



ENOVIA SmarTeam

SmarTeam – Community Workspace

Installation Guide

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Chapter 1: Introduction

Overview

This guide provides all the information necessary for the SmarTeam System Administrator to install the SmarTeam – Community Workspace Software on a designated server.

If you are upgrading from a previous version of SmarTeam – Community Workspace, you need to perform the upgrade procedure and not the installation procedure described in this guide. Details of the upgrade procedure are in the SmarTeam Procedure for Upgrading Document.

Software Location

The installation procedures described in this document is for the SmarTeam – Community Workspace software, which is available on the SmarTeam CD-ROM.

Related Documents

The following documents are referred to in this guide. All the documents are available on the SmarTeam Documentation CD unless specified otherwise.

Name of Document	Remarks
Introduction to SmarTeam Installation	It is recommended that you read this document thoroughly and plan your topology prior to installing your SmarTeam configuration or products
Hardware and Software Requirements	Details the hardware and software required for a successful installation
SmarTeam Procedure for Upgrading	Details the upgrade procedure if you are upgrading from a previous version of SmarTeam – Community Workspace
SmarTeam – Editor Installation Guide	You must install SmarTeam – Editor before SmarTeam – Community Workspace
SmarTeam – Community Workspace Online Help	Details and explains usage of theSmarTeam – Community Workspace
SmarTeam Web Viewer Installation Guide	Required if you want to view your documents with the SmarTeam – Web Viewer

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

You must complete all the stages in the following checklist to successfully install SmarTeam – Community Workspace.

<input type="checkbox"/>	Item	M/O*	Reference
Stage 1: Pre-Installation			
<input type="checkbox"/>	Verify that your Hardware & Software meet the requirements	M	Hardware and Software Requirements Guide
<input type="checkbox"/>	Verify that IIS exist and runs on your computer	M	Supported Application Servers
<input type="checkbox"/>	Verify that .NET 3.0 is installed on IIS	M	Supported Application Servers
<input type="checkbox"/>	Install SmarTeam – Editor as follows: <ul style="list-style-type: none"> • Client: Installs SmarTeam – Editor on a remote server. Recommended for Production Environments • Standalone: Installs SmarTeam – Editor with Core Services on a local machine. Recommended for Demo or Testing Environments 	M	SmarTeam – Editor Installation Guide
<input type="checkbox"/>	Note: Automatically installed .NET 3.0 on the Server machine	M	Prerequisites
<input type="checkbox"/>	Install SmarTeam Web Viewer, if you need to view documents	M/O	SmarTeam Web Viewer Installation Guide
<input type="checkbox"/>	Define in windows the user who will run the SmarTeam – Community Workspace Application	M	Defining a SmarTeam – Community Workspace User in Windows
<input type="checkbox"/>	Verify that you have administrative privileges on your local machine	M	Defining a SmarTeam – Community Workspace User in Windows
<input type="checkbox"/>	Check for any additional prerequisites on the SmarTeam Web Site	M	Release Notes of the latest Service Pack in the Release or SmarTeam Support Site
Stage 2: Installation Process			
<input type="checkbox"/>	Run SmarTeam – Community Workspace installation	M	Running the Installation
Stage 3: Post Installation			
<input type="checkbox"/>	When installed on Windows 2003 Server, perform the steps to finalize installation	M/O	Finalizing Windows 2003 Server Installation

<input type="checkbox"/>	Item	M/O*	Reference
<input type="checkbox"/>	Install SmarTeam – Synchronize Assembly Helper	M/O	Refer to the SmarTeam – Synchronize Assembly Helper Guide for details
<input type="checkbox"/>	If Lotus Notes is installed, perform steps to implement support for Lotus Notes	M/O	Lotus Notes Support
<input type="checkbox"/>	If you have Secure Socket Layer installed, perform configuration steps	M/O	If you have Secure Socket Layer (SSL) on your Web Server you need to ensure that in the key "SmarTeam.Web.UploadUrl" the value https exists and not http, which is the default value. See Secure Socket Layer (SSL) Configuration
What Next?			
<input type="checkbox"/>	Login SmarTeam – Community Workspace	M	An Introduction to Setting Up SmarTeam - Community Workspace Logging In to SmarTeam - Community Workspace

Chapter 3: System Requirements

Hardware and Software Requirements

Refer to the SmarTeam – Community Workspace sections in the Hardware and Software Requirements document. This document provides details of the hardware and software required for successful installation of the SmarTeam – Community Workspace application.

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, Installation Process](#))

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

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

Installation Environment

An explanation of the SmarTeam – Community Workspace Installation Environment can be found in the Introduction to SmarTeam Installation document. This document can be located on the Documentation CD.

Note: If you need to install SmarTeam – Web Editor and SmarTeam – Community Workspace, it is recommended that you install them on different servers.

Prerequisites

Before installing SmarTeam – Community Workspace, you must perform the following steps in the order specified:

- Install IIS if it does not exist.
- Install SmarTeam - Editor (automatically installs .NET Framework 3.0)
- Install SmarTeam Web Viewer, if you need to view documents

- Define the User Name and Password of the user who will run the SmarTeam – Community Workspace Application

Note: If you have installed the Release with a Service Pack, it is recommended to check the Service Pack Release Notes to see if there has been an update to this document since the main Release. The latest version of this document can be found in the latest Service Pack CD or in the [SmarTeam Support Website](#) (after login, select Material and then the relevant release).

Supported Application Servers

The SmarTeam – Community Workspace Application supports the Microsoft® Internet Information Services (IIS).

Installation for the SmarTeam – Community Workspace can run on IIS.

Note: Before you start the installation process, verify that IIS run successfully on your machine as follows:

- For **IIS**, check that the World Wide Web Publishing Service is running.

Microsoft® Internet Information Services (IIS)

If you are using IIS as your application server, make sure that IIS exists on your system. IIS is automatically included on your system when installing Windows 2000. It is not included in Windows 2003.

Note: When you configure IIS version 5.1, disable the **HTTP keep alives** option because there is a limitation on concurrent users when the HTTP - keep alives option is enabled.

Windows 2003 Configuration

Special configuration is required if you have Windows 2003 on your system. Review all the cases below to see which case applies to you.

Case 1: If you have Windows 2003 and IIS does not exist on your system, perform the following steps.

To configure Windows 2003:

- 1 Add the "Application Server" role via "Configure Your Server Wizard" as follows:
 - Select **Start, Settings, Control Panel, Administrative Tools** and then Configure Your Server Wizard
 - In the Welcome to Configure Your Server Wizard window, click **Next**
 - In the Preliminary Steps window, click **Next**
 - In the Server Role window, select **Application server (IIS,ASP.NET)** and then click **Next**
 - In the Application Server Options screen, select the **Enable ASP.NET** checkbox and then click **Next** to complete the Configure Your Server Wizard procedure
- 2 In the IIS Services Manager, go to the "Web Service Extensions" and do the following:
 - Select **Server Side Includes** and click **Allow**
 - Verify that the ASP.NET status is set to Allowed

Case 2: If you have Windows 2003 and IIS exists on your system:

- Verify that the items in Case 1, Step 2 are allowed in the Web Service Extensions

Case 3: The SmarTeam – Community Workspace User is automatically added to local IIS_WPG group during the SmarTeam – Community Workspace Installation process:

- If you are going to use a domain user as the SmarTeam – Community Workspace user, you must ensure that the user who is logged into Windows and running the SmarTeam – Community Workspace installation (user with administrative privileges) also has authorization for the domain. This must be done in order to add the domain user to local IIS_WPG group

SmarTeam – Editor

After installing IIS, you need to install SmarTeam – Editor. The installation process automatically installs .NET Framework 3.0 on your machine if it was not yet installed.

For details on how to install SmarTeam - Editor, refer to the SmarTeam – Editor Installation Guide, located on the Documentation CD.

Defining a SmarTeam – Community Workspace User in Windows

The SmarTeam – Community Workspace Application needs a specific set of permissions in order to run properly. This includes access to resources on the SmarTeam – Community Workspace machine and on other machines, e.g., the Vault server. For this purpose, you are prompted to specify the SmarTeam – Community Workspace user during the SmarTeam – Community Workspace installation. You can provide a local user or domain user account for this purpose.

Whether you decide to use local or domain accounts will depend on your system architecture and security policy in your organization. You can use an existing local user or domain user account, or create a new account for the SmarTeam – Community Workspace installation.

The SmarTeam – Community Workspace user should have access to vaults. If you are working with a Vault Server, the SmarTeam – Community Workspace user should be assigned to the SmVaultUsers group. This group could be a local group on the vault server machine or a global user group on the domain controller.

Note: After you use a local or domain user account for the SmarTeam – Community Workspace installation, you must not change the user's password. To make sure that the password cannot be changed, select the "User cannot change password" option while creating a new user account for a SmarTeam – Community Workspace user. If you change the password of the user after installation, you must uninstall and reinstall SmarTeam – Community Workspace or change the password in all the relevant places, e.g., Services, IIS.

In addition, do not use your personal domain account as the SmarTeam – Community Workspace user. If you use your personal domain account and use your password, depending on your organization's security policy, your account may be locked (as SmarTeam – Community Workspace will still be using your old password).

A SmarTeam – Community Workspace user must be defined as a local user or domain user in windows before installation, in order to be selected during the installation.

Defining a Domain User, to be used as a SmarTeam – Community Workspace User

Your System Administrator needs to provide you with a Domain User, which can be used during installation.

Defining a Local User, to be used as a SmarTeam – Community Workspace User

In order to be able to access files and other resources located on your server or on other computers on the network, you must first provide an appropriate user name and password with access permissions to these resources in the Computer Management window.

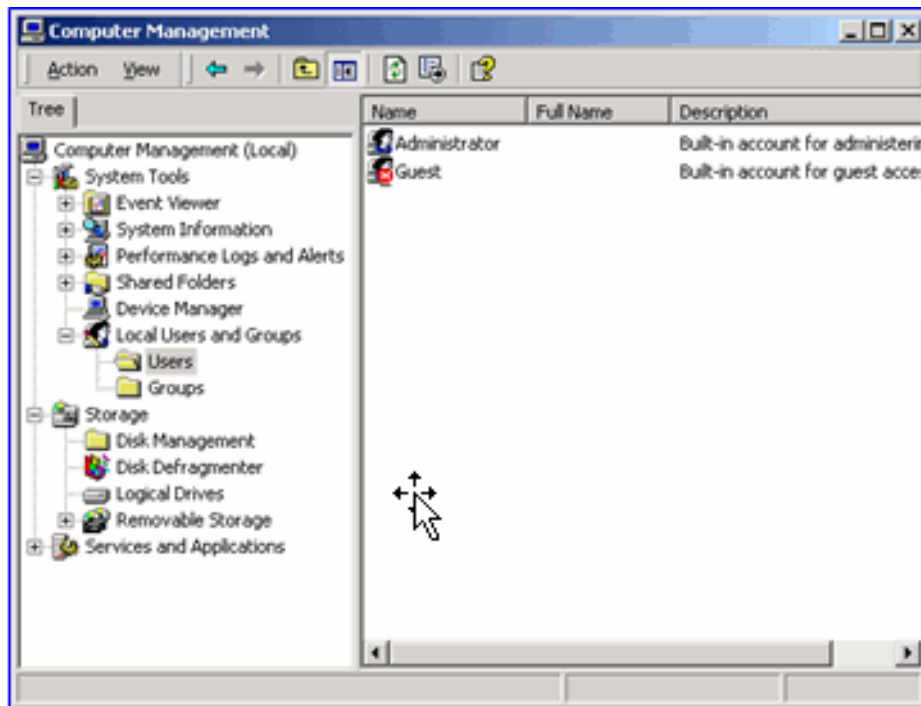
To display the Computer Management window:

- 1 From the Start button select **Settings, Control Panel, Administrative Tools, Computer Management**.

OR

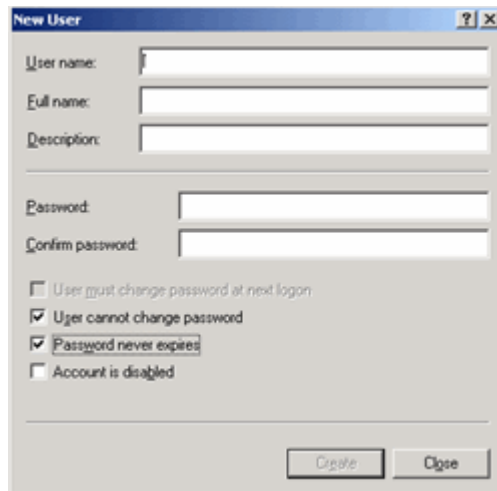
From the desktop, select My Computer and right-click to display a popup menu. From the popup menu, select **Manage, Computer Management**.

- 2 In the Computer Management window:
 - Expand System Tools and then Local Users and Groups
 - In the Local Users and Groups tree select Users. The defined user names are displayed in the right pane, e.g., Administrator and Guest



To add a new user to the list:

- 1 From the main menu select **Action, New User**. The New User window displays.



2 In the New User window, complete the fields as follows:

- **User name:** Enter a user name according to Windows specifications (without spaces, etc.), e.g., John_Smith
- **Full name:** Enter the user's full name e.g., Jonathan Smith
- **Description:** Enter a description e.g., Enable SmarTeam – Community Workspace to access files/resources
- **Password:** Enter a suitable password
- **Confirm password:** Enter the password again to confirm your password
- **User must change password at next logon:** Do not check
- **User cannot change password:** Check
- **Password never expires:** Check
- **Account is disabled:** Do not check

3 Click **Create**.

The new user name is listed in the right pane of the Computer Management window.

If you have IIS, do not grant access permissions to this user name - the installation process will automatically grant the appropriate permissions.

Administrative Settings for the SmarTeam – Community Workspace User

To install SmarTeam – Community Workspace, you must have administrative privileges on your local machine.

If you are going to use a local user as the SmarTeam – Community Workspace user, login to Windows and run the installation as a local administrator.

If you are going to use a domain user as the SmarTeam – Community Workspace user, login to Windows as a domain user with administrative privileges on the machine and then run the SmarTeam – Community Workspace installation.

Chapter 4: Installation Process

Installing SmarTeam – Community Workspace

This chapter provides a step-by-step description of the installation process for installing SmarTeam – Community Workspace Software on a designated server or local workstation.

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 SmarTeam – Community Workspace

Installation by Administrator

All SmarTeam products must be installed by a user with Administrator authorization. Depending on the SmarTeam products and tools that are selected for installation, a system message may appear at the end of the installation process, prompting the user to reboot. This indicates that the installation of some components will be completed only after the reboot.

If this occurs, the user who performed the installation with local Administrator rights must log into the system after the reboot.

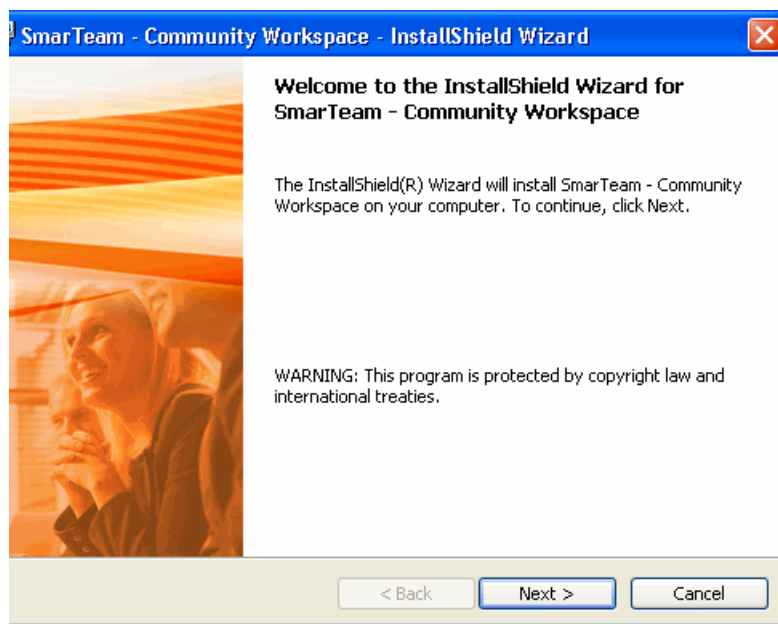
Running the Installation

To begin installing

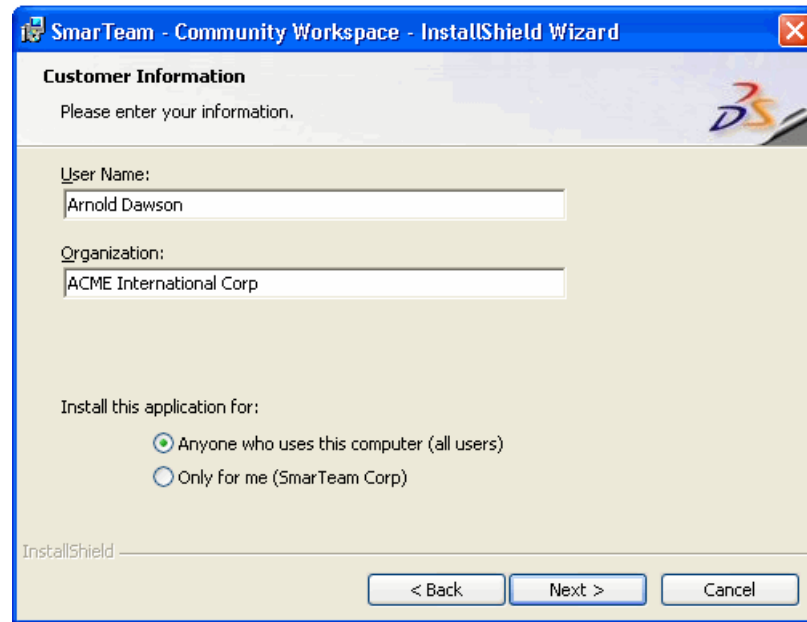
- 1 Run install.exe from the SmarTeam Service Pack CD; the Installation window appears.
- 2 In the Installations window, click **SmarTeam – Community Workspace Server**.



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



- 4 In the Customer Information window:
- Personalize the program by entering your user name and company details in the applicable fields
 - Verify that the "Anyone who uses this computer (all users)" option is selected
 - Click **Next**



5 In the Main Installation Type window select one of the following options:

■ **SmarTeam – Community Workspace Utilities** installs the following:

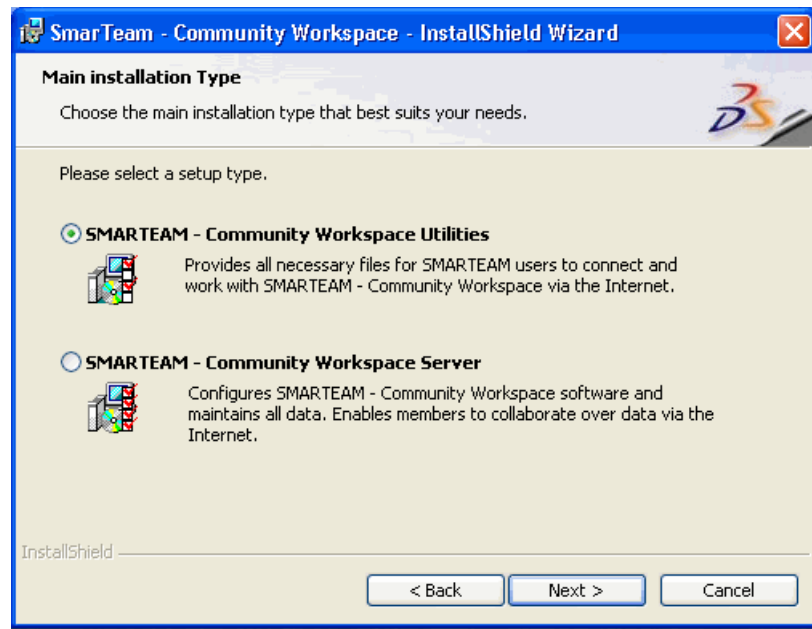
- SmarTeam – Community Workspace utilities on a SmarTeam client workstation for SmarTeam users who intend to publish objects to SmarTeam – Community Workspace for collaboration over the Internet
- An administration utility for updating the SmarTeam database to function with SmarTeam – Community Workspace

If you select this option, when you click **Next** the Ready to Install window appears, go to [Step 6](#)

■ **SmarTeam – Community Workspace Server** installs the following:

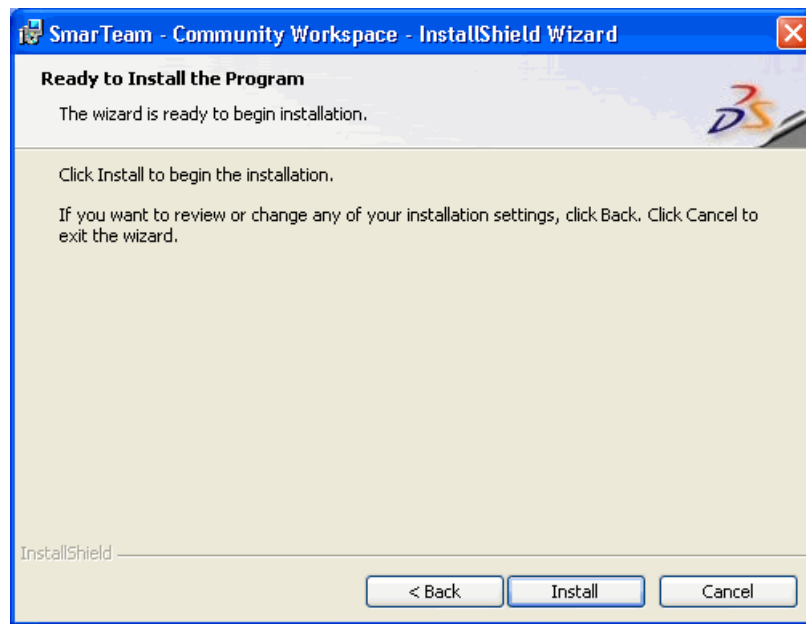
- SmarTeam – Community Workspace software on a server workstation, including SmarTeam – Community Workspace utilities
- Enables SmarTeam – Community Workspace members to connect and collaborate over data via the Internet

If you select this option, go to [Step 7](#)



Installing SmarTeam – Community Workspace Utilities Only

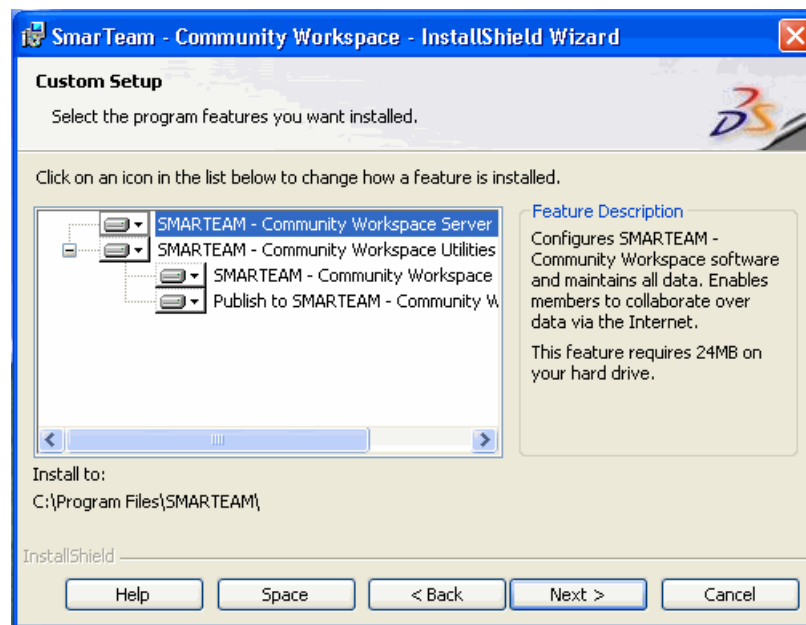
- 6 The Ready to Install window is displayed only if you selected SmarTeam – Community Workspace Utilities in the Main Installation Type window
This is a quick installation and only requires this step to complete the installation process:
 - Click **Install** to start the installation process
 - After successful installation, the **InstallShield Wizard Complete** window appears (see last window in section, [Security Authorization](#))
 - Click **Finish** to complete the installation and exit the InstallShield Wizard
 - SmarTeam – Community Workspace software installation is now complete
- Note:** All other installation steps are not relevant for the SmarTeam – Community Workspace Utilities option.



Installing SmarTeam – Community Workspace Server

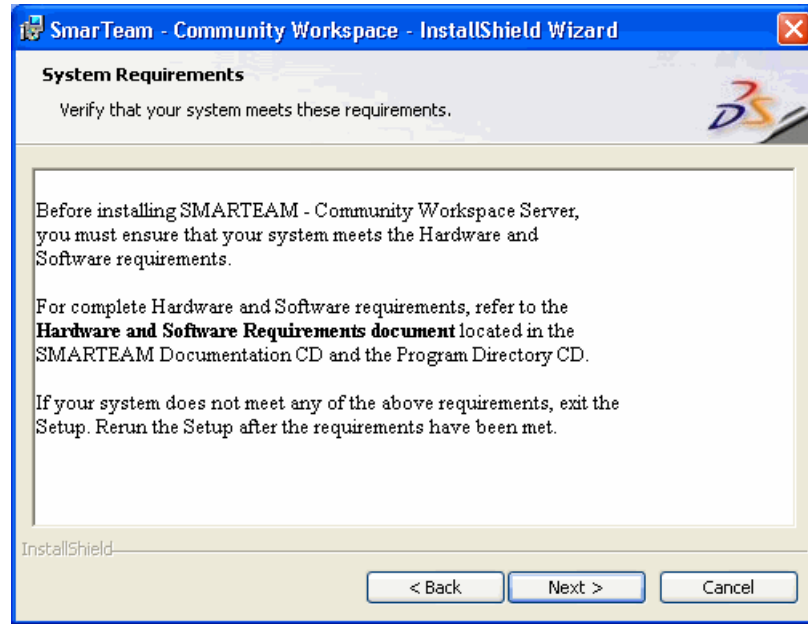
7 The Custom Setup window appears:

- Select the components you want to install
For each component you select, a description appears in the right pane
- Select the appropriate option for each component
- Click **Next**



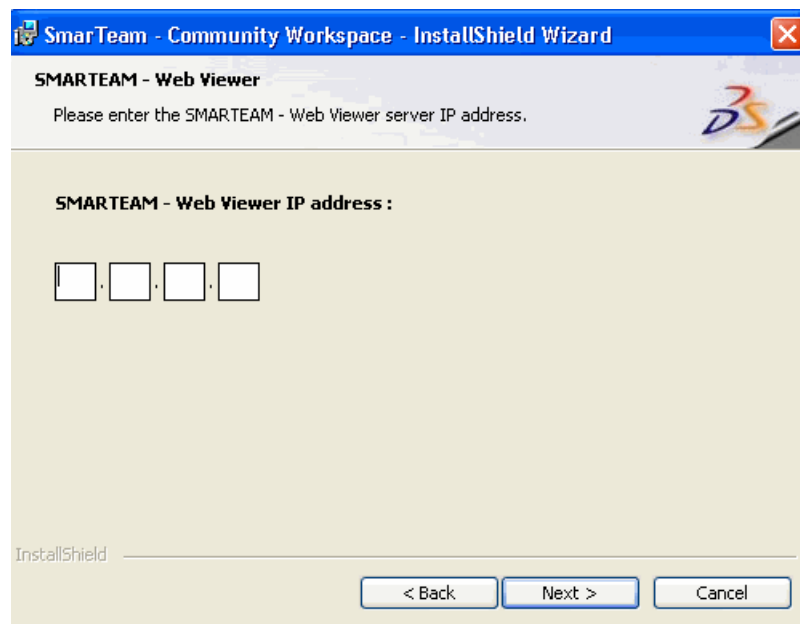
- ### 8 In the System Requirements window, verify that the designated server meets the minimum space requirements:
- If the requirements are met, click **Next**

- If the requirements are not met, click **Cancel** to abort the installation and restart it when the server has been updated to meet the minimum requirements



9 In the SmarTeam Web Viewer window:

- Enter the IP address for the designated server where you installed SmarTeam Web Viewer software. For complete instructions, refer to the SmarTeam Web Viewer Installation Guide
- Click **Next**



10 The next window to appear depends on whether you have IIS installed on your machine:

- **Only IIS:** The Information Internet Services window appears go to step 12 (section [Additional Step for IIS](#))

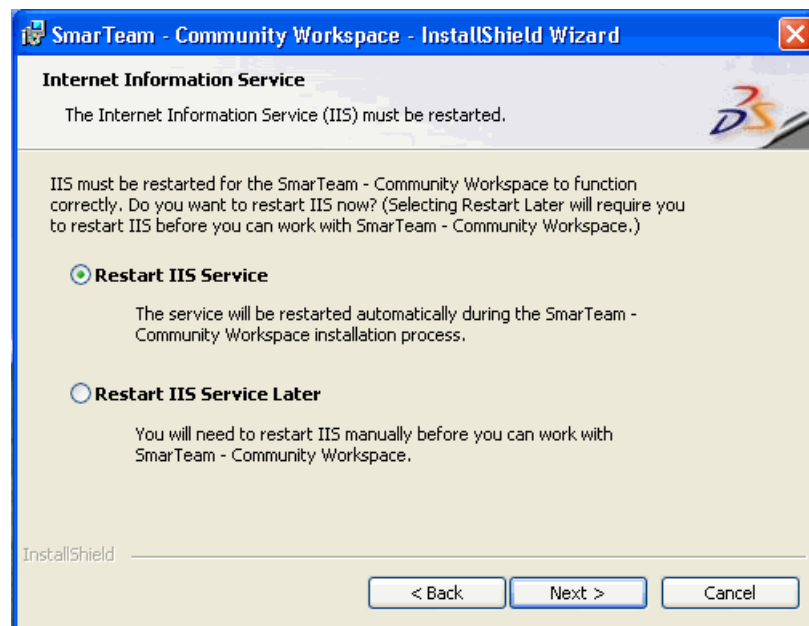
- **Not IIS** : If a supported version of IIS is not installed, the following message appears: "The installation has found that you do not have any compatible web server". In this case, you must install a supported version and start the installation process from the beginning

Additional Step for IIS

This step is only relevant if you have **IIS** installed.

- 11 As the Internet Information Service was stopped at the start of this installation process, it will need to be restarted on completion of the installation process. In the Internet Information Service window you must select to restart the IIS service automatically or manually, and then click **Next**:

- **Restart IIS Service**: This installation process automatically restarts the IIS
- **Restart IIS Service Later**: Enables you to restart the IIS manually. IIS can be started manually by selecting Start, Run, entering "iisreset" and clicking OK



Security Authorization

During the SmarTeam – Community Workspace installation process, permissions for the SmarTeam directory are automatically changed as follows:

- The **Everyone** system group is removed from the SmarTeam folder security
- The **SmarTeam Server Applications** group is assigned full control on the folder

This is done to enable non-administrator users to activate and use SmarTeam – Community Workspace correctly when the Windows operating system is installed. Under Windows, a user without administrator privileges cannot modify sub-directories in the Program Files directory where SmarTeam – Community Workspace is usually installed.

To maintain Web security, the SmarTeam – Community Workspace Server installation process creates a new system group called SmarTeam Server Applications, with full permissions only for the SmarTeam directory and sub-directories.

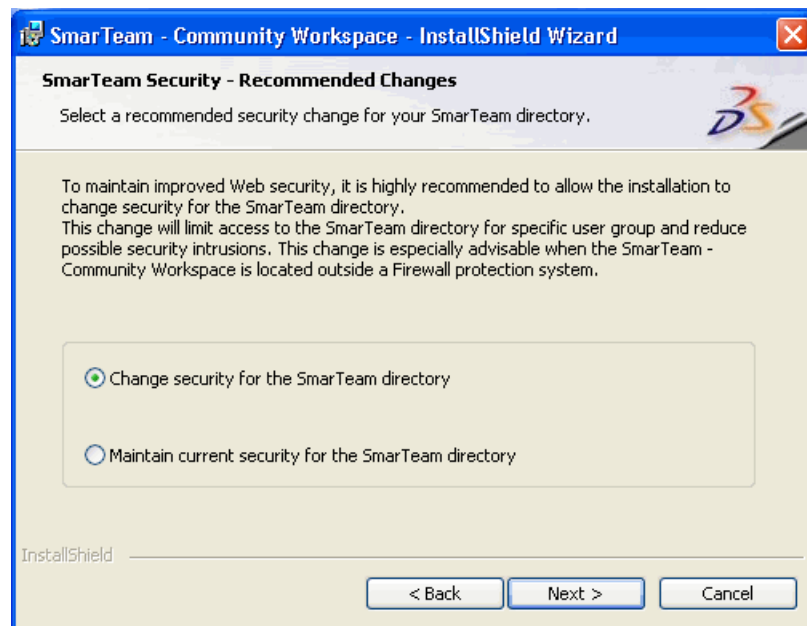
The SmarTeam – Community Workspace user, defined in the next step, is automatically assigned as a member of the SmarTeam Server Applications group, thus having access permissions to the SmarTeam directory and sub-directories only.

The SmarTeam – Community Workspace installation process changes the directory security recursively for the SmarTeam and the Community Workspace sub-directory, but does not interfere with permissions of the directory inherited from parent folders (e.g., C:\Program Files).

In addition, if the installation detects Vault directories used by the SmarTeam Vault Server below the SmarTeam directory, it will not delete their permissions. Instead, the installation will detect the SmarTeam Vault user group and automatically add the SmarTeam – Community Workspace user (defined in the next step) to the SmarTeam Vault user group, thus giving access to these directories to the user.

- 12** In the SmarTeam Security - Recommended Changes window select whether or not to change the SmarTeam directory security:

- **Change security for the SmarTeam directory (recommended):** Modifies the SmarTeam directory security for enhanced Web security and grants permission to the new SmarTeam Server Applications Group
- **Maintain current security for the SmarTeam directory:** Maintains your current Web security settings for the SmarTeam directory and grants permission to the new SmarTeam Server Applications Group
- **Click Next**



- 13** In the User Name and Password window, enter the SmarTeam – Community Workspace Server user name and password that you defined before running the installation process, as described in [Defining a SmarTeam – Community Workspace User in Windows](#).

The SmarTeam - Community Workspace User is automatically assigned as a member of the SmarTeam Server Applications group and granted full access to the SmarTeam installation directory only.

Enter the data as follows:

- **Username:** The SmarTeam – Community Workspace Server username as defined earlier in Defining a SmarTeam – Community Workspace User, e.g., John_Smith
When you need to use a local user, enter: <local computer>\<user name>
For example, iltdmtest\administrator
When using a domain user name and password, enter the domain name and username in the following format: <domain name>\<user name>
For example, SMARTEAM\smartuser
- **Password:** The SmarTeam – Community Workspace Server password as defined earlier in Defining a SmarTeam – Community Workspace User, e.g., JS1234
- **Confirm Password:** Re-enter the password to confirm your password
- **Click Next**

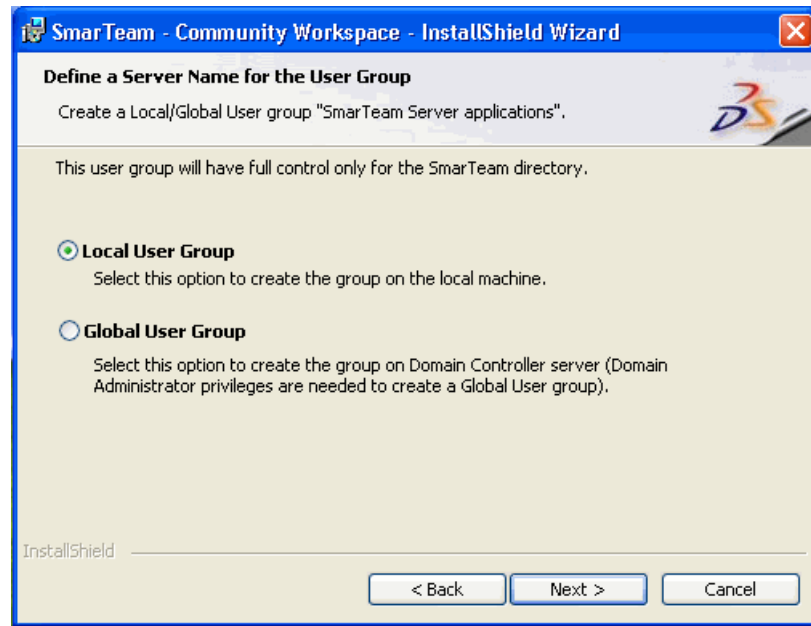
14 In the Define a Server Name for the User Group window, select:

Note: Select Local User Group for a standalone or demo installation. Select Global User Group for domain users.

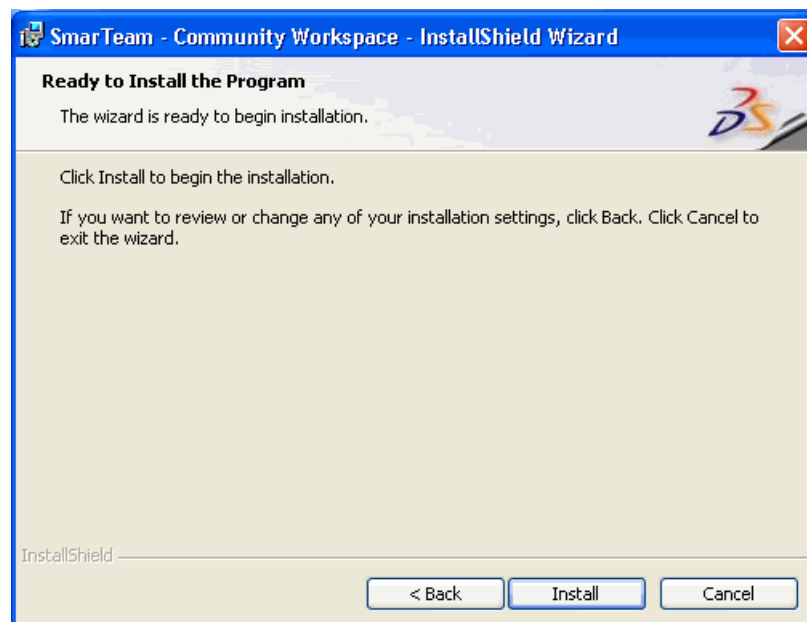
- **Local User Group:** Creates a local SmarTeam Server Applications user group on your local computer

OR

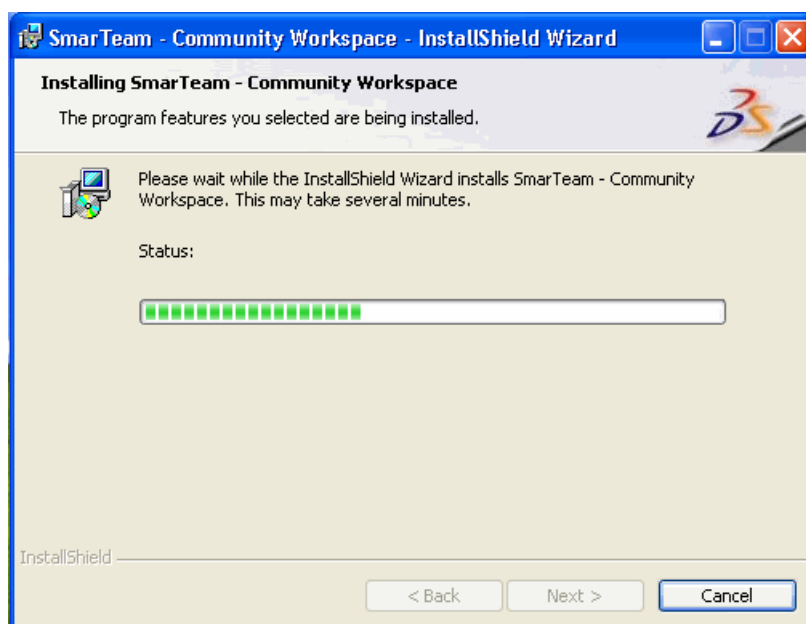
- **Global User Group:** Creates the SmarTeam Server Applications user group on a domain server (Domain Administrator privileges are required to create a Global User Group).
- **Click Next**



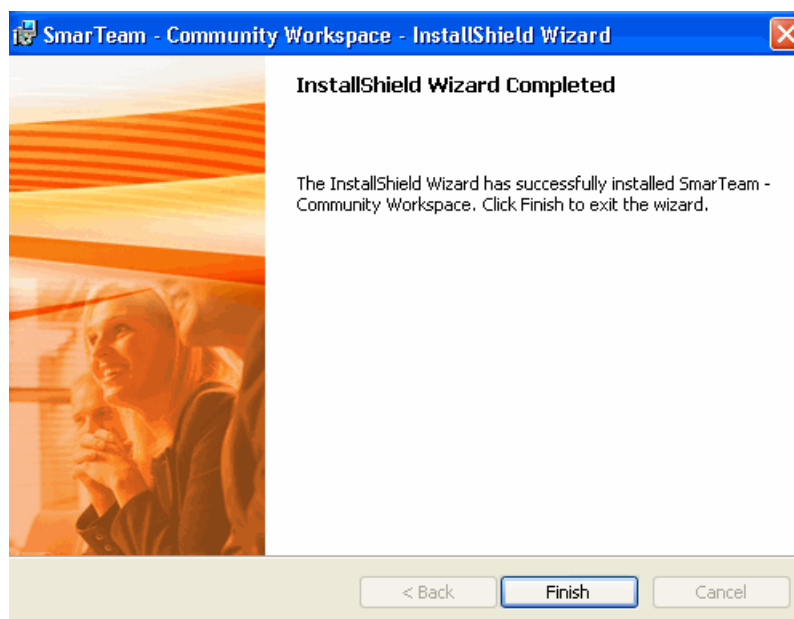
- 15 In the Ready to Install the Program window click **Install** to start the installation process.



- 16 After clicking Install, the installation process commences and the Installing SmarTeam – Community Workspace Server window appears:
- Installation progress and description appears in the Status bar - the installation process can take several minutes
 - Click **Cancel** at any stage to abort the installation
 - If an installation problem occurs at this stage, refer to the [Troubleshooting](#) section for assistance



- 17 After successful installation, the InstallShield Wizard Complete window appears:
- Click **Finish** to complete the installation and exit the InstallShield Wizard



Chapter 5: Post Installation

After completing the SmarTeam – Community Workspace installation process, you must perform the following tasks as described in this chapter.

Finalizing Windows 2003 Server Installation

When installing SmarTeam – Community Workspace on a Windows 2003 server, finalize the installation by performing the following steps:

To installation on a Windows 2003 server:

- 1** Restart the IIS services.
- 2** Create an alias for the SmarTeam – Community Workspace database.
For more information, refer to the Database Connection Manager Guide.
- 3** Update your SmarTeam database via the SmarTeam – Community Workspace Data Model Wizard, see [Updating SmarTeam Database via Data Model Wizard](#)
- 4** Install the SmarTeam Web Viewer server
For further information, refer to the SmarTeam Web Viewer Installation Guide

Web Viewer Configuration Settings

This section presents a sample `smarteam.std.legacyPreferences.config` file. Explanations are presented under the code.

```
<JVueViewerDirectory>\\<web viewer server
name>\Viewer</JVueViewerDirectory>

<JVueServer>http://<web viewer server
name>/servlet/VueServlet;socket://ilqaviewer:5099 </JVueServer>

<JVueAppletCodeBase>http://<web viewer server name>
/jVue</JVueAppletCodeBase>

<eDrawingURL>http://localhost/WebEditor/Dynamic/Download/Files/</eDra
wing URL>

<eDrawingDirectory>C:\WORK\Source\WebEditor\
SmarTeam.Std.Applications.W ebEditor\Dynamic\Download\
Files</eDrawingDirectory>

<ViewerSelectorType>SmarTeam.Std.Web.UI.WebControls.Viewer.DefaultVie
wer
    Selector</ViewerSelectorType>

<viewerAdapters>
    <adapter>
        <extension>default</extension>

    <adapter>SmarTeam.Std.Web.UI.WebControls.Viewer.Adapters.JVueAdapter
        </adapter>
    </adapter>
    <adapter>

    <extension>.sldprt</extension>

    <adapter>SmarTeam.Std.Web.UI.WebControls.Viewer.Adapters.eDrawingAdap
ter</ adapter>
        </adapter>

</viewerAdapters>
```

Element	Description
JVueViewerDirectory	The shared directory used by SmarTeam - Web Editor and the Jvue server. Files will be copied to this directory by SmarTeam - Web Editor and will be viewed from this directory by Jvue
JVueServer	The SmarTeam - Web Viewer server IP address. This indicates the connection used between the Jvue applet and server (used to be JVUE_SERVER_ADDRESS in SmTeam32.ini)
JVueAppletCodeBase	URL to which to download the Jvue applet (used to be JVUE_APPLET_CODEBASE in SmTeam32.ini)
eDrawingURL	Not finalized.
eDrawingDirectory	Not finalized.
viewerAdapters	Collection of Viewer per extension. This list determines which viewer will be used for each file extension. The extension "default" determines which viewer will be used by default. In the above example, the .sldprt extension will be viewed with the eDrawing viewer.

Updating the SmarTeam Database

In order for SmarTeam – Community Workspace to function with your selected SmarTeam database, you will need to perform the following tasks:

- Connect the SmarTeam – Community Workspace system to the selected SmarTeam database by creating an alias name
- Update the SmarTeam database with SmarTeam – Community Workspace functionality using the SmarTeam – Community Workspace Data Model Wizard

The SmarTeam – Community Workspace Data Model Wizard performs the following database changes to your selected SmarTeam database:

- Adds SmarTeam – Community Workspace internal mechanisms that enable SmarTeam – Community Workspace to function within SMARTEAM
- Enables the SmarTeam System Administrator to define a set of classes to support when creating a SmarTeam – Community Workspace system. These classes are then termed as SmarTeam – Community Workspace Managed Classes
- Defines attributes to support creating the SmarTeam – Community Workspace system

Note: Refer to the Database Connection Manager chapter in the Administration Guide for more background and details.

Defining a SmarTeam Database Connection

To connect SmarTeam – Community Workspace to the selected database, a database alias name must be created and defined.

If it was already defined in the SmarTeam – Editor, you do not need to redefine it.

For more information on creating the alias, refer to "Launching the Database Connection Manager" in the SmarTeam – Editor Online Help.

Note: It is very important to perform this step, because the SmarTeam – Community Workspace Data Model Wizard updates the SmarTeam – Web Editor specific menus.

It is strongly recommended that you perform a backup of the selected database before using the SmarTeam – Community Workspace Data Model Wizard.

All SmarTeam clients and SmarTeam administration tools must be disconnected from the selected SmarTeam Database before launching the SmarTeam – Community Workspace Data Model Wizard.

The SmarTeam – Community Workspace Data Model Wizard performs these operations:

- Updates the Database Data Model to be compatible for all the Web applications
- Adds the Menu Editor entries for the Web applications
- Adds the default links display definition

Buttons

The following buttons are available from the SmarTeam – Community Workspace Data Model Wizard windows:

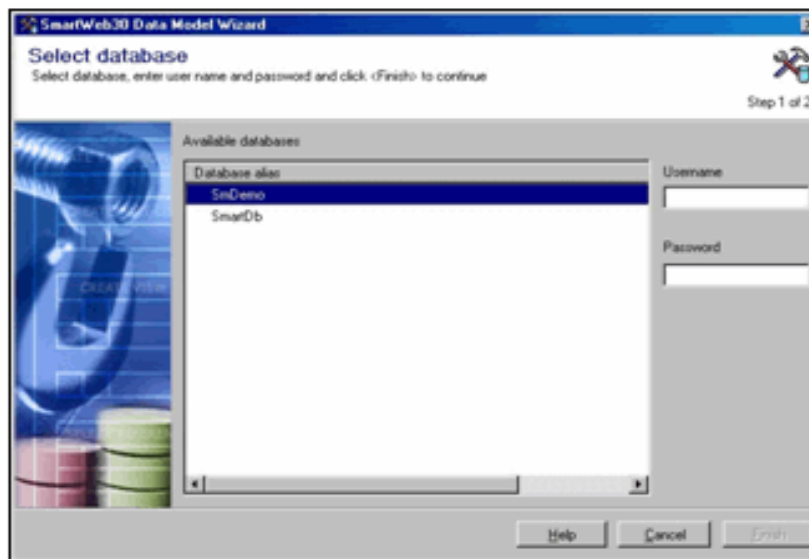
- **Help:** Displays the Help file for the SmarTeam – Community Workspace Data Model Wizard
- **Cancel:** Aborts the current upgrade for the selected database. A warning message appears, advising that you have selected to abort the current upgrade. Click **Yes** to abort or **No** to cancel and continue with the upgrade process
- **Finish:** Completes the Wizard and commences the upgrade procedure for the selected database

Updating SmarTeam Database via Data Model Wizard

To launch the Data Model Wizard:

- 1 From the Start button:
 - Select Programs, SmarTeam, SmarTeam – Community Workspace, SmarTeam – Community Workspace Data Model Wizard to display the SmarTeam – Community Workspace Data Model Wizard
 - Select the database for upgrading with SmarTeam – Community Workspace functionality
 - **User Name** - Enter the user name of the SmarTeam System Administrator for the selected SmarTeam database

- **Password** - Enter the password of the SmarTeam System Administrator for the selected SmarTeam database
- **Click Next**



2 In the Select Classes for mySmarTeam support window:

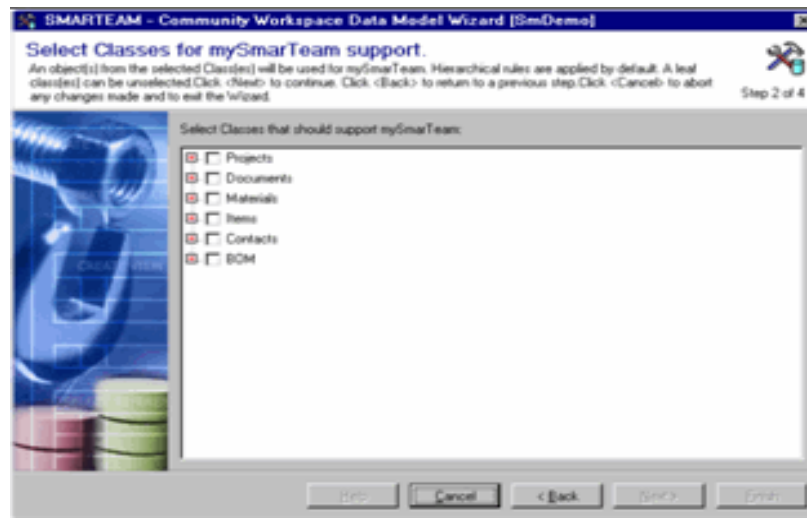
- Select the checkbox next to the class (or classes) of objects that you want to use in SmarTeam – Community Workspace. Hierarchical levels are maintained and included automatically with the SmarTeam – Community Workspace object. (All classes, except internal classes, display)
Objects can be managed in SmarTeam – Community Workspace only from objects of classes checked in this step
- Click in a selected checkbox to clear a selected class
- Click + to expand a selected class or subclass
- Click - to collapse an expanded class or subclass

Note: A leaf class can be cleared.

It is recommended that you clear any class(es) of SmarTeam – Community Workspace objects that will not be used.

For example: If you do not intend to publish/add an object where the top level object is be a Washer or a Nut, it is recommended that you remove these classes from the list. You will not be blocked from managing an object in SmarTeam – Community Workspace that includes these objects, but it keeps the SmarTeam class structure less complicated.

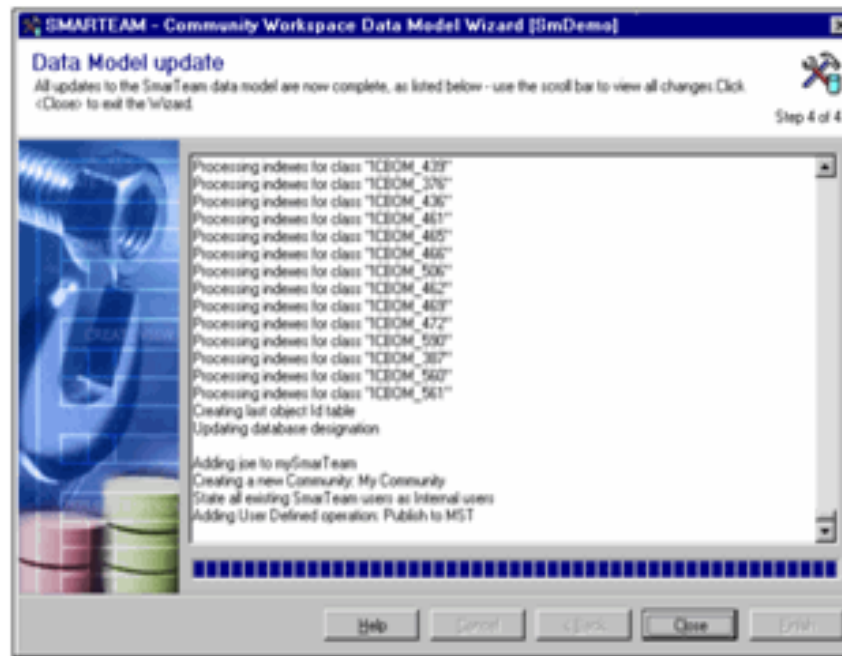
- **Click Next**



- 3 In the Previewing data model changes window a preview of classes appears that will be defined as SmarTeam – Community Workspace managed in the changed database, is a result of your selection(s) in [Step 2](#).
 - Click **Finish** to start upgrading the selected database with SmarTeam – Community Workspace-managed classes
 - The SmarTeam – Community Workspace Data Model Wizard upgrades and displays all changes to the selected database



- This process takes a few minutes depending on the classes selected and the size of the database



- 4 At the end of the process, a SmarTeam information message appears informing you that the database was successfully updated:

■ Click **OK**



- 5 Click **Close** to exit the SmarTeam – Community Workspace Data Model Wizard.

IMPORTANT! You can use the SmarTeam Menu Editor utility (if installed) to add the following menus to SMARTTEAM:

Publish to SmarTeam – Community Workspace.

Synchronize CAD Components.

Otherwise, the above menus are added automatically to the **User Defined Tools** menu for classes selected in the SmarTeam – Community Workspace **Data Model Wizard**.

User permission must be defined for the above menus via the **User Maintenance** utility.

Setting the URL/Server Name for SmarTeam – Community Workspace

The URL or Server Name for the SmarTeam – Community Workspace Server computer needs to be set for the Publish to SmarTeam – Community Workspace Wizard utility. This setting is required when a user publishes objects from SmarTeam – Editor to SmarTeam – Community Workspace.

To set the URL or Server Name for the SmarTeam – Community Workspace Server:

- 1 In the <SmarTeam root directory>\mySmarTeam\Bin directory, locate the mySmarTeamServerURLSetting.exe file and double click it to run the executable file.
- 2 Select the SmarTeam – Community Workspace database from the list of available databases.
- 3 The SmarTeam User Login window displays. The SmarTeam Administrator who updated the SmarTeam database via the SmarTeam – Community Workspace Data model Wizard is now defined as the SmarTeam – Community Workspace System Owner.
 - **User Name** - Enter the System Owner user name
 - **Password** - Enter the applicable password for the above user
- 4 In the SmarTeam User Login window click **OK** to continue and display the Server Setting window.
- 5 In the Server Setting window, enter the server's **URL** or **IP** address, for example:
http://255.255.255.255
- 6 In the Server Setting window, click **OK** to save your entries and exit the window.



Using Markups with SmarTeam – Community Workspace

It is possible to work with markups when using the viewer with SmarTeam - Community Workspace. To configure the use of markups, add the following to the C:\Windows\AVX.ini file:

```
{Markup Options}
```

```
REDLINEPATH=//<Viewer Server IP Address> /Markups
```


Completing SmarTeam – Community Workspace Setup

After performing all steps in the SmarTeam – Community Workspace installation process on the designated server, you can configure and setup your SmarTeam – Community Workspace system for data collaboration over the Internet.

IMPORTANT! For other SmarTeam users connected to the database to be able to publish to SmarTeam – Community Workspace, you must perform the installation on each user's workstation, as described in step 5, SmarTeam – Community Workspace Utilities, [Running the Installation](#) section.

To complete the SmarTeam – Community Workspace Setup:

- 1 Launch your Internet application and enter the following URL address in the Address field :
 - `http://<Server IP>/mySmarTeam`
 - Where: <Server IP> is the IP address of the designated server where SmarTeam – Community Workspace is installed
 - The SmarTeam – Community Workspace login dialog appears
- 2 In the SmarTeam – Community Workspace login dialog, log in to SmarTeam – Community Workspace for the first time by filling in the login fields as follows:
 - **User Name** - Enter the user name of the SmarTeam System Administrator (who used the SmarTeam – Community Workspace Data Model Wizard to update the SmarTeam database) for the selected SmarTeam database
 - **Password** - Enter the password of the SmarTeam System Administrator (for the above user name) for the selected SmarTeam database
 - **Vaults** - This field displays a working vault when working in a SmarTeam – Multi-site environment, only
 - If working in SmarTeam – Multi-site, select your working vault for performing Life cycle operations from the dropdown list



- 3 Click **Login** or press Enter to access SmarTeam – Community Workspace.

Verifying the Correct Database

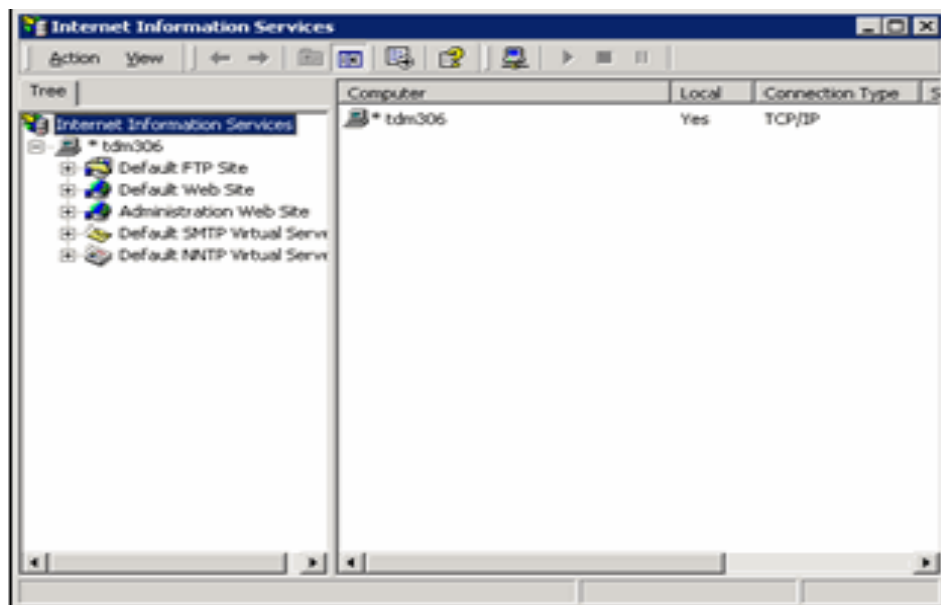
- Verify the database connection via the Database Connection Manager utility: For more information, refer to the Database Connection Manager Guide
- Try to publish an object to SmarTeam – Community Workspace via the Publish to SmarTeam – Community Workspace Wizard, enter as the user who configured the SmarTeam – Community Workspace Data Model Wizard (to update the SmarTeam database). When a SmarTeam user fails to publish an object via the Publish to SmarTeam – Community Workspace Wizard, verify that the publishing script (stdMSTPublisher.ebs) is in the correct location , with the correct name <SmarTeam root directory>\script

SmarTeam – Community Workspace Directory (mySmarTeam)

Verify that a directory named mySmarTeam was created on the designated server.

To verify creation of the mySmarTeam directory:

- 1 From the Start button, select Settings, Control Panel, Administrative Tools, Internet Information Services Manager to display the Internet Information Services window.



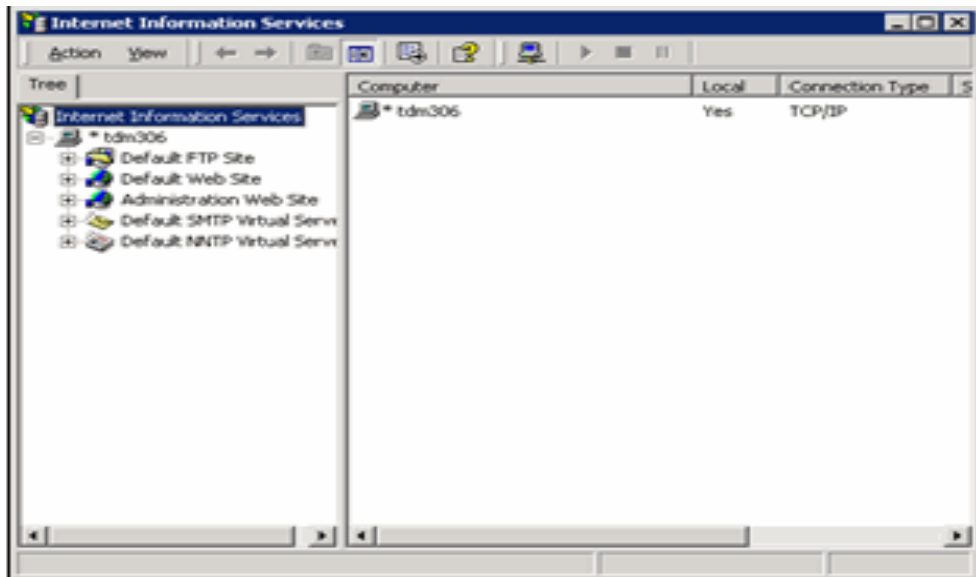
- 2 In the Internet Information Services tree, click + to expand the tree then select and click + to expand Default Web Site:
 - Check that the default web site mySmarTeam appears in the tree under Default Web Site
 - If the default web site mySmarTeam does not appear, you will need to add and define it

mySmarTeam Directory Properties

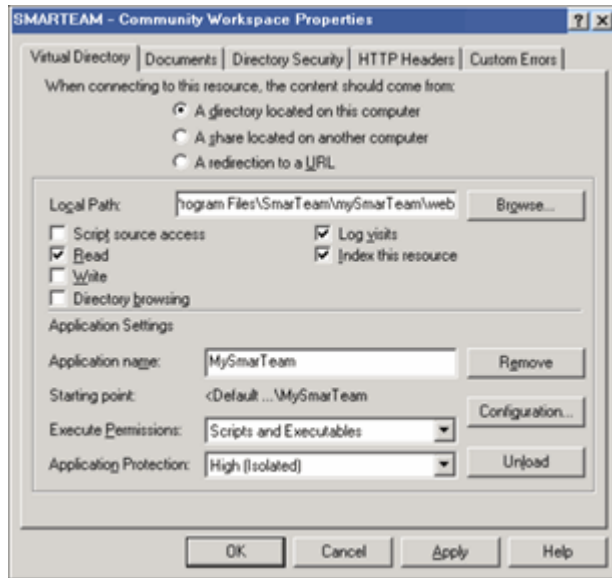
Verify that parameters are configured correctly in the mySmarTeam directory.

To verify the correct configuration of the mySmarTeam directory:

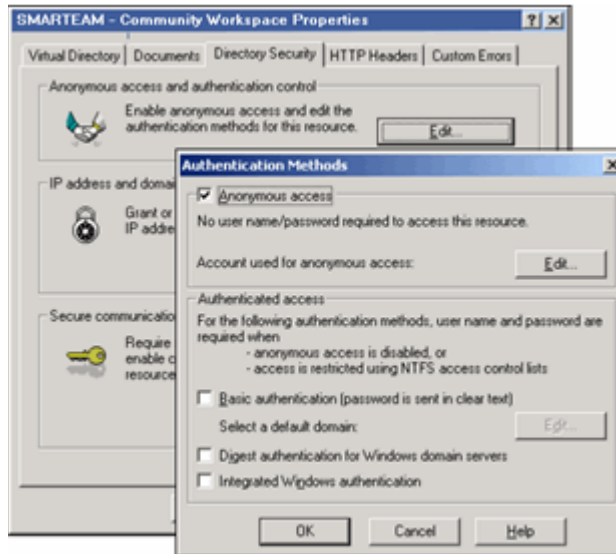
- 1 From the Start button, select Settings, Control Panel, Administrative Tools, Internet Services Manager to display the Internet Information Services tree.
- 2 In the Internet Information Services tree, click + to expand the tree then select and expand Default Web Site.
 - Select the default web site mySmarTeam and right click to display a popup menu
 - From the popup menu select Properties to display the mySmarTeam Properties window



- 3 In the mySmarTeam Properties window, click the **Virtual Directory** tab (if not already displayed above):
 - Verify that the entry in the Local Path field is <SmarTeam root directory>\mySmarTeam\web
 - Verify that the entry in the Application name field is mySmarTeam
 - Verify that in the Application Protection field, High (Isolated) is selected. If this option is not selected, click on the dropdown arrow and select it from the dropdown list



- 4 In the mySmarTeam Properties window, click the **Directory Security** tab (if not already displayed):
 - In the Anonymous access and authentication control section, click **Edit...** to display the Authentication Methods window above
 - In the Anonymous access section, click **Edit** to display the Anonymous User Account window



- In the Anonymous User Account window, verify that the entry in the Username field is correct

For example:

TDM306\SmarTeam Web User

TDM306 is the server's computer name or the domain name

SmarTeam Web User is the user name entered for the SmarTeam Server

- If the Username field is not correct, in the Anonymous User Account window click **Browse** to display the **Select User** window and select **SmarTeam Web User** from the listed names. The mySmarTeam Properties window appears (see [Step 3](#)).



- 5 In the mySmarTeam Properties window, click **OK** to save your changes (if applicable) and exit the window.

Oracle Client Post Installation Information

After installation, change the permissions for the Oracle directory to full permissions for the SmarTeam Server Applications system group.

Be sure to verify the inheritance permissions for all sub folders.

Restart the application after the changes.

Upgrading SmarTeam – Community Workspace

Before and after upgrading, delete the temporary Internet files on every client that ran SmarTeam – Community Workspace, as follows:

In Internet Explorer, select Tools ♦ Internet Options. Click the **Delete Files** button and select the **Delete all offline content** checkbox.

Restarting the Application

SmarTeam – Community Workspace runs on Microsoft® Internet Information System (IIS). Each server must be restarted separately after major modifications in the application's configuration.

Restarting SmarTeam – Community Workspace on IIS

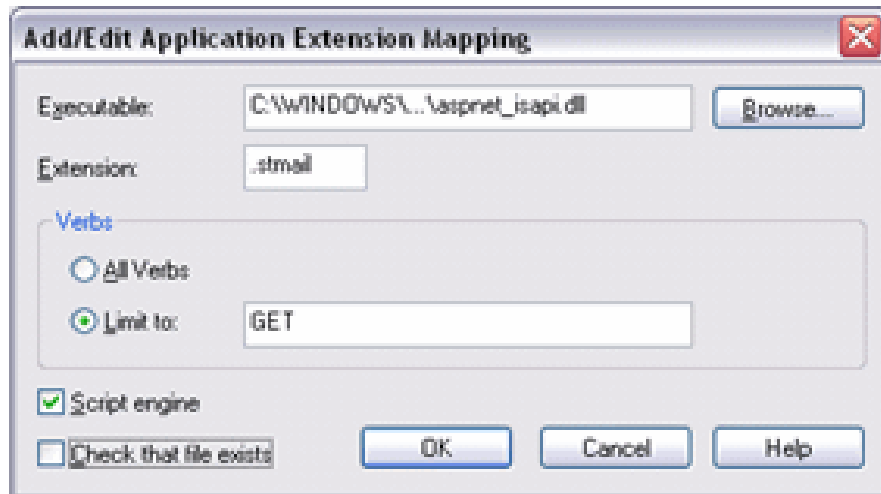
To restart the server:

- 1 From the Start menu, select **Run**.
- 2 In the Open field:
 - Type **IISReset**
 - Click **OK** to restart the Internet Information Service (IIS).

Lotus Notes Support

To implement Lotus Notes support:

- 1 Add support for the new extension in the Web Server:
 - For IIS - Add new mapping to the *.stmail extension as follows:
 - Select Internet Information Service => Machine Name - Web Site - Default Web Site
 - The Executable is from Asp.Net .aspx extension and the other fields should be filled as shown in the Add/Edit Application Extension Mapping dialog



- 2 Add an additional HttpHandler in the web.config file to the new extension (*.stmail):

```
<ApplicationName> = WebEditor / CommunityWorkspace.  
  <httpHandlers>  
  <add verb="GET" path="*.stmail"  
    type="SmarTeam.Std.Applications.<ApplicationName>.Mail.HttpHandler,  
    SmarTeam.Std.Applications.<ApplicationName>"/>  
  </httpHandlers>
```

3 Add the following keys to the Web.config file:

```
<appSettings>
  <!-- Key for holding the place for the Mail files that created by
the
      Send URL -->
  <add key="SmarTeam.Std.Application.Web.Mail.CachePath"
value="C:\Program
Files\SmarTeam\SmartWeb\Web\Dynamic\Cache\Mail\"/>

  <!-- Key for the time in months that the files will be in server
or client
      requests-->
  <add
key="SmarTeam.Std.Application.Web.Mail.NumberOfMonthsInCache"
value="4"/>

  <!-- Key for the URL presented to the user when the mail file
does not
      exist -->
  <add key="SmarTeam.Std.Application.Web.Mail.BaseUrl"
value="http://localhost/SmartWeb/"/>
</appSettings>
```

Secure Socket Layer (SSL) Configuration

If you have Secure Socket Layer (SSL) on your Web Server you need to ensure that in the key "SmarTeam.Web.UploadUrl" the value https exists and not http, which is the default value. This key is located in the Web.config file. Example: <add key="SmarTeam.Web.UploadUrl" value="https://172.16.100.101/UploadServlet/">

- **MS Internet Information System (IIS):** The location of the Web.config file is <SmarTeam Home Directory>\mySmarTeam\Web

Configuring IIS 64bit to Work with an Application running at 32bit

If you need to configure your 64 bit IIS machine to run an application at 32 bit, perform this procedure.

To configure an IIS 64bit for 32bit application:

1 Verify that ASP.NET is not installed on your server.

If ASP.NET is installed, remove it using the following example:

```
%SYSTEMROOT%\Microsoft.NET\Framework64\v2.0.50727\aspnet_regiis.exe -ua
```

2 Enter the following command to enable 32bit mode:

```
cscript %SYSTEMDRIVE%\inetpub\adminscripts\adsutil.vbs SET
W3SVC/AppPools/Enable32bitAppOnWin64 1
```

3 Install the ASP.NET.

If you uninstalled ASP.NET, you can use the following examples.

```
%SYSTEMROOT%\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe -i
```

- 4 Go to Computer Management, Services and Applications, Internet Information Services, Web service Extensions and verify that ASP.NET (32-bit) is set to: **Allowed**

Microsoft® Installer

After installing any SmarTeam product, do not remove or rename any file or directory.

The Microsoft Installer may appear when you launch a SmarTeam application if a directory or file has been deleted, changed or renamed. To prevent this, do the following:

- 1 Open the computer's Event Viewer.
- 2 Search for information or an error event related to the Installer.

For example, a possible cause could be the deletion of the UpdatedScripts folder under the script directory.

- 3 After finding the cause, take the required action: for example, restore a modified file name to its original name, or restore a file that had been deleted.

What Next?

After you install SmarTeam – Community Workspace and perform all the post installation tasks, further customization and administration may be required.

An Introduction to Setting Up SmarTeam - Community Workspace

If you are the SmarTeam System Administrator who updated the SmarTeam database via the SmarTeam - Community Workspace Data Model Wizard, as described in Section II, then you automatically retain the highest privileges available in SmarTeam - Community Workspace - the System Owner.

It is your responsibility to set up this new SmarTeam - Community Workspace system by performing the following tasks to get your SmarTeam - Community Workspace system "up and running". In addition, you can also transfer this responsibility to another member by granting Owner permission to the selected member.

- Define settings for SmarTeam - Community Workspace
- Add/assign members to SmarTeam - Community Workspace
- Assign permissions to members, where applicable, such as:
 - Owner - assign other members as System Owner, Community Owner or Folder Owner.
 - Manage permissions and members - permit other members to grant permissions to members and manage members.
 - Create Communities - permit other members to create communities. (A member assigned permission to create communities is defined as a Community Owner.)

SmarTeam - Community Workspace Administration Levels, Color Codes and Security

Before setting up your system, you should understand the following points when working with SmarTeam - Community Workspace:

- Administration levels
- Color codes used within SmarTeam - Community Workspace
- Security

Administration Levels

SmarTeam - Community Workspace has three controlled levels of administration that enable authorized members to work quickly and efficiently. Members can then concentrate on their main tasks - managing and securing product data no matter their location in the world at any moment in time.

The three administration levels are:

- System Level
- Community Level
- Folder Level

When SmarTeam - Community Workspace is first installed, the System Owner is responsible for assigning members to SmarTeam - Community Workspace and then assigning permissions to members (optional).

Members can then be assigned to communities and to folders within the community by a Community Owner and Folder Owner, respectively.

Once a member has been assigned to a folder, the Folder Owner can grant permissions to a member to manage data objects within the folder.

And this is what it's all about - the meaning of your SmarTeam - Community Workspace system: Enabling members to ultimately collaborate and manage specific data objects over the Internet!

Each member can be assigned permissions according to his/her needs within a community. Assigning permissions to members at all levels is optional - a member who is not assigned permissions is able to (only) view folders and data objects within a community of which he/she is a member.

Permissions are assigned to any member, who can be authorized to create communities (projects), folders and ultimately grant their own permissions to other members, depending on their needs.

By granting the correct authorizations and permissions, members are able to manage data added to a SmarTeam - Community Workspace community and collaborate over the Internet in a secure environment.

Color Codes

SmarTeam - Community Workspace uses a color code system for buttons that enable owners and members the ability to quickly identify different functions within SmarTeam - Community Workspace.

IMPORTANT! Buttons are only visible and enabled for members with the correct permissions.

An orange button indicates a system level function.



A yellow button indicates a community level function.



A blue button indicates available operations when managing members/groups.



Security Considerations

Before proceeding, you are recommended to consider the following security points:

Buttons that appear on various web pages are not always enabled at all levels and for all members. They are only enabled for members specifically assigned with the correct permissions. It provides total security to access projects and perform tasks within a project.

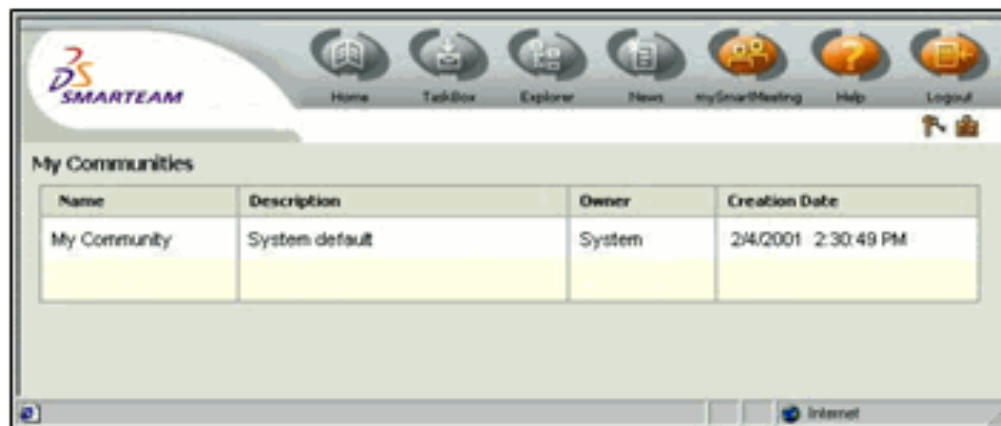
Careful consideration must be given when assigning permissions at all levels. Assigning permissions to a member with the ability to delete or change revisions who may misuse his/her permission rights - can be crucial to a community's success or failure.

- In addition to the Community Owner, a System Owner can also control permissions granted within a community


Logging In to SmarTeam - Community Workspace

The first time you login to SmarTeam - Community Workspace the **My Communities** window appears.

When you login SmarTeam - Community Workspace (after installation) as the System Owner (or for any member) only the **Help**  and **Logout**  buttons are enabled in the SmarTeam - Community Workspace toolbar.



Two icons appear and are enabled in the **My Communities** window:

-  Administration (system level)



My Details (for the member currently logged in)

When you login to SmarTeam - Community Workspace the first time, the My Communities list displays a default community provided by the system. This page is the main entry point for all members logging in to SmarTeam - Community Workspace.

As the **System Owner** setting up SmarTeam - Community Workspace for the first time, your first task is to define settings for your SmarTeam - Community Workspace system, see SmarTeam – Community Workspace Administration Guide for details.

Chapter 6: Troubleshooting

Installation Process Log

Every installation process is written to the log file SMARTEAM_Community_Workspace.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:

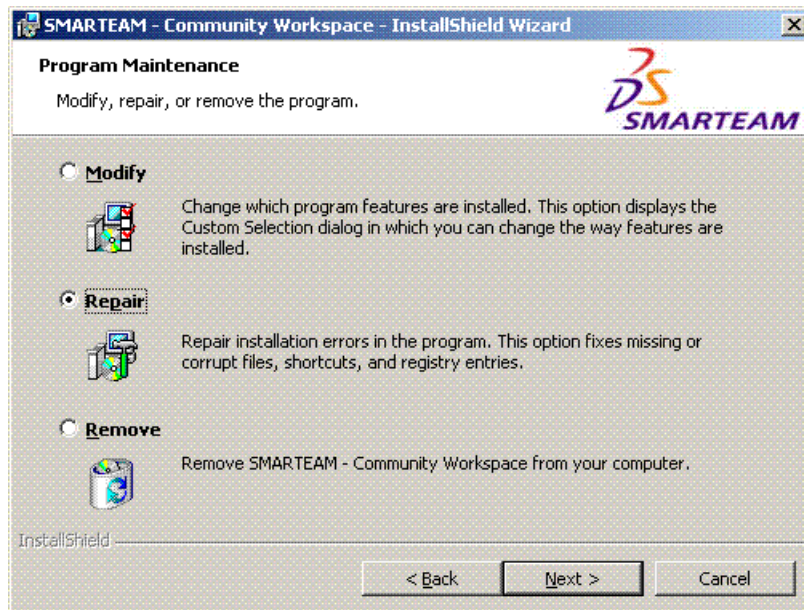
- 1** Select **Start**.
- 2** Select **Run**.
- 3** Enter "%temp%".
- 4** Click **OK**.

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

Modify/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:

- **Modify:** Enables you to install new components that were not installed during the installation process. For details see [Modify](#)
- **Repair:** Fixes installation errors in the program. This option fixes missing or corrupt files, shortcuts and registry entries. For further details see [Repair](#)
- **Remove:** Deletes SmarTeam – Community Workspace from your computer. For further details see [Uninstall](#)



Modify

If you need to modify the configuration of the current SmarTeam – Community Workspace installation on the machine, select **Modify** and the **Select Components** window appears, enabling you to change the components selection.

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 – Community Workspace Release CD. The Program Maintenance window displays.
- 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 Select SmarTeam – Community Workspace.
- 3 Click on the "Click here for support information" link; the Support Info window appears.
- 4 Click Repair in order to repair the installation.

Uninstall

If required you can remove SmarTeam – Community Workspace from your computer. This can be done by using either the Release CD or the Add or 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 – Community Workspace release CD. The Program Maintenance window is displayed.
- 2** Select Remove.
- 3** Click Next.
- 4** Follow the remaining 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** Select SmarTeam – Community Workspace.
- 3** Click Remove.

Known Issues

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

Frequently Asked Questions

Question: After installing SmarTeam – Community Workspace, why can I not access a page in IIS?

Answer: You installed IIS after installing Microsoft® .NET Framework, and the ASP.NET is not registered.

The following utility installs the latest version of ASP.NET and updates script maps at the IIS metabase root and all script maps below the root. Existing script maps of lower versions are upgraded to the latest version.

- For Windows 2000: Run the command

C: \<Windows>\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe /i

- For Windows 2003: Run the command

C:\<Windows>\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis.exe /i

Question: Why can I not view charts, flowcharts and icons?

Answer: In the registry, look for the following key and replace the IP address with your machine's name: HKEY_LOCAL_MACHINE\SOFTWARE\SmarTeam\DownloadManager BaseURL=http://<ip address>/SmarTeam/Download.

Question: After running the SmarTeam – Community Workspace Data Model Wizard I do not have the option: "Publish to Web Communities" from SmarTeam - Editor, why?

Answer: By default this option is created under the SmarTeam - Editor main menu -> Actions -> User Defined Tools. If this option does not exist and you must enable it and add this category to the main menu (via the Menu Editor)

- Open the Menu Editor (Start -> Programs -> SmarTeam -> Administrations Tools -> Menu Editor). Login as a SmarTeam administrator.
- On the Editor Tree expand "Menu Profiles, System Profiles, System, Defaults, Pulldown Menus, SmarTeam Main Menu, Actions"
- Right click on Actions and select copy
- Still on the Editor Tree expand "Menu Profiles, System Profiles, {DBName}, {UserGroup, SmarTeam, Pulldown Menus, SmarTeam Main Menu". (You can add this to one or more UserGroups)
- Right click on SmarTeam Main Menu and select Paste -> tree
- Validate that the DB name has changed it's color to red.
- Go to File -> Save All Profile.
- Open SmarTeam - Editor and verify that Action existing in the main menu.

Tip & Tricks

Upgrade

When upgrading from a previous version of SMARTEAM, it is recommended to delete the temporary internet files on every client that ran SmarTeam – Community Workspace, as follows:

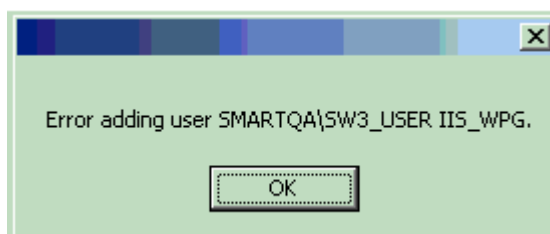
- Internet Explorer: Tools / Internet Options. Click the Delete Files button and check the Delete all offline content checkbox
- Netscape: Edit / Preferences / Advanced / Cache. Click the Clear Disk Cache button

URL Field when Using Netscape

In the URL field in Profile Card when using Netscape browser, only www addresses are supported. No Universal Naming Convention (UNC) is supported.

Windows 2003 Configuration

If the IIS user is a domain user, and the administrator does not have authorization for the domain in order to add the user to the IIS_WPG group, an error message is generated.



From the error message screen, click **OK**. The installation process will still continue.

Once it has completed, you must add the user manually to the IIS_WPG group.

Example of error message details:

- Domain Name = SMARTQA
- User Name = SW3_USER
- Local Group = IIS_WPG