



ENOVIA SmarTeam

**SmarTeam – FOUNDATION
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– Foundation Software on a designated server.

If you are upgrading from a previous version of SmarTeam– Foundation, 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.

SmarTeam– Foundation is a complete enterprise product information collaboration platform that enables teams across the extended enterprise to collaborate on product data in a concurrent engineering environment. It delivers complete organizational collaboration across all enterprise applications and is configured for optimal use of the company's IT infrastructure.

Notes:

- All the documentation mentioned in this document, unless specified otherwise, is available on the SmarTeam Documentation CD.
- The term DEMO in this Installation Guide indicates special guidelines for Demo installation.
- Windows 2003 Domain Controller Server - SmarTeam installations do not support Domain Controller machines.

Software Location

The installation procedures described is for the following SmarTeam – Foundation software, which is available on the SmarTeam CD-ROM:

Related Documentation

The following documents are referred to in this guide. All of these documents are available on the SmarTeam Program Directory CD.

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
SmarTeam Procedure for Upgrading	Details the upgrade procedure if you are upgrading from a previous version of SmarTeam – Foundation
Hardware and Software Requirements	Details the hardware and software required for a successful installation
SmarTeam – Editor Installation Guide	You must install SmarTeam – Foundation before the SmarTeam – Editor Client
SmarTeam – Foundation Administration Guide	Details the SmarTeam – Workflow Server use and operations. Details the required Vault sizing procedure. Details the required Vault server configuration

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 this checklist to successfully install SmarTeam – Foundation

*Requirement: M = Mandatory, O = Optional.

<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"/>	Define in Microsoft® Windows the user who will run the SmarTeam – Foundation Services	M	Defining a SmarTeam – Foundation User in Windows
<input type="checkbox"/>	Verify that Microsoft .NET Framework 3.0 is installed on your system (automatically installed in Windows 2003)	M	If it has not been installed, Download Microsoft .NET Framework Windows 2003: No download is required as it is installed automatically in Windows 2003.
<input type="checkbox"/>	If you are using DS Veiwier Server, verify that Microsoft .Visual J#.NET 2.0 is installed on your system	O	Download Microsoft .Visual j#.NET 2.0
<input type="checkbox"/>	Verify that you have administrative privileges on your local machine	M	Defining a Domain User, to be used as a SmarTeam – Foundation User
<input type="checkbox"/>	Verify that LUM is installed on your local or remote machine (Mandatory when working on a Network)	M/O	Step 6
<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 Site .
Stage 2: Installation Process			
<input type="checkbox"/>	Run SmarTeam – Foundation installation	M	Running the Installation
Stage 3: Post Installation			
<input type="checkbox"/>	Setup SmarTeam – Workflow Server	M	SmarTeam – Foundation Administration Guide
<input type="checkbox"/>	Using the Full Text Search	M	SmarTeam – Foundation Administration Guide
Stage 4: What Next?			
<input type="checkbox"/>	Install SmarTeam – Editor	O	What Next?
<input type="checkbox"/>	Install other SmarTeam products you want to install, e.g. SmarTeam – Web Editor	O	What Next?

Chapter 3: System Requirements

Hardware and Software Requirements

Refer to the SmarTeam – Foundation sections in the Hardware and Software Requirements document. This document provides details of the hardware and software required for successful installation of the SmarTeam – Foundation 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 – Foundation Installation Environment can be found in the Introduction to SmarTeam Installation document. This document can be located on the Documentation CD.

Prerequisites

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

- 1 Obtain Administrator privileges via the User Accounts Administrative tool.
- 2 Close all other applications running on your computer.
- 3 To install on a Windows domain, you must create a dedicated account for the core services only. Do not use your personal account to install the core service.
- 4 To install on a Windows workgroup environment, you must create a user account on the local computer and use it for the core service.
- 5 If you are installing SmarTeam on a Windows 2003 Server, prior to installing SmarTeam, define a role for the server, e.g., Application Server. If you perform a SmarTeam installation

without defining a role for the Windows 2003 server, the SmarTeam Session Management Service installation fails, resulting in the improper installation of SMARTEAM.

For details of steps 1, 3 and 4 see [Defining a SmarTeam – Foundation User in Windows](#).

- 6 Verify that LUM server is installed on your local or remote machine.

Microsoft .Net Framework 3.0

During the SmarTeam – Foundation installation, Microsoft .NET Framework 3.0 will be installed.

Defining a SmarTeam – Foundation User in Windows

The SmarTeam – Foundation Application needs a specific set of permissions to be installed and run properly. For this purpose you must create a dedicated account for SmarTeam Services, only. 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.

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

A SmarTeam – Foundation 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 – Foundation User

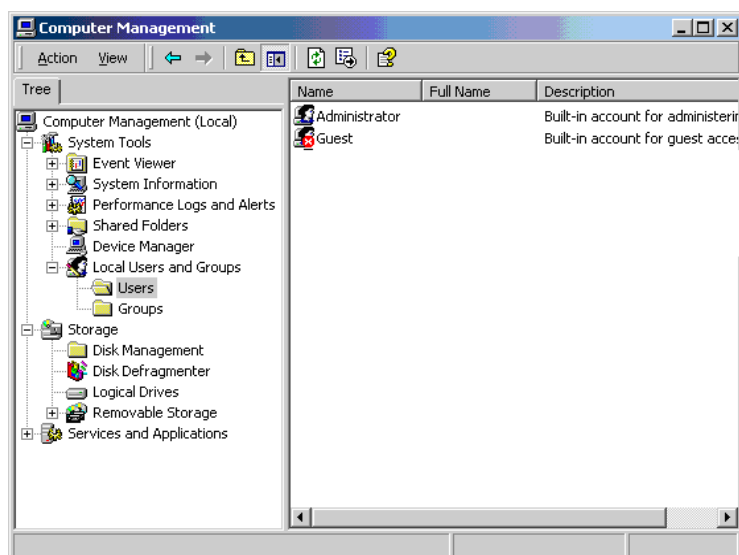
Your System Administrator needs to provide you with a Domain User, which can be used during installation.

Defining a Local User, to be used as a SmarTeam – Foundation 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 Microsoft® Windows Administrative Tools, 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 is displayed.

New User

User name:

Full name:

Description:

Password:

Confirm password:

☐ User must change password at next logon

☒ User cannot change password

☒ Password never expires

☐ Account is disabled

- 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 – Web Editor 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 select
 - User cannot change password: Select
 - Password never expires: Select
 - Account is disabled: Do not select

- 3 Click **Create**.

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

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

Chapter 4: Installation Process

Installing SmarTeam – Foundation

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

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

Note: If you use SmarTeam via a WAN, performance may be affected.

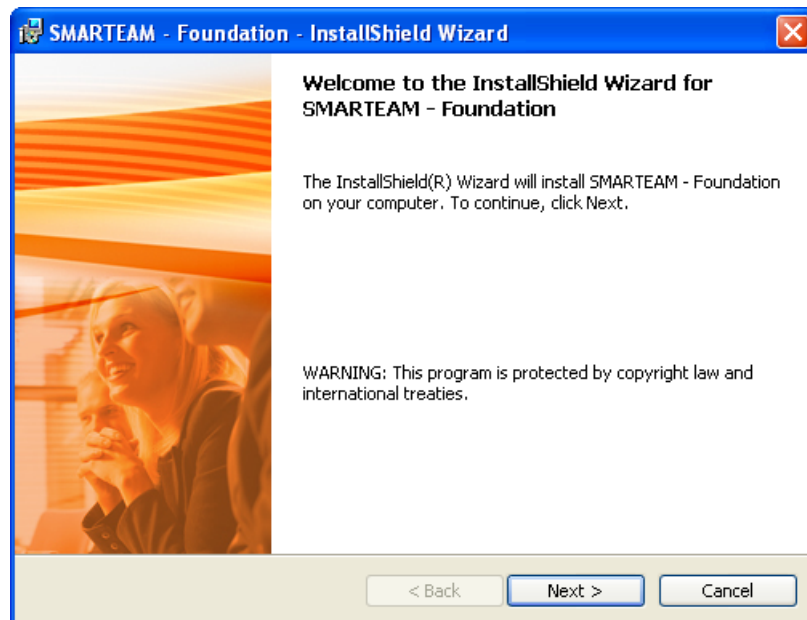
To begin installing:

- 1 Run install.exe from the SmarTeam – Foundation Software CD.
- 2 The SmarTeam – Foundation installation application launches automatically and appears on your screen.
 - If the installation application does not appear, click **Start** and select **Run** to open the Run utility
 - In the Run Open line type **D:\install.exe** to run the installation setup program (where D denotes the CD ROM drive in which the SmarTeam CD-ROM is inserted)
 - To abort the installation without installing SmarTeam software, click **Exit**

- 3 In the Installations window, click **SmarTeam – Foundation**.



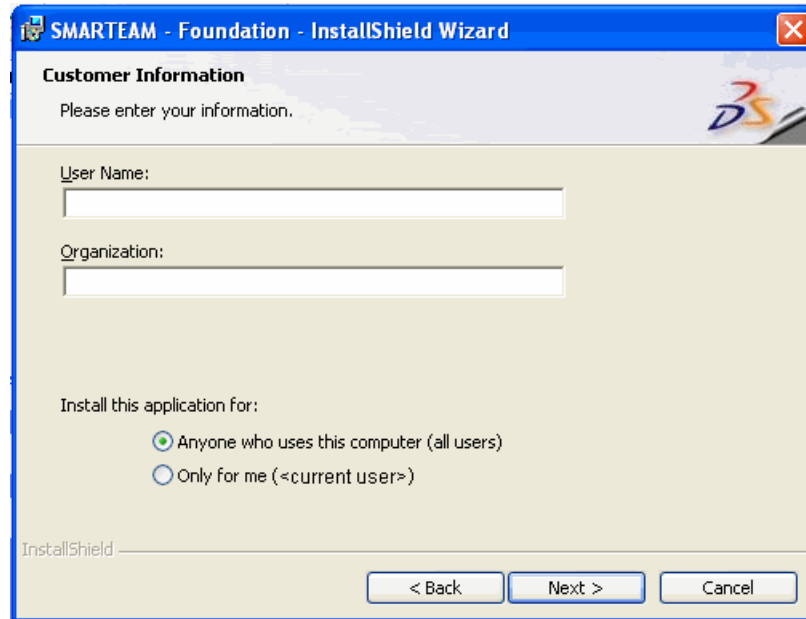
- 4 In the SmarTeam – Foundation Welcome window, click **Next**.



- 5 In the **Customer Information** window:

- Personalize the program by entering your User Name and Organization Name
- Select install this application for option by selecting either:
 - Anyone that uses this computer (all users), default setting
 - Only for me (<current user>)

- Click **Next**.



6 In the **Custom Setup** window:

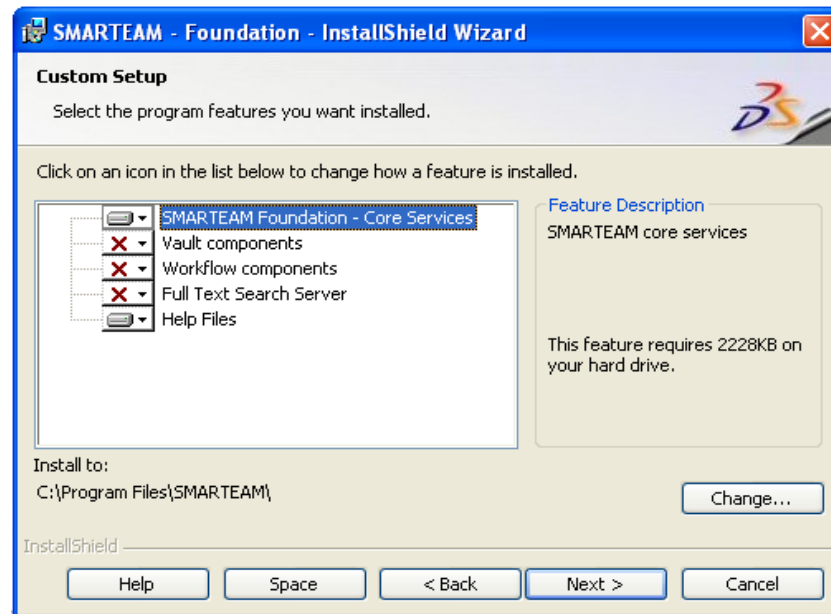
- Select the components you want to install or clear the components that you do not want to install. The next window that opens depends on the components that you have selected

A brief explanation of each component appears in the **Description** section when you highlight a component.

- **SmarTeam – Foundation Core Services:** SmarTeam – Foundation Core Services option is selected by default and includes:
 - Session Management
 - System Configuration
- **Vault components:** Select if you want to install SmarTeam – Vault server
- **Workflow components:** Select if you want to install SmarTeam – Workflow server
- **Full Text Search:** If you select Full Text Search server, the installation searches your computer for a compatible Internet Information Service (IIS) web server (IIS 5 or higher). If a compatible web server is found, the Full Text Search component is installed
 - **Noise files in the indexing server:** When creating search queries, words that are very common or carry no meaning about the content are removed during indexing. These "noise" words cannot be matched in full-text searches. For example, searching for the phrase "this is a test" is equivalent to searching for the word "test" because "this", "is", and "a", are all discarded when the documents are indexed
 - **SQL reserved words:** For each database application, there is a list of words that have a special meaning and therefore should not be used in searches, or should be part of the Noise words for the indexing server
- **Help Files:** If you select the SmarTeam – Workflow and/or Vault Server options the related Help files are selected by default

Note: The **Help** button opens Help file with descriptions of the Custom Setup Components. Clicking **Change** enables you to change the directory of the destination folder.

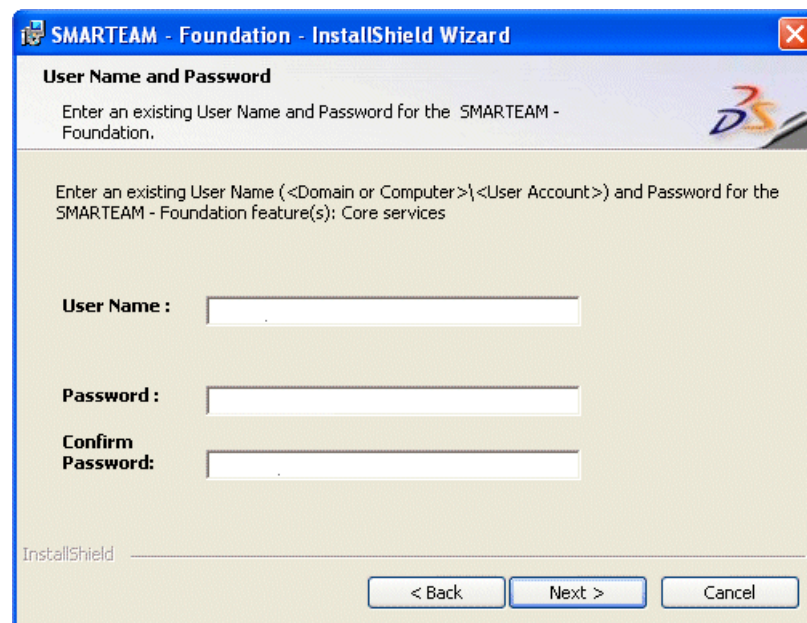
- Click **Next**



Note: When using the SmarTeam Product DEMO Environment - **DEMO INSTALLATION** - In this window, select SmarTeam – Foundation Core Services, Vault Components, Workflow Components and Help Files.

7 In the User Name and Password window:

- Enter a User Name and Password for the SmarTeam User Account
Your user account is used according to which components you select to install
- Click **Next**.

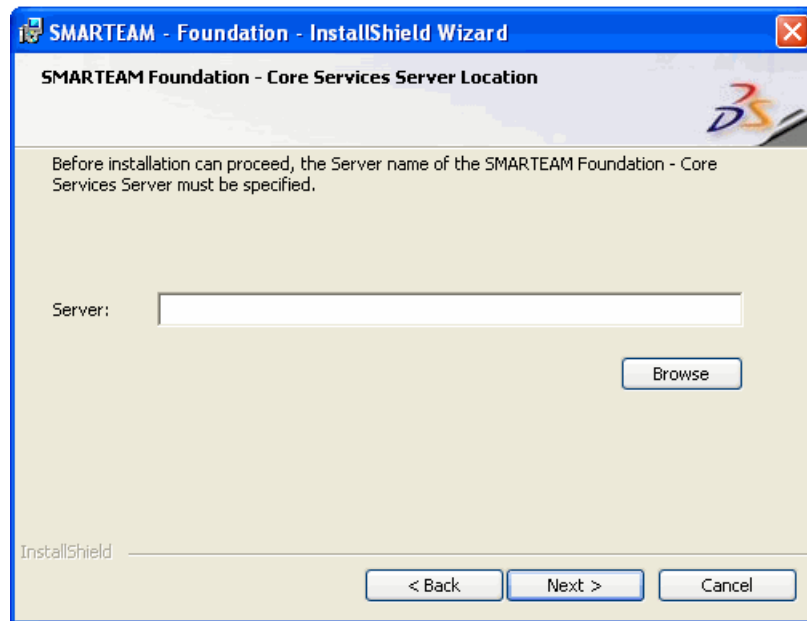


- 8 If you selected SmarTeam Foundation – Core Services component in [Step 6](#) go to [Step 9](#).

OR

If you did not select SmarTeam Foundation – Core Services component, the SmarTeam Foundation – Core Services Location window appears

- In the SmarTeam – Foundation Core Services Server Location window:
 - Enter the name of the server on which the SmarTeam – Foundation Core Services are located
- Click **Next**



Using License Use Management

- 9 In the **Using License Use Management** window:
- Select the option button for the network protocol required for the network license software

Note: It is highly recommended that you obtain from the [IBM](#) web site and install LUM license either before or after the SmarTeam – Foundation installation process.

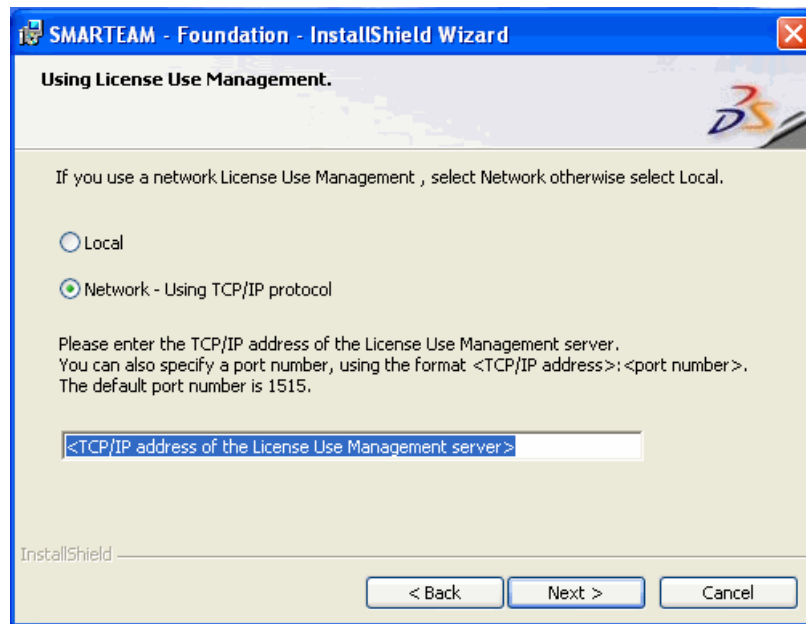
- **Local:** Uses the License Use Management (LUM) installed on your local machine. In addition, this option requires you to install LUM server on your local machine.
- **Network - Using TCP/IP Protocol:** Enables you to use LUM license installed on a network server using TCP/IP Protocol

Note: When using the SmarTeam Product DEMO Environment - **Demo INSTALLATION** - In this window, select **Local**.

- If you selected **Network - Using TCP/IP Protocol**, enter the TCP/IP address of the License Use Management server.

Note: You can also specify a port number using the format <TCP/IP address> <port number>. The default port number is 1515.

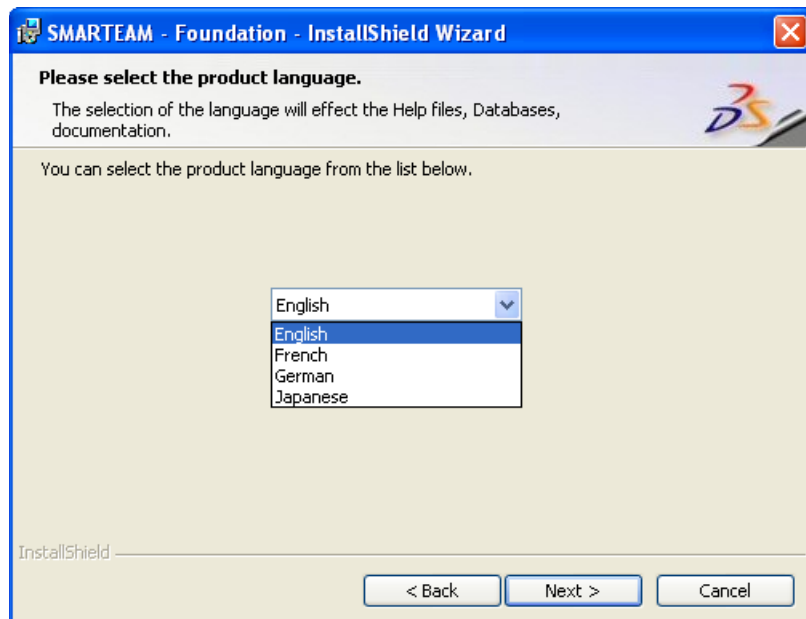
- Click **Next**



10 In the Setup Language Selection window:

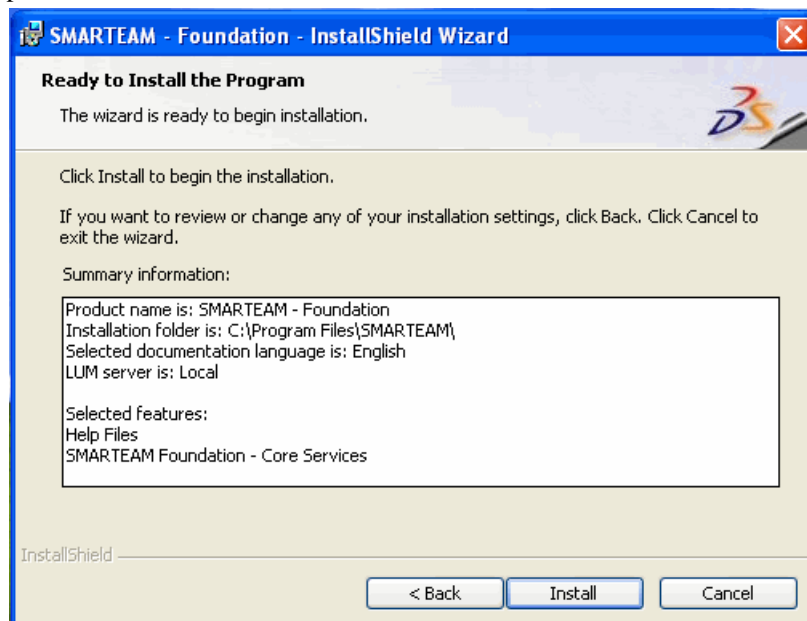
Note: French, German and Japanese are detected automatically from the Operating System. Otherwise, the default language is English.

- Click the dropdown menu arrow to select the language you require when viewing Help, database and documentation files. The language you select in this window affects all subsequent SmarTeam products installed on this computer
- Click **Next**.

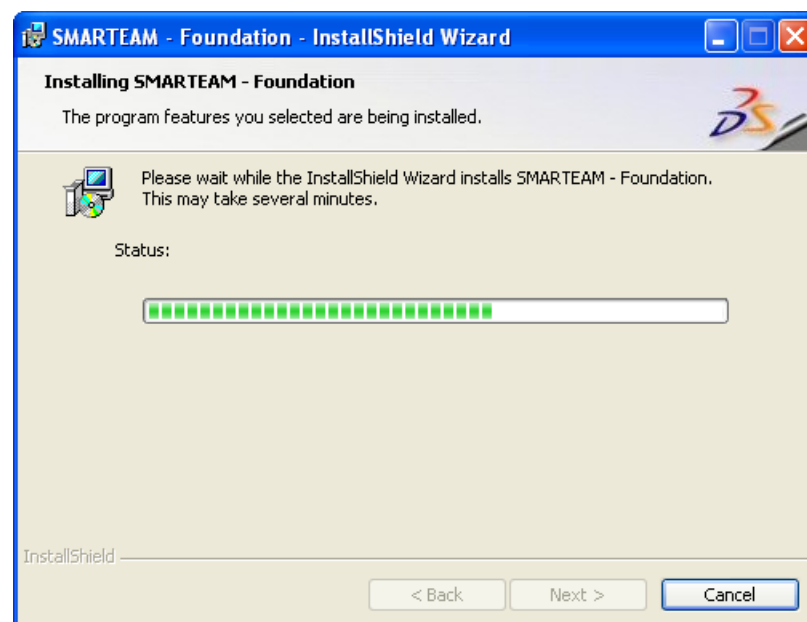


11 In the Ready to Install window, click **Next**.

- The installation copies the files of the selected components to the designated folders on your computer



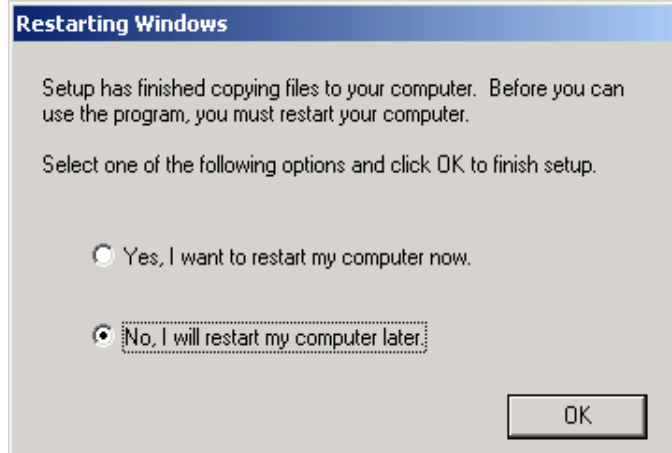
- 12 The Setup Status graphics bar window shows the progress of the installation process.



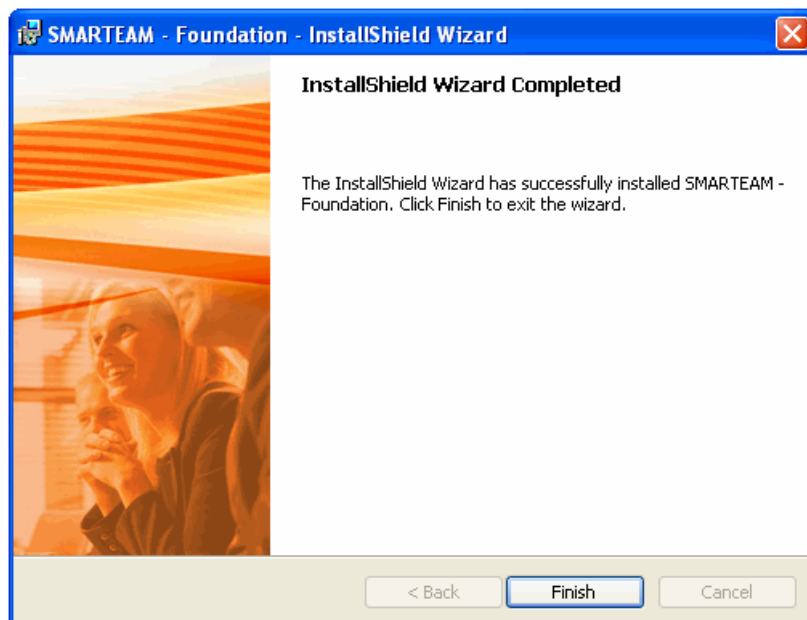
- 13 After successful installation, the SmarTeam – Foundation InstallShield Wizard Complete window appears:

- Select one of the radio button for restarting your computer:
 - **Yes, I want to restart my computer now:** When you click **Finish** the computer restarts. Make sure that any other running applications are closed before clicking **Finish**

- **No, I will restart my computer later:** Enables you restart your computer later at a time of your choosing. You must restart your computer for the SmarTeam – Foundation to register in the system



- 14 Click **Finish** to complete the SmarTeam – Foundation installation process and return to the Installations main window.



Note: If you click **Cancel** at any point during the installation process, the following warning window will be displayed to indicate that the installation process did not finish and requires you to re-run the process.



Chapter 5: Post Installation

After the SmarTeam – Foundation software has been installed you must perform post-installation tasks as described in this chapter. For SmarTeam – Foundation Post Installation information, see the SmarTeam – Foundation Administration Guide.

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?

Optionally, you can now install SmarTeam – Editor (refer to the SmarTeam – Editor Installation guide for details) or any other SmarTeam product you want to install.

Chapter 6: SmarTeam - Foundation 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 1 defines the options and properties that can be used in the command-line installation commands.

Section 2 presents some common command-line installation scenarios.

Command-Line Operation

This document 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 detailed in the sections below.

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>

Command-Line Properties

Properties are global variables that Microsoft® 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.

Note: Command-line options that require a parameter must be specified with no space between the option and its parameter. For example, `[Setup.exe full path] 'ALLUSERS=2'` is valid, while `[Setup.exe full path] ' ALLUSERS= 2'` or `'ALLUSERS = 2'` are not. Inserting quotation marks around an option's parameter are required only if the parameter contains spaces.

Command-Line Properties

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 =2 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.
Specify SmarTeam features to install	ADDLOCAL	See below for list of parameter values	The value of the ADDLOCAL property is a list of SmarTeam features delimited by commas that are to be installed locally.
Using License Use Management	SM_LUM_LOCAL_NETWORK	Options: Local or Network	Specifies if the license for the SmarTeam applications will be retrieved locally or from a network location.

GUI Dialog	Property	Value	Description
Using License Use Management	SM_LUM_SERVER_LOCATION	LUM Server name or LUM Server name:<Port number>	The name (hostname or IP address) of the LUM Server ... licenses. In cases where the LUM server operates with a non-default port, use a semicolon followed by the actual port number of the LUM Server.
Select Installation Language	SM_SETUP_LANGUAGE	Options: English, French, German or Japanese	Select the appropriate Language for the installation. [This affects the help files and Databases]

GUI Dialog	Property	Value	Description
Username and Password	USER_NAME	A full user name <Domain\Machine Name >\<User Name >	Full user name of a user that has privileges for installing SmarTeam Core services and/or creating IIS folders. USER_NAME is a mandatory property when: <ul style="list-style-type: none"> • Installing SmarTeam - Editor Standalone • Installing System_Configuration_Editor feature in the "SmarTeam Administrator Tools"
	USER_PASSWORD	Password prepared in advance	The password of the user name provided in the USER_NAME property USER_PASSWORD is a mandatory property when: <ul style="list-style-type: none"> • Installing SmarTeam - Editor Standalone • Installing System_Configuration_Editor feature in the "SmarTeam Administrator Tools"
Change Current Destination Folder	INSTALLDIR	Directory name	Full path of the target installation directory in which to install the application. Note: This has to be the last property in the command line.

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 - Foundation Core Components	SmarTeam_SDK SmarTeam SmarTeamCore Note: All the above features must be selected.
SMARTEAM - Foundation Vault Server	Vault_Server Note: This feature requires that the SMARTEAM - Foundation Core Components be installed as well
SMARTEAM - Foundation WorkFlow Server	SmartFlow_Server Note: This feature requires that the SMARTEAM - Foundation Core Components be installed as well
SMARTEAM - Foundation Full Text Search Server	FTS_Server Note: This feature requires that the SMARTEAM - Foundation Core Components be installed as well
SMARTEAM - Foundation Core Services	Smart_Service Note: This feature requires that the SMARTEAM - Foundation Core Components be installed as well
Help Files (for SmarTeam & WorkFlow Server)	SmarTeam_Help SmartFlow_Help

Silent Installation Example (for Cut and Paste)

Open Command Prompt window (cmd.exe) and run following line:

Install SMARTEAM - Foundation silent installation with log file with all components except for the Help Files:

```
"<path to SMARTEAM - Foundation setup.exe> /V" /qb /L*v c:\log_test.log
SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=diffusion02
SM_SETUP_LANGUAGE=English
ADDLOCAL=SmarTeam_SDK,SmarTeam,SmarTeamCore,Smart_Service,Vault_Server,SmartFlow_Server,FTS_Server
INSTALLDIR="c:\program files\SmarTeam\"
ALLUSERS=1 USER_NAME=<machine name\full username>
USER_PASSWORD=<password>"
```

Run full silent SMARTEAM - Foundation installation using msixec.exe utility and with log file:

```
msiexec /I "<path to SMARTEAM - Foundation.msi >" /qb /L*v c:\log_test.log
SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=diffusion02
SM_SETUP_LANGUAGE=English

ADDLOCAL=SmarTeam_SDK,SmarTeam,SmarTeamCore,Smart_Service,Vault_Server,SmartFlow_Server,FTS_Server
INSTALLDIR="c:\program files\SmarTeam\"
ALLUSERS=1 USER_NAME=<full username> USER_PASSWORD=<password>
```