



ENOVIA SmarTeam

SmarTeam – Job Server Installation Guide

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Chapter 1: Introduction

Overview

This guide provides all the information necessary for the SmarTeam System Administrator to setup the Job Server software. The system must have SmarTeam Win32 Client in order to run the installation.

Adding an Admin Setting does not influence system behaviour. However, deleting Admin Settings may cause a system failure. Therefore, it is highly recommended that only the SmarTeam System Administrator has update rights for Admin Settings.

What is the Job Server?

Job Server software is a server-side application that handles central SmarTeam activities. The server configuration frees SmarTeam – Editor clients from running these activities and the need to have an application installed on each client to process them.

The SmarTeam - Job Server supports the following functions:

- **Silent Release** - Accesses the secure SmarTeam Vault Server. The Job Server maps data from SmarTeam metadata into released files without the need to perform a life cycle Check Out operation or create a new version of the file. This is usually required after the file has been released to the vault and additional information, such as Electronic Signature, is added to the metadata that needs to be embedded in the attached file. Therefore, the Job Server helps engineers to add the required information to the latest file without creating additional files. In addition, the function of embedding information in the file requires the authoring system to be installed on the computer. The Job Server configuration reduces the need to install the authoring system on all clients.

Note: When the user uses non local vaults the Job Server only works with files which are in the vault

- **Mail Server** - Using a standard SMTP server, the Job Server automatically routes messages for required system notifications to administrators and end users. The Job Server reduces the requirement to have an SMTP server installed on client stations and centralises the mail sending process.
- **Print Server** -Using the SmarTeam Viewer (SmarTeam – Editor’s embedded viewer functionality), the Job Server prints files as requested by the user. The printer needs to be accessed by the computer running Job Server software. In addition, metadata information from SmarTeam - Editor records can be embedded automatically in the print watermark, header and/or footer.

- **Custom Job** - Using Admin Settings to write a class library and configure a new executable, the user can create a job type. This executes the code written. This code must follow a certain specification.

How the Job Server Functions Within SmarTeam

The **Job Server** uses the following queue mechanism types for processing jobs:

- **Mail** - The Mail queue handles all mail jobs. When a SmarTeam application needs to send an e-mail message through the Job Server, it creates a job in the Mail queue. The job includes processing information and mail message information, such as the sender, receiver and message text.
- **Print** - The Print queue handles all print jobs. When a SmarTeam application needs to print a file through the Job Server it creates a job in the Print queue. The job includes processing information and the SmarTeam object ID and class ID of the record for the file that needs to be printed.
- **Operation** - The Operation queue handles Silent Release jobs in this release. When a SmarTeam application needs to use the Job Server for a Silent Release operation, it creates a job in the Operation queue with operation type Silent Release. The job includes processing information and the name of the authoring application that is supported in the Job Server. Job Server supports Microsoft Word, Microsoft Excel and Custom Jobs.

Queues are implemented using SmarTeam classes. The Admin class includes a Queues sub class and three leaf classes: Mail, Print and Operation.

Creating a Job

When a SmarTeam application needs to create a new job, the job is created in the appropriate queue as a new record. Based on system definitions (as detailed in this document), the job includes processing information and job-related details. The processing information includes:

- **Executing Server Name** - the job type on which the executable is run.
- **Object ID** and **Class ID** of the record that the job needs to access.
- **Not Processed** - A flag indicating whether the job was already processed. When the job is created, it is always set to Not Processed.
- **Error Occurred** - A flag indicating whether the job ended in error. When the job is created, it is always defaulted with False, which means that an error has not occurred.
- **Job Details** - When the job is created, job details are empty. After processing the job, the Job Server writes in this field whether the job ended successfully or with an error.
- **Priority** - The urgency of the job. The job server sorts the jobs to process by this field, the higher the value, the higher the job's priority is.

Note: The Administrator can define Query By Attributes to simplify the search for mainting Job Server Jobs e.g. defining a query for all jobs where an error occurred. To create an advanced search for the object from multiple classes in the SmarTeam – Editor database, you must select classes, attributes and define the search criteria.

Processing a Job

The Job Server runs constantly on the designated server. Applications running on the Job Server are checked by the SmarTeam System Administrator. When a new job for one of these applications is added to the queue, the Job Server proceeds to execute it.

After processing the job successfully, the Job Server either:

- Deletes the job record from the queue if the application's Admin Setting, Section: Job Server, Second Value indicates to delete the job.

Or

- Updates the job record with a success message if the application's Admin Setting, Section: Job Server, Second Value indicates to leave the job. The Not Processed flag is turned off, and the Error Occurred flag is also turned off.

When the job ends in an error, the Job Server updates the job record with a failure message and updates the Error Occurred flag accordingly.

Silent Release

Authoring Systems integration, such as Microsoft Word, provide server-side functionality that occurs after a lifecycle Release operation has been performed on a document.

In a company's Approve and Release production process, there may be some time between approving (Electronic Signature) a document to releasing it to the vault. During this time, changes are not allowed on the document. To prevent a user from performing changes to the document and changing it to include approval information (approver user name and time of approving) a Silent Release operation is required.

A Silent Release operation takes place after the actual release operation on a document. The server copies the file from the vault server into a temporary directory on the server. It then opens the file with its authoring system; retrieves approval information from the metadata information stored in the SmarTeam database and writes this information to predefined, mapped fields on the file. The file is then saved and copied back to the vault.

SmarTeam provides several Authoring Systems integrations with Job Server software, such as Microsoft Word and Microsoft Excel. If an additional integration is required, the implementer can develop it per customer requirements with SmarTeam.

Note: If you use the Job Server, Microsoft Word and Microsoft Excel executables, download and register Microsoft office 2003 primary interop assemblies (PIAs). For additional information, see: <http://www.microsoft.com>.

Related Documentation

The following documents are referred to in this guide.

Document	Remarks
SmarTeam – Regulatory Compliance Framework User Guide	Provides an overview on how to use the SmarTeam – Regulatory Compliance Framework system. Available on SmarTeam V5R19 CD.
SmarTeam – Regulatory Compliance Framework Setup Guide	Describes how to setup during the SmarTeam – Editor installation process. Available on SmarTeam V5R19 CD.
SmarTeam – Editor Administrator Guide	Provides administration procedures to customize and maintain SmarTeam – Editor. Available on the SmarTeam Documentation CD.
SmarTeam – Job Server Online Help	Provides system administrators with the necessary information to setup the Job Server.

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 provides 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 – Job Server software.

*Requirement: M = Mandatory, O = Optional

	Item	M/O*	Reference
Stage 1: Pre-Installation			
<input type="checkbox"/>	Verify that your hardware and software meet the requirements of all other products listed as a prerequisite	M	SmarTeam Hardware and Software Requirements Guide
<input type="checkbox"/>	Install SmarTeam - Foundation with the Workflow components	M	SmarTeam - Foundation Installation Guide
<input type="checkbox"/>	Install SmarTeam - Editor	M	SmarTeam - Editor Installation Guide
<input type="checkbox"/>	Install IIS and SMTP	M	SmarTeam - Editor Installation Guide
<input type="checkbox"/>	Install SmarTeam - Web Editor.	O	SmarTeam - Web Editor Installation Guide
<input type="checkbox"/>	Install SmarTeam V5R18 or a later Service Pack	M	Prerequisites
<input type="checkbox"/>	Check for any additional prerequisites on the SmarTeam Web Site	M	Release Notes of Latest Service Pack in the Release or SmarTeam Support Web Site
Stage 2: Installation Process			
<input type="checkbox"/>	Run SmarTeam – Job Server installation	M	Running the Installation
Stage 3: Post Installation			
<input type="checkbox"/>	Update the database structure in SmarTeam Data Model Designer	M	Update Database Structure in Data Model Designer Utility
<input type="checkbox"/>	Activate mechanisms in SmarTeam Data Model Designer	M	Activate Mechanisms in Data Model Designer Utility
<input type="checkbox"/>	Set class sequences in SmarTeam Form Designer	M	Setting Class Sequences
Stage 4: What's Next			
<input type="checkbox"/>	Run SmarTeam Job Server	O	SmarTeam Job Server Online Help.

Chapter 3: System Requirements

Hardware and Software Requirements

There are no specific Hardware and Software Requirements for the SmarTeam - Job Server software.

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 the following stages:

Stage 1: Pre-Installation (This Chapter)

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

Stage 3: [Chapter 5, Post Installation](#)

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

Note: Once you have completed all the stages you can start working with SmarTeam – Job Server software.

Prerequisites

Existing SmarTeam users do not comply with RCF requirements, which include certain login and password restrictions. Before installing the SmarTeam – Job Server software, you must perform the following steps in the order specified:

- Install SmarTeam - Foundation with Workflow components
- Install SmarTeam - Editor with the SmarTeam - Regulatory Compliance Framework option selected
- Install IIS and SMTP components
- Install SmarTeam - Web Editor. This is only required if you want to use the SmarTeam - Regulatory Compliance Framework in SmarTeam - Web Editor.
- Install SmarTeam Viewer
- Install SmarTeam V5R16 SP6 or a later Service Pack. SmarTeam – Foundation with the Workflow components must be installed on your computer before you install SmarTeam V5R16 SP6 or a later Service Pack.

Chapter 4: Installation Process

Installing the SmarTeam – Job Server software

This chapter provides a step-by-step description of the installation process for installing SmarTeam – Job Server software.

Buttons

These 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:** Enables you to return to the previous window
- **Cancel:** Enables you to abort the installation setup program without installing the SmarTeam – Job Server software

Running the Installation

To begin installing:

- 1 Run **Setup.exe** from the SmarTeam – Job Server software.

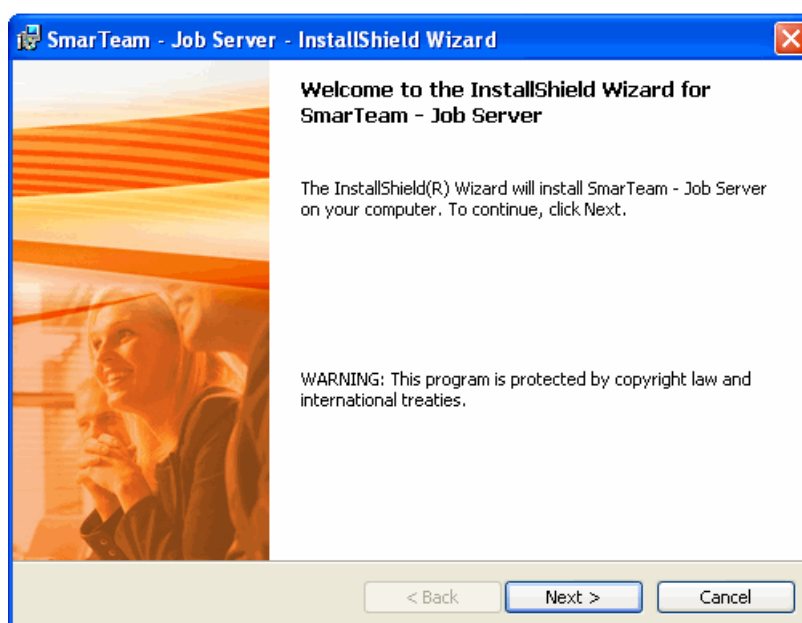
The installation application is launched automatically and appears on your screen to take you through the software installation process.

- If for some reason the installation program does not appear on your screen, click **Start** and select **Run** to open the Run utility.
- In the Run Open line type **D:\Setup.exe** to run the installation setup program (where D denotes the CD ROM drive in which the CD-ROM is inserted).
- To abort the installation without installing SmarTeam – Job Server software, click **Exit**.

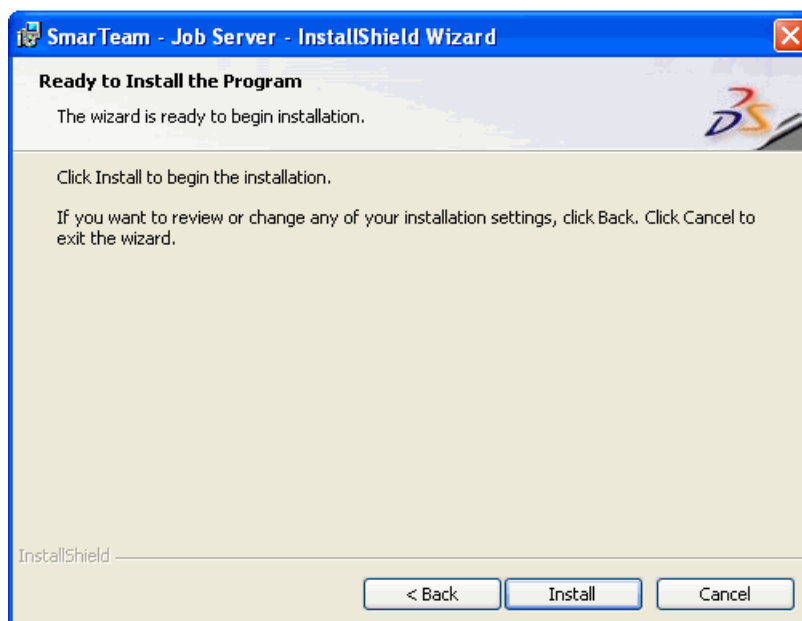
- 2 Click the SmarTeam – Job Server option to install Smarteam – Job Server



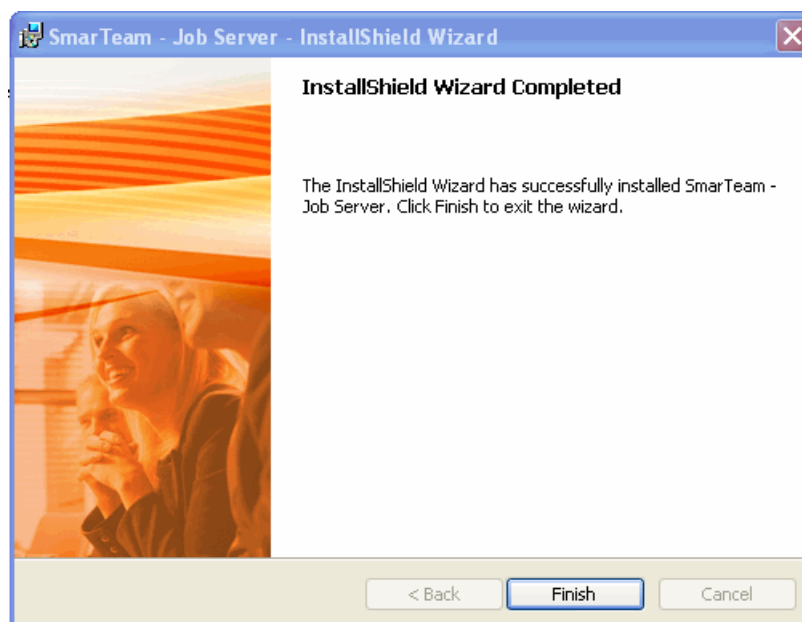
3 In the Welcome window, click **Next**.



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



- 5 Click **Finish** to complete the installation and exit the InstallShield Wizard.



Chapter 5: Post Installation

After the SmarTeam – Job Server software is installed, you must perform post installation tasks as described in this chapter.

Adding Mechanisms to Database

In order to work with the Electronic Signature you must add mechanisms into your database. This is done by adding the relevant mechanisms to your database using the SmarTeam Data Model Designer utility.

Note: This operation will only add the relevant JBS mechanisms. It will not affect the SmarTeam Data Model structure.

Update Database Structure in Data Model Designer Utility

Run the SmarTeam Data Model Designer utility to update the structure of your selected database.

IMPORTANT! It is highly recommended that you perform a backup operation of the selected database before performing this update procedure.

To update your selected database, perform the following steps:

- 1** From the taskbar Start button, select **Programs, SmarTeam, Administrative Tools, SmarTeam Data Model Designer** to launch the SmarTeam Data Model Designer.
- 2** In the Data Model Designer window, select **File, Modify Database Structure** from the main menu to display the Available Databases window.
- 3** In the Available Databases window, select the required database and click **OK**.
- 4** A SmarTeam message window appears, advising you to perform a backup of the selected database before proceeding to update the selected database.
 - **Yes:** Select this option if you have already performed a backup of the selected database and want to continue with the upgrade.
 - **No:** Select this option to exit the upgrade process in order to perform a backup of the selected database before proceeding. After performing a backup operation, return to this upgrade process as described in Step 1, above.
- 5** If you selected **Yes** in the previous step, the Wizard Login [Database Name] window appears. Enter the applicable User Name and Password for the selected database and then click **OK** to continue.

After a successful login, the SmarTeam Data Model Designer window displays the selected database.

Activate Mechanisms in Data Model Designer Utility

The **Job Server** mechanism will be displayed in the SmarTeam Data Model Designer utility.

To activate these mechanisms:

In the SmarTeam Data Model Designer select the Job Server mechanism and click **Next**.

Setting Class Sequences

In order to work with Electronic Signature, sequences must be set for specific classes in the SmarTeam Form Designer Administrative Tool.

To define the required sequences:

The following sequences, defined using the SmarTeam Form Designer, are required for unique identifiers of objects.

- 1 To launch the SmarTeam Form Designer utility, from the taskbar **Start** button select **Programs, SmarTeam, Administrative Tools, Form Designer**.

IMPORTANT! When logging in to the Form Designer utility, at this stage, you must use the user name and password entered in the SmarTeam – Job Server Installation process.

- 2 In the Form Designer, select the Attribute Profile Card of the relevant Class (see list of classes in the table below) and then open Attribute Profile Card:
 - Verify that the column name (attribute name) is **TDMX_ID**.
 - Select **View, Properties** (F4).
 - Click on the **Mask Name**.
 - Click **New** to create a new sequence if the sequence does not already appear in the list.
 - After creating a new sequence, click **Select** to link it to the specific field. The sequence will then be available in the system for SmarTeam – Regulatory Compliance Framework.
 - Repeat this step for each class mentioned in the Table below.

Note: For further information on the Form Designer refer to the SmarTeam - Editor Administrator Guide.

Table 1: List of classes which require defined sequence values

Class Name	Sequence Name	Sequence Description	Sequence Pattern	Sequence Value
Admin	Admin	Admin	Admin-99999999	Admin-00000000
Admin Folder	Admin Folder	Admin Folder	Admin Folder-99999999	Admin Folder-00000000
Messages	Messages	Messages	Messages-99999999	Messages-00000000

Class Name	Sequence Name	Sequence Description	Sequence Pattern	Sequence Value
Settings	Settings	Settings	Settings-99999999	Setting-00000000
Admin Settings	Admin Settings	Admin Settings	Admin Settings-99999999	Admin Settings-00000000
User Settings	User Settings	User Settings	User Settings-99999999	User Settings-00000000
Queues	Queues	Queues	Queues-99999999	Queues-00000000
Mail	Mail	Mail	Mail-99999999	Mail-00000000
Operation	Operation	Operation	Operation-99999999	Operation-00000000
Print	Print	Print	Print-99999999	Print-00000000

What's Next?

See the SmarTeam – Job Server Online Help for further details.

Chapter 6: Troubleshooting

Installation Process Log File

Every installation process is written to the log file SmarTeam_JBS.log, which is located in the Windows default TEMP directory. If any problem occurs during the installation the error details can be found in the log file.

To locate the log file:

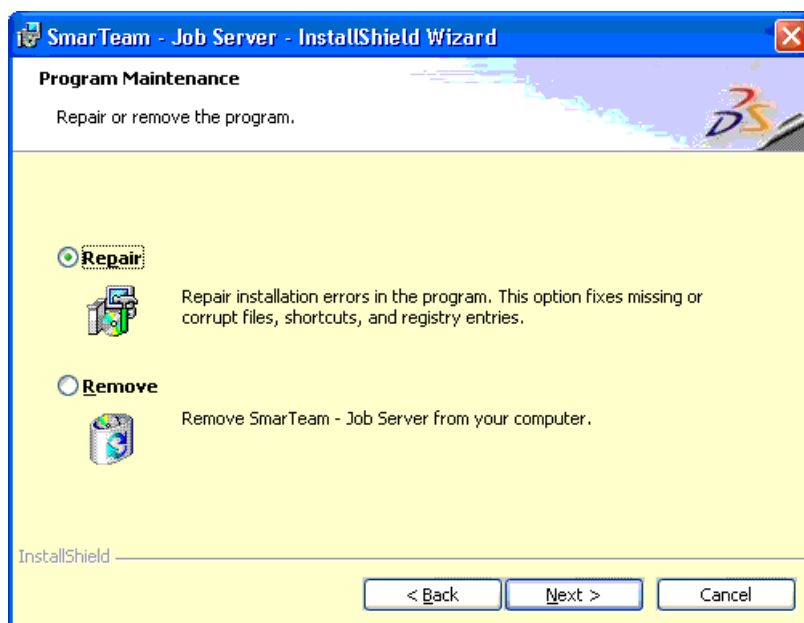
- 1 Select **Start**.
- 2 Select **Run**.
- 3 Enter “%temp%”.
- 4 Click **OK**.

Note: For details of how to fix an error, which is reported in the log file, see [Repair](#).

Repair/Uninstall

If you have SmarTeam installed on your machine, when you insert the original software, the Program Maintenance window is displayed. The following options are available:

- **Repair:** Repairs installation errors in the program. This option fixes missing or corrupt files, shortcuts and registry entries. For further details see [Repair](#)
- **Remove:** Removes SmarTeam – Job Server from your computer. For further details see [Uninstall](#)



Repair

If an error was found in the log file it must be repaired. This can be done by using either the Release CD or the Add or Remove Programs facility on your computer.

To repair an error using the Release CD:

- 1 Insert the SmarTeam – Job Server Release CD. The Program Maintenance window is displayed.
- 2 Select **Repair**.
- 3 Click **Next**.
- 4 Follow the remaining instructions on the CD.

To repair an error using the Add or Remove Programs facility on your computer:

- 1 Select **Start, Settings, Control Panel, Add or Remove Programs**.
- 2 Open SmarTeam – Job Server CD and select:
 - **SmarTeam – Job Server**
 - **“Click here for support information”** link.
The Support Info window appears.
- 3 Click **Repair**.

Uninstall

If required, you can remove SmarTeam – Job Server from your computer. This can be done by using either the Release CD or the Add/Remove Programs facility on your computer.

To uninstall a Service Pack you only need to uninstall the Release. This will automatically remove the relevant Service Packs.

To uninstall using the Release CD:

- 1** Insert the SmarTeam – Job Server release CD. The Program Maintenance window is displayed.
- 2** Select **Remove**.
- 3** Click **Next**.
- 4** Follow the remaining the instructions on the CD.

To uninstall using the Add or Remove Programs facility on your computer:

- 1** Select **Start, Settings, Control Panel, Add or Remove Programs**.
- 2** Open the SmarTeam – Job Server CD.
- 3** Click **Remove**.

Known Issues

For installation known issues, refer to the [SmarTeam Support Web Site](#).

Frequently Asked Questions

For installation frequently asked questions, refer to the [SmarTeam Support Web Site](#).

Chapter 7: SmarTeam – Job Server Silent Installation

Overview

This document shows how to use the Windows Installer to perform a silent installation of the SMARTEAM - Foundation.

The Windows Installer performs a command-line based installation without requiring any user interface dialogs. This allows an administrator to use a script to install SMARTEAM - Foundation automatically for a group of computers.

Section 2 defines the options and properties that can be used in the command-line installation commands.

Section 3 presents some common command-line installation scenarios.

Command-Line Operation

This section describes how to formulate a command-line command, including how to specify command-line options and properties.

Command-Line Format

Browse to the Setup folder. The general format of a command-line command is:

```
<Setup folder>\Setup.exe /s /v "<installation_flags> <commandLine_Properties>  
<ADDLOCAL_values>"
```

The relevant options are described in detail in the following sections.

Note: When you use setup.exe to run the installation in silent mode, every back-slash "\" must appear in the command line script as a double back-slash. For example, the INSTALLDIR parameter must look like this: **INSTALLDIR="C:\\Program Files\\SmarTeam"**

Installation Flags

The recommended flags for installation are:

1. /qb : Installation will present a progress bar during the silent installation process, which disappears once the installation is complete.
2. /L*v : Installation logging will be written to a log file in the location specified after this flag.

For example: Using this flag as follows: `/L*v"%temp%\InstallIdentifier.log"`, the installation will reproduce a log file named "InstallIdentifier.log" in the %temp% folder of the local machine.

An example with both flags:

`/qb /L*v"%temp%\InstallIdentifier.log"`

Complete detailed information about these options and more can be found at:

<http://msdn2.microsoft.com/en-us/library/aa367988.aspx>

Command-Line Properties

Properties are global variables that Windows® Installer uses during an installation. This section lists the command-line properties that can be used. Each set of properties corresponds to a dialog in the user-interface based installation. The following table shows the parameter, description and the corresponding dialog name.

GUI Dialog	Property	Value	Description
Customer Information	USERNAME	Registered user name for the application	Installer's user name
	COMPANYNAME	Registered company name	Installer's organization
	ALLUSERS	Options: ALLUSERS parameter omitted: ALLUSERS Per-user installation using folders in user's personal profile. (Installation works only for that user.) ALLUSERS =1 Per-machine installation using folders in "All Users" profile. (Installation works for all users on the machine.)	Administrator access privileges. ALLUSERS property determines if the installation is per-user or per-machine.

Values for ADDLOCAL Parameter

The following parameter values can be used for the ADDLOCAL All parameters listed in the Parameter column (see table) are case-sensitive.

Type of Service	Parameter
SMARTEAM – Job Server	JobServer

Silent Installation Example (to Cut and Paste)

Installing SmarTeam – Job Server

Open Start -> Run or Command Prompt window (cmd.exe) and run following line:

```
<Setup folder>\setup.exe /s /v"/qb /L*v %temp%\SMARTEAM_Job_Server.log  
USERNAME=<Installer's user name> COMPANYNAME=<Installer's organization>  
ALLUSERS=1 ADDLOCAL=JobServer"
```