



ENOVIA SmarTeam

SmarTeam – Editor Installation Guide

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Chapter 1: Introduction

Overview

This document provide all the information necessary for the SmarTeam System Administrator to install the SmarTeam – Editor (Windows and Web based) Software on a designated machine.

If you are upgrading from a previous version, 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 – Editor (Windows based) is a Microsoft® Windows based collaborative PLM solution that enables users to view, share, exchange, and manage product information throughout the product lifecycle.

SmarTeam – Editor (Web based - referred to as the SmarTeam – Web Editor in this document) is an intuitive, web-based, thin client interface for using standard web browsers that brings Collaborative Product Data Management (cPDM) directly over the Web. It brings read-write web accessibility to your company's SmarTeam database and vaulted files for Enterprise employees.

Notes: All the documentation mentioned in this document, unless specified otherwise, is available on the SmarTeam Documentation CD. The term **DEMO INSTALLATION** in this Installation Guide indicates special guidelines for SmarTeam Product Demo Environments installation.

Software Location

The installation procedures described is for the SmarTeam – Editor (Windows and Web based) software, which is available on the SmarTeam DVD.

Related Documentation

The following documents are referred to in this guide. All of these documents are available on the SmarTeam Documentation 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 – Foundation Installation Guide	Details the SmarTeam – Foundation Installation Process
Guidelines for SmarTeam Product Demo Environments Installation	Details the SmarTeam Product Demo Environments Installation Process
SmarTeam – Web Viewer Installation Guide	Required if you want to view your documents with the SmarTeam - Web Viewer.
SmarTeam – Editor Installation Guide	You must install SmarTeam - Editor (Windows based) before the SmarTeam - Editor (Web based).

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://www.3ds.com/support/>.

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

Chapter 2: SmarTeam – Editor Windows Installation

Checklist

There are two installation options for SmarTeam – Editor:

- SmarTeam – Editor without SmarTeam Core Services (connects to a remote Core Services server)
- SmarTeam – Editor with Core Services on the same machine (recommended for Demos or small testing environments)

They both have the same installation process. But, there are one or more steps that need to be performed during the installation process for each of them. You must complete all the stages in this checklist to successfully install SmarTeam – Editor.

Notes: If SmarTeam – Foundation already exists on your machine, the SmarTeam Core Services feature does not appear in the SmarTeam – Editor Installation wizard.

Checklist: SmarTeam – Editor without Core Services

*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 Windows the user who will run the SmarTeam – Editor Application. Mandatory if you did not do it when installing SmarTeam – Foundation	M/O	Refer to the SmarTeam – Foundation Installation Guide, Defining a SmarTeam – Foundation User in Windows. Access the Microsoft® Windows Administrative Tools for details about defining user privileges
<input type="checkbox"/>	Install Microsoft SQL 2008 Server Express Edition if you require SmarTeam - Editor with SmarTeam Data Model Designer	M/O	Download Microsoft® SQL 2008 Express Edition from the Microsoft® web site
<input type="checkbox"/>	If you want to install SmarTeam – Editor client on a Windows Vista 64 BIT machine you must install the IIS 6 Management Compatibility component.	M	Prerequisites
<input type="checkbox"/>	Verify that you have administrative privileges on your local machine	M	Refer to Microsoft® Windows Administrative Tools for details about existing administrative privileges

<input type="checkbox"/>	Item	M/O*	Reference
<input type="checkbox"/>	Define a role for the Windows 2003 server, e.g., Application Server. Mandatory if you have Windows 2003 server otherwise not required	M/O	Windows 2003 server Help
<input type="checkbox"/>	Verify that you have installed the License Use Management (LUM)	M	Download from the IBM website
<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 – Editor installation On a 64 Bit operating system, do not install SmarTeam – Editor in the "C:\Program Files\SMARTEAM" directory	M	Installation Procedure
<input type="checkbox"/>	Additional steps for SmarTeam – Editor without Core Services Installation	M	Additional Step for the Without Core Services Installation
<input type="checkbox"/>	Define the network protocol required for the network license software	M	Using License Use Management
<input type="checkbox"/>	Define the language required for viewing Help, database and documentation files	M	Selecting Language
Stage 3: Post Installation			
<input type="checkbox"/>	Attach a new database to SmarTeam	O	Attaching Existing Database to SmarTeam – Editor
<input type="checkbox"/>	Configure SmarTeam BOM	O	Configuring BOM
<input type="checkbox"/>	Installing SDK Scripts	O	Installing SDK Scripts
What Next?			
<input type="checkbox"/>	Launch SmarTeam – Editor	M/O	To launch SmarTeam – Editor:

Checklist: SmarTeam – Editor with Core Services

*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 windows the user who will run the SmarTeam – Editor Application.	M	Refer to the SmarTeam – Foundation Installation Guide, Defining a SmarTeam – Foundation User in Windows section. Access the Microsoft® Windows Administrative Tools for details about defining user privileges
<input type="checkbox"/>	Install Microsoft SQL 2008 Server Express Edition if you require SmarTeam - Editor with Data Model Designer	M/O	Download Microsoft SQL 2008 Express Edition Refer to Guidelines for Installing SmarTeam Product Demo Environments
<input type="checkbox"/>	Verify that you have administrative privileges on your local machine	M	Refer to Microsoft® Windows Administrative Tools for details about existing administrative privileges
<input type="checkbox"/>	Verify that you have installed the License Use Management (LUM)	M	Download from the IBM website
<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"/>	On a 64 Bit operating system, do not install SmarTeam – Editor in the "C:\Program Files\SMARTTEAM" directory Define the network protocol required for the network license software	M	Using License Use Management
<input type="checkbox"/>	Define the language required for viewing Help, database and documentation files	M	Selecting Language
Stage 3: Post Installation			
<input type="checkbox"/>	Attach a new database to SmarTeam	O	Attaching Existing Database to SmarTeam – Editor
<input type="checkbox"/>	Configure SmarTeam BOM	O	Configuring BOM
<input type="checkbox"/>	Installing SDK Scripts	O	Installing SDK Scripts
What's Next?			
<input type="checkbox"/>	Launch SmarTeam – Editor	M/O	To launch SmarTeam – Editor

System Requirements

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

Order of Installation

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

The installation procedure is split into four stages:

Stage 1: Pre-Installation (this chapter)

Stage 2: Installation Process ([Installation Procedure](#)) or Silent Installation ([Silent Installation](#)) depending on whether you need to install on one or multiple computers

Stage 3: Post-Installation ([Post Installation](#))

Stage 4: Troubleshooting ([Troubleshooting](#))

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

Notes: After you have completed all the stages you can start working with SmarTeam – Editor.

Prerequisites

Before installing SmarTeam – Editor, you must perform the following steps in the order specified.

- 1 If you want to install both SmarTeam – Foundation and SmarTeam – Editor you must install SmarTeam – Foundation first. For the SmarTeam – Editor installation uses the same User Password that you used for the SmarTeam – Foundation installation.
- 2 If you are going to install SmarTeam – Editor on a Windows 2003 server, you must define a role for the Windows 2003 server, e.g., Application Server. This is required for the SmarTeam Session Management Service installation, which is part of the SmarTeam – Editor installation process. For details on how to define a Role in Windows 2003 server, refer to the Windows 2003 Server Help.
- 3 Install the License Use Management (LUM) by downloading it from the [IBM website](#)
- 4 If you want to install SmarTeam – Editor with the System Configuration Editor Admin tool on a Windows Server 2008 machine, you must perform the following procedure: Go to Start > Settings > Programs > Turn Windows features on or off > IIS > Web Management Tools > IIS 6 Management Compatibility -> Select all sub- features.
- 5 To install SmarTeam – Editor with Microsoft® Vista 32 bit Business Edition, you must perform the following procedure:
 - a Shutdown the Firewall or enable outbound ports for:
 - 5607 - TCP port for Session Management
 - 5606 - TCP port for System Configuration
 - 1515 - UDP port for LUM
 - 80 - http vault

- b** Disable DEP (Data Execution Prevention) on your machine
 - From the Run command prompt, execute: **bcdedit.exe /set {current} nx AlwaysOff**
- c** Disable the User Access Control (UAC):
 - Click **Start, Control Panel, User Account and Family Safety, User Accounts**
 - Click **Turn User Account Control**, on or off

Note: If UAC is currently configured in Admin Approval Mode, the User Account Control message appears. Click Continue.

 - Clear the **"Use User Account Control (UAC) to help protect your computer"** checkbox
 - Click **OK**
 - Click **Restart Now** to apply the change immediately
 - Click **Restart Later** to close the User Accounts tasks window

Note: You must reboot the system to make the change effective.
- d** If Internet Information Service (IIS) is installed on a Microsoft® Vista machine or you want to install it
 - Verify that the IIS 6 Management compatibility and IIS Management Console features were/are selected
 - If IIS is not installed on your Microsoft® Vista machine skip this step
- e** For Microsoft® Windows Vista, Oracle 10gR2 (10.2.0.3) patch is supported and recommended. If you have Microsoft® Windows Vista with Service Pack 1 or later, Oracle 10gR2 (10.2.0.4) patch is recommended and supported.

Note: Obtain an access link to the ENOVIA SmarTeam support site, download and install the latest recommended patch/patchset for the relevant Microsoft® Vista version on your computer.
- f** Launching SmarTeam – Editor for the first time when UAC is enabled:
 - Right click the SmarTeam shortcut and run the application as an administrator

Installation Procedure

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

There are two options for SmarTeam – Editor:

- **SmarTeam – Editor without Core Services**
- **SmarTeam – Editor with Core Services:**

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 – Editor

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.

SmarTeam Installation Notice

When performing a SmarTeam installation, all computers included in the environment must use the same version of the SmarTeam release and/or service pack. This refers to all client or server machines and all machines that include SmarTeam– Foundation and/or SmarTeam – Editor.

Running the SmarTeam – Editor Installation

Notes:

- When you upgrade SmarTeam – Editor, Client (or Stand Alone) from V5R17, V5R18 or V5R19 to V5R20, the installation opens the new roles splash. To update previously installed components to V5R20, select any role (Editor, Designer and Engineer) or Administrator option.
- If the installation process does not support your Operating System (OS), this message will be displayed:
"The Operating System configuration does not meet the minimum requirements for this type of installation. Please refer to the SmarTeam Hardware and Software Requirements Guide for more information. Would you like to continue with the installation anyway?"
- To run SmarTeam installation as a different user than the currently-logged on user, you can use **Run As** option.
 - a Right click **Install.exe**
 - b Select **Run as**
 - c In the **Run As** window select **The following user** radio button
 - d Enter **Administrator user name** and **password**
 - e Click **OK**

To begin installing:

- 1 Run install.exe from the SmarTeam – Editor Software CD.
- 2 The SmarTeam – Editor 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**



Descriptions of the SmarTeam – Editor role based applications are:

- **Editor role** - Manages, links and releases technical documents in the context of the product, with data integrity ensured. Use this role to enable users outside of the engineering department to participate in engineering processes by interacting with product-related data and contributing product related content, e.g. requirements and specifications documents.
- **Engineer role** - Manages E-BOM, M-BOM, item lifecycle engineering release and change processes. It enables users to manage, manipulate, track and collaborate on items, product structure and Bill of Material throughout the product lifecycle and across the extended enterprise and supply chain.
- **Designer role** - Manages design activities in a multi-CAD, multi-data environment. The Designer role can efficiently create, edit and annotate design and related documents, including Microsoft Office-type. Powerful searches, “where used” retrievals and product lifecycle operations accelerate work and promote design reuse.
- **Administrator role** - Manages Administrator activities. The Administrator role feature provides you with all the admin tools you require.

The application components that you install for each respective role are as follows:

Installation Component	Editor Role	Engineer Role	Designer Role	Administrator
Editor	X	X	X	X
Core Services				
Workflow		X		X
BOM		X		X
Integrations	X	X	X	X
CAD Integration Note: Installs 32 bit Integration, only. 64 bit Integration installation is performed by a different process.			X	X
Office Integration	X	X	X	X
Viewers	X	X	X	X
3DVIA Viewer	X	X	X	X
eDrawings		X	X	X
DS Viewer		X	X	X
Add-ons				
Program Management				
Regulatory Compliance Framework				
Utilities				
Editor SDK				
Icon Library				X
CAD Templates				
Admin Tools				X
Help file	X	X	X	X

Note: If CATIA Integration is installed, install the LACD from the Kits folder of SmarTeam Windows Client.

Note: The following Administrator tools are installed for each role with limited capabilities, but enables you to apply the required tasks:

- User Maintenance
- Menu Editor

- Workflow Editor

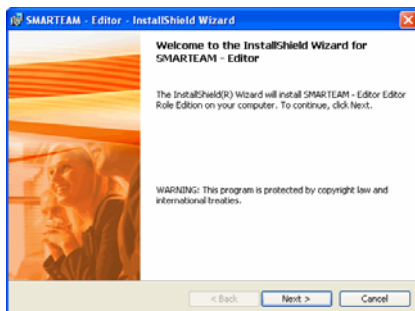
3 In the Installations window, click one of the four options:

- Editor Role
- Engineer Role
- Designer Role
- Administrator Role

Note: In this document example, select the Editor Role.

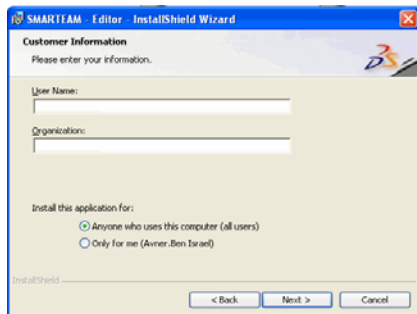


4 In the SmarTeam – Editor Welcome window, click **Next**.



5 In the Customer Information window:

- Personalize the program by entering your User Name and Organization (company details) in the applicable fields
- Select the relevant option under the Install this application for:
 - **Anyone who uses the computer:** Enables access to this installation by anyone who uses this computer
 - **Only for me (user name):** Enables access to this installation only to the user named in the User Name field
- Click **Next**, the Customer Information window appears.



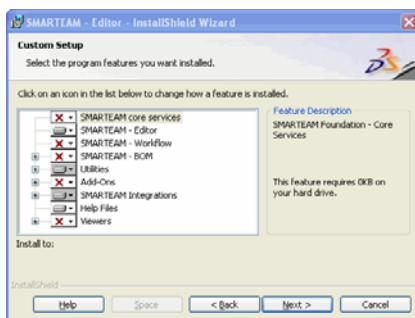
- Click **Next**


6 In the Custom Setup window:

- On the left side a list of application components that can be installed appear. Components marked with X are not included in the installation. To include them click the arrow next to the X and select the relevant component. All other component are automatically included. Click the plus sign (+) to expand a component and view the available sub-components.
- On the right side the description of the selected component appears in pane.
- Each component consists of sub-components that can be selected or cleared, as you require. Select the component or sub-component icon to select the installation option for specific components. A brief description of each component appears in the Feature Description section when you select a component

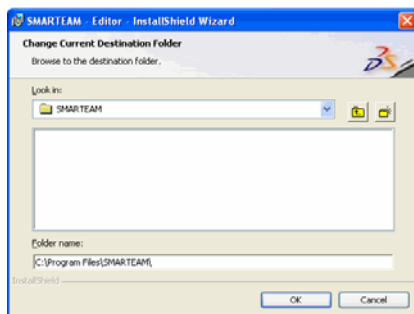
Notes:

- You need to activate a license from SmarTeam – Editor in order to activate the BOM
- For Demo Installation make sure that ST Admin Tools and Icons library component is included (needed to add new icons to ST at a later date).



- 7 If you need to change the current destination folder, click  to open the Change Current Destination Folder window, as shown below

- Select a different destination folder
- Click **OK**



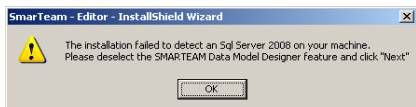
Notes:

- You cannot install SmarTeam – Editor on a root drive.
- On 32 Bit OS you can select any directory, the default directory is C:\Program Files\SmarTeam. On a 64 Bit OS, the default location of SmarTeam Editor Installation is C:\SmarTeam. It is not possible to install SmarTeam – Foundation or SmarTeam – Editor in the "Program Files" directory.

■ Click Next

- If you selected the without Core Services installation, go to [Step 8](#)
- If you selected the with Core Services installation, go to [Step 9](#)

Note: If you do not have SQL Server 2008 installed in your machine, you must deselect the SmarTeam Data Model Designer.



Note: The System Configuration Editor requires you to install Internet Information Services (IIS) and ASP.NET must be registered with IIS (run the **aspnet_regiis.exe** utility from the .NET 2.0 home directory). For details, please refer to the V5R20_Hardware_and_Software_Requirements.pdf.

Additional Step for the Without Core Services Installation

If you did not select SmarTeam Core Services, you must perform the following steps to define the server name where the SmarTeam – Foundation Core Services are located.

8 In the SmarTeam – Foundation Core Services Location window:

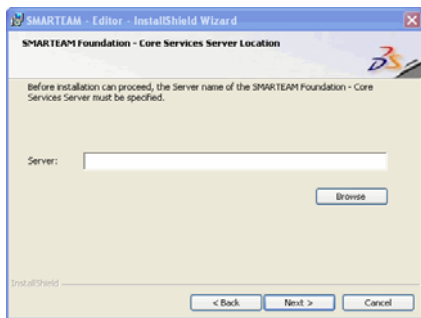
- Enter the server name where the SmarTeam – Foundation Core Services are installed

OR

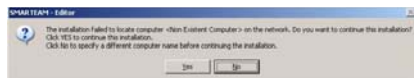
- Click **Browse** and select a server from the LAN

■ Click Next

- The Using the License User Management window appears, [Step 13](#).



- a If the computer failed to find the specified computer on the network, an error message appears:
 - Click **Yes** to continue or **No** to specify another computer



Note: In some cases, [Step 9](#), [Step 10](#) and [Step 11](#) in the Additional Steps for the Option B Installation apply for the Option A Installation.

Additional Steps for the With Core Services Installation

Note: Perform these steps for DEMO environments, only.

If you selected the SmarTeam Data Model Designer feature, you must perform the following steps to configure the SQL Server 2008 database server.

First, the system checks to see if the SQL Server 2008 server is installed on your computer.

- 9 If the SQL Server 2008 server is located the Database Server window appears, go to [Step 11](#).
- 10 If the SQL Server 2008 server is not located an error message appears, shown below.

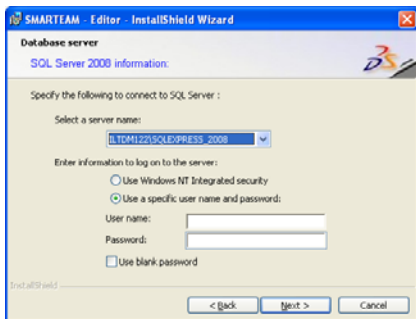


- 11 In the Database Server window, enter the SQL Server 2008 Database Server information:
 - In the Select a server name field:

- Select the SQL Server 2008 server installed on the computer
- Select the relevant option in the Enter Information to Log On to the Server area:
 - **Use Windows NT Integrated security:** The logon from the Windows user name and password are also used to log on to the SQL Server 2008 server
 - **Use a specific user name and password:** Enables you to use the built-in User name and Password of the SQL Server 2008 server. If you select this option enter the details in the User Name and Password fields. The username must be an administrator of the SQL server
- Select **Use blank password** field to enable you to use a blank password - this is generally not recommended

Note: By selecting **Use blank password** enables logging on the SQL Server 2008 server without entering a password.

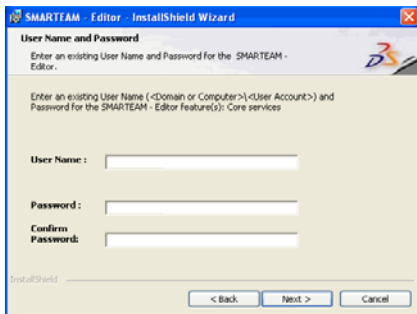
- Click **Next**



Note: The User Name and Password window appears only if you selected SmarTeam Core Services or the System Configuration Editor Admin Tool.

12 In the User Name and Password window:

- Enter the username and password you want to use for SmarTeam – Editor Core Services and confirm the password
When you need to use a local user, enter e.g., <local computer>\<user name>.
For example, My Computer\Local Admin
- Click **Next**



Using License Use Management

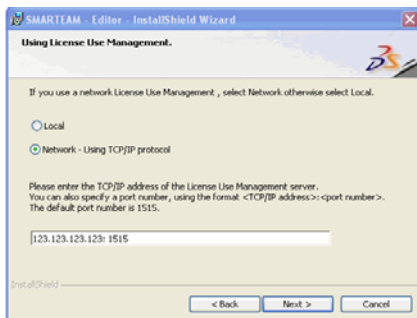
- 13** In the Using License Use Management window define the network protocol required for the network license software by selecting one of these radio buttons:

- **Local:** Select if the LUM server is installed on the machine on which you are currently installing SmarTeam – Editor. When using SmarTeam Product Demo Environment, select **Local** for **DEMO INSTALLATION**
- **Network - Using TCP/IP Protocol:** Select if the LUM server is installed on a remote machine. Enter the TCP/IP address of the License Use Management server. You can also specify a port number using the format <TCP/IP address> <port number>. The default port number is 1515

Note: The License Use Management (LUM) feature must be employed except in cases where SmarTeam – Editor is to run in demo mode. In this case, the database is limited to a maximum of 5000 records and a notification that the user is running SmarTeam – Editor in demo mode appears every time the user opens SmarTeam – Editor.

■ **Click Next.**

If the computer failed to find the specified License Use Management server on the network, an error message appears. Click **Yes** to continue or **No** to specify another computer.



Selecting Language

You need to define the language required for viewing Help, database and documentation files. The selected language, affects all subsequent SmarTeam products installed on this computer.

14 In the Setup Language Selection window:

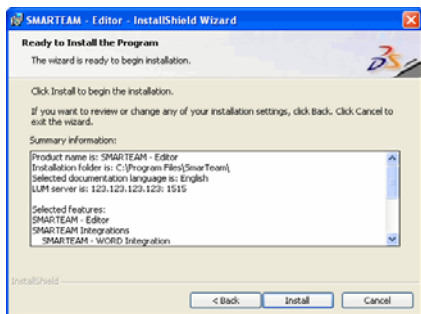
- Select the relevant language
- Click Next



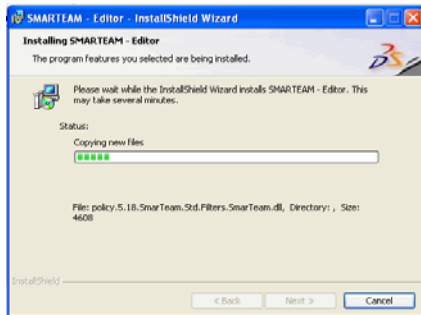
SmarTeam – Editor InstallShield Wizard

This process is required to copy the selected files to the designated folders on your computer.

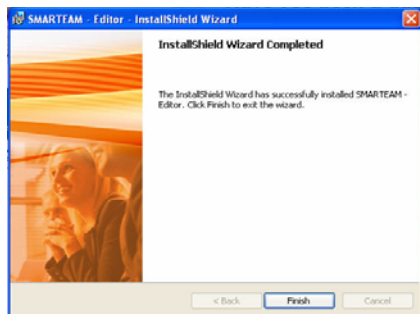
15 In the Ready to Install the Program window, click **Install**.



- 16 In the Installing SmarTeam – Editor window, progress is indicated on the screen via the Setup Status graphics bar window. The installation process might take several minutes



- 17 The InstallShield Wizard Completed window appears indicating whether or not the installation was successful:
- If it was successful, click **Finish** to complete the installation process and return to the main installation window
 - If not, click **Finish** to exit the wizard then re-install SmarTeam – Editor



18 The Main Installation window appears:

- Click Exit



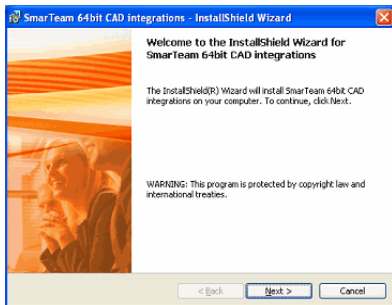
Running the CAD 64 bit Installation

After you install/upgrade to SmarTeam – Editor V5R20, the CAD 64 bit installation process can be performed.

To install CAD 64 bit:

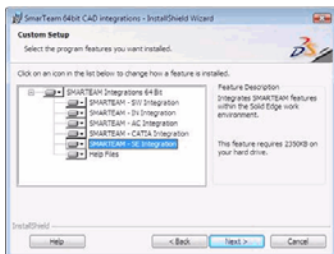
- 1 Run the CAD 64 bit installation from the DVD.
- 2 In the Welcome window, click **Next**.

The Custom Setup window appears.

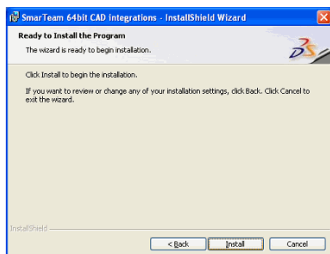


Note: The system searches for installations for supported CAD Integrations.

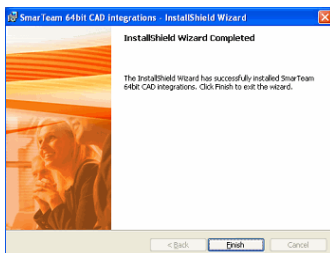
- 3 In the Custom Setup window:
 - If CAD installations are detected in the system, the installation automatically selects the relevant integration feature.
 - If CAD installations are not detected in the system, select the relevant CAD features manually and click **Next**.



- 4 In the Ready to Install dialog, click **Install**.



- 5 In the InstallShield Wizard Completed dialog, click **Finish**.



CAD Integration Installation Procedure for CAD Certified after SmarTeam GA

If the CAD integration you are going to install was certified after SmarTeam GA release, perform the following procedure.

32bit Environment:

1. Navigate to **Control panel** → **Add\Remove Programs** → **Modify SmarTeam-Editor installation** → add integration manually.
2. Run latest SmarTeam Service Pack installation.

64bit Environment:

1. Navigate to **Control panel** → **Add\Remove Programs** → **Modify SmarTeam 64 bit CAD integrations installation** → add integration manually.
2. Run latest SmarTeam Service Pack installation.

Post Installation

Attaching Existing Database to SmarTeam – Editor

This section is relevant only if you want to attach an existing database to SmarTeam – Editor other than PLMDB.

- 1 Copy the <newDB>.mdf file into your SmarTeam DB directory (<SmarTeam>\DB).
- 2 Create a new DB connection through the Database Connection Manager utility - when prompted, assign the <newDB>.mdf file as the Database file.
- 3 Configure the vault server to work with the new DB through the vault server setup utility.
- 4 Configure the Workflow server to work with the new DB through the Workflow server setup utility.
- 5 If you have additional icons you want to use with the new DB, add those icons to the <SmarTeam>\Icons folder.
- 6 If you have a new vault folder that you want to use with the new DB, place this folder under the <SmarTeam> directory and make sure that you configure the Vault Server through the Vault Server Setup utility to work with this folder.

Installing SDK Scripts

The SmarTeam script running directory is defaulted as <SmarTeam>\script. In V5R19 the SmarTeam – Editor installation process will automatically install the new script samples into the <SmarTeam>\SDK directory. Therefore, if you wish to use the script samples provided in V5R19, you must copy them from <SmarTeam>\SDK directory to <SmarTeam>\script directory.

Note: Prior to V5R19 the script samples were automatically installed on the <SmarTeam>\script directory.

File Permissions

The application automatically updates several files (e.g. log files, working directory, TEMP directory) providing that the Administrator and users have full permission in the following locations:

- TEMP directory (%TEMP%).
- %DOCUMENTATION%\All Users\Application Data\Microsoft\Crypto (usually C or D drive).

Configuring BOM

If the user chose from the Custom Installation window, the BOM Briefcase sub-option, only one post installation action is suggested. In order to define Briefcase Available Classes, run the Briefcase Administration Wizard as follows:

- Choose **Start, Programs, SmarTeam, SmarTeam - Briefcase, Briefcase Administration Wizard**.

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. Use this procedure for the System Configuration feature installation.

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 Open the Command Prompt (cmd.exe) and run 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® Windows Installer

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

The Microsoft Windows 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 have installed SmarTeam – Editor and performed all the post installation tasks, further customization and administration might be required.

When you complete all customization and administration you need, you can start working with the SmarTeam – Editor by launching SmarTeam – Editor.

To launch SmarTeam – Editor:

- 1 In the taskbar, click **Start** then select **Programs > SmarTeam > SmarTeam – Editor** to launch the application.
 - The SmarTeam User Login window appears
- 2 In the SmarTeam – Editor Login window, enter your **User name** and **Password**:

■ Click OK

For standalone installations only, when you first launch SmarTeam – Editor after a new installation, an advanced SmarTeam User Login window appears. This advanced window enable you to enter a new user name and password instead of using the default user name [joe]. The next time you launch SmarTeam – Editor, the standard SmarTeam User Login window appears.)

Note: If you do not know your password, consult with your System Administrator.

Setting passwords is performed by the System Administrator, who assigns users to specific User Groups.

Passwords define and limit access permissions of each user to different functions and data accessed via SmarTeam – Editor.

For example, one user may not be permitted to access information regarding pricing while another user can only delete specific information.

3 After successful login the SmarTeam – Editor main window is displayed.

Note: When a different user needs to login to SmarTeam, all SmarTeam applications must be closed before switching users. If a SmarTeam application is running under one user's login, it is not possible to log into a SmarTeam integration with a different user name. If different users are working with an integration on one computer, they must close SmarTeam and open it again. In this case, a new user will also be able to work with the integration.

Troubleshooting

Modify/ Repair/ Remove

If you have SmarTeam installed on your machine, when you insert the original software, the Program Maintenance window appears. 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:** Repairs installation errors in the program. This option fixes missing or corrupt files, shortcuts and registry entries. For details see [Repair](#).
- **Remove:** Removes SmarTeam – Editor from your computer. For details see [Remove](#).



Modify

If you need to modify the configuration of the current SmarTeam – Editor 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 – Editor 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 Select **SmarTeam – Editor Server**.
- 3 Click "Click here for support information" link; the Support Info window appears.
- 4 Click **Repair** in order to repair the installation.

Remove

If required you can remove SmarTeam – Editor 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 need only to uninstall the Release. This will automatically remove the relevant Service Packs.

To uninstall using the Release CD:

- 1 Insert the SmarTeam – Editor release CD. The Program Maintenance window is displayed.
- 2 Select **Remove**.
- 3 Click **Next**.

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 Select **SmarTeam – Editor Server**.
- 3 Click **Remove**.

Known Issues

For installation known issues, refer to the SmarTeam Program Directory.

Frequently Asked Questions

For Frequently Asked Questions (FAQ) refer to the Program Directory on the [ENOVIA SmarTeam Support Site](#).

Silent Installation

This section shows how to use the Windows Installer to perform a silent installation of the SmarTeam - Editor (Windows).

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

The [Command-Line Operation](#) section defines the options and properties that can be used in the command-line installation commands.

The [Sample SmarTeam – Editor Silent Installation Scripts](#) section provides some common command-line installation scenarios.

Note: Before you run the SmarTeam - Editor Silent installation script via CMD on a Microsoft® Windows 2003 terminal server, perform the following:

1. Enter **change user /install** at the command prompt to set the system in install mode and turn off .ini file mapping.

The system then records how the setup APIs initially install the program.

2. After the program installation finishes, enter **change user/execute** to reset the system to execute mode, restore .ini file mapping and redirect user-specific data to the user's home directory.

Command-Line Operation

This chapter 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 SILENT SILENT_FILE="<full path to the  
SilentFile.txt>"
```

where 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"**

Setup.exe Options

Setup.exe can accept a number of command-line parameters from the Silent Installation file. Using these parameters, end users can specify data, such as the language in which the setup should run and whether to launch Setup.exe silently. End users can also pass parameters through Setup.exe to the included .msi file.

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.

Complete detailed information about these options can be found at:

Setup.exe options	http://support.installshield.com/kb/view.asp?articleid=q105473 only Parameters without the note (InstallScript and InstallScript MSI projects only)
--------------------------	---

Msiexec options

Use this option for direct installation of a product without using the **setup.exe** file. The command line parameters must be exactly the same as the ones in the Silent Installation file, excluding the beginning and ending curly brackets.

Prior to running silent installation the user must install following prerequisites for the installation to complete successfully.

- 1 Microsoft Windows Installer, version 3.1 or later. This file can be downloaded from the Microsoft site.
- 2 Microsoft .NET version 3.0. It can be found on the Installation CD in the folder \Data\dotNET Framework installations\DotNet 3.0, then the appropriate subfolder should be selected according to operating system and language (if applicable), filename to run is install.exe.
- 3 Microsoft .NET version 3.0 can be found on the Installation CD in the folder Data\dotNET Framework installations\DotNet 3.0, filename to run is dotnetfx3.exe (32 bit) or dotnetfx3_x64.exe (64 bit).

Complete detailed information about these options can be found at:

Msiexec options	http://msdn.microsoft.com/library/default.asp?url=/library/en-us/msi/setup/command_line_options.asp
-----------------	---

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 of the SmarTeam - Editor. 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	<p>Options:</p> <p>ALLUSERS parameter omitted:</p> <p>Per-user installation using folders in user's personal profile. (Installation works only for that user.)</p> <p>ALLUSERS =1</p> <p>Per-machine installation using folders in "All Users" profile. (Installation works for all users on the machine.)</p>	<p>Administrator access privileges.</p> <p>ALLUSERS property determines if the installation is per-user or per-machine.</p>
Change Current Destination Folder	INSTALLDIR	Directory name	<p>Full path of the target installation directory in which to install the application.</p> <p>Note: This has to be the last property in the command line</p>

GUI Dialog	Property	Value	Description
SQL2008 Database Server information Note: These properties are used when a local SQL2008 server exists and the installation is attaching a new Database to the SQL2008 Server	SQL_SERVER_NAME	SQL2008 Server name	Name of a local SQL2008 Server
	USE_WINDOWS_NT_INTEGRATED_SECURITY	Options: 0 for NT Security 1 for SQL security	This property sets the authentication mode used for the connection to the SQL Server database
	SQL_USER_NAME	User name	Administrator user of the SQL2008 server
	SQL_PASSWORD	Password	Password of the Administrator user provided in the SQL_USER_NAME property
MSDE2000(SQL database Server information. Note: This dialog appears only during upgrade installation from previous version of SmarTeam - Editor. This information is needed to detach databases from the MSDE(SQL server.	LEGACY_SQL_SERVER_NAME	Server name	Name of a local SQL/MSDE server. This property should be used during upgrade installation from R16 only, for the installation to be able to detach databases from the previously installed MSDE server.
	LEGACY_SQL_USER_NAME	User name	Administrator user of the SQL/2008 server which name specifies in the LEGACY_SQL_SERVER_NAME property. This property should be used during upgrade installation from R16 only
	LEGACY_SQL_PASSWORD	Password	Password of the Administrator user provided in the LEGACY_SQL_USER_NAME property. This property should be used during upgrade installation from R16 only.
	USE_BLANK_PASSWORD	Options: 1 - if the password is blank 0 - otherwise [Default]	Determines if the password can be left blank

GUI Dialog	Property	Value	Description
User Name 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"
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.
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
SmarTeam Foundation - Core Services Server Location	SM_CORE_SERVICES_SERVER	Server name	Server name (hostname or IP address) where SmarTeam Core Service server is installed
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.
Specify SmarTeam features to remove	REMOVE	See below for list of parameter values	The value of REMOVE property is a list of SmarTeam features delimited by commas that are to be removed (Should be specified only in consecutive installations)
Reboot Behavior	FORCE_REBOOT	YES or NO	By selecting YES, a reboot message appears at the completion of an installation. If NO is selected, then the reboot message does not appear and the user needs to decide whether a reboot is necessary or not.

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.

Roles Legend

Name	Abbreviation
Designer	Des.
Engineer	Eng.
Editor (Information Worker)	Info.
Administrator	Admin.
All Roles	All
No Role	None

Type of Service	Parameter	Parameter Description	Role
SmarTeam Core Services	Smart_Service	SmarTeam Foundation Core Services	None
SmarTeam - Editor [All features to the right must be selected]	SmarTeam_ClientLibrary		All
	SmarTeamCore		All
	SmarTeam_SDK		All
	SmarTeam		All

Type of Service	Parameter	Parameter Description	Role
SmarTeam Administrator Tools	SmarTeam_Tools If any of the below listed SmarTeam Administrator tools are selected for installation, this parameter must be selected		
	Default_Values	Default Values	Admin
	Smart_DB_Explorer	SmarTeam Database Explorer	Admin
	Flow_Designer	Flow Chart Designer	Admin
	Flow_Manager	Workflow Manager	All
	Form_Designer	Form Designer	Admin
	Import_Export	Import-Export	Admin
	Integration_Tools_Setup	Integration Tools Setup	Admin
	LDAP_users_import_wizard	LDAP Users Import Wizard	Admin
	Menu_Editor	Menu Editor	All
	Multi_Language	Translation Utility	Admin
	Lifecycle_Rules_Setup	Lifecycle Rules Setup	Admin
	Script_Maintenance	Script Maintenance	Admin
	Sequence_Designer	Sequence Designer	Admin
	Smart_Data_Model_Doc_Wizard	SMARTEAM Data Model Documentation Wizard	Admin
	Smart_Wizard	SMARTEAM Data Model Designer	Admin
	System_Configuration_Editor ¹	System Configuration Editor	Admin
	Users_Maintenance	Users Maintenance	All
	Vault_Tester	Vault Tester	Admin
Smartflow	SmartFlow_Tools		Eng. and Admin

Type of Service	Parameter	Parameter Description	Role
SmarTeam Integrations	SmarTeam_Plugins If any of the below listed SmarTeam Integrations are selected for installation, this parameter must be selected		
	CATIA_Integration	SMARTEAM – CATIA Integration	Des. and Admin
	SolidWorks_Integration	SMARTEAM – SW Integration	Des. and Admin
	AutoCAD_Integration	SMARTEAM – AC Integration	Des. and Admin
	Inventor_Integration	SMARTEAM – IN Integration	Des. and Admin
	SolidEdge_Integration	SMARTEAM – SE Integration	Des. and Admin
	MS_Excel_Integration	SMARTEAM – EXCEL Integration	All
	MS_Word_Integration	SMARTEAM – WORD Integration	All
SmarTeam - Item & BOM	SmarTeam_BOM If any of the below listed SmarTeam - Item & BOM are selected for installation, this parameter must be selected		
	Online_BOM	Item and BOM Management	Eng. and Admin
	Offline_BOM	BOM Package - Briefcase	Eng. and Admin
SmarTeam - Editor SDK	SDK		None
Program Management	Program_Management If any of the below listed SmarTeam - Program Management are selected for installation, this parameter must be selected		None
	Project_Manager		None
Regulatory Compliance	Regulatory_Compliance		None

Type of Service	Parameter	Parameter Description	Role
SmarTeam Viewers	Viewers If any of the below listed SmarTeam Viewers are selected for installation, this parameter must be selected		
	eDrawings_Viewer		Des., Eng. and Admin
	IE_Viewer		All
	ENOVIA_Viewer		Des., Eng. and Admin
Help Files	SmarTeam_Help		All
	SmartFlow_Help		All
	SmarTeam_Works_Help		All
	SmartDesk_Help		All
	SmartInventor_Help		All
	SmartEdge_Help		All
	MsOffice_Integration_Help		All
Icons Library	Icons_Library		Admin
Upgrade	Upgrade		

¹ System Configuration Editor requires you to install Internet Information Services (IIS) version 5 or above. It does not suffice to only have IIS version 5 or above; but, ASP.NET must be registered with IIS (run `aspnet_regiis.exe` utility from the .NET 2.0 home directory).

SmarTeam – Editor Silent Installation V5R20 without Reboot

Prerequisites

Before performing the Silent Installation, install the following products on your machine.

If any prerequisite prompts you to restart, perform it.

MSI 3.1 - run `WindowsInstaller-KB893803-v2-x86.exe` from DVD "Data\MSI 3.1" folder

DotNet 3.5 from DVD "Data\dotNET Framework installations\DotNet 3.5" folder

On 32 BIT machine - run `dotnetfx3.exe`

On 64 BIT machine - run `dotnetfx3_x64.exe`

After installing dot net 3.5 on not English OS please run language pack installation

For French OS - run `dotnetfx3langpackfr.exe` from DVD "Data\dotNET Framework installations\DotNet 3.5\Fr" folder

For German OS - run `dotnetfx3langpackde.exe` from DVD "Data\dotNET Framework installations\DotNet 3.5\De" folder

For Japanese - run `dotnetfx3langpackjp.exe` from DVD "Data\dotNET Framework installations\DotNet 3.5\Jp"

SQLExpress 2008 (for PLMDB installation only) - run `SQLEXPR.EXE` from DVD "[Data\SQLExpress" folder.

2. J# Redistributable (for SmarTeam DS Viewer Server only) - run `vjredist.exe` from CD "SmarTeam DS Viewer Server\Data\J#\En" folder.

After J# installation on not English OS please run language pack installation:

For French OS - run `vjredist-LP.exe` CD 3 "SmarTeam DS Viewer Server\Data\J#\Fr"

For German OS - run `vjredist-LP.exe` CD 3 "SmarTeam DS Viewer Server\Data\J#\De"

For Japanese - run `vjredist-LP.exe` CD 3 "SmarTeam DS Viewer Server\Data\J#\Ja"

Note: Verify that all prerequisites were installed on your machine.

To install SmarTeam – Editor V5R20:

- Run **Setup.exe** with parameters from the Setup folder on the DVD.

```
<Setup folder>\Setup.exe SILENT SILENT_FILE="<full path to the SilentFile.txt>"
```

Example:

```
<Setup folder>\Setup.exe SILENT SILENT_FILE="C:\myfolder\SilentFile.txt"
```

When the file contains the following in its first line:

```
{/qb USERNAME= Name COMPANYNAME=SMARTTEAM ALLUSERS=1
USER_NAME=ILibm277_VM_XP\Administrator USER_PASSWORD=123456

SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=Sq12008
SM_SETUP_LANGUAGE=English SM_CORE_SERVICES_SERVER=ILibm277_VM_XP
ADDOLOCAL=SmarTeam_ClientLibrary,SmarTeamCore,SmarTeam_SDK,SmarTeam

INSTALLDIR="c:\program files\SmarTeam"}
```

Make `INSTALLDIR` the last parameter.

Sample SmarTeam – Editor Silent Installation Scripts

SmarTeam - Editor

Installing SmarTeam - Editor to the location "c:\program files\SmarTeam" with the features SmarTeam - Editor, SmarTeam Administrator Tools Multi Language and Users Maintenance , SmartFlow, Help Files, Demo Database and Demo Files.

Two formats of the example are shown. The first has been arranged to show the parts of the command more clearly; it is not immediately usable. The second format is immediately usable (after the full setup.exe path is substituted).

If you have a parameter value that includes a blank space, enclose it with quotation marks, e.g. SQL_PASSWORD = "ab ed".

Layout of Command Showing Parts in the Silent Installation File

```
{/qb USERNAME= Name
COMPANYNAME=SmarTeam
ALLUSERS=1
USER_NAME=ILibm277_VM_XP\Administrator
USER_PASSWORD=123456
SM_LUM_LOCAL_NETWORK=Network
SM_LUM_SERVER_LOCATION=Sql2008
SM_CORE_SERVICES_SERVER=ILibm277_VM_XP
SM_SETUP_LANGUAGE=English ADDLOCAL=SmarTeam_ClientLibrary,SmarTeamCore,
SmarTeam_SDK,SmarTeam
INSTALLDIR="c:\program files\SmarTeam" [has to be last]}
```

Notes:

- The ADDLOCAL path parameters are case sensitive
- All entities in a command-line must be entered on one line

Exact Format of Silent Clean Command Setup.exe (to Cut and Paste)

```
<Setup folder>\Setup.exe SILENT SILENT_FILE="C:\myfolder\SilentFile.txt"
When the file contains the following in its first line:
{/qb USERNAME= Name COMPANYNAME=SMARTTEAM ALLUSERS=1
USER_NAME=ILibm277_VM_XP\Administrator USER_PASSWORD=123456
SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=Sql2008
SM_SETUP_LANGUAGE=English SM_CORE_SERVICES_SERVER=ILibm277_VM_XP
ADDLOCAL=SmarTeam_ClientLibrary,SmarTeamCore,SmarTeam_SDK,SmarTeam
INSTALLDIR="c:\program files\SmarTeam"}
```

Exact format of command Msiexec.exe (to cut and paste)

```
Msiexec.exe /I <Full Path To SmarTeam - Editor.msi> /qn /L!*v "%temp%\SmarTeam_Editor.log"
USERNAME=<Name> COMPANYNAME=SmarTeam ALLUSERS=1
USER_NAME=ILibm277_VM_XP\Administrator USER_PASSWORD=123456
SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=Sql2008
```

```
SM_SETUP_LANGUAGE=English SM_CORE_SERVICES_SERVER=ILibm277_VM_XP
ADDLOCAL=SmarTeam_ClientLibrary,SmarTeamCore,SmarTeam_SDK,SmarTeam
INSTALLDIR="c:\program files\SmarTeam"
```

Exact format of command MsiExec.exe to modify an already installed product

```
Msiexec.exe /I <Full Path To SmarTeam - Editor.msi> /qn /L!*v "%temp%\SmarTeam_Editor.log"
USERNAME= Name COMPANYNAME=SmarTeam ALLUSERS=1
USER_NAME=ILibm277_VM_XP\Administrator USER_PASSWORD=123456
SM_LUM_LOCAL_NETWORK=Network SM_LUM_SERVER_LOCATION=Sql2008
SM_SETUP_LANGUAGE=English SM_CORE_SERVICES_SERVER=ILibm277_VM_XP
[ADDLOCAL=<SomeFeature1,SomeFeature2>] [REMOVE=<SomeFeature3,SomeFeature4>]
```

SmarTeam – Editor Silent Installation Upgrade

To perform SmarTeam – Editor Silent Installation upgrade:

- ADDLOCAL property must not be specified
- When you upgrade SmarTeam – Editor using Smart_Wizard feature installed locally; the Command-line must include these four properties:
 - SQL_SERVER_NAME
 - USE_WINDOWS_NT_INTEGRATED_SECURITY
 - SQL_USER_NAME
 - SQL_PASSWORD

Exact Format of Silent Upgrade Command (to Cut and Paste)

```
{/qb USERNAME=<registered user> COMPANYNAME=<registered company> ALLUSERS=1
USER_NAME=<full username>
USER_PASSWORD=<user password>
SQL_SERVER_NAME=<SQL Server Name>
USE_WINDOWS_NT_INTEGRATED_SECURITY=<0 for NT Security 1 for SQL security>
SQL_USER_NAME=<Username> SQL_PASSWORD=<Password>}
```

Chapter 3: SmarTeam – Editor Web Based Installation for SmarTeam – Web Editor

Checklist

You must complete all the stages in this checklist to successfully install SmarTeam – Web Editor.

*Requirement: M = Mandatory, O = Optional

	Item	M/O*	Reference
Stage 1: Pre-Installation			
<input type="checkbox"/>	Verify that your Hardware & Software meet the requirements	M	SmarTeam 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 3.5 is installed on IIS Note: Automatically installed .NET Framework 3.5 during SmarTeam – Editor Installation process on the Server machine	M	Supported Application Servers
<input type="checkbox"/>	Install SmarTeam – Editor as follows: <ul style="list-style-type: none"> Without Core Services: Installs SmarTeam – Editor on a remote server. Recommended for Production Environments With Core Services: Installs SmarTeam – Editor with Core Services on a local machine. Recommended for Demo or Testing Environments 	M	SmarTeam – Editor Installation Guide
<input type="checkbox"/>	Define in Microsoft® Windows the user who will run the SmarTeam – Web Editor Application	M	Defining a SmarTeam – Web Editor User in Windows
<input type="checkbox"/>	Verify that you have administrative privileges on your local machine	M	Administrative Settings for the SmarTeam – Web Editor User
<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
<input type="checkbox"/>	Verify that you have the IP address where the SmarTeam - Web Viewer IP Address is installed	M	Your SmarTeam System Administrator should provide you with the IP address
Stage 2: Installation Process			
<input type="checkbox"/>	Run SmarTeam - Web Editor installation	M	Running the Installation

	Item	M/O*	Reference
<input type="checkbox"/>	Define user authorizations for SmarTeam - Web Editor Security	M	Security Authorizations
Stage 3: Post Installation			
<input type="checkbox"/>	Define SmarTeam Database Connection	M	Define SmarTeam Database Connection
<input type="checkbox"/>	Define Authorization Mode for SmarTeam and Windows	M	Define Microsoft® Windows Authentication Protocol Mode
<input type="checkbox"/>	Perform the steps to enable Windows Authentication with the SmarTeam - Web Editor if you use Windows Authentication	M	Define Microsoft® Windows Authentication Protocol Mode
<input type="checkbox"/>	Define Profile Groups for SmarTeam – Web Editor menus. This procedure refers to the Menu Editor. SmarTeam – Web Editor users must be added to a group and that group added to the System Profile Groups via Menu Editor. To know when it is mandatory, see reference section at right	M/O	Defining a SmarTeam – Web Editor User in Windows
<input type="checkbox"/>	Configure your Viewer (only Mandatory if you want to view documents)	M/O	Viewer Configuration
<input type="checkbox"/>	Configure Oracle 9.2.0 Client if this is your environment	M	Oracle Client Security Configuration
<input type="checkbox"/>	Configure Proxy if this is your environment	M	Reverse Proxy Configuration
<input type="checkbox"/>	Configure the persistency storage sub-system if you are not using PLMDB database	M	Persistency Storage Configuration
<input type="checkbox"/>	Configure your settings if you have SSL on your Web Server	M	Configuration for Secure Socket Layer
<input type="checkbox"/>	Restart the IIS	M	Restarting the Web Server
<input type="checkbox"/>	Configure your Browser Settings	M	Browser Settings
<input type="checkbox"/>	Configure your JRE Settings	M	Sun Java Runtime Environment (JRE) Installation
Additional Checks			
<input type="checkbox"/>	Verify your setup on the server	M	Verifying Setup on the Server
<input type="checkbox"/>	If you are not connected to the network make changes to your registry	M	Local Installation for Demo Purposes
What Next?			
<input type="checkbox"/>	Login to SmarTeam – Web Editor	M	

System Requirements

Refer to the SmarTeam – Editor (Web based) sections in the Hardware and Software Requirements document. The document provides details of the hardware and software required for successful installation of the SmarTeam – Web Editor application.

Order of Installation

The installation procedure is split into three stages:

- Stage 1: Pre-Installation (this chapter)
- Stage 2: Installation Process ([Installation Procedure](#))
- Stage 3: Post-Installation ([SmarTeam – Editor for Web 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 – Web Editor.

Installation Environment

An explanation of the SmarTeam – Web Editor Installation Environment can be found in the Introduction to SmarTeam Installation document under the eb Applications chapter.

Prerequisites

Before installing SmarTeam – Web Editor, you must perform the following steps in the order specified.

- Install IIS if it does not exist.

Note: If you are using Microsoft® Internet Information Services (IIS) as your Web server, you must install IIS *before* Microsoft .NET Framework 3.5. If you installed IIS after Microsoft .NET Framework 3.5, see [Frequently Asked Questions](#).

- Install SmarTeam – Editor (automatically installs .NET Framework 3.5)
- Define the User Name and Password of the user who will run the SmarTeam – Web Editor Application. For more details, see [Defining a SmarTeam – Web Editor User in Windows](#)

Note: 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 **Materials**, **Materials Download** and the relevant release/service pack).

Supported Application Servers

The SmarTeam – Web Editor Application supports Microsoft® Internet Information Services (IIS).

Before you start the installation process, verify that IIS runs successfully on your machine by checking that the World Wide Web Publishing Service is running.

MS Internet Information Services (IIS)

As 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.

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:

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 – Web Editor User** is automatically added to local **IIS_WPG** group during the **SmarTeam – Web Editor Installation** process.

- If you are going to use a domain user as the **SmarTeam – Web Editor** user, you must ensure that the user who is logged into Windows and running the **SmarTeam – Web Editor** 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.

Defining a SmarTeam – Web Editor User in Windows

The **SmarTeam – Web Editor** Application needs a specific set of permissions in order to run properly. This includes access to resources on the **SmarTeam – Web Editor** machine and on other machines, e.g., the **Vault** server. For this purpose, you are prompted to specify the **SmarTeam – Web Editor** user during the **SmarTeam – Web Editor** 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 – Web Editor** installation.

The SmarTeam – Web Editor user should have access to vaults. If you are working with a Vault Server, the SmarTeam – Web Editor 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.

Notes:

- After you use a local or domain user account for the SmarTeam – Web Editor 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 – Web Editor user. If you change the password of the user after installation, you must uninstall and reinstall SmarTeam – Web Editor 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 – Web Editor 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 – Web Editor will still be using your old password)

A SmarTeam – Web Editor 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 – Web Editor User

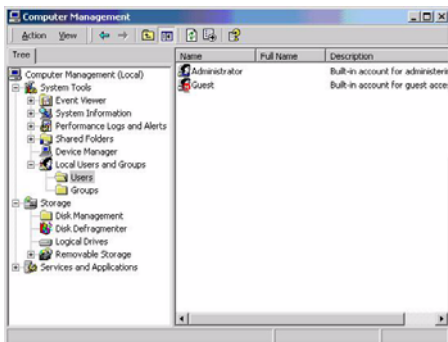
Your System Administrator needs to provide you with a Domain User, which can be used during installation.

Defining a *Local* User, to be used as a SmarTeam – Web Editor 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.

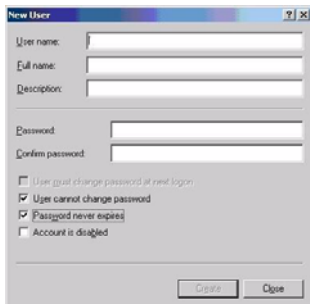
To display the Computer Management window:

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 is displayed.
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 check
 - **User cannot change password:** Check
 - **Password never expires:** Check
 - **Account is disabled:** Do not check



3. Click **Create**.

The new user name is now 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 – Web Editor User

In order to install SmarTeam – Web Editor, you must have administrative privileges on your local machine.

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

If you are going to use a domain user as the SmarTeam – Web Editor user, login to Windows as a domain user with administrative privileges on the machine and then run the SmarTeam – Web Editor installations

Installation Procedure

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

Note: This installation process is for IIS unless stated otherwise.

The installation process consists of three parts. If you have IIS, all three parts are required.

- Part 1: [Running the Installation](#)
- Part 2: [Restarting IIS](#) (additional step for IIS users)
- Part 3: [Security Authorizations](#)

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:** Allows you to return to the previous window
- **Cancel:** Allows you to abort the installation setup program without installing SmarTeam – Web Editor

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

Notes:

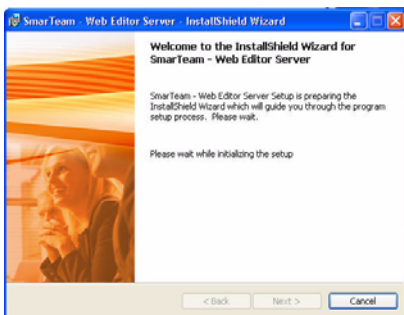
- If the installation process does not support your Operating System (OS), this message will be displayed:
"The Operating System configuration does not meet the minimum requirements for this type of installation. Please refer to the SmarTeam Hardware and Software Requirements Guide for more information. Would you like to continue with the installation anyway?"
- To run SmarTeam installation as a different user than the currently-logged on user, you can use **Run As** option.
 - a Right click **Install.exe**
 - b Select **Run as**
 - c In the **Run As** window select **The following user** radio button
 - d Enter **Administrator user name** and **password**
 - e Click **OK**

To begin installing:

- 1 Run install.exe from the SmarTeam DVD.
- 2 In the Installations window, click **SmarTeam – Web Editor Server/SmarTeam – Navigator Server**.



- 3 In the SmarTeam – Web Editor Welcome window, click **Next**.



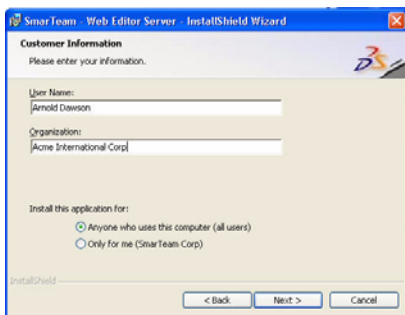
- 4 In the Customer Information window:

- Personalize the program by entering your **User Name** and **Organization** details

- Select **Anyone who uses this computer (all users)**.

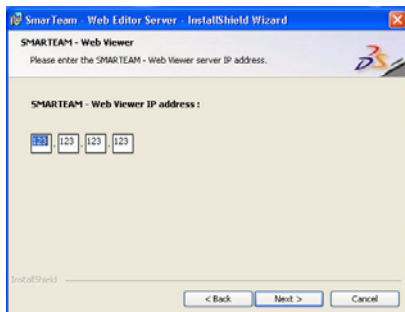
If **Only For Me** is selected, then only the currently logged in user will be able to operate the installed applications

- Click **Next**



5 In the SmarTeam – Web Viewer window:

- Enter the **SmarTeam – Web Viewer IP Address** for the designated server on which SmarTeam – Web Viewer software is/will be installed. (For complete instructions, refer to the SmarTeam – Web Viewer Installation Guide.)
- Click **Next**



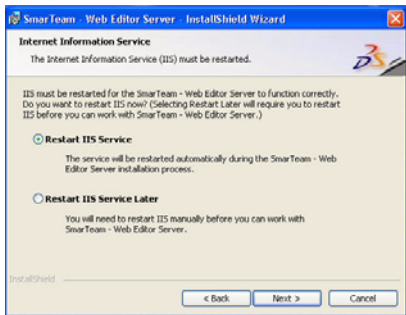
6 The next window to appear depends on whether you have IIS installed on your machine.

- **Only IIS:** The Information Internet Services window appears (skip the next step and go to the section on [Restarting IIS](#))
- **Not IIS:** If a support 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

Restarting IIS

This step is only relevant if you have IIS installed.

- 1 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 Authorizations

During the SmarTeam – Web Editor 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 allow non-administrator users to activate and use SmarTeam – Editor 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 – Editor is usually installed.

To maintain Web security, the SmarTeam – Web Editor 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 – Web Editor 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 – Web Editor installation process changes the directory security recursively for the SmarTeam – Editor and the SmarTeam – Web Editor 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 – Web Editor user (defined in the next step) to the SmarTeam Vault user group, thus giving access to these directories to the user.

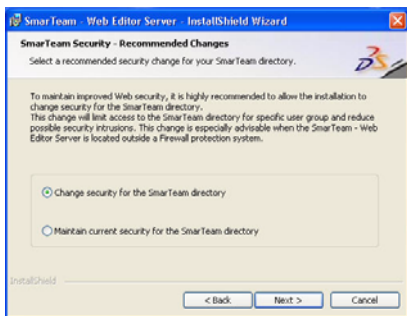
- 1 In the SmarTeam Security - Recommended Changes window select whether or not to change the SmarTeam directory security.

- 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

Then, click **Next**.



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

The SmarTeam – Web Editor User will automatically be assigned as a member of the SmarTeam Server Applications group, thus being granted full access to the SmarTeam installation directory only.

Enter the data as follows, then click **Next**:

- **Username:** The SmarTeam – Web Editor Server username as defined earlier in [Defining a SmarTeam – Web Editor User in Windows](#) e.g., John_Smith

When you need to use a local user, enter e.g.: <local computer>\<user name>

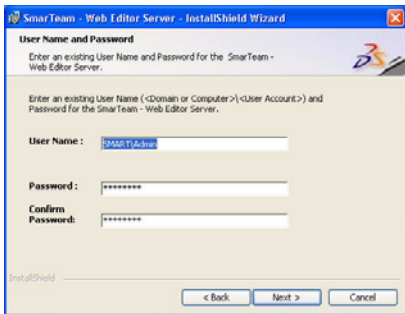
For example, Ildmtest\administrator

When using a domain user name and password, enter the domain name and username in the following format:

<domain name>\<user name>

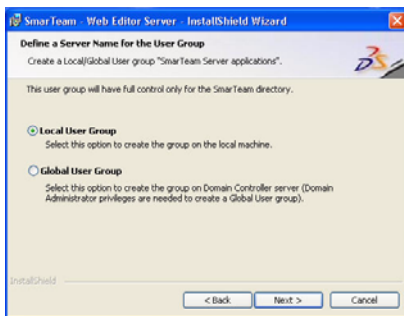
For example, SmarTeam\smartuser

- **Password:** Enter the SmarTeam – Web Editor Server password as defined earlier in [Defining a SmarTeam – Web Editor User in Windows](#) e.g., JS1234
- **Confirm Password:** Enter the password again for the process to confirm your password

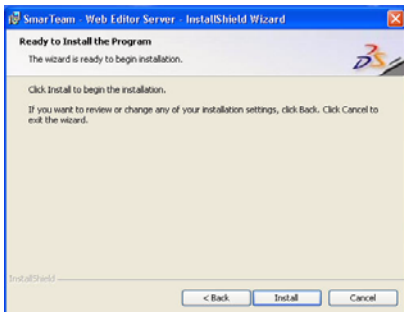


3 In the Define a Server Name for the User Group window select:

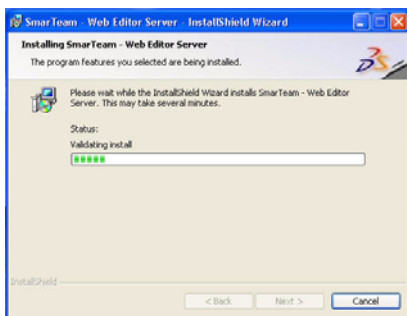
- **Local User Group:** For standalone or demo installation. It creates a local SmarTeam Server Applications user group on your local computer
- **Global User Group:** For domain users. It creates the SmarTeam Server Applications user group on a domain server (Domain Administrator privileges are required to create a Global User Group)
 - If you select Global User Group, the Server Name section appears
 - Enter the <Domain Controller Name> where the SmarTeam Server Applications user group will be created, in the Server Name field
- Click **Next**



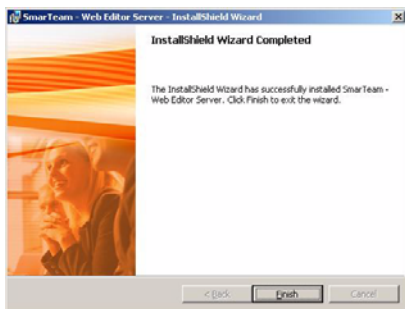
- 4 In the Ready to **Install** the Program window click **Install** to commence the installation process and copy files to the designated folders on your computer from the CD-ROM.



- 5 After clicking Install, the installation process commences and the Installing SmarTeam – Web Editor Server window is displayed.
- Installation progress and description is shown in the Status bar – the installation process may 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



- 6 After successful installation, the InstallShield Wizard Complete window is displayed. Click **Finish** to complete the installation and exit the InstallShield Wizard.



- 7 SmarTeam – Web Editor Server software installation is now complete.

SmarTeam – Editor for Web Post Installation

After the SmarTeam – Web Editor software has been installed, you must perform post-installation tasks as described in this chapter.

Define SmarTeam Database Connection

To connect SmarTeam – Web Editor 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.

Define SmarTeam Authentication Mode

The Authentication Manager controls the default authentication protocol used throughout the organization and all its relevant parameters. After installation, the Authentication Manager must be run in order to specify the protocol, and the database against which authentication will be performed.

Note: If you run the Windows Authentication Manager you will receive a Java error.

For a detailed explanation of authentication refer to SmarTeam – Editor Online Help.

To run the Authentication Manager (On SmarTeam Core Services server):

- 1 From the Start menu, select **All Programs > SmarTeam > Administrative Tools > Authentication Manager**; the Authentication Manager window appears.
- 2 Enter the following details in the Authenticaion Manager Window:
 - Select the relevant **authentication protocol** from the list of all available authentication protocols and update the Authentication Protocol Parameters accordingly.
- 3 Click **Apply**.
- 4 Click **Exit**.

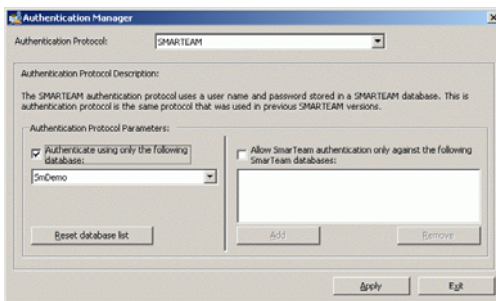
To define the relevant authentication mode.

Example

Case: SmarTeam Authentication Protocol Configuration

Setting the Authentication Manager: In the Authentication Manager window, enter the fields as follows:

- 1 In the Authentication Protocol field select **SmarTeam**.
- 2 In the Authentication Protocol Parameters area:
 - Select **Authenticate using the following database**
 - Select the database to be authenticated from the combo box, e.g., PLMDB
- 3 Click **Apply**.
- 4 Click **Exit**.



Define Microsoft® Windows Authentication Protocol Mode

The following steps are required for Windows Authentication with SmarTeam – Web Editor:

- 1 In the web.config file located at <SmarTeam Home Dir>\WebEditor\Web you will find three keys:

```
<authentication mode="Forms">
<forms loginUrl="Authentication/LoginPage.aspx" name=".SMARTAUTH"/>
</authentication>
```

```
<authorization>
<deny users="?" />
</authorization>
```

```
<!--identity impersonate="true"/-->
```

Change the <authentication mode="Forms"> key to <authentication mode="Windows">

Add open comment tag "!--" to the "<forms..." add close comment tag "--" to ".SMARTAUTH"/>

Add open comment tag "!--" to the <authorization>..." add close comment tag "--" to "</authorization>"

Comment out or delete the open comment and close comment tags from "<identity impersonate="true"/>"

Example:

```
<authentication mode="Windows">
<!-- forms loginUrl="Authentication/LoginPage.aspx" name=".SMARTAUTH"/-->
</authentication>

<!--authorization>
<deny users="?" />
</authorization-->
```

```
<identity impersonate="true"/>
```

2 On the SmarTeam – Web Editor server in the IIS Manager, select **Web Sites > Default Web Site > WebEditor**.

3 Right-click and select **Properties**.

4 Select the **Directory Security** tab:

- In the Authentication and access control section, click **Edit**
- Select **Integrated Windows Authentication**
- Clear the **Enable anonymous access** checkbox.
- Click **OK**

5 Restart **IIS**.

To perform the procedure described below, you might require the assistance of your organization's system administrator.

1 In the System Configuration Editor, configure the key

LDAP_User_Import.accountNameLDAPFieldName to be **sAMAccountName** for the domain level.

The key is stored in `smarteam.std.legacyPreferences.config.xml`.

The key's default value is: **cn**.

2 Run **Import LDAP Users** utility.

- Connect to the SmarTeam database and the Active Directory (on the Domain Controller)
- Import users from the Active Directory to SmarTeam database

Note: You are required to use the Import LDAP Users utility to import users into SmarTeam in order to import usernames in the proper case into the SmarTeam database (SmarTeam's login is case sensitive). The System Configuration key (see [Step 1](#)) determines how usernames are imported.

If you have SmarTeam – Web Editor installed on Microsoft @ Windows 2003 computer with IIS 6, perform the following steps.

1 Obtain **setspn.exe** from the Microsoft @ Windows 2003 installation CD.

If your Domain Controller is Microsoft@ Windows 2000, download **setspn.exe** from the [Microsoft Support](#) site.

2 On the Domain Controller machine (it controls the domain to which the IIS machine with SmarTeam – Web Editor belong) - run the following commands from the command prompt:

- **setspn.exe** -a http/IIS_computer's_NetBIOS_name DomainName\UserName
- **setspn.exe** -a http/IIS_computer's_FQDN DomainName\UserName

Notes:

DomainName\UserName refers to the same user that runs the SmarTeam – Web Editor application pool and the user account provided during the SmarTeam – Web Editor installation process.

IIS_computer's_NetBIOS_name is the name of the computer running IIS with SmarTeam – Web Editor (e.g., WEBMACHINE).

IIS_computer's_FQDN is the fully qualified domain name of the same machine (e.g., WEBMACHINE.DOMAIN1)

- If you have several IIS machines with SmarTeam – Web Editor on your domain, repeat [Step 2](#) for each IIS machine
- For more information please refer to: <http://support.microsoft.com/?id=871179>

For CATIA Web Integration, Microsoft® Windows authentication mode perform:

- 1 The changes required in **web.config** for windows authentication are:
 - Remove comment indicator from the line `<!--<identity impersonate="true"/>-->`
 - Replace the word **Forms** with **Windows** in the line `<authentication mode="Forms">`
- 2 Enable anonymous access on IIS (InetMgr), (Web Editor, without CWI anonymous access is removed).
- 3 After launching CATIA, the first connect attempt may display an authentication page prompting you for a user name and password.
- 4 Close it and connect again.

Impersonate a Client After Authentication

An additional security setting for using Windows Authentication is presented below:

- 1 On the SmarTeam – Web Editor server, go to **Local Security Policy** located in Control Panel -> Administrative Tools.
- 2 Select **Local Policies, User Right Assignment**.
- 3 Double-click **Impersonate a client after authentication**.
- 4 Add the user that was entered during the SmarTeam – Web Editor installation (see step 2 in the installation process.)

Browser Settings for SmarTeam – Web Editor Client for Microsoft Windows Authentication

To define the browser settings for SmarTeam – Web Editor Client Microsoft Windows Authentication, perform the following procedures:

- 1 Select **Settings > Control Panel > Internet Options > Advanced** tab:
 - Verify that the **Enable Integrated Windows Authentication** checkbox is selected
- 2 Select the **Security** tab:
 - Select the relevant **Web content zone** (e.g. Local intranet, Trusted sites, etc.)
 - Select Custom level
 - User Authentication > Logon
 - For Local intranet, select **Automatic logon only in Intranet zone**
 - For Trusted sites, select **Automatic logon with current username and password**
 - For other selections, when attempting to access a SmarTeam – Web Editor URL you either receive a username/password prompt or an error message that you are not authorized to view that web page.

Selecting the Profile Groups

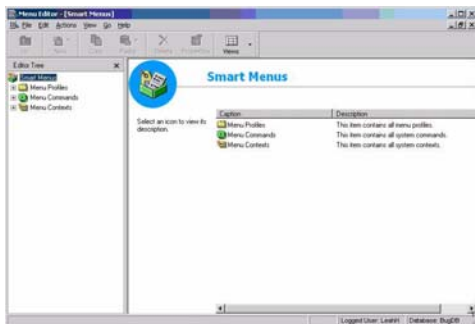
Before running SmarTeam – Web Editor, you must select the user profile groups that will be allowed to work in SmarTeam – Web Editor and add these groups to the System Profile.

Profile groups must be selected each time you create a new user group and assign users to the group. When a user is created in SmarTeam, it must be assigned to one of the groups selected as System Profile groups.

If you do not assign the user to a selected user group, user menus will not fully display in SmarTeam – Web Editor.

To select the profile groups, the Menu Editor is used.

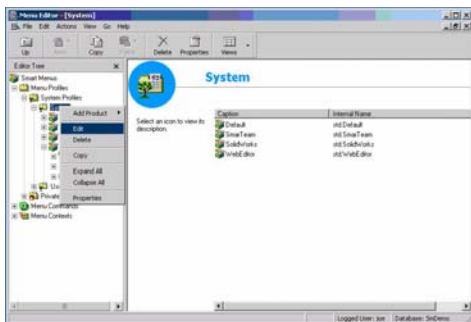
- 1 From the Start menu, select **All Programs / SmarTeam / Administrative Tools / Menu Editor**; the Menu Editor window appears:



- 2 In the Smart Menu window:
 - Select Menu Profiles / System Profiles / System
 - Then click the right mouse button

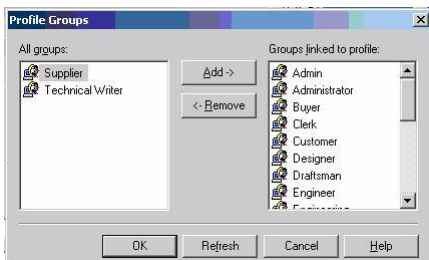
The System popup menu appears.

- 3 From the menu, click **Edit**. The System Properties window appears.
- 4 In the System window, click **Select**. The Profile Groups window appears.



5 In the Profile Groups window.

- Double click on the group in the All groups section to add them to the user profile
- Double click on the group(s) in the Groups linked to profile section to remove groups from the user profile
- When you have finished, click **OK**, save changes and exit the Menu Editor



6 To implement these changes, restart your web server as described in [Restarting the Web Server](#).

Viewer Configuration

A viewer is required if you want to view documents in SmarTeam – Web Editor.

Refer to the SmarTeam – Web Viewer Installation Guide for a detailed explanation of how to configure your viewer.

Oracle Client Security Configuration

After SmarTeam – Web Editor installation, change the permissions for the Oracle directory (e.g. c:\Oracle) 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. See [Restarting the Web Server](#) for details.

Update System Configuration Properties

SmarTeam – Web Editor can be installed on the same machine as the SmarTeam Services or on a separate machine. The system configuration is installed with the SmarTeam Services. Therefore, any changes which need to be made to the system configuration will be done on the machine on which the SmarTeam Services exist.

The System Configuration Editor runs on IIS. You can make changes to the System Configuration using the System Configuration Editor or manually updating the XML files in the System Configuration.

Reverse Proxy Configuration

If you use Reverse Proxy as part of your environment, you must make changes to the system configuration. This can be done in either of the following ways:

- [System Configuration Editor](#)
- [Manually Update XML Files](#)

System Configuration Editor

- 1 Open the System Configuration Editor.
- 2 Switch to Unfiltered view.
- 3 Expand the *smarteam.std.persistenceStorage.config* configuration set.
- 4 Select the Domain override level.
- 5 Select the *uploadurl* key (if the key does not exist create it using the **Add New Key** option; select Domain for Override Level).
- 6 Select the current value and edit it, according to the following:
`http://[PROXY_SERVER_NAME]/WebEditor/FileManager.aspx`
- 7 Expand the *smarteam.std.filestoragemanager.config.xml* configuration set.
- 8 Select the Domain override level.
- 9 Select the *downloadurl* key (if the key does not exist create it using the **Add New Key** option; select Domain for Override Level).
- 10 Select the current value on Domain Override Level and edit it, according to the following:
`http://[PROXY_SERVER_NAME]/WebEditor/FileManager.aspx`
- 11 Expand the *smarteam.std.filestoragemanager.config.xml* configuration set.
- 12 Select the Domain override level.
- 13 Select the *transportProvidersUrls* key (if the key does not exist create it using the **Add New Key** option; select Domain for Override Level).
- 14 Select the current value on Domain Override Level and edit it, according to the following:

- 15 Change /Temp/ value to `http://[PROXY_SERVER_NAME]/WebEditor/Temp/`.

Manually Update XML Files

Manual changes need to be made to the SmarTeam System Configuration if changes were not made by the System Configuration Editor.

Before making changes to the XML files, it is highly recommended to backup the [SmarTeam home directory]\ConfigurationSettings\Data directory.

To make the manual changes to the System Configuration:

- 1 On SmarTeam Services server navigate to <SmarTeam home directory>\Configuration Settings\Data\Domain.
- 2 In the file `smarteam.std.filestoragemanager.config.xml` enter your Proxy_server_name:

■ For IIS

```
<downloadUrl>http://
[PROXY_SERVER_NAME]/WebEditor/FileManager.aspx</downloadUrl>
<uploadUrl>http://
[PROXY_SERVER_NAME]/WebEditor/FileManager.aspx</uploadUrl>
<additionalParameters>
<parameter>
<name>temporaryDownloadVirtualPath</name>
<value>http://[PROXY_SERVER_NAME]/WebEditor/Temp/</value>
</parameter>
</additionalParameters>
```

- 3 Then create appropriate mappings on your Reverse Proxy server.

Example:

This example describes the configuration of an IBM Caching Proxy server. It shows you how to configure the `ibmproxy.conf` file on IBM Caching Proxy Server serving SmarTeam – Web Editor:

```
Proxy /WebEditor/* http://[WED Server Name]/WebEditor/*
Proxy /WebEditor/Authentication/* http://[WED Server
Name]/WebEditor/Authentication/*

Proxy /aspnet_client/* http://[WED Server Name]/aspnet_client/*
Proxy /SmarTeam/* http://[WED Server Name]/SmarTeam/*

Proxy /VueServlet/* http://[JVUE Server Name]/VueServlet/*
Proxy /jVue/* http://[JVUE Server Name]/jVue/*
```

Configuring IIS with JVUE on Ports other than 80

For ports other than 80, e.g., 8080 the usual configuration for Jvue is not suitable. You must work around this by performing the following steps.

To configure JVUE for other ports:

- 1 Verify that, C:\Program files\SmarTeam\Web\viewers directory is mapped as virtual directory "<default Web site>/Viewer".
- 2 Configure ISAPI.DLL so that it is possible to use `http://<viewer>:8080/JVueIISFilters/VueServletIsapi.dll` to add the keys:
 - JVUEAppletCodeBase - `http://[SMARTEAM - Web Viewer IP address]:8080/jvue`
 - JVUEServer - `http://<viewer ip address>:8080/JVueIISFilters/VueServletIsapi.dll`
 - JVUEURL - `Http://[Server ip address]:8080/Viewer`

- 3 Restart all SmarTeam services, including IIS.

Persistency Storage Configuration

The default Persistency Storage location is PLMDB and it is configured in the PLMDB Standalone installation, only.

If you are not using the PLMDB database you can configure the Persistency Storage sub-system to work on the same database as SmarTeam. Otherwise, you can configure a specific database by changing the `smarteam.std.persistencyStorage.config.xml` file.

This can be done in either of the following ways:

- [System Configuration Editor](#)
- [Manually Update XML Files](#)

System Configuration Editor

To enable the operation of the SmarTeam – Web Editor perform the following:

- 1 From All Programs, SmarTeam, Administrative Tools, open the System Configuration Editor.
- 2 Switch to Unfiltered view.
- 3 Expand the `smarteam.std.persistencyStorage.config` configuration set.
- 4 Select the Domain override level.
- 5 Select the `providerType` key.
- 6 Click on the current value and edit it, according to the following:
 - **For an SQL server database, enter the following value:**
`System.Data.SqlClient.SqlConnection, System.Data, Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089`
 - **For an Oracle server database, enter the following value:**
`System.Data.OracleClient.OracleConnection, System.Data.OracleClient, Version=1.0.5000.0, Culture=neutral, PublicKeyToken=b77a5c561934e089`
 - **For a DB2 server database, enter the following value:**
`IBM.Data.DB2.DB2Connection, IBM.Data.DB2, Version=8.1.2.1, Culture=neutral, PublicKeyToken=7c307b91aa13d208`
- 7 From the `smarteam.std.persistencyStorage.config` configuration set, select `connectionString` from the list of keys available.
- 8 Update the connection string to the relevant database.
 - **For SQL:** `Password=[DB password];Persist Security Info=True;User ID=[User ID];Initial Catalog=[DB Name];Data Source=[SQL Server Data Source]`
 - **For Oracle:** `Password=[DB password];Persist Security Info=False;User ID=[Oracle User Name];Data Source=[Oracle Data Source]`
 - **For DB2:** `Server=[ServerName];[Port];Database=[DatabaseName];UID=[User ID];PWD=[Password]`

Examples of connection strings for all supported databases:

- **SQL Server:** `Password=myPassword;Persist Security Info=True;User ID=testUser;Initial Catalog=MyDemoDB;Data Source=myComputer`

- **Oracle Server:** Password= myPassword;Persist Security Info=False;User ID=testUser;Data Source=myOracleServer
- **DB2 Server:** Server=ilaixdb:50002;Database=TestDB;UID=smarteam;PWD=myPassword

Manually Update XML Files

If you do not have System Configuration installed you can edit the `smarteam.std.persistencyStorage.config.xml` file manually.

If you are not working with the PLMDB database you must modify the `smarteam.std.persistencyStorage.config.xml` file as follows.

- 1 On SmarTeam Services server navigate to **<SmarTeam home directory>\Configuration Settings\Data\Domain**.
- 2 Edit the file. The changes made depend on whether you have Oracle, DB2 or MS SQL Server.

Configuration for Oracle

```
<providerType>System.Data.OracleClient.OracleConnection,
System.Data.OracleClient, Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089</providerType>

<connectionString>Password=[DB password];Persist Security Info=False;User
ID=[Oracle User Name];Data Source=[Oracle Data Source]</connectionString>
```

Replace each of the values in [...] with the correct ones.

Example:

```
<connectionString>Password=MyOraPass;Persist Security Info=False;User
ID=MyOraDB;Data Source=OracleSrv</connectionString>
```

Configuration for MS SQL Server:

```
<providerType>System.Data.SqlClient.SqlConnection, System.Data,
Version=1.0.5000.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089</providerType>
<connectionString>Password=[DB password];Persist Security Info=True; User
ID=[User ID];Initial Catalog=[DB Name];Data Source=[SQL Server Data
Source]</connectionString>
```

Replace each of the values in [...] with the correct ones.

Example:

```
<connectionString>Password=SmarTeam;Persist Security Info=True;User
ID=SmarTeam;Initial Catalog=PLMDB;Data
Source=.\SmarTeam</connectionString>
```

Configuration for Secure Socket Layer

If you have Secure Socket Layer (SSL) on your Web Server you need to manually configure settings for the following:

- [Life Cycle Operations](#)
- [Workflow Flowchart](#)

Life Cycle Operations

To manually configure the Web Server for Life cycle operations:

- 1 Modify the smarteam.std.filestoragemanager.config.xml file, which is located under SmarTeam\ConfigurationSettings\Data\Domain.
- 2 Insert the following lines between <transportProvidersUrls> and </transportProvidersUrls> tags:

■ For IIS

```
<transportProviderUrl>
<protocol>https</protocol>
<downloadUrl>https://[Web Editor Server
Name]/WebEditor/FileManager.aspx</downloadUrl>
<uploadUrl>https://[Web Editor Server Name]/WebEditor
/FileManager.aspx</uploadUrl>
<additionalParameters>
<parameter>
<name>temporaryDownloadVirtualPath</name>
<value>https://[Web Editor Server Name]/WebEditor /Temp/</value>
</parameter>
</additionalParameters>
</transportProviderUrl>
```

- 3 Replace [Web Editor Server Name] with your Web Editor Server name.
- 4 Verify that https appears instead of http.

Workflow Flowchart

To manually configure the Web Server for Workflow Flowcharts:

- 1 Run Windows Registry Editor by selecting Start, Run, enter **Regedit** and click **OK**.
- 2 In Registry Editor navigate to HKEY_LOCAL_MACHINE, SOFTWARE, SmarTeam, DownloadManager
- 3 Select "BaseUrl" and modify it by replacing **http** with **https** in the URL.

Example:

```
"BaseUrl"=https://172.16.100.11/SmarTeam/Download
```

ASP.NET Worker Process Recycling (IIS 6.0 only)

The default behavior of the "WebEditor" application pool is to recycle the ASP.NET worker process after 29 hours (1740 minutes). If this setting is not changed, SmarTeam - Web Editor will automatically recycle (restart) after this period of time. This behavior may not be suitable for some customers and it can be changed.

Worker process recycling options configuration may vary from customer to customer (depending on number of seats, web server workload, maintenance schedule and other factors).

For more information on application pools and how to configure the recycling options, refer to Internet Information Services 6.0 Help (Server Administration Guide, Configuring Servers for Applications, Worker Process Isolation Mode) or MSDN on-line library topics:

- [How to Configure Recycling](#)
- [Application Pools](#)

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

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\admscripts\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**

Additional Settings for SmarTeam – Web Editor Servers Running with More than 1GB

In order to allow safe usage of additional memory for the ASP.NET process, it is highly recommended to perform the steps described below. Performing these steps will greatly improve performance.

Note: These actions are only valid for servers that have more than 1GB of RAM.

- 1 Edit the boot.ini file located under C:\.
- 2 Add the flag /3GB to the end of the line that is used to boot the operating system.

Example: The following is a typical boot.ini file:

```
[boot loader]  
timeout=30  
default=multi(0)disk(0)rdisk(0)partition(1)\WINDOWS  
[operating systems]  
multi(0)disk(0)rdisk(0)partition(1)\WINDOWS="Windows Server 2000"  
/fastdetect  
After the change, the boot.ini file should look like this:  
[boot loader]  
timeout=30  
default=multi(0)disk(0)rdisk(0)partition(1)\WINDOWS  
[operating systems]  
multi(0)disk(0)rdisk(0)partition(1)\WINDOWS="Windows Server 2000"  
/fastdetect /3GB
```

- 3 Save the file and reboot.

Note: Steps 1 to 3 are relevant only for SmarTeam – Web Editor running on a Windows 2000 Advanced Server and for All Windows 2003 operating systems (3GB settings).

If the machine has more than 2GB of RAM, you must perform additional steps to update the memoryLimit value in the machine.config file not to exceed 1.2 GB. The value assigned to the memoryLimit attribute represents the percentage of physical memory that can be accessed by the process before it recycles. For example, on a computer with 4 GB of RAM, the value must be set to 30 to not exceed the 1.2 GB limit.

To change this value, perform the following steps:

- 1 Backup the <Windows Home Directory>\Microsoft.NET\Framework\v2.0.50727\config file.
- 2 Open the file **machine.config** in Notepad.
- 3 Search for the line "memoryLimit=60". This parameter is located in the ProcessModel section.
- 4 Change the value accordingly (see the explanation above).
- 5 Save the file and run iisreset.

Note: This memory limit is only relevant for the Windows 2000 Advanced Server.

Restarting the Web Server

SmarTeam – Web Editor runs on web servers with Microsoft® Internet Information System (IIS). The installed web server must be restarted independently after major modifications to the application's configuration.

Restarting SmarTeam – Web Editor on IIS

To restart the server:

- 1 From the taskbar **Start** button, select **Run**.
- 2 Type **IISReset** then click **OK**. This stops and then restarts the **Internet Information Service (IIS)**.

Browser Settings

This section is only relevant if you are using Microsoft® Internet Explorer as your browser.

To run SmarTeam - Web Editor your browser must have the original default security settings. If you have Windows 2003 or Windows XP as your web client it is also recommended to adjust your security settings for the Microsoft® Internet Explorer browser, otherwise security warning messages may be displayed on each page.

To adjust your security setting for Microsoft® Internet Explorer:

- 1 Reduce the browser security setting to **Medium** for the relevant Web content zone (Click Start > Settings > Control Panel > Internet Options > Security > select the relevant zone (e.g. Internet, Local intranet, etc.) > click Default Level).
- 2 Add the URL with the server name of the SmarTeam – Web Editor application to the Trusted Sites list (Click Settings > Control Panel > Internet Options > Security > Trusted Sites > Sites>).

Sun Java Runtime Environment (JRE) Installation

If you have an internet connection on Microsoft® Windows clients, Sun JRE installs automatically on your machine during the first Life Cycle operation (e.g. Check In, Check Out, Create document, etc.).

If you do not have an internet connection, you must install Sun JRE on your machine to enable the Life cycle operations (Check In, Check Out, etc) to work.

Automatic installation of Sun JRE may fail due to security settings of web browser, firewall/proxy settings, failure to connect to Sun Java downloads website or due to lack of administrative privileges of user logged in on web client machine. In these cases the system administrator should perform installation of Sun JRE on client machines.

On UNIX/LINUX clients, the system administrator should install Sun JRE manually.

Sun JRE can be downloaded from <http://java.sun.com> or <http://java.sun.com/products/archive>. The version of Sun JRE needed depends on the operating system installed on the SmarTeam – Web Editor client machine. The default Sun JRE is version 1.6.0. If you want to work with Secure Sockets Layer (SSL), you must work with update 4. Refer to SmarTeam Hardware Software Requirements Guide for details about supported versions.

To configure SmarTeam to use explicit JRE level:

- 1 In System Configuration Editor:
 - Type **jreExplicit** in the Search field
 - Select the configuration key, **jreExplicit**
 - Click **Add Value**
 - From the Override Level dropdown list, select **Domain**
 - In the Value field, type **true** (small letters only)
- 2 Click **Save Changes**.

Verifying Setup on the Server

After performing all the stages of the SmarTeam – Web Editor installation process on the designated server, you are now ready to verify successful SmarTeam – Web Editor installation by launching SmarTeam – Web Editor.

To launch SmarTeam – Web Editor, proceed as follows, depending on your available license:

- **SmarTeam – Editor (Web based) License:** Provides Read/Write access

From the Start button select **Programs, SmarTeam, SmarTeam – Web Editor, SmarTeam Web Editor** (with the Microsoft ® Internet Explorer (IE) icon).
The SmarTeam – Web Editor login screen is displayed.

- **SmarTeam – Navigator License:** Provides Read Only access

From the Start button select **Programs, SmarTeam, SmarTeam – Web Editor, SmarTeam – Navigator** (with the IE icon).
The SmarTeam – Navigator login screen is displayed.

To log in to SmarTeam – Web Editor for the first time:

- 1 Enter the **User Name** and **Password** of the SmarTeam System Administrator for the selected SmarTeam database. (This is the name of the administrator who used the SmarTeam Data Model Wizard to update/create the SmarTeam database)
- 2 Check “Log-in to last database and vault” to login to your last database and vault as specified in Database Connections Manager.
- 3 If you clear “Log-in to last database and vault”, the Select Database screen is shown after Login. This screen presents a list of available database connections. Select a database and click **Connect**.

Local Installation for Demo Purposes

If you are working on a local SmarTeam – Web Editor system that is not connected to the network you need to make changes to your registry.

To change the registry:

- 1** Run the Windows Registry Editor by selecting Start, Run, enter **Regedit** and clicking OK.
- 2** Change the following registry keys to the local IP address or machine name:
 - HKEY_LOCAL_MACHINE \ SOFTWARE \ SmarTeam \ SmarTeam - Web Editor \ InstallInfo \ JVUE_IP_ADDRESS
 - HKEY_LOCAL_MACHINE \ SOFTWARE \ SmarTeam \ Download manager \ BaseUrl

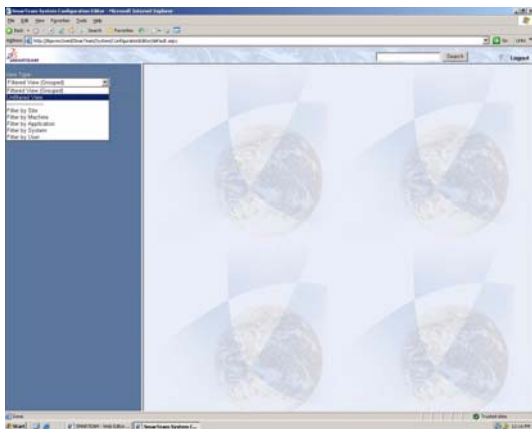
In addition, each time you switch off the network or connect the computer to the network, you need to perform the following:

- 1** Restart IIS - IISReset.
- 2** Restart both SmarTeam services: Configuration Service and Session Management Service.

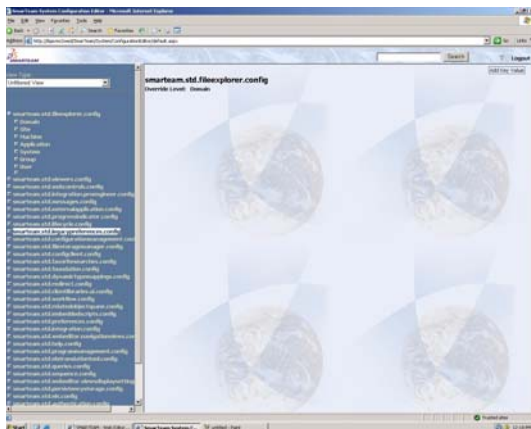
SmarTeam – Community Workspace with E-drawing

This configuration is used with Windows 2003. Use the following procedure to enable SmarTeam – Community Workspace to work with E-drawing:

- 1 From the SmarTeam – System Configuration Editor,
 - Enter **Name** and **Password**
- 2 From the View Type,
 - Click **Unfiltered View**



- 3 From the left pane,
 - Click **smarteam.std.legacypreferences.config, Domain**



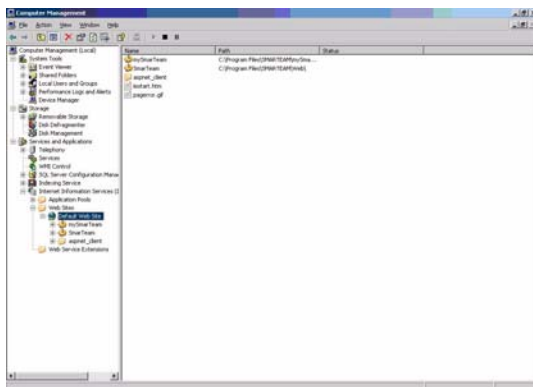
4 Click **Add value** (or edit)

- Key name : **mySmarTeam.EDRAWINGS_ENABLED** to **YES**

5 From the SmarTeam – Community Workspace machine,

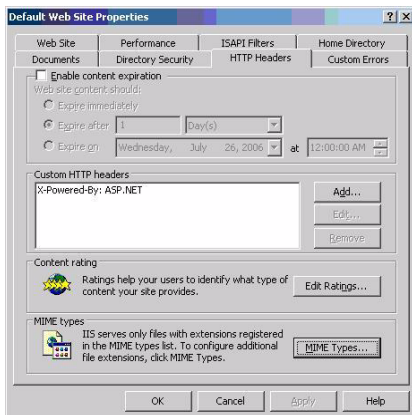
- Open **Computer Management**

- Select **Internet Information Service, Web Sites, Default Web Sites**



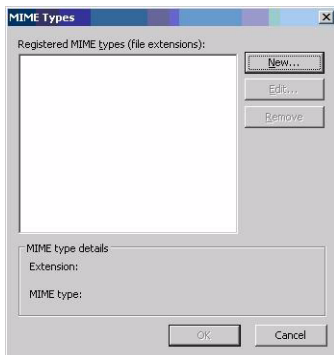
6 Right-click Default Web Sites,,

- Select **HTTP Headers** tab
- Click **MIME Types**

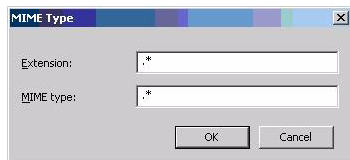


7 From the MIME Types window:

- Click **New**

**8** In the New MIME Type window:

- Enter the Extension and MIME type .*

**9** Click **OK** three times and then restart IIS service.

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's Next?

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

Troubleshooting

Installation Process Log File

Every installation process is written to the log file SmarTeam_Web_Editor.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 – Web Editor 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 Service Pack CD or the Add or Remove Programs facility on your computer.

To repair an error using the Release CD:

- 1 Insert the SmarTeam Service Pack 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 Select **SmarTeam – Web Editor Server**.
- 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 – Web Editor from your computer. This can be done by using either the Service Pack 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 Service Pack 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 Select **SmarTeam – Web Editor Server**.
- 3 Click **Remove**.

Known Issues

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

Frequently Asked Questions

Question: After installing SmarTeam – Web Editor, 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: \WINNT\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 does the System Configuration Editor not start?

Answer: Verify that the virtual directory “ConfigurationEditor” exists under Default Web Site, SmarTeam, System. If it does not exist you must create it. Also, verify that SmarTeam – Foundation and SmarTeam – Editor were installed on this machine.

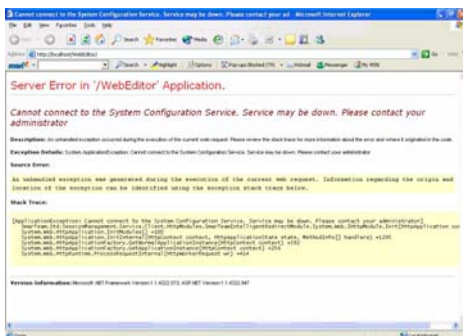
To verify that the virtual directory “ConfigurationEditor” exists:

- 1 Go to **Start \ Settings \ Control Panel \ Administrative Tools \ Computer Management**.
- 2 In Computer Management, navigate to **Services and Applications \ Internet Information Services \ Default Web Site \ SmarTeam \ ConfigurationEditor**.
- 3 Right-click and select **Properties**.
- 4 In the Directory tab, check if the Application Name field is enabled. If it is disabled, click **Create**. Click **OK** to close Properties window.

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: When trying to log in to SmarTeam – Web Editor, this window is displayed. What do I do?



Answer: Check that SmarTeam Services are running on the Foundation Server, as follows:

- 1 Select **Start, Settings, Control Panel, Administrative Tools, Services**.
- 2 Check that the following services are running:
 - SmarTeam Configuration Service
 - SmarTeam Session Management Service

Tips & 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 – Web Editor, as follows:

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

Windows 2003 Configuration

If the IIS user is a domain user, and the local administrator does not have authorization for the domain in order to add the user to the IIS_WPG group, an error message is generated during SmarTeam – Web Editor installation.



In 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:

- Domain Name = MYDOMAIN
- User Name = WEBUSR1
- Local Group = IIS_WPG

Enabling a IIS 64bit to work with an application running at 32bit

If you need to configure your 64bit IIS machine to run an application at 32 bit, see [Configuring IIS 64bit to Work with an Application running at 32bit](#), for details.

Silent Installation

This section shows how to use the Windows Installer to perform a silent installation of the SmarTeam – Web Editor.

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 – Web Editor automatically for a group of computers.

Command-Line Operation

This section describes how to formulate a command-line command, including how to specify command-line options and properties. It presents some common command-line installation scenarios.

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.

Installation Flags

The recommended flags for installation are:

A. /qb: Installation will present a progress bar during the silent installation process, which disappears once the installation is complete.

B. /L*v: Installation logging will be written to a log file in the location specified after this flag.

For example: Use this flag as follows: /L*v"%temp%\InstallIdentifier.log", the installation reproduces a log file named "InstallIdentifier.log" in the %temp% folder on the local machine.

An example with both flags:

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

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

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

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"**

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.

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' is not valid. Inserting quotation marks around an option's parameter are required only if the parameter contains spaces.

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.

GUI Dialog	Property	Value	Description
N/A	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. When use ADDLOCAL=ALL all features will be installed
SmarTeam - Web Viewer	JVUE_IP_ADDRESS	IP address of machine where SMARTEAM - Web Viewer is installed	Note: SMARTEAM - Web Viewer IP address.
SmarTeam Security - Recommended changes	CHANGE_SECURITY	Property value can be "YES" (default value) or "NO"	To maintain improved Web security, it is highly recommended to allow the installation to change security for the SmarTeam directory. This change will limit access to the SmarTeam directory for specific user group and reduce possible security intrusions. This change is especially advisable when the SmarTeam Web Editor is located outside a Firewall protection system.

GUI Dialog	Property	Value	Description
User Name and Password	USER_NAME	A full user name <Domain\Machine Name > <User Name >	Mandatory property Full user name of a user that has privileges for installing SmarTeam Web Editor.
	USER_PASSWORD	Password prepared in advance	The password of the user name provided in the USER_NAME property USER_PASSWORD is a mandatory property
	USER_CONFIRM_PASSWORD	Confirmed password	Confirmed user's password. USER_CONFIRM_PASSWORD is mandatory property.
Define a server name for the User Group	LOCAL_GLOBAL_GROUP	Property value can be "LOCAL" (default value) or "GLOBAL"	Mandatory property. Use LOCAL_GLOBAL_GROUP=LOCAL to create user group on the local machine Use LOCAL_GLOBAL_GROUP=GLOBAL to create the group on Domain Controller server (Domain Administrator privileges are needed to create a Global User group).
	GROUP_SERVER_NAME	The computer name where the SmarTeam Server Applications user group will be created.	The computer name where the SmarTeam Server Applications user group will be created. Should be specified only if LOCAL_GLOBAL_GROUP=GLOBAL

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 - Web Editor Server	ALL Notes: use ADDLOCAL=ALL to install all features

Silent Installation Examples (to Cut and Paste)

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

Install full SmarTeam Web Editor silent installation with log file

```
"<path to SMARTTEAM - Web Editor setup.exe>" /s /v"/qb /L*v"
%temp%\STWebEditorSilentInstall.log" ALLUSERS=1 ADDLOCAL=ALL
USER_NAME=itldm122\Administrator USER_PASSWORD=123456
USER_CONFIRM_PASSWORD=123456 JVUE_IP_ADDRESS=127.0.0.1"
```

Run full silent SmarTeam Web Editor installation using msisec.exe utility and with log file

```
msiexec /I "<path to SmarTeam - Web Editor Server.msi >" /qb /L*v "%temp%\
STWebEditorSilentInstall.log" ALLUSERS=1 ADDLOCAL=ALL
USER_NAME=itldm122\Administrator USER_PASSWORD=123456
USER_CONFIRM_PASSWORD=123456 JVUE_IP_ADDRESS=127.0.0.1
```

SmarTeam – Web Editor Silent Installation V5R20 without Reboot

Prerequisites

Before performing the Silent Installation, install the following products on your machine.

Note: If any prerequisite prompts you to restart, perform it.

- MSI 3.1 - run WindowsInstaller-KB893803-v2-x86.exe from DVD "Data\MSI 3.1" folder
- DotNet 3.5 from DVD "Data\dotNET Framework installations\DotNet 3.5" folder
 - On 32 BIT machine - run dotnetfx3.exe
 - On 64 BIT machine - run dotnetfx3_x64.exe
 - After installing dot net 3.5 on not English OS please run language pack installation
 - For French OS - run dotnetfx3langpackfr.exe from DVD "Data\dotNET Framework installations\DotNet 3.5\Fr" folder
 - For German OS - dotnetfx3langpackde.exe from DVD "Data\dotNET Framework installations\DotNet 3.5\De" folder
 - For Japanese - dotnetfx3langpackjp.exe DVD "Data\dotNET Framework installations\DotNet 3.5\Jp"
- SQLExpress 2005 (for PLMDB installation only) - run SQLEXPRESS.EXE from DVD "Data\SQLExpress" folder.
- J# Redistributable (for SmarTeam DS Viewer Server only) - run vjredist.exe from CD "SmarTeam DS Viewer Server\Data\J#\En" folder.
 - After J# installation on not English OS please run language pack installation:
 - For French OS - run vjredist-LP.exe CD "SmarTeam DS Viewer Server\Data\J#\Fr"
 - For German OS - run vjredist-LP.exe CD "SmarTeam DS Viewer Server\Data\J#\De"
 - For Japanese - run vjredist-LP.exe CD "SmarTeam DS Viewer Server\Data\J#\Ja"

Notes:

- Verify that all prerequisites were installed on your machine.
- For all ENOVIA SmarTeam products other than SmarTeam – Editor, run msi file - **<Product Name>.msi** as described in the installation guides for each product. To suppress reboot, add **REBOOT=ReallySuppress** property when running msi in the silent mode. The

property REBOOT=ReallySuppress is not valid for SmarTeam – Web Viewer installation, because it is not a msi project.

Example:

Run the full SmarTeam – Foundation Silent installation using **msiexec.exe** utility and suppress reboot after installation:

```
msiexec /I "<path to SMARTEAM - Foundation.msi >" /qb /L*v c:\FDN.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
ALLUSERS=1 USER_NAME=<full username> USER_PASSWORD=<password>
REBOOT=ReallySuppress INSTALLDIR="c:\program files\SmarTeam"
```

Silent Installation Mechanism for Service Packs

To perform a Silent Installation for a V5R20 service pack, run the installation command from the command line. Note the following parameters:

Sample: "<Root CD>\Setup\setup.exe" V5R20_INSTALL SilentMode {"<path to the silent installation ini file>\Silent.ini"}

Note: When installing a SmarTeam V5R20 service pack in silent mode, there must be full network trust between the machine on which the service pack installation is running and the machine in which the Microsoft Installer Package (MSI) of the SmarTeam V5R20 Release (GA) version is located.

Structure of Silent.ini file

[SmarTeam - Web Editor]

ServUserName =username provided during the installation of SmarTeam - Web Editor

ServUserPassword = password provided during the installation of SmarTeam - Web Editor

[SmarTeam Full Text Search Server]

ServUserName = username provided during the installation of SmarTeam - Foundation

ServUserPassword =password provided during the installation of SmarTeam - Foundation

[SmarTeam - Community Workspace]

ServUserName = username provided during the installation of SmarTeam - Community Workspace

ServUserPassword =password provided during the installation of SmarTeam - Community Workspace

These sections are relevant only if the product in the following list is installed locally.

- [SMARTEAM - Web Editor]
- [SmarTeam Full Text Search Server]
- [SMARTEAM - Community Workspace]

For example: Fill in the information for the SmarTeam - Web Editor section only if SmarTeam - Web Editor is installed locally on your computer. If SmarTeam - Web Editor is not installed locally, that section can be omitted.

Silent Installation of Viewers

From SmarTeam V5R19 SP2, the following viewers can be installed automatically:

eDrawings 2008 Viewer

Note: eDrawings 2008 will be installed in addition to the existing eDrawings 2007 installed for V5R19 GA.

To enable the silent installation of these viewers, add the following new key to the [SMARTEAM - Editor] section of the Silent.ini file:

InstalleDrawings2008=YES

Appendix A: System Management Server Installation Guidelines for SmarTeam – Editor

Microsoft Systems Management Server (SMS) is a systems management software product that manages large groups of Windows-based computer systems. SMS provides remote control, patch management, software distribution, and hardware and software inventory.

This chapter describes the guidelines to use Microsoft SMS for distribution and installation of SmarTeam-Editor software to computers in the organization.

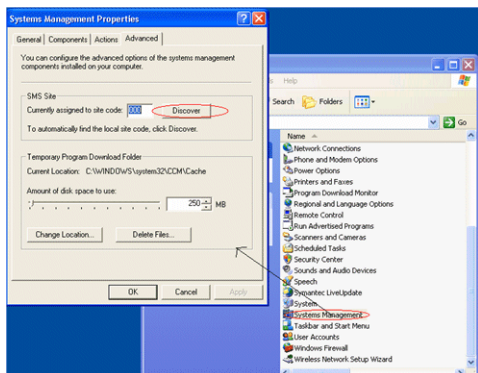
Microsoft Systems Management Server (SMS) is a systems management software product that manages large groups of Windows-based computer systems. SMS provides remote control, patch management, software distribution, and hardware and software inventory.

This chapter describes the guidelines to use Microsoft SMS for distribution and installation of SmarTeam-Editor software to computers in the organization.

Checklist

*Requirement: M = Mandatory, O = Optional

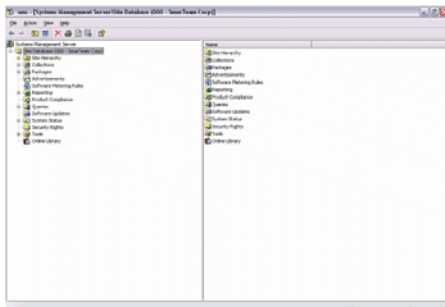
<input type="checkbox"/>	Item	M/O*	Reference
Stage 1: Pre-Installation			
<input type="checkbox"/>	Verify that SMS Client is installed on each client machine and registered on the SMS Server	M	
<input type="checkbox"/>	Open Control Panel > Systems Management > Advanced tab > Discover in the SMS Site pane	M	
<input type="checkbox"/>	Verify that the site code value appears in the site code field of the System Management > Advanced tab.	M	
<input type="checkbox"/>	To create a SMS Package, verify that you have full access to the SMS Administrator Console	M/O	Obtain access by logging in to an ILMOM01 server



Preparing the SMS Installation Package

Preparing the SMS Installation Package consists of the following steps:

- Prepare SMS Installation Image
- Update SMS Admin Console sections:
 - Collection
 - Packages
 - Advertisements



Preparing SMS Installation Image

To prepare a SMS Installation image:

- 1 Prepare the installation image from which the SMS package will be created.

Note: The installation image contains the installation (CD) that the SMS Server prepares for the package. In cases where it prepares SmarTeam - Editor, the installation image consists of CD1 + the Silent installation script file.

- ## 2 Prepare the Silent installation script file:

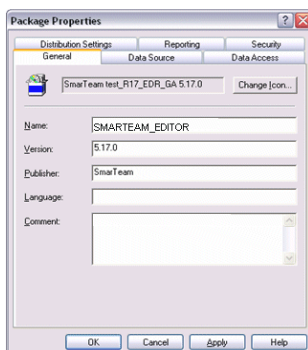
- Save script file in the CD1, Directory Setup
- Verify that all parameters were configured to the target machine(s)

Preparing the Package

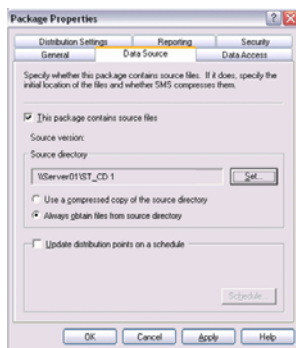
The SMS package defines the installation, its behavior, and the command line of the setup.

To create a new package:

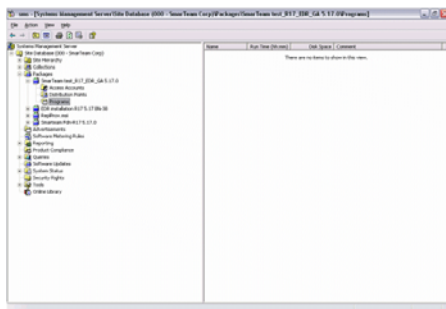
- 1 In the SMS tree, right-click **Packages > New > Package > General** tab.
 - Enter a value in the fields:
 - Name
 - Version
 - Publisher
 - Comments, if relevant
 - Click **Data Source** tab



- 2 In the Data Source tab, click **OK** to save the settings and open the SMS database window.

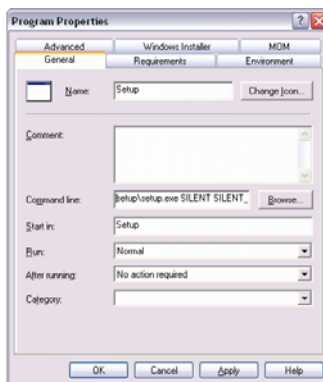


- 3 In the SMS database window, expand the node of the new package and select **Programs > RMB > New > Program Properties**.



4 In the Program Properties dialog:

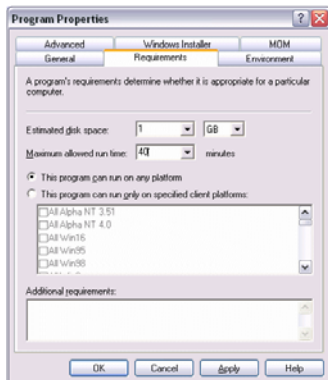
- The path setup\setup.exe SILENT SILENT_FILE = SilentFileTest.txt appears in the General tab, command line field.
- Click **Requirements** tab.



5 In the **Requirements** tab:

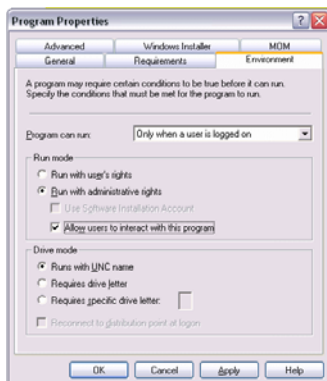
- Select 1 GB from the drop-down list in the estimated Disk Space field.
- Select 40 minutes from the drop-down list in the Maximum allowed run time field

- Click **Environment** tab.



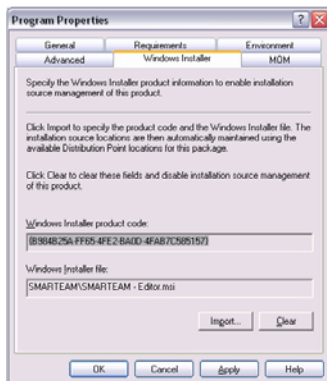
Note: We recommend that you use this option to run the program only when a user (local administrator) is logged on

- 6 In the Environment tab, Program can run area, select **Only when a user is logged on** from the drop-down list.



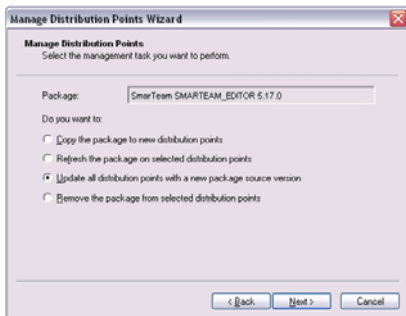
7 In the Windows Installer tab:

- Click **Import** to select the SmarTeam - Editor.msi file (located in the SmarTeam sub-directory of the CD image)
- The Windows Installer Product Code appears automatically with the correct value



8 In the SMS database window:

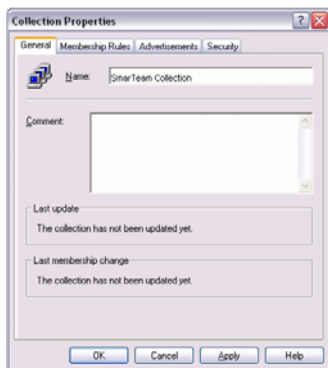
- Expand the new Package, right-click **Distribution Point > New > Distribution Points**
- In the new dialog, select the **ILMOM01** server, and click **Finish**
- Right-click **Distribution Point > All Tasks > Manage Distribution Points**



9 Click **Next** and then click **Finish**.

10 In the SMS tree, right-click **Collections > New > Collection Properties > General** tab:

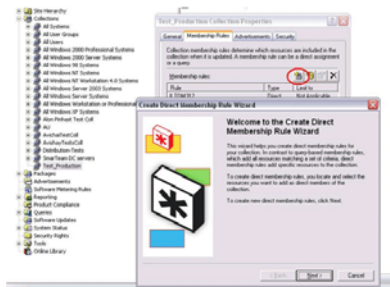
- In the General tab, Name field create unique name for the new collection
- Click **Membership Rules** tab



11 In the Membership Rules tab:



The Create Direct Membership Rule Wizard opens



Example: Common Settings for Membership Rule for a Collection

12 In the Search for Resources dialog:

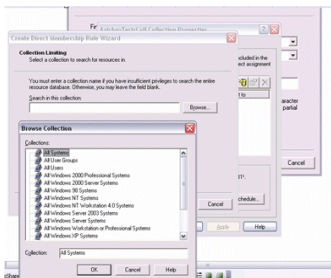
- In the Resource Class field, select **System Resource** (for this example) from the drop-down list

- In the Attribute Name field, select an appropriate attribute type (**Netbios Name** for this example)
- In the Value field, enter an appropriate value (**SmarTeam Machine** for this example)
- Click **Next**

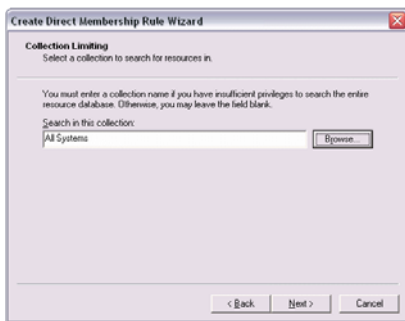


13 In the Collection Limiting dialog:

- Click **Browse**
- In the Browse Collection dialog, select **All Systems** from the Collections tree (for this example)



- Click **OK**
- Click **Next**



14 In the Select Resources dialog

- Select an appropriate Resource (**SmarTeam Machine** for this example)
- Click **Next**.

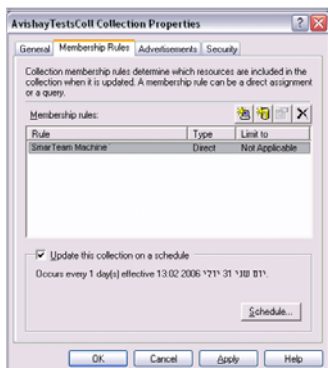


15 Click **Finish** to create the new rules and close the wizard.



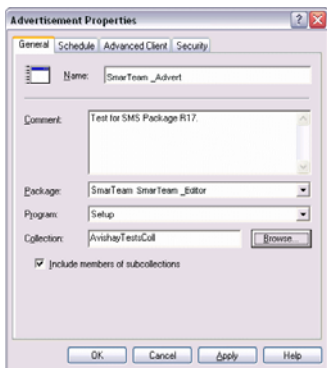
16 In the Membership Rules dialog:

- Select **SmarTeam Machine** (for this example)
- Click **OK**



- 17 In the SMS tree, right-click **Advertisements > New > Advertisement Properties > General** tab:

- In the General tab, Name field create unique name for the new advertisement
- Add Comment, if relevant
- Select a package from the Package drop-down list
- Select a program from the Program drop-down list
- Enter/Browse for the Collection name
- Select **Include members of subcollections** check box, if required
- Click **Schedule** tab



- 18 In the Schedule tab:

- In the Advertisement start time field:
 - Select relevant date from the combo box drop-down list
 - Select relevant time from the spin box
- Select a value in the Mandatory Assignments pane
- Select the **Assignments are not mandatory over slow links** check box
- In the Priority field, select **Medium** from the combo box drop-down list

