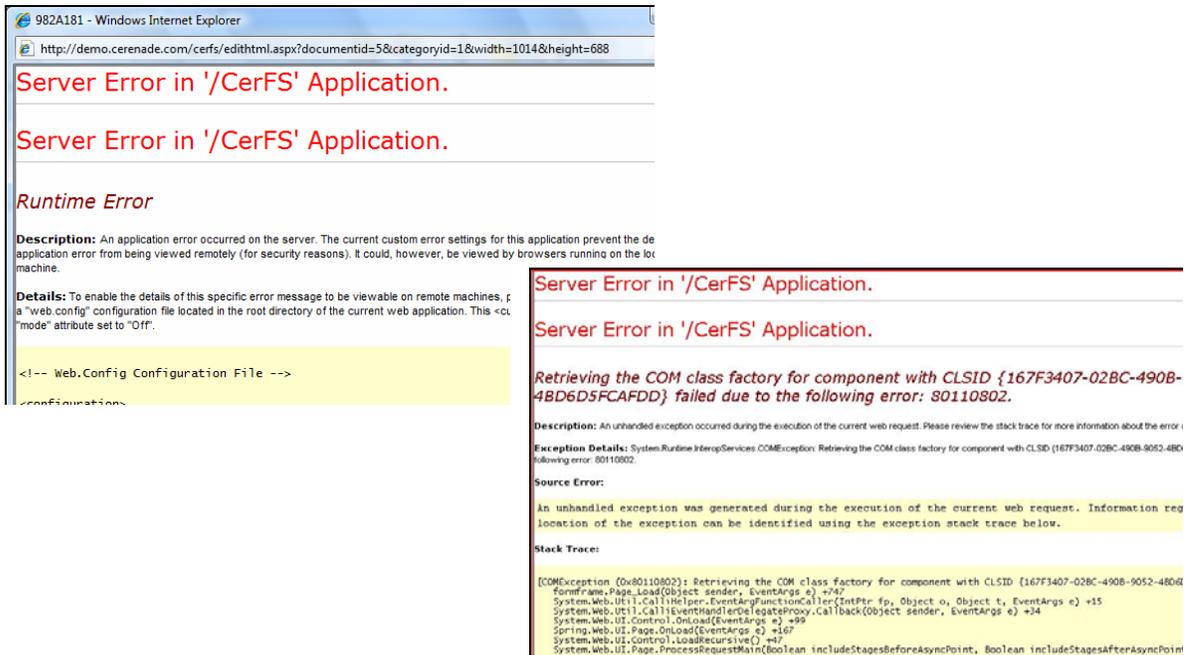
Add new forms

Available through FormsServer Administrative Console

Forms | Add a Form

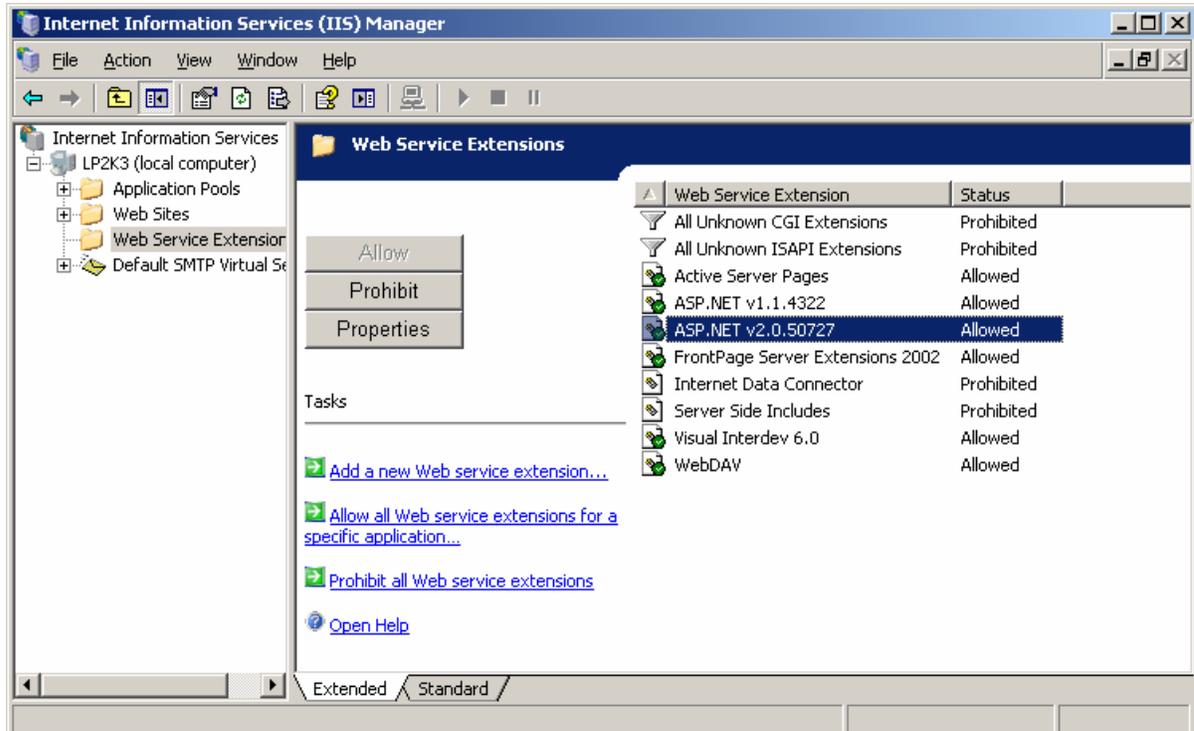
If you have designed or converted forms and they are ready to be published, from Admin/Management console of Cerenade FormsServer use the Add new forms option to deploy these forms for the use of your end-users.

IMPORTANT: If **CerEntServCtl.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”

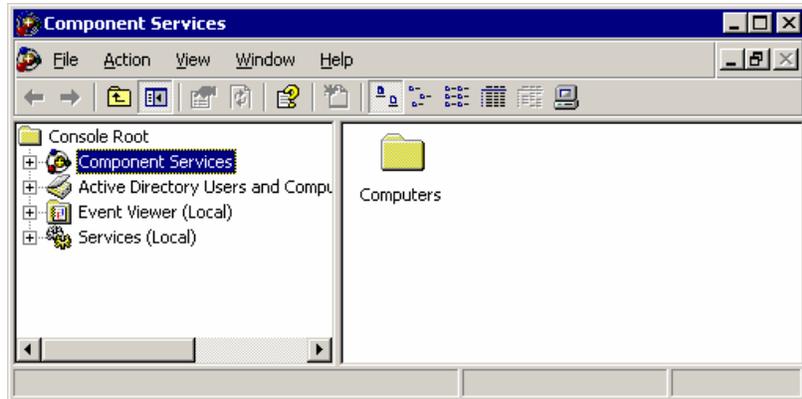


Wrapping CerEntServCtl.dll in a COM+ application

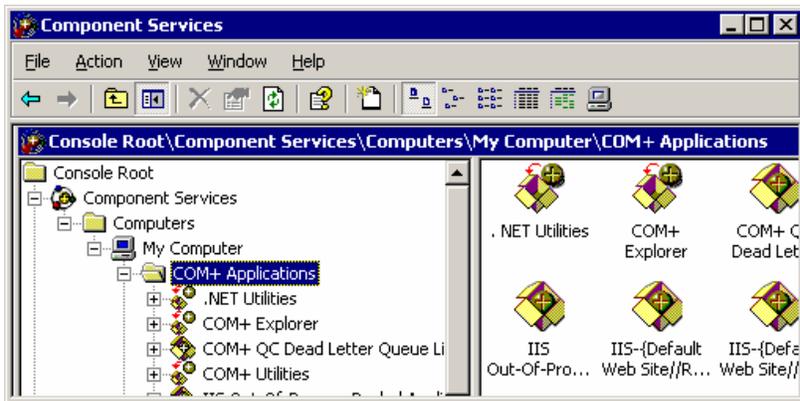
Applies to when installing FormsServer on Windows 2003 Servers

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

4(A) Run “Administrative tools | Component services”

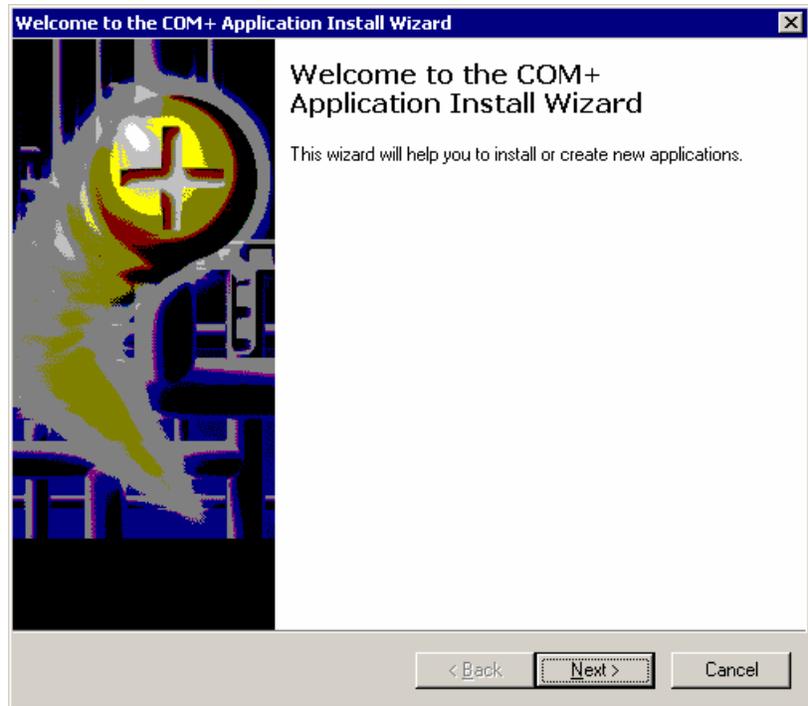


4(B) Expand Component Service | Computers | My Computer | COM+ Applications

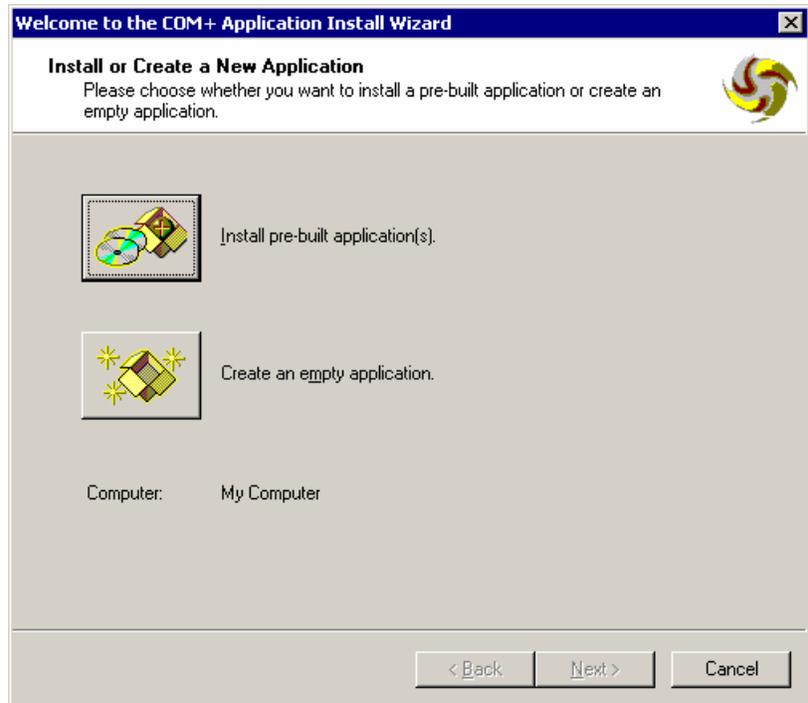


4(C) Right Click on COM+ Applications

4(D) Click on New and then Application. Click **Next**.



4(E) Click "Create an empty application"



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

Welcome to the CDM+ 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.

< Back Next > 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 CDM+ Application Install Wizard

Set Application Identity
Please specify the application identity.

Account

The application identity will be set to the following account. Components in the application will run under this account. If you are creating more than one application, this setting will be applied to each application.

Interactive user - the current logged on user

Local Service - Built-in service account.

Network Service - Built-in service account with network access

This user:

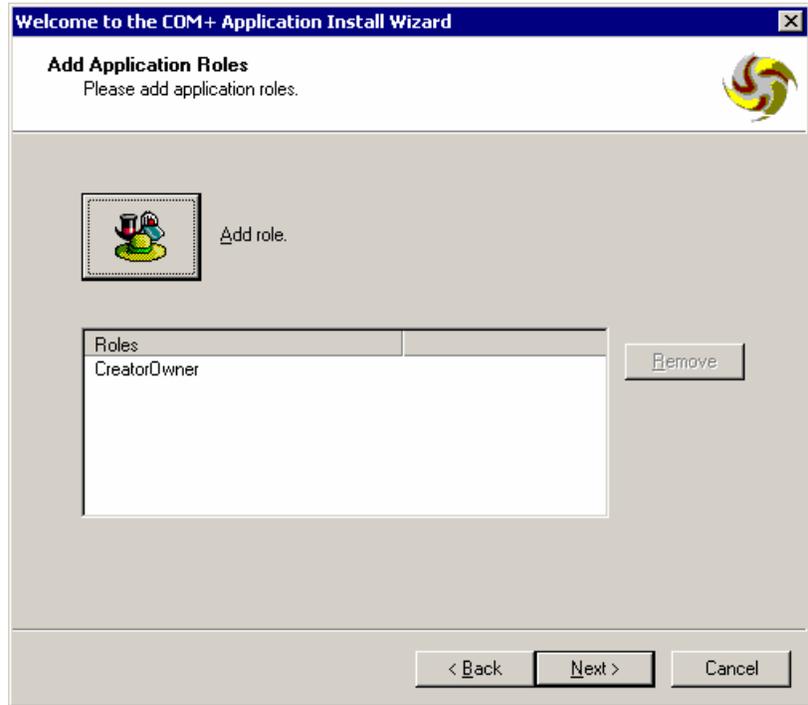
User: Browse...

Password:

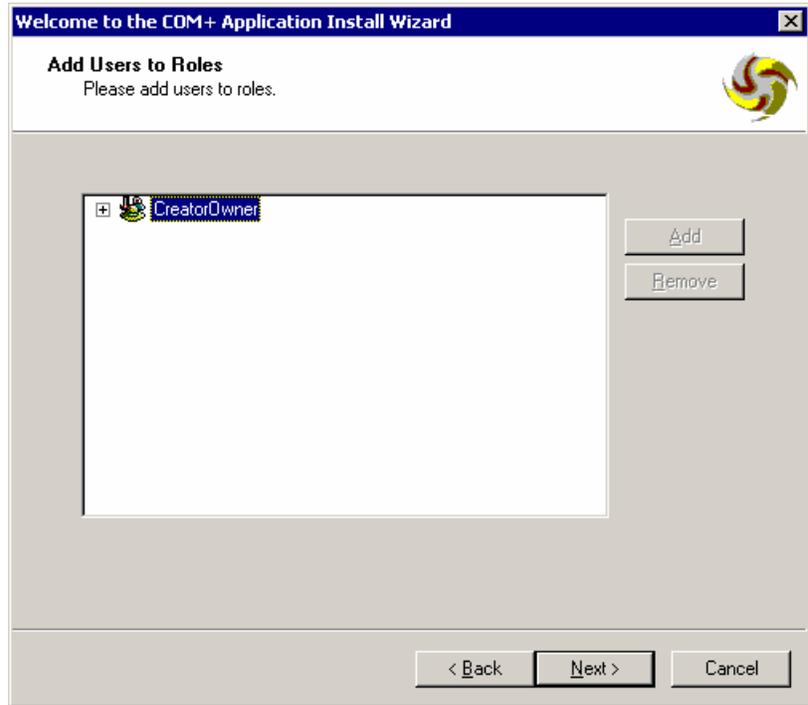
Confirm password:

< Back Next > Cancel

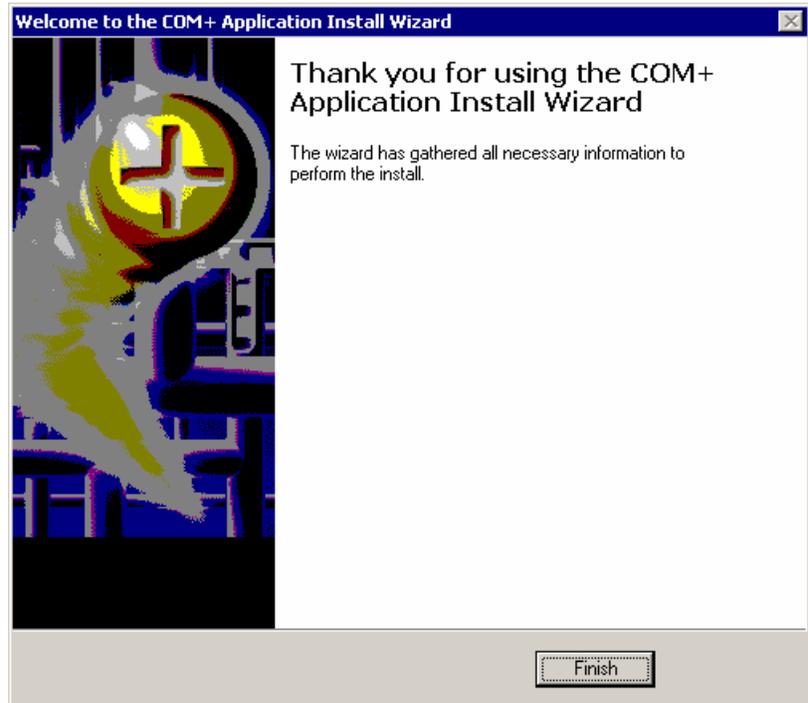
4(H) Click **Next**



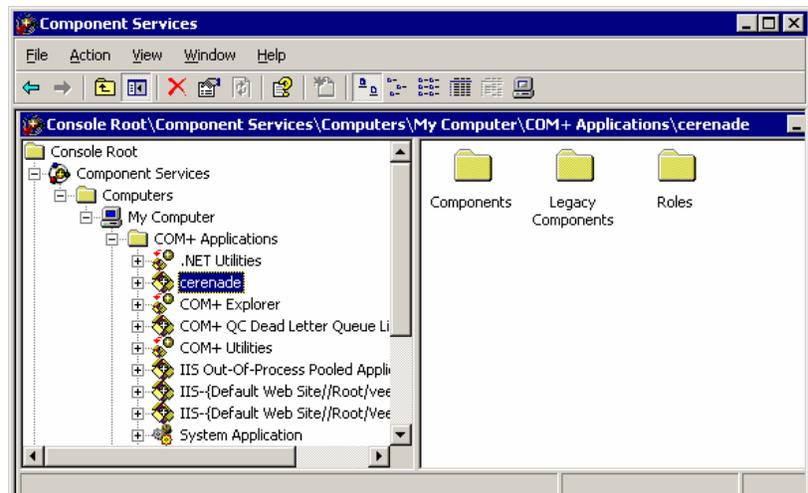
4(I) Click **Next**

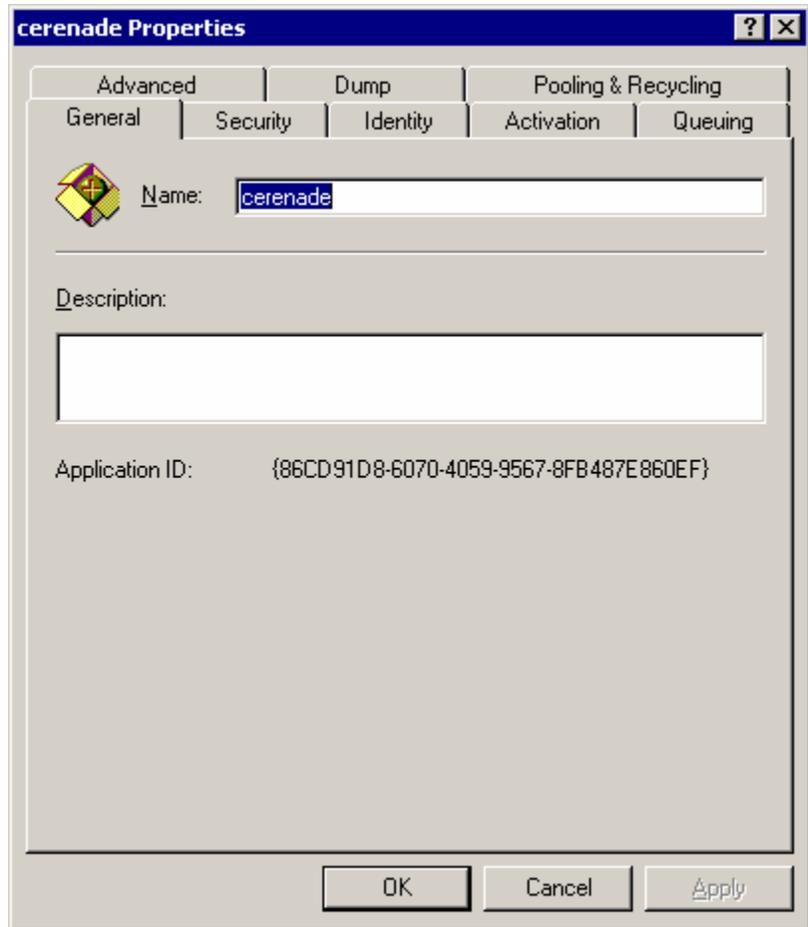


4(J) Click "Finish"

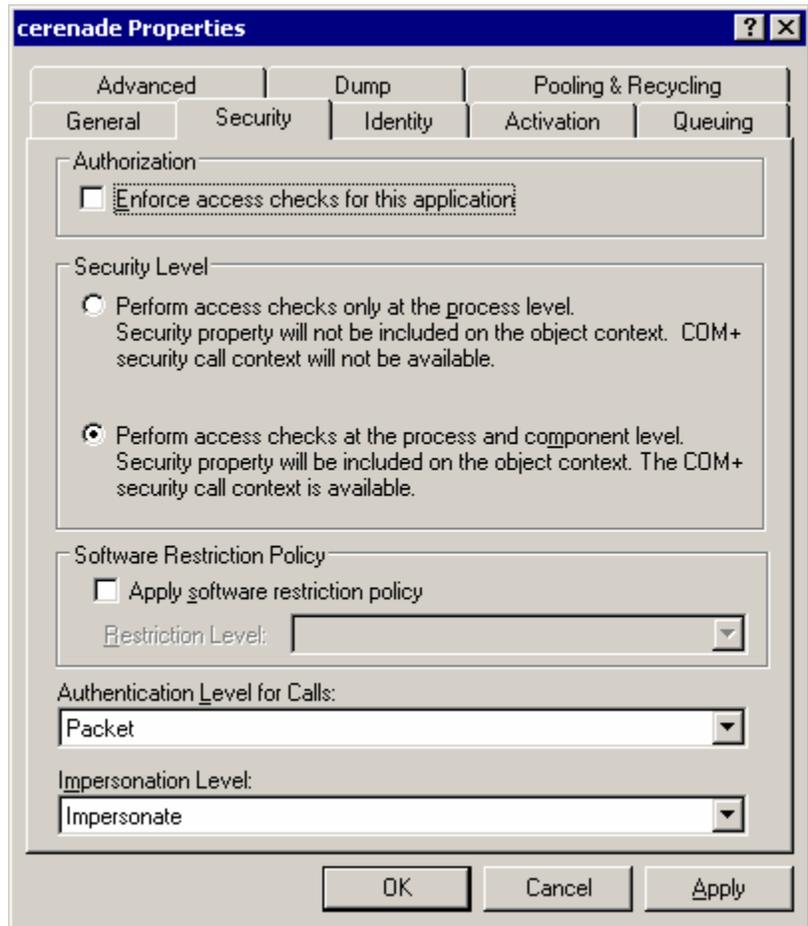


4(K) Under "COM+ Applications" container locate the application name (i.e. Cerenade).
Right Click the application name and select "properties"





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



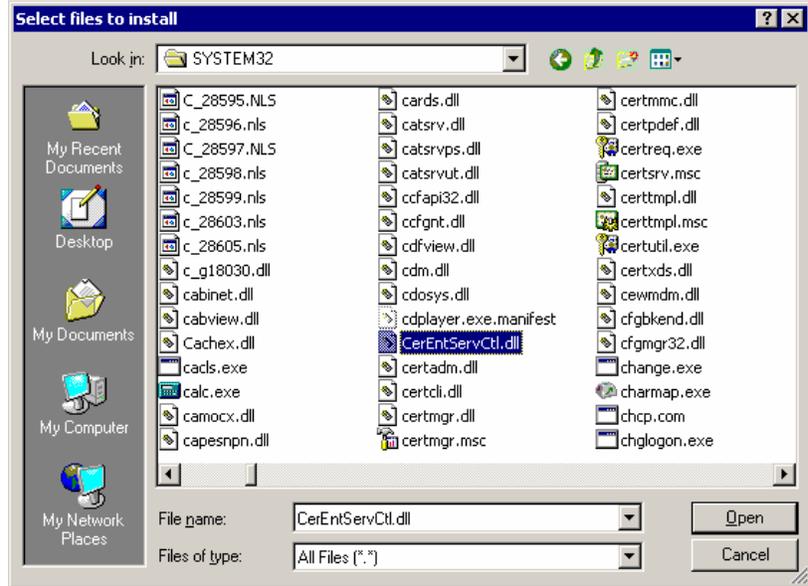
- 4(M) Expand the application container and right click on the “Components” sub-container, click “New” and then “Component”.
Click **Next** on the welcome window.



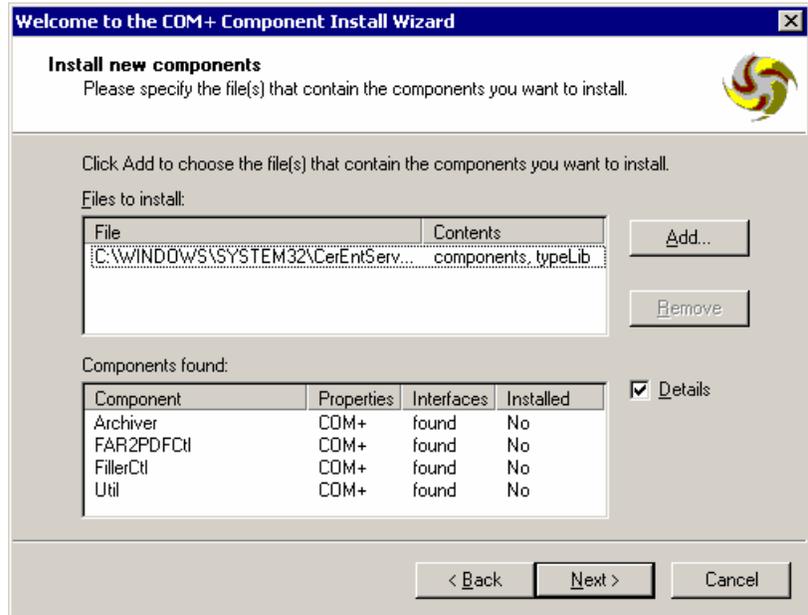
- 4(N) Click “Install new component(s)”.



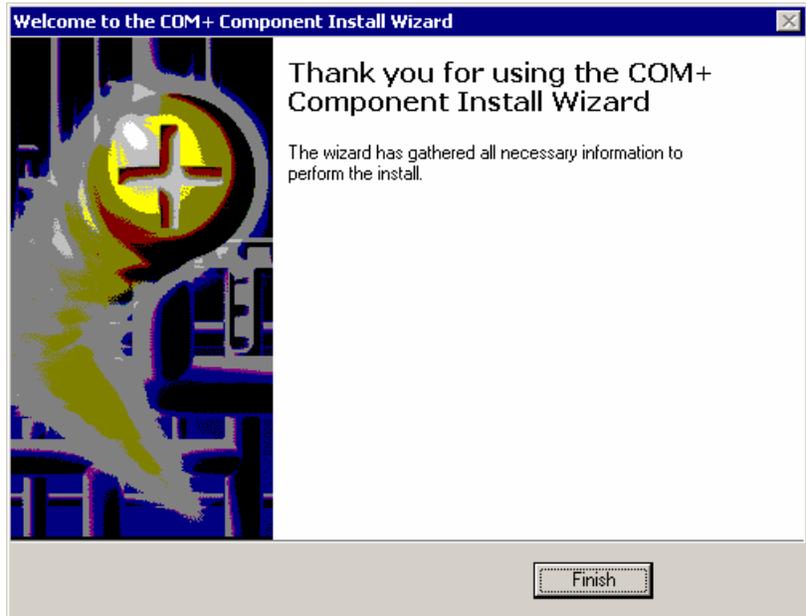
4(O) Browse the local system folder and select the file CerEntServCtl.dll.



4(P) Click **Next**



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