



## **ENOVIA SmarTeam**

# **Guidelines for Installing SmarTeam Product Demo Environments**

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# Chapter 1: Introduction

## Overview

This quick guide provides you with a clear and concise overview of the steps required to install demonstrations of SmarTeam Products. It is intended for any authorized person that wants to install SmarTeam products on their machine for demonstration purposes.

This quick guide does not replace the installation guides for each product. It simplifies the SmarTeam Demo Environment installation process, and provides a useful reference for a quick and easy installation.

It is recommended that you first read this guide to fully understand the SmarTeam Demo Environment installation process and then continue with the individual installation guides for each product.

During installation, make sure that you follow the checklist in this guide to verify that all the necessary steps are taken.

Note that SmarTeam Demo Environment does not need to include all the products, nor does it need to be connected to the network. Before installing SmarTeam Demo Environment, consider the following issues:

- 1 Do you want the SmarTeam Demo Environment to include SmarTeam - Editor (the Windows-based application) with or without SmarTeam - Web Editor (the web-based application)?

To install only SmarTeam - Editor, skip all the installation steps in Chapter 2 [Installation Checklist](#) that are relevant for the web application (marked with **WED** in the checklist).

To install SmarTeam – Editor and SmarTeam – Web Editor, complete all the installation steps in Chapter 2 [Installation Checklist](#).

- 2 Do you want to install SmarTeam on a virtual machine?

The SmarTeam installation process uses the machine name. It is recommended for SmarTeam Demo Environment installation to use a unique machine name. Therefore, when installing on a virtual machine e.g., VMware<sup>®</sup>, it is recommend to configure your virtual machine settings, e.g., the machine name, before beginning the installation process.

If you are using VMware as your virtual machine refer to [Appendix A, “Renaming VMware.”](#) for details on how to configure the settings.

- 3 Do you plan to demonstrate SmarTeam SmarTeam while working offline (i.e., no physical network connection)?

However you plan working (online or offline), consider the following issues:

- a License Management Utility

The machine on which SmarTeam is installed should have a license management utility.

If SmarTeam does not detect this utility it will automatically run in demonstration mode. This means that the database will be limited to a total of 5000 records. A message appears when opening SmarTeam to indicate that SmarTeam is running in demonstration mode.

If you do not need more than 5000 records, no changes are required.

If you do not want these limitations, you need the LUM server for the licenses.

- If you are working **online**, connect to the LUM server that exists on your network.
- If you are working **offline**, install the LUM server on your machine and configure SmarTeam to retrieve licenses from this LUM server.

#### **b** <sup>WED</sup> IP Address

If you are installing SmarTeam – Web Editor and you are working offline then you must configure the IP Address in order to work with the SmarTeam – Web Viewer successfully.

For details on how to configure the IP Address, refer to [Appendix B, “Loopback Network Adapter Installation & Configuration.”](#)

#### **Notes:**

All the documentation mentioned in this document, unless specified otherwise, is available on the SmarTeam Documentation CD.

The term **DEMO INSTALLATION** in the various Installation Guides indicates special guidelines for the SmarTeam Demo Environment installation.

## Internet Site

You are highly recommended to frequently visit our website for the latest updates and plug-in products, including the latest Service Packs, Program Directory (Release Notes), Hotfixes and technical support at <http://support.smarteam.com/>.

In addition, you will also be able to view any installation known issues.

## Chapter 2: Installation Checklist

This checklist gives a detailed list of all the steps that need to be performed and the order in which the products need to be installed. You must complete all the stages in this checklist to successfully install SmarTeam Demo Environment.

The items with the term **WED**, indicates that they are only relevant if you want to install SmarTeam - Web editor.

\*Requirement: M = Mandatory, O = Optional

<input type="checkbox"/>	Item	M/O*	Reference
<b>Stage 1: Pre-Installation</b>			
<input type="checkbox"/>	Verify that your Hardware & Software meet the requirements	M/O	Hardware and Software Requirements Guide
<input type="checkbox"/>	Verify that Microsoft® Office 2003 is installed on your machine - Mandatory if you want to work with Microsoft® Office	M/O	Check your machine
<input type="checkbox"/>	Verify that Microsoft® Project is installed on your machine - Mandatory if you want to work with Program Management	M/O	Check your machine
<input type="checkbox"/>	Verify that CAD tools used with SmarTeam, are installed on your machine e.g. CATIA	M/O	Start, Programs Menu on your machine
<input type="checkbox"/>	<b>WED</b> Install Loopback network adapter - Mandatory if you want to work offline	M/O	<a href="#">Appendix B. "Loopback Network Adapter Installation &amp; Configuration."</a>
<input type="checkbox"/>	Check for any additional prerequisites on the SmarTeam Web Site	M	Release Notes of Latest Service Pack in the Release or <a href="#">SmarTeam Support Site</a>
<b>Stage 2: Installation Process</b>			
<input type="checkbox"/>	Install SmarTeam - Foundation; includes Workflow & Vault Server Notes: In the <b>Select Components</b> window, select SmarTeam – Foundation Core Services, Vault Components, Workflow Components and Help Files In the <b>User License Use Management</b> window, select <b>Local</b> Note: In the <b>Local/Global Users Group</b> window, select <b>Local</b>	M	SmarTeam - Foundation Installation Guide

<input type="checkbox"/>	Item	M/O*	Reference
<input type="checkbox"/>	Install SmarTeam - Editor (automatically installs CAD Integration e.g. CATIA if the CAD is installed on the local machine) <b>Note:</b> When you install SmarTeam – Editor on top of SmarTeam – Fondation the Custom Setup window appears. SmarTeam Administration Tools In the <b>Using License Use Management</b> window, select <b>Local</b>	M	SmarTeam - Editor Installation Guide
<input type="checkbox"/>	Install SmarTeam Demo Environment	M/O	<a href="#">SmarTeam Demo Environment Installation</a>
<input type="checkbox"/>	<b>WED</b> Install SmarTeam - Web Editor	M/O	SmarTeam - Web Editor Installation Guide
<input type="checkbox"/>	<b>WED</b> Install SmarTeam - Web Viewer	M/O	SmarTeam - Web Viewer Installation Guide
<input type="checkbox"/>	Install relevant SmarTeam SP	M/O	SmarTeam Client components Installation Guide
<input type="checkbox"/>	<b>WED</b> Install CATIA Client Components - Mandatory if you want to work with CATIA Integration Xtended.	M/O	SmarTeam Client components Installation Guide
<input type="checkbox"/>	Install LUM server - Mandatory for licenses and configure the licenses.	O	LUM Installation and Configuration Guide
<b>Stage 3: Post Installation</b>			
<input type="checkbox"/>	Configure your Workflow server through the Workflow server setup utility	M	SmarTeam - Editor Online Help
<input type="checkbox"/>	Configure your Vault server through the Vault server setup utility	M	SmarTeam - Editor Online Help

# Chapter 3: System Requirements & Pre-Installation

## Hardware and Software Requirements

For a detailed description of all the requirements, refer to the Hardware and Software Requirements document.

## Order of Installation

Refer to [Chapter 2, Installation Checklist](#) for a detailed list of all the steps that need to be performed.

The installation procedure is split into three stages:

Stage 1: Pre-Installation (this chapter)

Stage 2: Installation Process ([Chapter 4, SmarTeam Demo Environment Installation Process](#))

Stage 3: Post Installation ([Appendix A](#), [Appendix B](#), [Appendix C](#), [Appendix D](#))

For a successful installation you must complete one stage before preceeding to the next stage.

## Prerequisites

Before installing SmarTeam Demo Environment, you must perform the following steps:

- Install Microsoft SQL Server 2005
- SmarTeam – Editor
  - Install SmarTeam – Editor with Core Services
  - or-
  - Install SmarTeam – Foundation and SmarTeam – Editor Client



# Chapter 4: SmarTeam Demo Environment Installation Process

This chapter provides a step-by-step description of the installation process for installing two SmarTeam Demo Environments: SmDemo and PLMDB.

**PLMDB** – For SmarTeam Express demonstrations (SDE and SNE) on SmarTeam – Editor Windows and Web based.

**SmDemo** – For all other SmarTeam products, e.g. SmarTeam Regulatory Compliance Framework.

## Buttons

The following buttons are available at the bottom of the installation windows:

- **Next:** Confirms your selection in the current window and proceeds to the next window.
- **Back:** Allows you to return to the previous window.
- **Cancel:** Allows you to abort the installation setup program without installing the SmarTeam Demo Environment.

## SmarTeam Demo Environment Installation

This section describes the SmarTeam Demo Environment process.

**Note:** CAD Templates are automatically installed with the demonstration environment installation.

## Running the Installation:

### *To begin installing:*

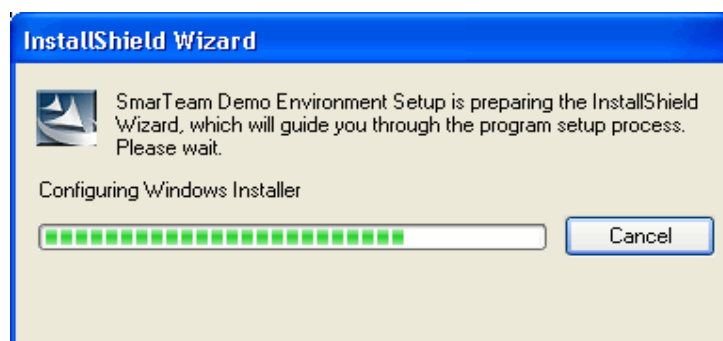
- 1 Insert the CD-ROM containing the SmarTeam Demo Environment installation (CD-4) in the CD-ROM drive. The SmarTeam Demo Environment installation is started automatically.



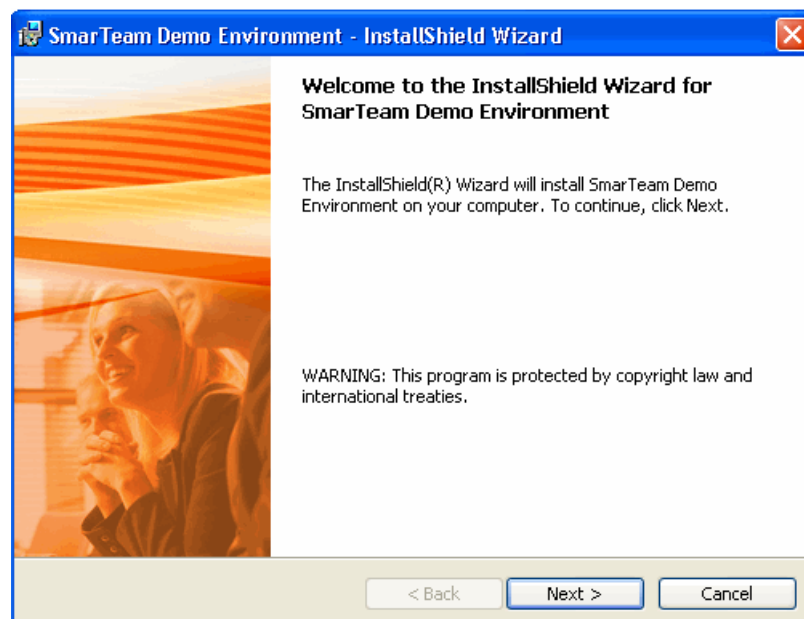
2 Click the **Demo Environment for ENOVIA SmarTeam** option

-or-

Click **Exit** to abort the installation.

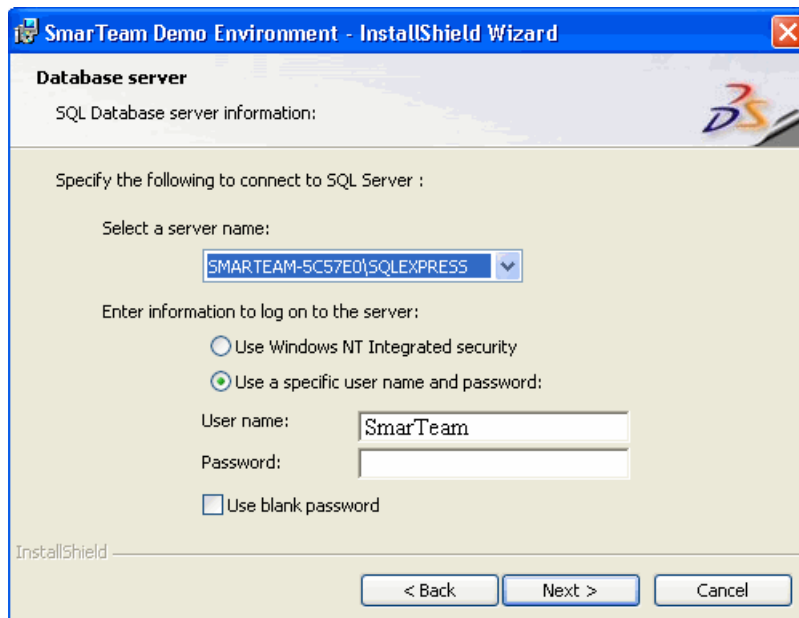
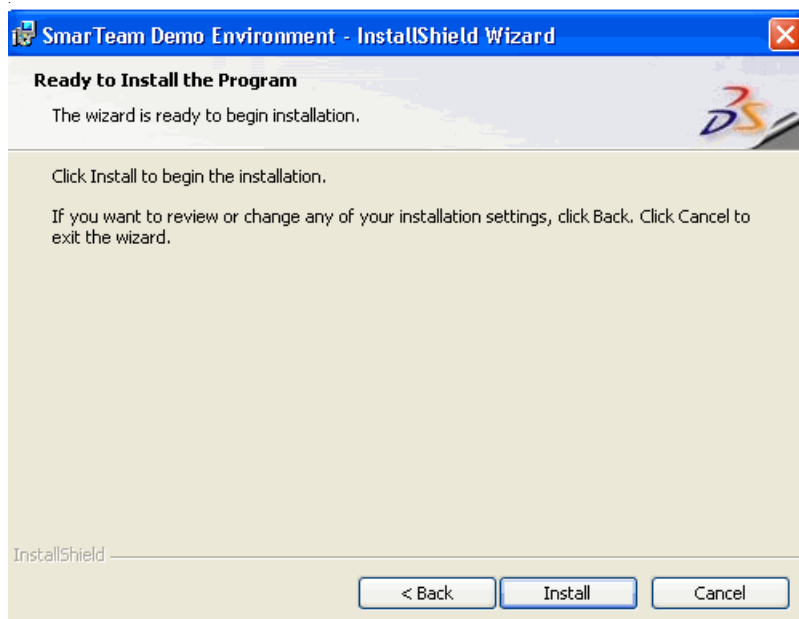


In the Welcome window, click Next.

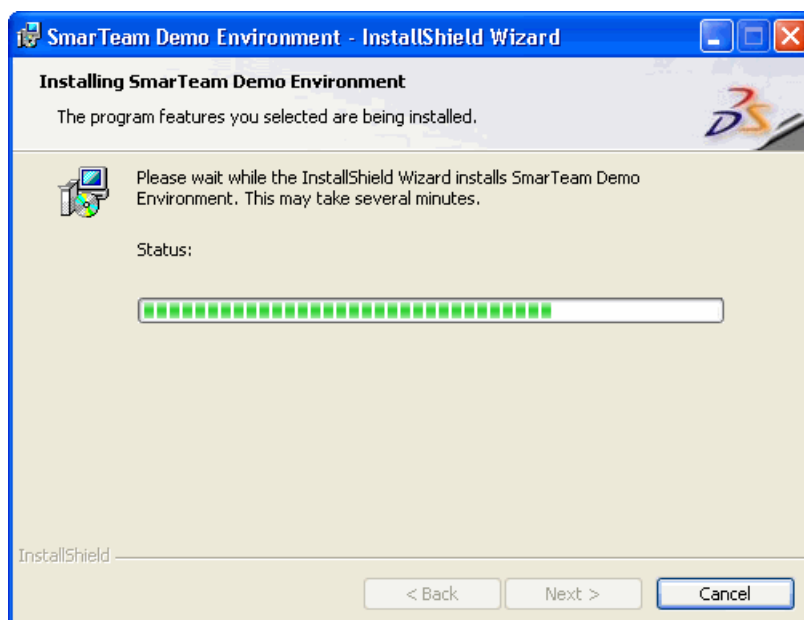


**3** In the Database Server window:

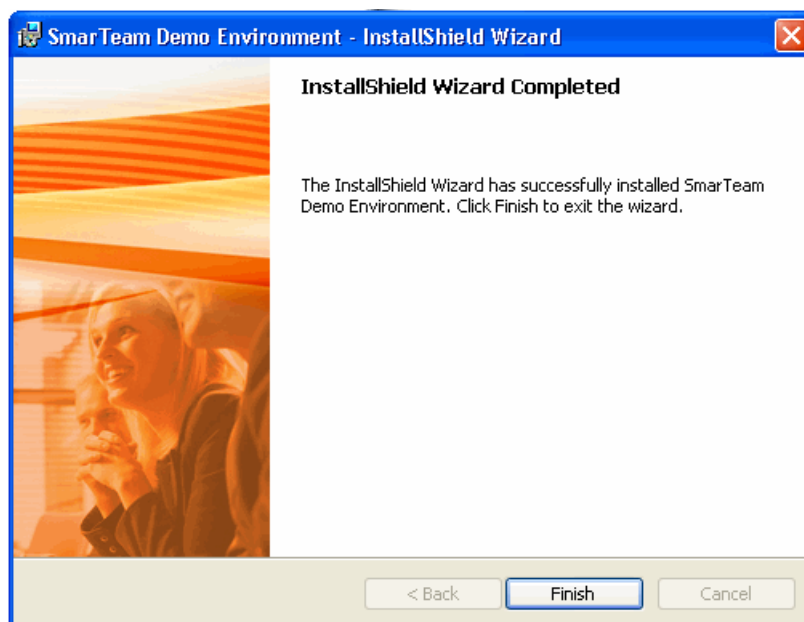
- Select a server name from the drop down box
- In the Enter Information to Log on to Server, select one of the following radio buttons:
  - Use Windows NT Integrated Security
  - Use a Specific User Name and Password
    - If the Use a Specific User Name and Password was selected, enter your user name and password (the default password is: **SMARTDBUSER**) in the applicable fields.

**4** In the Ready to Install window, click **Install**.

The installation progress is viewed on the screen in the Installing SmarTeam - SmDemo window.



After successful installation, click **Finish** to exit the SmarTeam Demo Environment installation.



The SmarTeam Demo Environment installation is now complete.

# Appendix A: Renaming VMware

This appendix is only relevant if you are using VMware as your virtual machine and installing SmarTeam Demo Environment on it.

The relevant procedures for changing a VMware workstation name and the configuration required to enable SmarTeam to continue to work on the machine after the change are described in this appendix.

During the installation process, SmarTeam uses some of the machine settings (e.g. the machine name). Since VMware might be duplicated and many users can use it concurrently, some steps need to be taken to ensure that SmarTeam Demo Environment will not detect any problems while running on a VMware workstation.

In general, it is recommended to configure your virtual machine fully prior to installing SmarTeam on it so that it will have a unique machine name in the domain. This will guarantee a successful installation of SmarTeam if all the required steps are done. However, if you have got a VMware with SmarTeam already installed on it, it is recommended to perform the steps that are described in this appendix to ensure a successful running of SmarTeam.

If you configure your VMware workstation before installing SmarTeam on it, then only the first section (How to change your VMware workstation name) is needed. But if you already got a VMware with SmarTeam installed on it and you want to configure it, then you have to complete all the steps that are described in this Appendix (both sections).

## How to change your VMware workstation name:

- 1 Go to My computer/Properties/Network Identification and click **Properties**.

**Notes:** In Windows XP (It is not officially supported by SmarTeam, please refer to the 'Hardware & Software Requirements' doc for details): Go to My computer/Properties/Computer Name and click Change.

- 2 In the *Member of* field, select **Workgroup**, enter the relevant workgroup name and click **OK**.
- 3 Restart the machine.
- 4 Go to My computer/Properties/Network Identification and click **Properties**.
- 5 Click **More...**
- 6 Clear the *Primary DNS suffix of this computer* textbox (leave the checkbox checked) and click **OK**.
- 7 Change the computer name to the required name and click **OK**.
- 8 Restart the machine
- 9 Go to My computer/Properties/Network Identification and click **Properties**.
- 10 In the *Member of* field, select **Domain**, enter the relevant Domain name and click **OK**.

**Note:** If a DNS lookup error message appears, this means that your VMware network bridge is not configured correctly. Shut down the VMware, go to its settings editing/hardware/NIC1/Network connection and make sure that the first option is selected (Bridged: connect directly to the physical network).

- 11** Insert the username and password to the domain you want to join and click **OK**.
- 12** Restart the machine; you should now see that your machine is logged on to the new domain with the new name.

**How to configure SmarTeam after changing your VMware workstation name:**

- 1** Change the DB connection strings: In the SmarTeam.std.legacypreferences.config.xml file located in C:\Program Files\SmarTeam\ConfigurationSettings\Data\Domain, search for the words 'Data Source' and change the text from "Data Source=<OLD NAME>\SmarTeam" to "Data Source=<NEW NAME>\SmarTeam".
- 2** In the SmarTeam.std.sessionmanagement.service.host.Installstate file located in C:\Program Files\SmarTeam\Bin, search for the old computer name and replace it with the new computer name.
- 3** In the SmarTeam.std.systemconfiguration.service.host.Installstate file located in C:\Program Files\SmarTeam\Bin, search for the old computer name and replace it with the new computer name.
- 4** Restart SmarTeam Configuration and Service Management Services.

# Appendix B: Loopback Network Adapter Installation & Configuration

This appendix is only relevant if you are working offline and are intending to install SmarTeam – Web Editor.

SmarTeam needs to have an IP address for the SmarTeam - Web Viewer. Therefore when working offline, you must install the Network loopback adapter and fix the machine IP address so the SmarTeam will be able to use this IP address.

It is recommended to install the loopback network adapter before the installation of SmarTeam.

## 1 Loopback Network Adapter Installation:

- Start the *Add/Remove Hardware* control panel (Start/Settings/Control Panel/ Add/Remove Hardware)
- Click **Add/Troubleshoot a device**, and then click **Next**
- Click **Add a new device**, and then click **Next**
- Click **'No, I want to select the hardware from a list'**, and then click **Next**
- Click **Network adapters**, and then click **Next**
- In the *Manufacturers* box, click **Microsoft**
- In the *Network Adapter* box, click **Microsoft Loopback Adapter**, and then click **Next**
- Click **Finish**

## 2 Loopback Network Adapter Configuration:

- Go to Start/Settings/Network and Dial-up connections/Microsoft Loopback adapter (Local Area Connection)
- Right-click and select **Properties**
- Select **Internet Protocol (TCP/IP)**, then select the **Properties** button
- Check **Use the following IP address** and insert the following:
  - IP address: 169.254.0.2
  - Subnet mask: 255.255.0.0
  - Default gateway: 169.254.0.1
- Click **OK**

## 3 Vault Server Configuration (can be configured only after FDN installation):

**Note:** Verify that Vault Server is configured before configuring it to work with Loopback Adapter:

- Open the Vault server setup utility

- Stand on the *Default Vault Node* folder, right click and select **Modify**
- In the *TCP/IP address*, type **169.254.0.2**
- If the TCP/IP address textbox is disabled, perform the following workaround:
  - Go to the following file: <SmarTeam>\ConfigurationSettings\Data\Machine\<Machine Name>\smarteam.std.legacyPreferences.config.xml
  - Change the text in the <General.SmTCIPAddress> Tag to: 169.254.0.2
  - Save and Exit
  - Refresh the Vault Server: Close the Vault Server setup utility; Right-click ->Modify. In 'Vault Server Details' window Change 'Vault server protocol' to 'Named Piped' and back to TCP/IP. Click OK.
  - Close the Vault server setup utility.
  - Stop and Start the services.
- 4** Change a registry parameter:

Open the following path in the registry:  
HKEY\_LOCAL\_MACHINE\SOFTWARE\SmarTeam\Download Manager

Change the BaseURL parameter as follows:  
**From:** http://<machine IP>/SmarTeam/Download  
**To:** http://127.0.0.1/SmarTeam/Download
- 5** Restart the SmarTeam vault service.



# Appendix C: HUB & Clients Configuration

This appendix is only relevant if you need to configure your machine to work as a server in SmarTeam Demo Environment mode.

If you want to have SmarTeam Demo Environment with a server and client machines using Hub in a private network, then you must perform the following steps:

- 1** Shut down all the clients and the Server machines.
- 2** Connect them to the Hub.
- 3** Start the clients and the Server machines.
- 4** Login to SmarTeam – Web Editor from any client.
- 5** Try to view a flowchart in the client. If you cannot view it, perform the following:  
Change the entry in the server in the following registry path:  
MyComputer\HKEY\_LOCAL\_MACHINE\SOFTWARE\SmarTeam\Download  
manager\BaseURL  
**From:** http://127.0.0.1/SmarTeam/Download  
**To:** http://<ServerName>/SmarTeam/Download
- 6** Login again to SmarTeam – Web Editor.

# Appendix D: LUM Server on Host For Offline

This appendix is only relevant if you installed SmarTeam on a VMware workstation, the License Use Management (LUM) server is installed on the host and you are working Offline.

## General

This appendix describes the required configuration in order to be able to work with SmarTeam, when it is installed on a VMWare workstation in an offline mode and the LUM server is installed on the host machine.

## Prerequisites

The following conditions must exist:

- VMware workstation 4.5 and above is installed on the host machine
- SmarTeam is installed on a guest VMWare workstation
- LUM server is installed on the host machine
- Licenses are available and imported into the LUM server

## Procedure

Once you have installed SmarTeam Demo Environment, you need to configure your system as described in this procedure.

### **VMware Workstation Configuration**

#### **Network Adapter Configuration**

Perform the following steps:

- 1 Via Start/Settings/Network connections, select VMware network Adapter 'VMnet1'.
- 2 Right click and select Properties.
- 3 Check the Internet Protocol (TCP/IP) checkbox.
- 4 Stand on the Internet Protocol, and click Properties.
- 5 Check the 'Use the following IP address' and insert the following:
  - IP Address: 192.168.X.128 (you can choose any IP address between the 'Start IP' and the 'End IP' addresses that you got from the VMware settings)
  - Subnet Mask: 255.255.255.0

- Default Gateway: 192.168.X.2
- Click **OK**

**6** Make sure that the Adapter is enabled.

### Start the VMware workstation

- 7** Run the VMware workstation (make sure you are in Host-Only configuration). Your host and guest machines are now sharing a private network. From the guest you can see the host through TCP/IP.

### VMware Workstation Configuration

- 8** Open the VMware workstation (do not Run it).
- 9** Go to VM/Settings/NIC1. In the Network Connection field select **Host-Only**.

**Note:** The *connect at power on* field must be checked.

- 10** Go to Edit/Virtual Network settings.
- 11** In the Summary Tab you need to have the following line: 'VMNet1 (Host Only), a private network shared with the host, 192.168.X.0, Enabled' (where X can be any valid address).
- 12** Go to the Host Virtual Network Mapping Tab. In the VMnet1 field select **VMware network Adapter VMnet1**.
- 13** Go to the Host Virtual Adapters tab. Select **VMware network Adapter VMnet1** and click **Enable Adapter**. You should then see that the adapter is enabled.
- 14** Go to the DHCP Tab. Select VMnet1 and then select **Properties** to obtain the *Start IP address* (it should be similar to 192.168.X.128) and the *End IP address* (it should be similar to 192.168.X.254). Click **OK**.
- 15** Go to the NAT Tab and verify that the *Gateway IP address* is: 192.168.X.2 and the *Netmask* is: 255.255.255.0.

### LUM server INI file Configuration

- 16** In the VMware workstation (where SmarTeam is installed), open the I4LS.ini file, which is accessed as follows: C:\Documents and Settings\All Users\Application Data\ibm\LUM\I4LS.ini.
- 17** In the line: DirectBindServer1=ip:<something>[1515], change the <something> to the IP address you inserted in the Network adapter (192.168.X.128). Your line should now look similar to: DirectBindServer1=ip:192.168.X.128[1515].
- 18** Save the file and exit.
- 19** Run **SmarTeam**.