Inmagic® *Content Server* Workgroup Version 11.00

Installation Notes for

New and Upgrade Installations

Thank you for purchasing Inmagic® *Content Server*. This document is intended for the following installations:

- New *Content Server* installations
- *Content Server* upgrades

Content Server is an enterprise-wide scalable content management system that enables you to display, add, modify, and delete information using your desktop and/or a Web browser. *Content Server* Workgroup is the configuration for a site with Microsoft SQL Server 2005 Express Edition (referred to as SQL Server Express throughout the rest of this document) or Microsoft SQL Server Database Engine (MSDE).

Content Server includes the following components:

- **CS/TextWorks.** This is the Windows desktop component.
- **CS/*WebPublisher PRO*.** If you purchased this component, it enables you to publish your textbases on the Web. Anyone with a Web browser can point to an HTML screen and submit a query. The results are returned dynamically, in forms that your organization can design. Your organization can also design an interface so users can add, edit, and delete records in a textbase via the Web.
- **CS/*Importer*.** This component, installed with CS/TextWorks, is a service that enables you to load records into one or more textbases, while automatically and continually processing imports in the background. You can import records in Inmagic tagged, delimited ASCII, and XML formats. You can also import documents (for example, Microsoft Word documents).

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System Requirements

The minimum system requirements are:

- Microsoft Internet Information Services (IIS), Microsoft's Web server, is required to support CS/*WebPublisher PRO.*
- Although CS/*WebPublisher PRO* supports both ISAPI and CGI, Inmagic recommends ISAPI for better performance.
- Microsoft XML Core Services 4.0 SP2 will be automatically installed during setup, if not already installed.
- MDAC version 2.7 SP1 or greater is required. It will be automatically installed during setup, if not already installed.
- The .NET Framework v2.0 is required for SQL Server Express and CS/*WebPublisher PRO.*

  If you are not sure if you have the .NET Framework v2.0, it would be located in the c:\WINDOWS\Microsoft.NET\Framework directory.

- Internet Explorer version 6 or greater is required.

Database Server

Content Server Workgroup may be used with either SQL Server Express or MSDE. SQL Server Express is recommended. Download and install the most recent version of SQL Server Express from the Microsoft download site.

Processor	PC with a 600 MHz Pentium III-compatible or faster processor. 1.0 GHz processor or faster is recommended.
Memory	512MB or more is recommended
Hard Drive	• SQL Server Express recommends 350MB hard-disk space. • MSDE requires 44 MB Additional disk space is required for the textbases. The size depends on the projected size and anticipated amount of data.

Operating System	• One of the following:
	
	  o Windows Server 2003 with SP1 or later
	
	  o Windows 2000 Server with SP4 or later
	
	  o Windows 2000 Professional with SP4
	
	  o Windows XP PRO with Service Pack 2 or later

Software	• Database
	
	  o Microsoft SQL Server 2005 Express Edition OR
	
	  o Microsoft SQL Server 2000 Desktop Engine (MSDE) with Service Pack 4
	
	• Microsoft Internet Explorer 6.0 SP1 or later (prerequisite for installing the .NET Framework and SQL Server Express)
	
	• Microsoft .NET Framework v2.0 (prerequisite for installing SQL Server Express)
	
	• Microsoft Window Installer 3.1 must already be installed (prerequisite for .NET Framework and SQL Server Express)

Drive	CD-ROM drive

Web Server

The Web server is where CS/*WebPublisher PRO* is installed.

If you will be installing CS/*WebPublisher PRO* outside of your firewall, refer to Inmagic Knowledgebase Article 2454 (http://support.inmagic.com/supbase3.htm) for installation instructions.

Processor	Pentium or compatible, 540 MHz
Memory	At least 512MB recommended
Hard Drive	500MB available disk space minimum, 1GB recommended

Operating System	• One of the following:
	
	   o Windows Server 2003, Standard Edition
	
	   o Windows 2003 Enterprise Edition
	
	   o Windows 2000 Professional with Service Pack 4
	
	   o Windows 2000 Server with Service Pack 4

Software	• CS/*WebPublisher PRO* software
	
	• Microsoft Internet Information Services (IIS)
	
	   o Microsoft Internet Information Services (IIS) version 5.0 (Win2000)
	
	   o Microsoft Internet Information Services (IIS) version 6.0 (Win2003)
	
	• Microsoft Internet Explorer version 6.0 or greater
	
	• Microsoft .NET Framework v2.0 (prerequisite for installing CS/*WebPublisher PRO*). CS/*WebPublisher PRO* will not install without .NET Framework v2.0.
	
	• Web Communication Protocol: TCP/IP must be installed and running.
	
	• ISAPI or CGI: Both are supported, but ISAPI is recommended for better performance.

File Server

A file server is needed for CS/TextWorks textbase files. Note that CS/TextWorks can reside on the database or Web server, if desired.

Processor	Pentium or compatible, 400 MHz minimum
Memory	256MB or higher
Hard Drive	50MB

Operating System	• One of the following:
	   o Windows Server 2003, Standard Edition
	   o Windows 2003 Enterprise Edition
	   o Windows 2000 Professional with Service Pack 4
	   o Windows XP PRO with Service Pack 2

Software	CS/TextWorks software
File System	NTFS instead of FAT32 is recommended for storing and retrieving files on a hard disk.

Windows Client Machine

The minimal Windows client operating requirements for the CS/TextWorks client are:

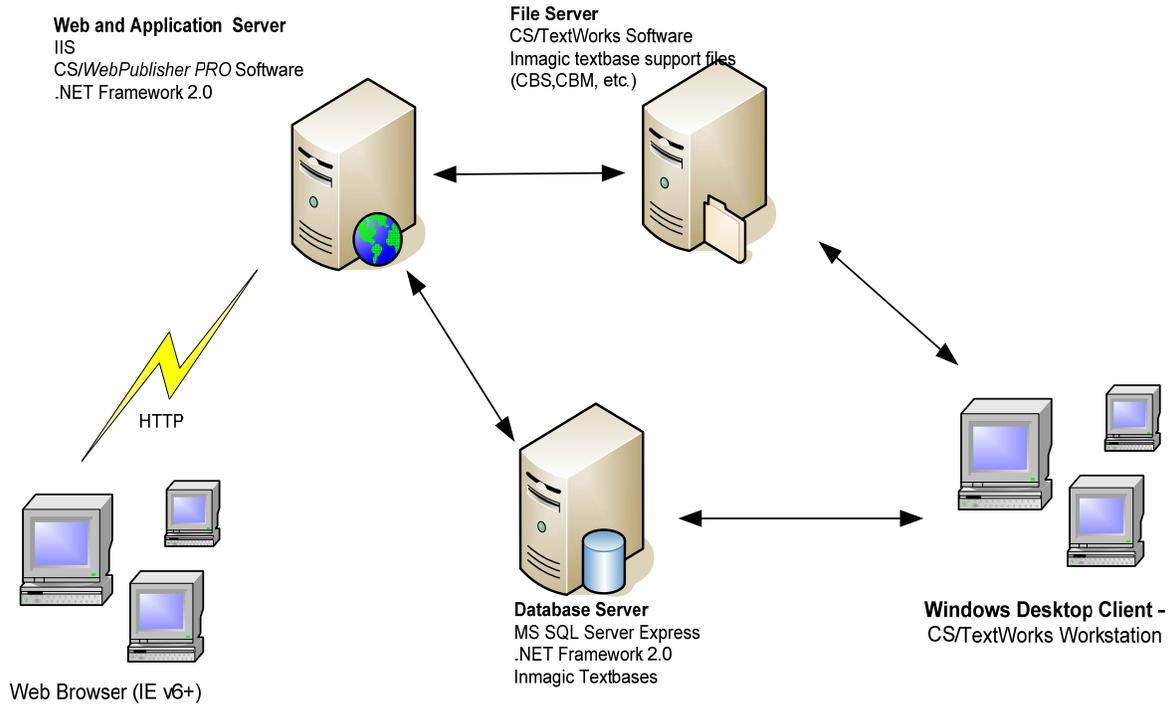| Processor	Pentium or compatible, 400 MHz minimum
Memory	256MB or higher
Hard Drive	50MB

Operating System	• One of the following:
	   o Windows Server 2003, Standard Edition
	   o Windows 2003 Enterprise Edition
	   o Windows 2000 Professional with Service Pack 4
	   o Windows XP PRO with Service Pack 2

Software	Microsoft Internet Explorer version 6.0 or greater must be installed before running Workstation Setup.

Sample System Configurations

Web and Application Server
IIS
CS/*WebPublisher PRO* Software
.NET Framework 2.0

File Server
CS/TextWorks Software
Inmagic textbase support files
(CBS,CBM, etc.)

HTTP

Web Browser (IE v6+)

Database Server
MS SQL Server Express
.NET Framework 2.0
Inmagic Textbases

Windows Desktop Client –
CS/TextWorks Workstation

Figure 1: Sample System Configuration, Intranet

Web, File Server and Database Server
IIS
CS/TextWorks Software
CS/*WebPublisher PRO* Software
.NET Framework 2.0
Inmagic textbases and support files
(CBS, CBM, etc.)
MS SQL Server Express or MSDE

Server

HTTP

Web Browser (IE v6+)

Windows Desktop Client -
CS/TextWorks Workstation
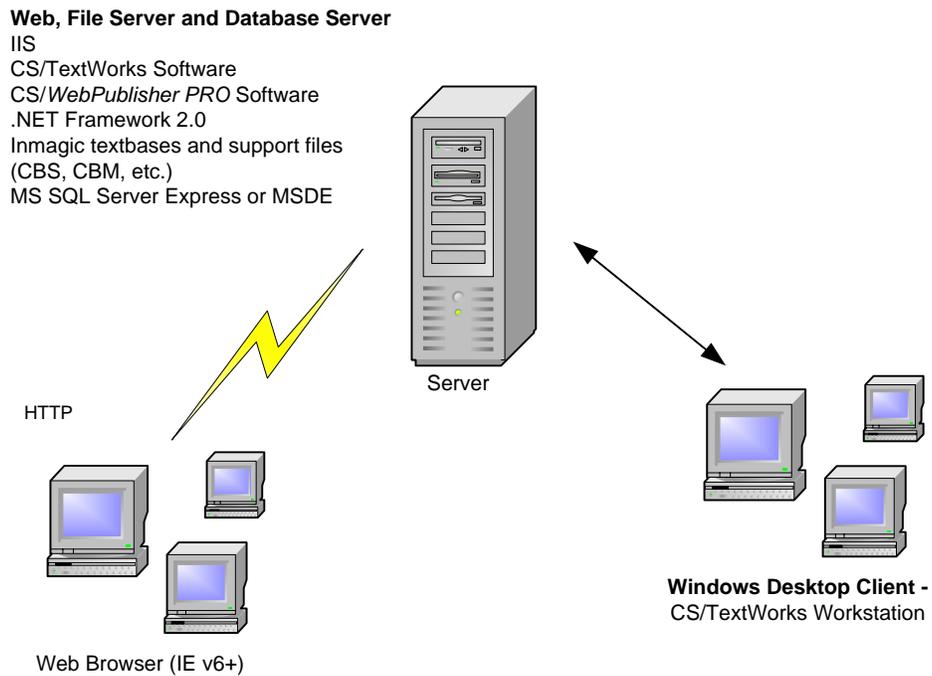
Figure 2: Sample System Configuration, Single box

Inmagic Content Server Workgroup Version 11.00 Installation Notes for New and Upgrade Installations

About Installing *Content Server*

Your license agreement permits you to install each purchased copy of *Content Server* in one location, such as your local hard drive, a network workstation, or a network server (to allow access by multiple users). The desktop and Web components may reside on different machines, as long as each component only resides in a single location.

These installation notes are for both new installations and upgrades.

New Installations

Before You Begin

- *Inmagic Content Server Administrator's Guide.* We recommend you review this guide before you install *Content Server*, or at least have it available to you. You will find it useful, especially with regard to using the Content Server Administration program. This PDF file is installed with the *Content Server* software and is also available from the Inmagic Customer Extranet at http://support.inmagic.com/downloads/extranet.html.

- **Remote access software.** Do not use remote access software to install this product. The Windows Installer service may encounter problems when interacting with remote access software (especially Terminal Services), which can result in various errors and the inability to install the product. Install the product on your machine directly instead.

- **Antivirus software.** If you have Norton AntiVirus software active on the machine on which you plan to install *Content Server*, you may receive an error message about a malicious script. This is due to scripts running in Microsoft Windows Installer and the Norton AntiVirus script-blocking feature. You should choose to continue with the installation.

- **.NET Framework v2.0**. The Microsoft .NET Framework v2.0 must be installed on the server before CS/*WebPublisher PRO* can be installed. If you are not sure if you have the .NET Framework v2.0, it would be located in the c:\WINDOWS\Microsoft.NET\Framework directory.

- **Troubleshooting assistance.** Refer to the README file (located on the CD and in the Documentation subfolder of the main installation folder) or the Inmagic Knowledgebase for troubleshooting assistance (http://support.inmagic.com/supbase3.htm).

- *Content Server* **serial number.** Have your serial number available. You will be asked for it during installation.

- **Converting from DB/TextWorks to *Content Server*.** If you are moving from Inmagic® DB/TextWorks® to *Content Server*, we recommend you read *Converting to the Inmagic Content Server Platform*. This PDF document details how to use the automated tools provided with *Content Server* to convert your textbases, menu screens, and (if you have Inmagic DB/Text® *WebPublisher PRO*) Web screens, forms, and other Web-related files to the *Content Server* platform. This document is installed with the *Content Server* software and is also available from the Inmagic Customer Extranet at http://support.inmagic.com/downloads/extranet.html.

- **Log in with Administrator access.** You will need to log in as Local Administrator or a domain user with local administrator privileges before you start the installation process. If you are not logged in as an Administrator, Setup detects it and a dialog box opens so that you can switch accounts (to an Administrator). If you try to proceed with the installation without being logged in as Administrator or having Administrator privileges on the local machine, an error message appears and the installation does not continue.

  Important! Do not log in as the Domain Administrator. This administrator access has "super privileges." Therefore, if there are permission-related problems during the installation process, they will not be apparent, and you will not see them. Log in as the Local Administrator or a domain user with local administrator privileges.

- **Virtual Directories.** CS/*WebPublisher PRO* requires two virtual directories: ics-wpd and InmagicBrowse. During the installation, both ics-wpd and InmagicBrowse are created and configured on the Web site you select. Refer to Inmagic Knowledgebase article 2846 to change these virtual directories.

- **Exit all Windows applications.** Exit all Windows applications, including the Microsoft Office taskbar and/or the Microsoft Find Fast program (visible only in the Task Manager/Startup group), before installing CS/TextWorks or running Setup Workstation.

Checklist for a New Installation

☐ Review System Requirements

☐ Install SQL Server Express

☐ Install CS/TextWorks
   Note: During the installation of CS/TextWorks, the Inmagic CS/*Importer* is installed by default.

☐ Install sample CS/TextWorks textbases (optional)

☐ Run Setup Workstation from each machine that will be using CS/TextWorks

☐ Install CS/*WebPublisher PRO*
   - o   CS/*WebPublisher PRO* software installation
   - o   Setting Windows permissions on folder and files, as required.

☐ Install sample CS/*WebPublisher PRO* textbases (optional)

Notes about Installing SQL Express

To install SQL Express, use these steps.

1.   Download the most recent version of SQL Server Express from the Microsoft download site.

2.   Install Microsoft .NET 2.0 if you have not already done so.

3.   Install SQL Express using the default options with this exception:

     On the Authentication Mode dialog box, choose **Mixed Mode**. (The default is Windows Authentication Mode.)

4.   Run the SQL Server Surface Area Configuration tool to enable the SQL Server Browser tool used to support browsing for SQL Instance names.

     - Click **Start>All Programs>Microsoft SQL Server 2005>Configuration Tools>SQL Server Surface Area Configuration**.

     - Click **Surface Area Configuration for Services and Connections**.

     - Highlight **SQL Server Browser** in the left panel. From the **Startup type** drop-down list on the right, select **Automatic**. Click OK to save your change, then close Surface Area Configuration.

5.   Run the SQL Server Configuration Manager to set the necessary protocol (TCP/IP) and support remote connectivity from another server.

     - Click **Start>All Programs>Microsoft SQL Server 2005>Configuration Tools>SQL Server Configuration Manager**.

     - Expand **SQL Server 2005 Network Configuration** and highlight **Protocols for SQLEXPRESS**. Right click on **TCP/IP** and choose **Enable** from the menu.

     - Click **SQL Server 2005 Services** on the same screen.

     - Right click on **SQL Server Browser** and if the State column indicates Stopped, click **Start**.

     - Right click on **SQL Server (SQLEXPRESS)** and click **Restart**.

     - Close the SQL Server Configuration Manager.

Upgrading an Existing Installation

Before You Begin

- **Inmagic Content Server Administrator's Guide.** We recommend you review this guide before you install *Content Server*, or at least have it available to you. You will find it useful, especially with regard to using the Content Server Administration program. This PDF file is installed with the *Content Server* software and is also available from the Inmagic Customer Extranet at http://support.inmagic.com/downloads/extranet.html.

- **Remote access software.** Do not use remote access software to install this product. The Windows Installer service may encounter problems when interacting with remote access software (especially Terminal Services), which can result in various errors and the inability to install the product. Install the product on your machine directly instead.

- **Antivirus software.** If you have Norton AntiVirus software active on the machine on which you plan to install *Content Server*, you may receive an error message about a malicious script. This is due to scripts running in Microsoft Windows Installer and the Norton AntiVirus script-blocking feature. You should choose to continue with the installation.

- **Troubleshooting assistance.** Refer to the README file (located on the CD and in the Documentation subfolder of the main installation folder) or the Inmagic Knowledgebase for troubleshooting assistance (http://support.inmagic.com/supbase3.htm).

- **Back up your existing textbases.** If you are currently using *Content Server* v1.2 or earlier, once you install the new version and update your existing textbases, you will no longer be able to access them with an earlier version of the product.

- **Ensure that all users have exited the software.** Be sure all users have exited the software before you begin. Be sure to stop CS/*Importer* if it is running

- *Content Server* **serial number.** Have your serial number available. You will be asked for it during installation.

- **Log in with Administrator access.** You will need to log in as Local Administrator or a domain user with local administrator privileges before you start the installation process. If you are not logged in as an Administrator, Setup detects it and a dialog box opens so that you can switch accounts (to an Administrator). If you try to proceed with the installation without being logged in as Administrator or having Administrator privileges on the local machine, an error message appears, and the installation does not continue.

  Important! Do not log in as the Domain Administrator. This administrator access has "super privileges." Therefore, if there are permission-related problems during the installation process, they will not be apparent and you will not see them. Log in as the Local Administrator or a domain user with local administrator privileges.

- **Virtual Directories.** CS/*WebPublisher PRO* requires two virtual directories: ics-wpd and InmagicBrowse. During the installation, InmagicBrowse will be created and configured on the Web site you select. Existing ics-wpd and InmagicBrowse virtual directories will not be modified by the installer.

- **INMCSRV.INI settings**. During the upgrade, the install utility reads the existing INMCSRV.INI settings. Any defaults specified before the install will be retained.

- **Exit all Windows applications.** Exit all Windows applications, including the Microsoft Office taskbar and/or the Microsoft Find Fast program (visible only in the Task Manager/Startup group), before installing CS/TextWorks or running Setup Workstation.

Checklist for Upgrading an Existing Installation

☐ Review System Requirements

☐ Upgrade CS/TextWorks

☐ Install sample CS/TextWorks textbases (optional)

☐ Run Setup Workstation from each machine that will be using CS/TextWorks

☐ Upgrade CS/WebPublisher
   o Upgrade CS/*WebPublisher PRO* software installation
   o Setting Windows permissions on folder and files, as required

☐ Install sample CS/*WebPublisher PRO* textbases (optional)

Installing Inmagic CS/TextWorks

Both new and upgrade installations should follow these installation instructions for CS/TextWorks Workgroup.

Installing the Inmagic CS/TextWorks Software

Depending on your situation, do the following:

Installing from a CD-ROM

If you are installing from the Inmagic *Content Server* Workgroup CD-ROM, insert it in the drive on the machine where you want to install CS/TextWorks. Setup should automatically start. If it does not, open Windows Explorer and from the installation CD-ROM, double-click **Setup.EXE**.

Installing from an electronic download

If you are installing from an electronic download, after you download the *Content Server* Workgroup ZIP file, unzip it to a temporary folder on the machine where you have a previous version of CS/TextWorks installed. Then, from within that folder, double-click **Setup.EXE** to launch the program to install CS/TextWorks.

Note that for either type of installation, the Setup program will not proceed if:

o   Microsoft Internet Explorer 6.0 or later is not already installed. You must have Internet Explorer 6.0 or later installed before you run the *Content Server* Setup program.

1.   **Welcome**. We recommend that you print the *Content Server* install notes PDF document. Adobe Reader is required. Click **View Install Notes**. When finished, click **Next** to continue.
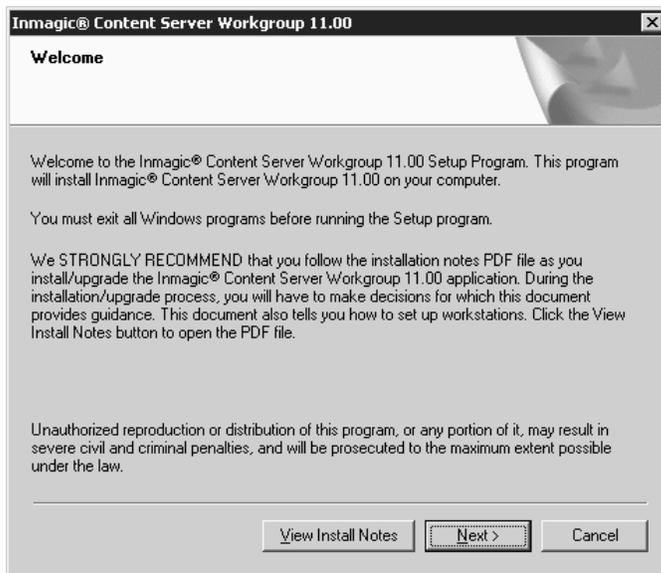
2. Application Selection. Select the **Install or Configure CS/TextWorks** option. Click **Next**.
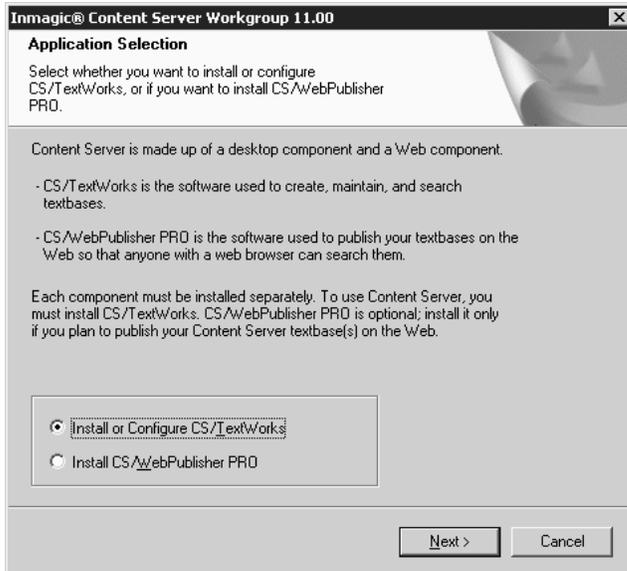
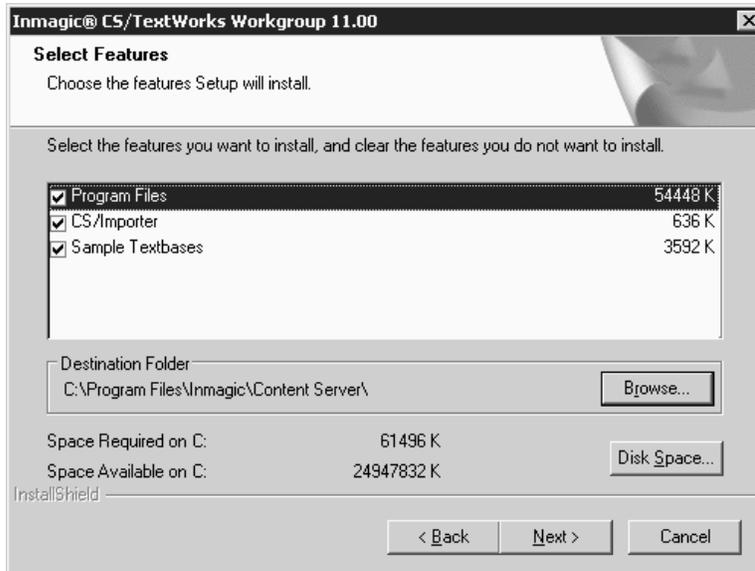
3. Installation Options. Click the **Install** button.
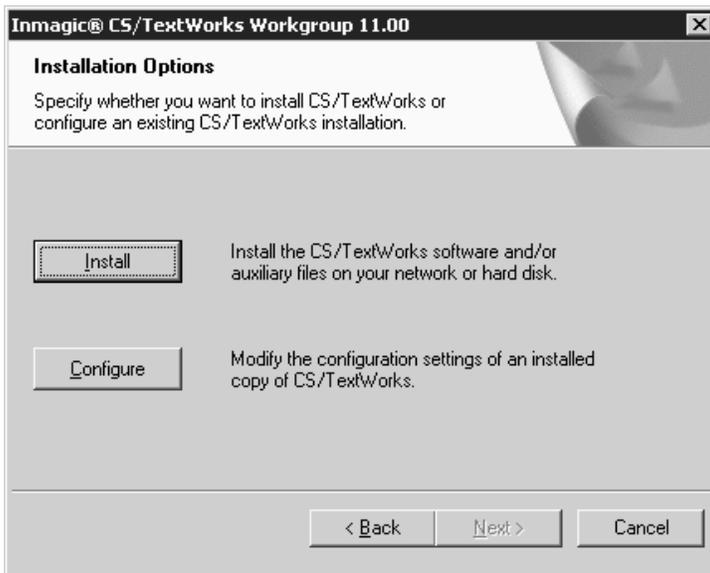
4. **License Agreement**. Read the license agreement, and then respond appropriately.
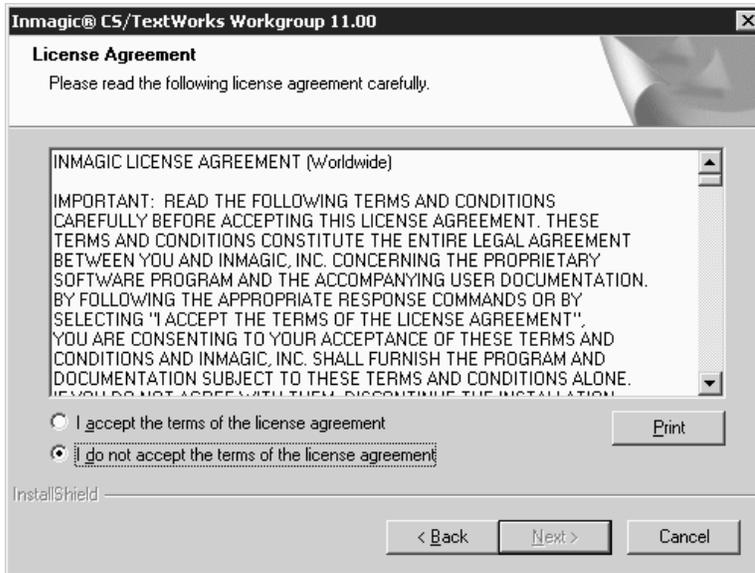
5. **Customer Information**. Enter your user name, company name, and the *Content Server* serial number, and then click **Next**.
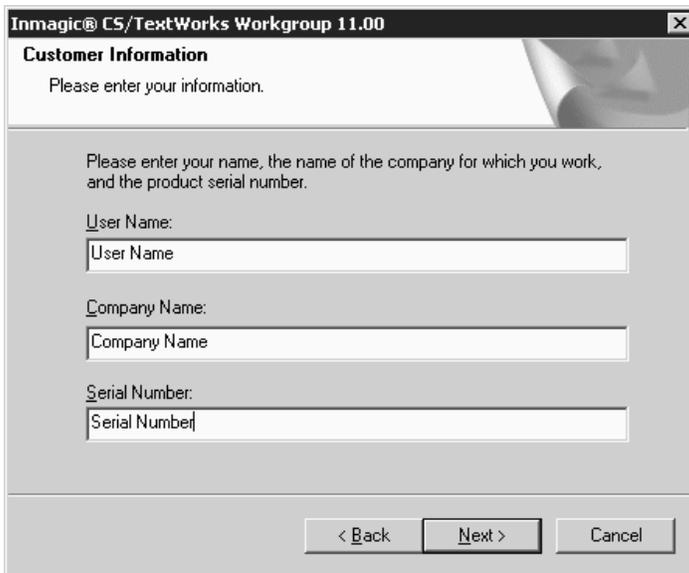
6. Select Features:

- Select or clear the check boxes, as appropriate:
    - **Program Files.** Installs CS/TextWorks.
    - **CS/Importer.** Installs the CS/*Importer* service.
    - **Sample Textbases.** Provides the files needed to install the sample textbases supplied with CS/TextWorks.
- Destination Folder – This is where CS/TextWorks Workgroup will be installed.
    - If this is a New installation, accept the default or click **Browse** to change it.
    - If this is an upgrade, install version 11.00 in the same folder as before. When a message appears asking if you want to overwrite the existing files, click **Yes**.

7. Setup Status. Wait while Setup installs the files.

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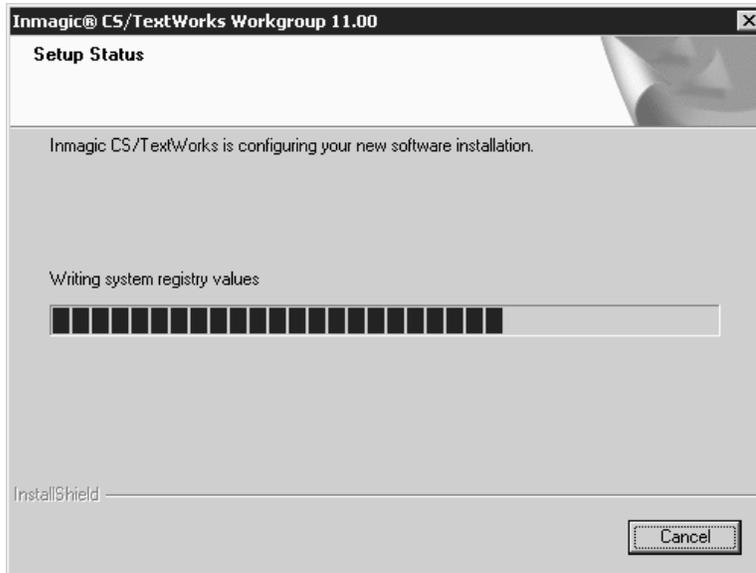
8. Setup automatically launches the Content Server Administration program so you can configure the SQL Server for use with CS/TextWorks. If this is a new installation, the User File Path dialog box will open automatically. Specify where you want to save private textbase elements, then click OK. You can accept the suggested path or specify a different one. You need full rights to whichever folder you specify.
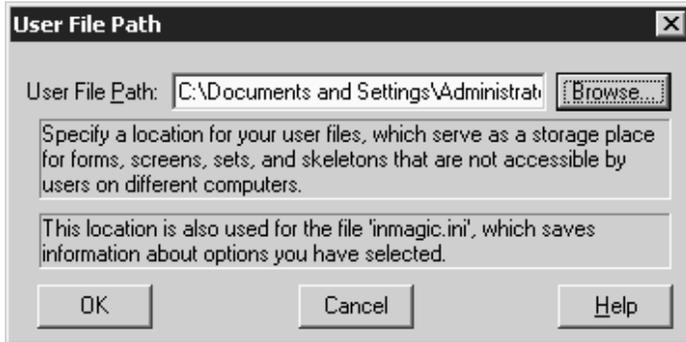
Setting up Database Connectivity using Content Server Administrator program

Before completing the installation of CS/TextWorks, you must complete the configuration via the Content Server Administration program.
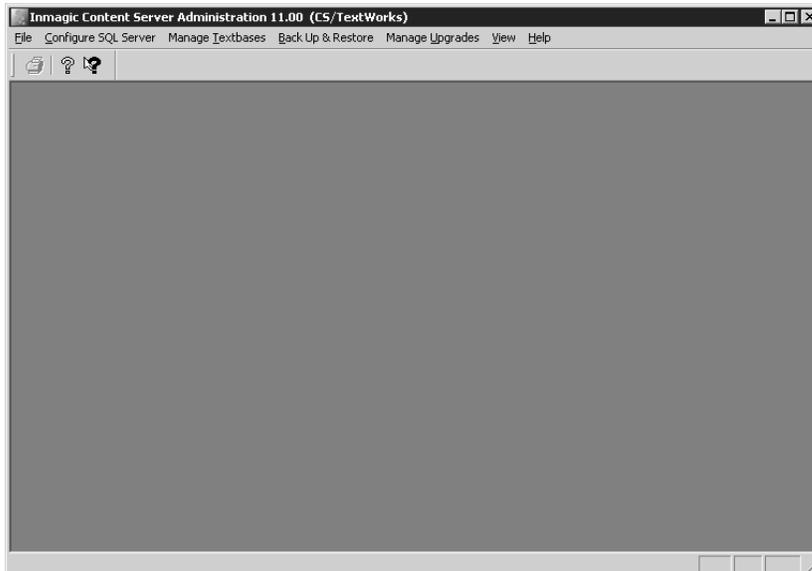
Note that the Content Server Administration program may also be started from the Windows Start menu, choose **Programs>Inmagic Applications>Content Server>Administration (CSTW)**.

There are different steps to follow depending on the type of installation. Identify the type of installation being performed, and follow those instructions. When finished, go to step 10.

- New Installation – 9a

- Upgrading from a previous version of CS/TextWorks

9a.   New Installation

- The following steps assume that the *Content Server* database (SQL Server Express or MSDE) has already been installed.

  A Setup Wizard is available to configure SQL Server Express or MSDE for *Content Server*. The Setup Wizard will guide you to set up the following:

  - Select SQL Instance
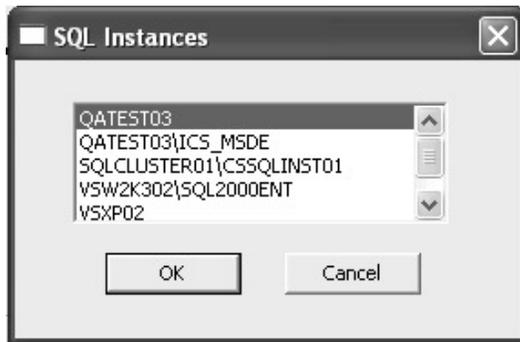 - Change SQL Password

Select **Configure SQL Server>Setup Wizard** to run the wizard.
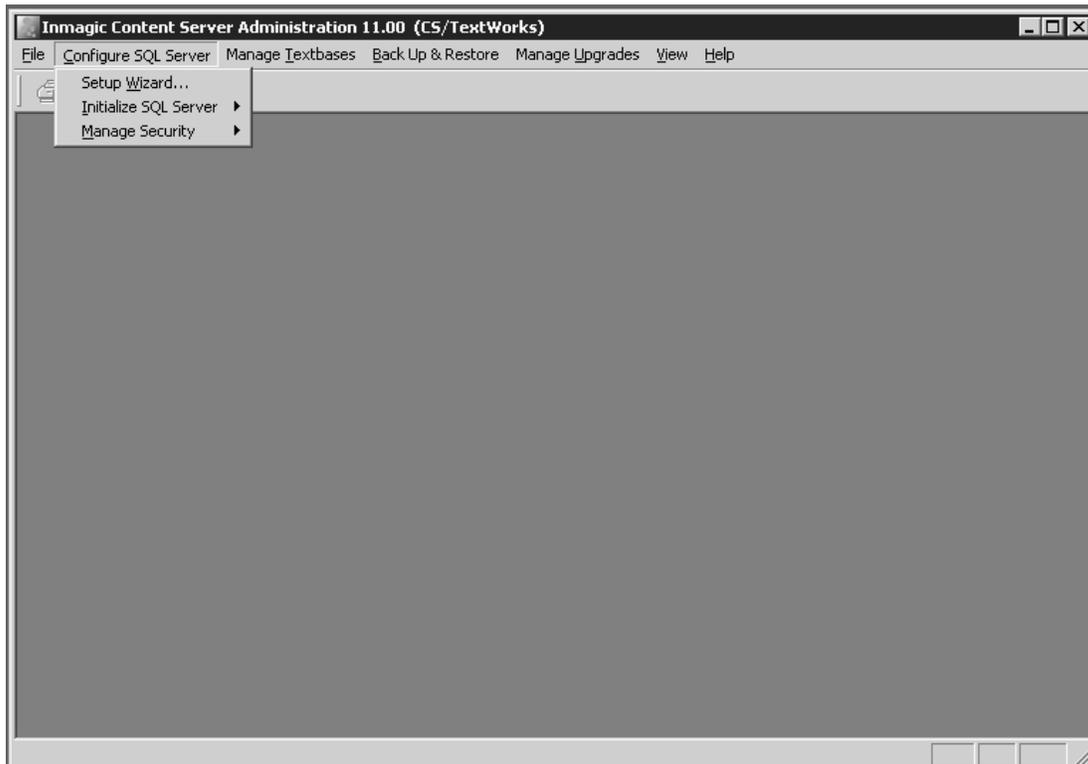
The *Content Server* **Select SQL Instance** dialog box will appear.

If the *Content Server* **SQL Instance** is not displayed, click the **Browse** button. Find the SQL Instance you will be using for *Content Server* and select it. Click **OK**.

If you do not find the *Content Server* SQL Instance, you may manually enter it.

Use one of the following formats:

o   Server name followed by a backslash and the instance name (for example, MACHINENAME\SQLExpress).

Tip! You can press the period (.) key to enter your server name.

o   IP address followed by a comma and the port number on the SQL Server (for example, 192.168.0.199, 1783).

Once you have entered your SQL instance, click **Next**.

SQL Server Instance selected: _____ (note here for future reference)

If *Content Server* could not successfully communicate with or connect to the SQL instance, an error message will be displayed, for example:
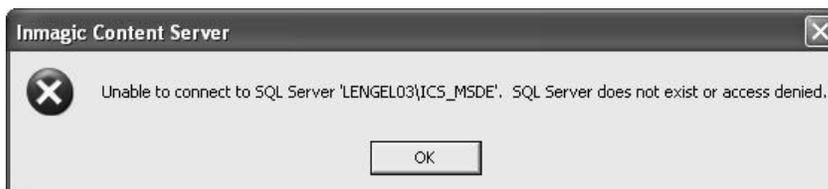
Refer to the Inmagic Knowledgebase (http://support.inmagic.com/supbase3.htm) for troubleshooting assistance.

When *Content Server* successfully connects to your SQL instance, the **Change SQL Password** dialog will appear.

- o   Enter a password in the **New password** box, and then click **Finish**.
- o   Confirm your password and click **OK**.

IMPORTANT: Be sure to make note of the password; you will need to specify the same password during the installation of CS/*WebPublisher PRO*. CS/TextWorks and CS/*WebPublisher PRO* must both use the same password.

SQL Password entered: _____ (note here for future reference)

The Setup Wizard will provide confirmation of the configuration. Click **OK**.
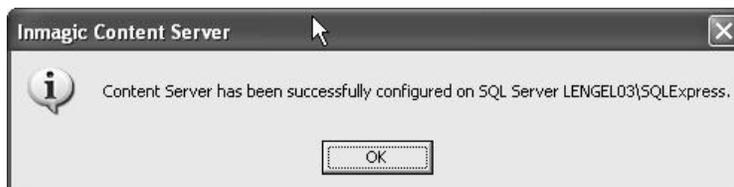
Exit the *Content Server* Administration program.

Proceed to step 10.

9b. Upgrading from an earlier version of CS/TextWorks

If you are upgrading from an earlier version to CS/TextWorks v11.00, determine if the following statements are true:

- The database instance name has not been changed (for example, ICS_MSDE is the instance name used with *Content Server* v1.3 and earlier)
- The database server has not changed (the database was not moved to a different server)

If both of these statements are true, the *Content Server* database settings were upgraded, as needed, during the upgrade to *Content Server* v11.00. Exit the *Content Server* Administration program and proceed to step 13.

Otherwise, the *Content Server* Administration program must be used to provide the necessary database settings and connectivity. Follow the steps provided for a New Installation (9a).

10. Configuration. If upgrading, the install utility reads the existing INMCSRV.INI settings. Any defaults specified before the install will be retained. Click **Next**.

For new installations or if you want to change your existing configuration, click the buttons to configure CS/TextWorks. You can specify alternate languages for months and days, how two-digit years are interpreted, default stop word and leading article lists, and whether the software tracks textbase access. In most cases, you can accept the default settings. Click **Next**.
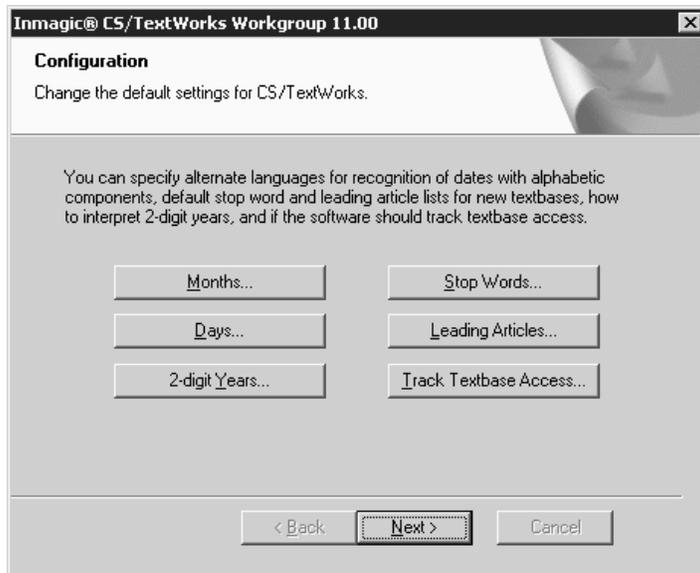
11. **Installation Almost Complete**. Select or clear the check boxes, as appropriate, and click **Next**.
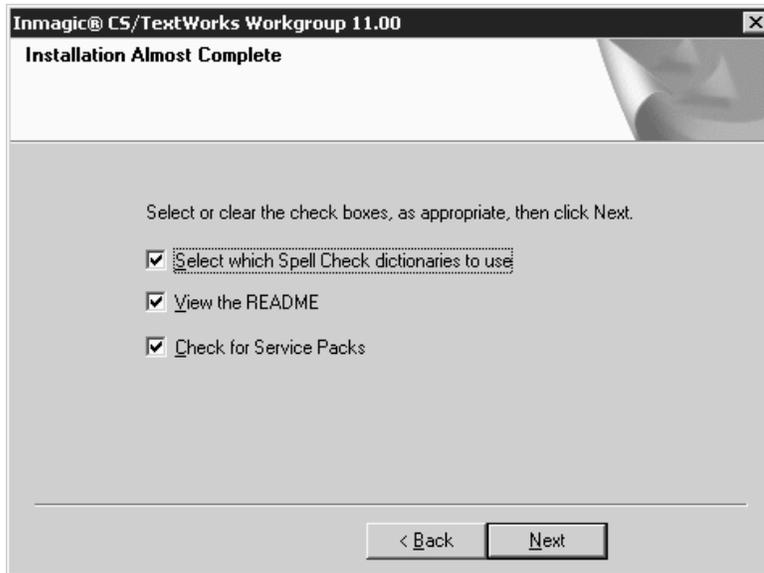

12. If you selected the **Select which Spell Check dictionaries to use** check box in the previous step, the **Dictionary Selection** dialog box opens with a list of the available dictionaries. Select or clear the check boxes to specify the dictionaries you want to use. For example, users in the United States may want to clear the **British English** check box, so the Spell Checker will catch such words as "colour" and "centre." If you do not plan on editing text with embedded HTML tags, you may want to clear the **HTML (common key words)** check box. The dictionary selections you make are recorded in the Windows Registry on the local machine. Click **Next** to continue.
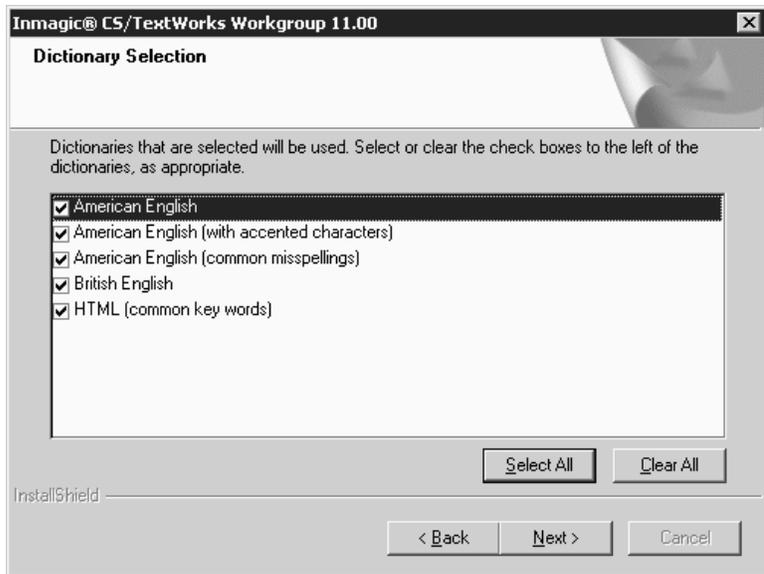

13. MDAC 2.7 is required. Setup will check if it is available. If not, it will install it.
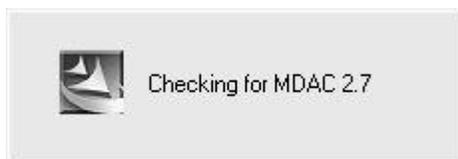
14. A message appears to remind you that, if this is a network installation, you must run Setup Workstation from each machine that will run the software. This is only a reminder at this point. Setup Workstation is run after the installation of CS/TextWorks is completed. Click **OK**.
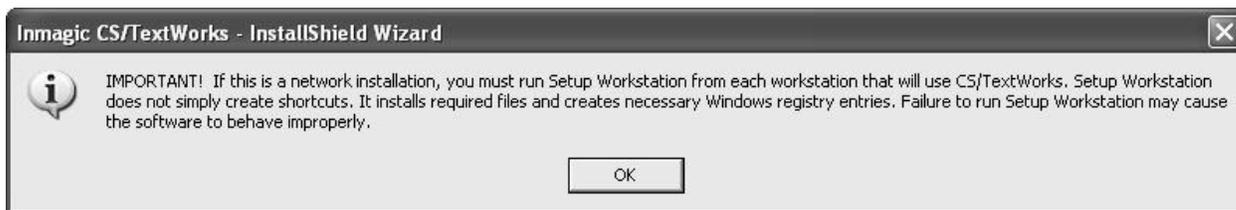
15. If you selected **View the README**, the Readme file will open in your Web browser. Read or print the file, and then close it to continue with the installation.

16. If you selected the **Check for Service Packs** check box, your browser will launch and connect you to the Inmagic Service Packs page.

17. On the **InstallShield Wizard Complete** dialog box, click **Finish**.
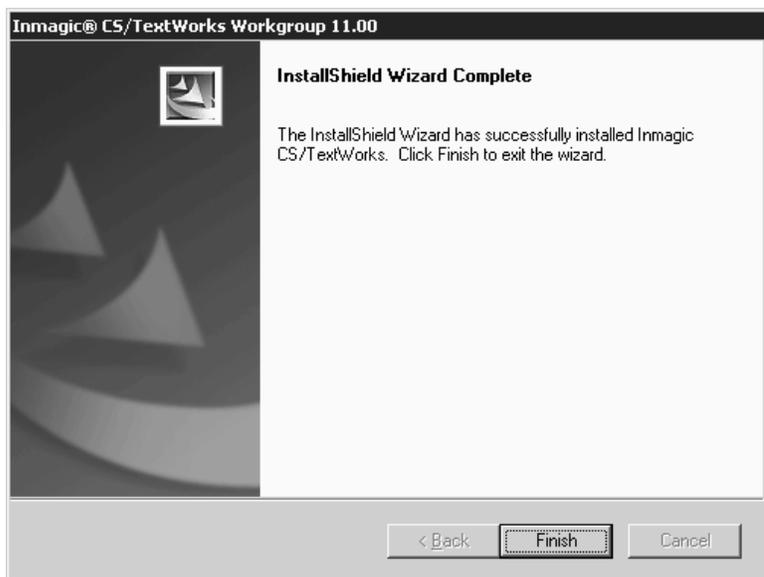
18. If Setup determines that you have to reboot your computer, the InstallShield Wizard Complete dialog box provides you with an option to restart your computer when you click the **Finish** button.

19. Congratulations, you have completed setting up CS/TextWorks Workgroup!

Note: **Configuration settings for CS/TextWorks.** After you install CS/TextWorks, if you want to change the configuration settings (for example, to specify alternate month names for date recognition), run the Setup program from the installation folder and follow the prompts. Click the **Configure** button on the Installation Options dialog box.

Setting Up Workstations

If you installed CS/TextWorks on a network server, you need to set up each user's computer to run the software. The following process adds required files to the local machine's Windows System folder. The process also updates the local machine's Windows Registry to register file extensions and point to the correct Spell Check dictionaries.

Be sure that Internet Explorer version 6.0 or later is installed on every machine that will be running the software. It does not have to be the default browser.

Note: If you are upgrading from CS/TextWorks v9.00, you do not need to run Setup Workstation unless you are using Internet Explorer 7.0 or later.

Note: On each workstation, you will be asked to specify a user file path the first time you run CS/TextWorks from it. The folder should be unique for each user (for example, a location on their local machine).

To use SMS to do Setup Workstation

1. Share the CS/TextWorks installation folder on the machine hosting CS/TextWorks. This destination location was specified in step 6 of "Installing Inmagic CS/TextWorks".

2. From the main CS/TextWorks installation folder, edit the CSWorkstation.MSI file with an MSI editing tool such as Wise, InstallShield, or Orca.

3. Go to the Property table and edit the property CONTENTSERVERDIR to point to your CS/TextWorks installation folder (for example, \\ServerName\Vol1\Inmagic\Content Server\). Note that the path you enter for this value must end in a trailing slash.

4. Use your SMS program to do Setup Workstation on your client machines.

Manually Set Up Workstations

1. Share the CS/TextWorks installation folder. This destination location was specified in step 6 of "Installing Inmagic CS/TextWorks".

2. Log in with Administrator privileges on each workstation that will access CS/TextWorks. You must be logged in as Administrator to run Setup Workstation.

3. From the Windows Start menu, choose **Run** to open the Run dialog box. Then run the Setup program from where CS/TextWorks is installed (for example, X:\Program Files\Inmagic\Content Server\Setup.EXE, where X is a network drive), then click **OK**.

4. If Internet Explorer 6.0 or later is not installed on this machine, a notification message appears and asks if you want to continue with Setup. You can continue, but note that CS/TextWorks running on this workstation will not have XML or certain scripting functionality. This means the XML Import, Inmagic.net, and Thesaurus features will not work properly. If this is acceptable, click **Yes**. Otherwise, click **No** and install Internet Explorer 6.0 or later, then run Setup Workstation again.

5. On the Welcome dialog box, click **Next**.

6. On the Installation Options dialog box, click the **Workstation** button.

7. Wait while Setup installs the files.

8. On the Installation Almost Complete dialog box, select or clear the check boxes, as appropriate.

   Select which Spell Check dictionaries to use.

   View the README.

   Click **Next**.

9. If you selected the **Select which Spell Check dictionaries to use** check box on the Installation Almost Complete dialog box, the Dictionary Selection dialog box opens with a list of the available dictionaries. Select or clear the check boxes to specify the dictionaries you want to use with CS/TextWorks. (To help you decide which dictionaries to select, see step 14 of "Installing Inmagic CS/TextWorks"). Click **Next**.

10. If you selected the **View the README** check box, the README file opens in your Web browser. Read or print the file, then close it to continue with the installation.

11. When the InstallShield Wizard Complete dialog box opens, click **Finish**.

   Note: During the setup workstation process, CS/TextWorks checks the Windows System folder and installs any necessary files. If files were installed, you may need to reboot your computer using the Reboot Computer dialog box. If files were not installed, you will not need to reboot and will not see the Reboot Computer dialog box. Click **Finish** when you have chosen your reboot option.

Installing Inmagic *CS/WebPublisher PRO*

CS/*WebPublisher PRO* is the Web component of *Content Server*. If you purchased it, you can search for, display, add, update, and delete records in *Content Server* textbases from a Web browser. This enables you to make your textbases interactive over your corporate intranet, extranet, or the Internet.

Your license agreement for CS/*WebPublisher PRO* permits installation on one Web server.

Note: If CS/*WebPublisher PRO* is being installed on a Web server located outside of your firewall, see Inmagic Knowledgebase article 2454 (http://support.inmagic.com/supbase3.htm) for information on how to set up this configuration.

Install CS/*WebPublisher PRO* Software

1. On the Web server, log in with Administrator privileges.

2. If you are upgrading CS/*WebPublisher PRO*, you must stop IIS (the World Wide Web Publishing Service). For example, you can do this by doing the following:

    o   Right click on **My Computer**

    o   Select **Manage>Services and Applications**

    o   Double click on **Services**

    o   Right click on **World Wide Web Publishing Service**

    o   Select **Stop**

    Stopping IIS ensures that installation and configuration of the application are not interrupted.

3. Depending on your situation, do the following:

    Installing from a CD-ROM

    If you are installing from the Inmagic *Content Server* CD-ROM, insert it in the drive of the Web server machine where you want to install CS/*WebPublisher PRO* or have an older version already installed. Setup should automatically start. If it does not, open Windows Explorer and from the installation CD-ROM, and double-click **Setup.EXE**.

    Installing from an Electronic Download

    If you are installing from an electronic download, after you download the *Content Server* ZIP file, unzip it to a temporary folder on the Web server machine. Then, from within that folder, double-click **Setup.EXE** to launch the program to install the CS/*WebPublisher PRO* application.

    Note that for either installation option, the Setup program will not proceed if either of these is true:

    - Microsoft Internet Explorer 6.0 or later is not already installed. You must have Internet Explorer 6.0 or later installed before you run the *Content Server* Setup program.

    - Microsoft .NET Framework Version v2.0 is not already installed. You must have Microsoft .NET Framework Version v2.0 installed before you run the Setup program for CS/*WebPublisher PRO*. If you are not sure if you have the .NET Framework v2.0, it would be located in the c:\WINDOWS\Microsoft.NET\Framework directory.
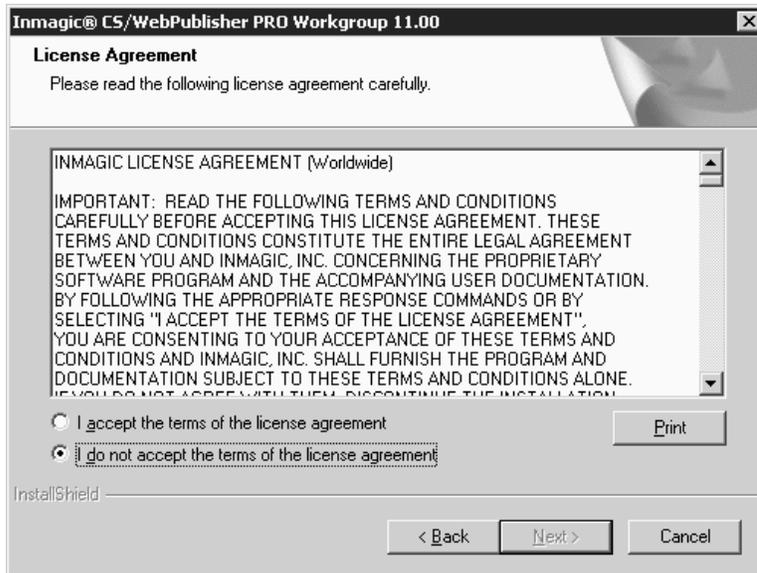
4. **Application Selection**. Select the **Install CS/WebPublisher PRO** option button. Click **Next**.
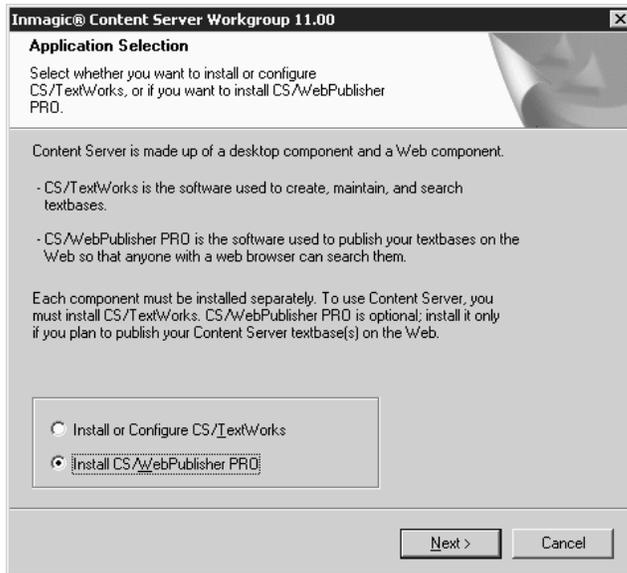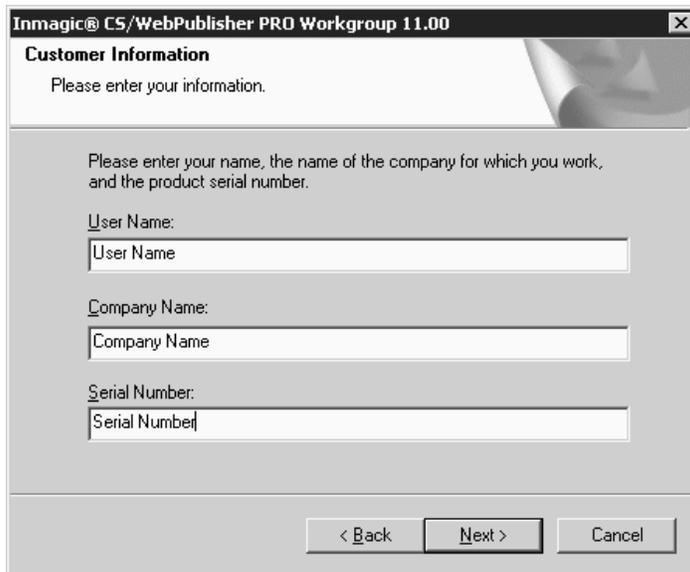

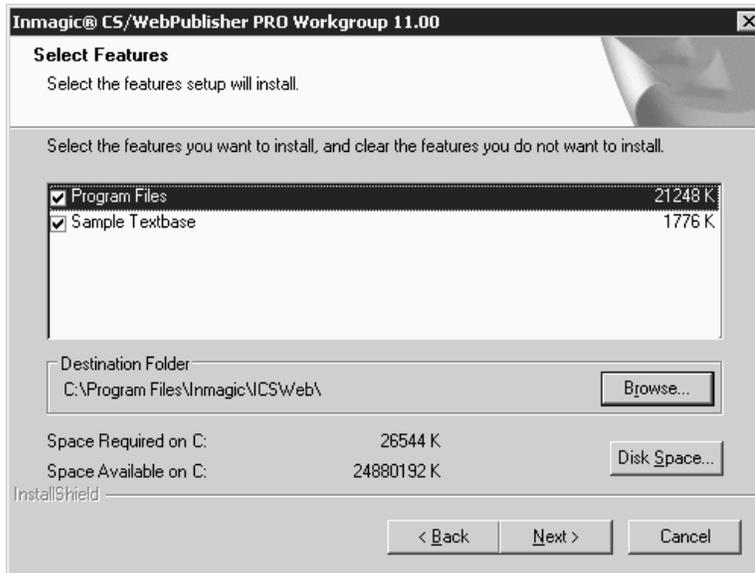5. **Welcome Dialog Box**. On the Welcome dialog box, click **Next**.
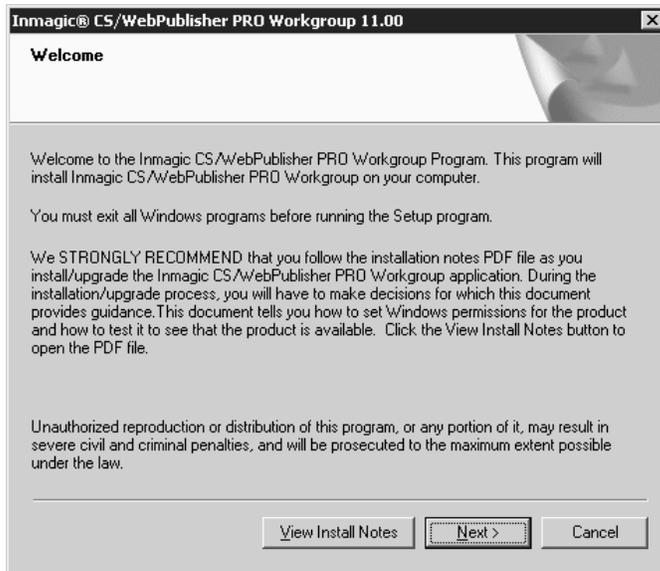
6. **License Agreement**. Read the license agreement, and then respond appropriately.

7. **Customer Information**. Enter user name, company name, and the *Content Server* serial number, and then click **Next**.

8. **Select Features** dialog box:

- Select or clear the check boxes, as appropriate:
    - **Program Files.** Installs CS/*WebPublisher PRO*.
    - **Sample Textbases.** Provides the files needed to install the sample textbase supplied with CS/*WebPublisher PRO*.
- Destination Folder – This is where CS/*WebPublisher PRO* is installed.
    - If this is a new installation, accept the default or click **Browse** to change it.
    - If this is an upgrade, install version 11.00 in the same folder as before. When a message   appears asking if you want to overwrite the existing files, click **Yes**.

9. **Search Path(s).** Specify one or more locations where you want CS/*WebPublisher PRO* to search for the textbases you will publish, then click **Next**.
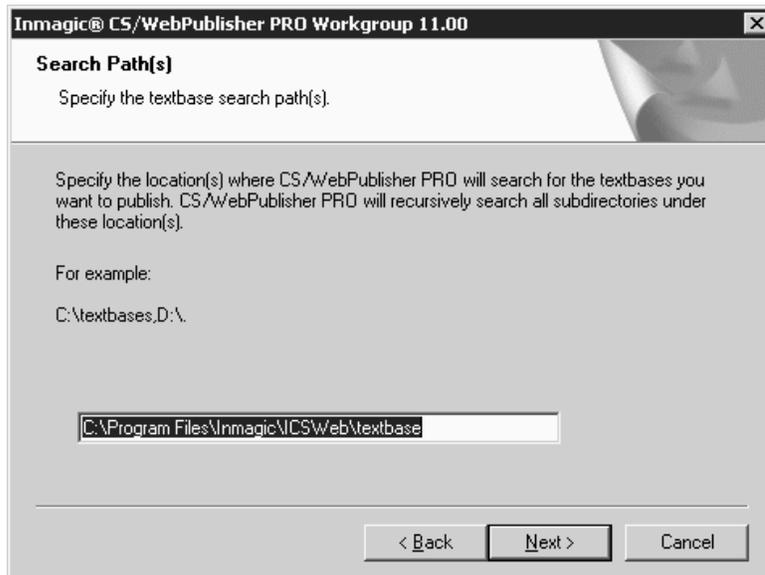
When necessary, the software can recursively search all subfolders under those locations. These locations are folders containing the textbase files that reside outside of the SQL Server Express or MSDE database.

Use a comma to separate multiple locations. If you specify a machine other than the HTTP server machine, use the Universal Naming Convention (UNC) directory name instead of a drive letter.

For example:
C:\ICSWEB\TEXTBASE\,C:\DATA,\\SERVER2\TBS

The locations you specify are written to an initialization file called ICSWeb.INI, located in the installation folder. Later, you can edit that file to add or change locations.

10. **Logo/Background URL**. Type the URL for a default Web directory where you will place logo and background image files used on forms, then click **Next**.
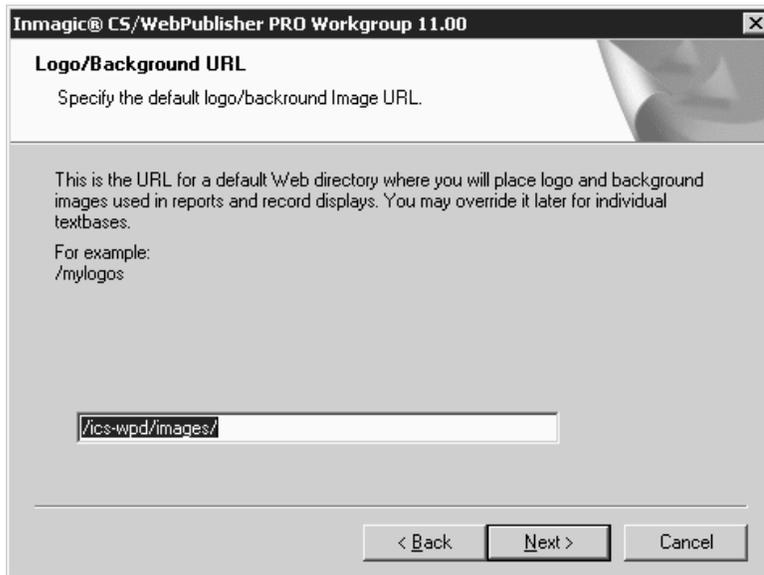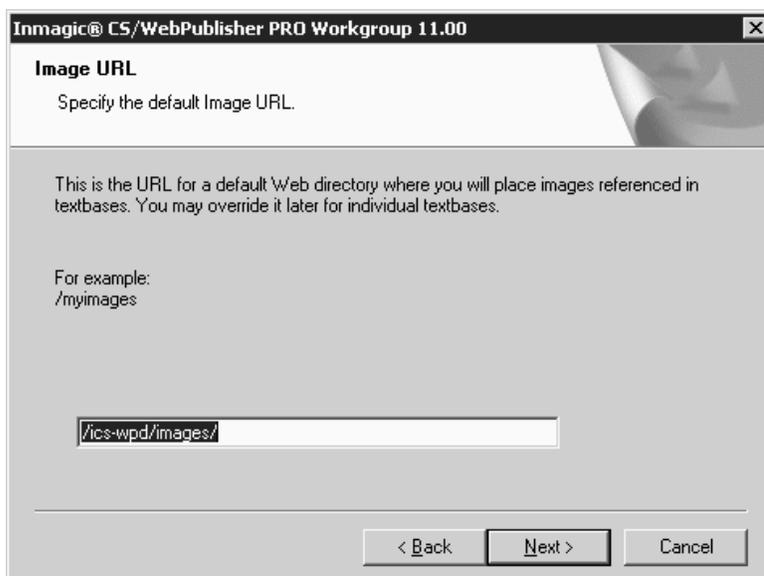

We recommend you accept the default location (/ics-wpd/images) and store your images in the Images subfolder of the CS/*WebPublisher PRO* installation folder.

If you want to specify a different location, use a leading slash to make the URL relative to the current server root. Specify the full path (for example, http://hostname/mylogos/) only if the Web server where the images reside is different from the installation server.

The URL you specify will be written to an initialization file called ICSWeb.INI, located in the installation folder. Later, you can edit that file to change the location, if needed.

11. **Image URL.** Type the URL for a default folder where you will place image files referenced in textbase records, then click **Next**.


We recommend you accept the default location (/ics-wpd/images) and store your images in the Images subfolder of the CS/*WebPublisher PRO* installation folder. Note that the same path format applies as in the previous step, and the URL is also written to the ICSWeb.INI file.

12. **Choose Application.** Specify whether to use ISAPI or CGI programs. We recommend you use ISAPI for better performance. Click **Next**.
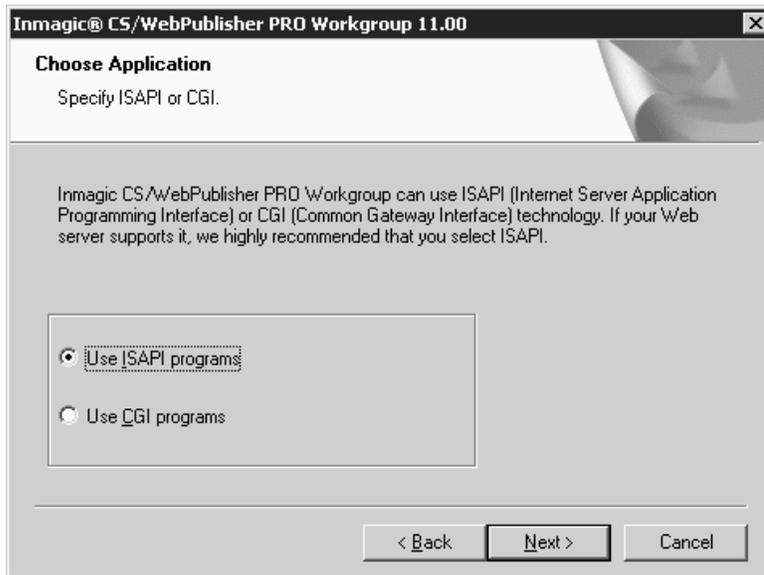

Note that support for both versions is installed. If you need to switch later, run ISAPI.BAT in the JScript subfolder to switch to using ISAPI, or run CGI.BAT to switch to using CGI.

13. **Setup Status**. Wait while Setup installs the necessary files.
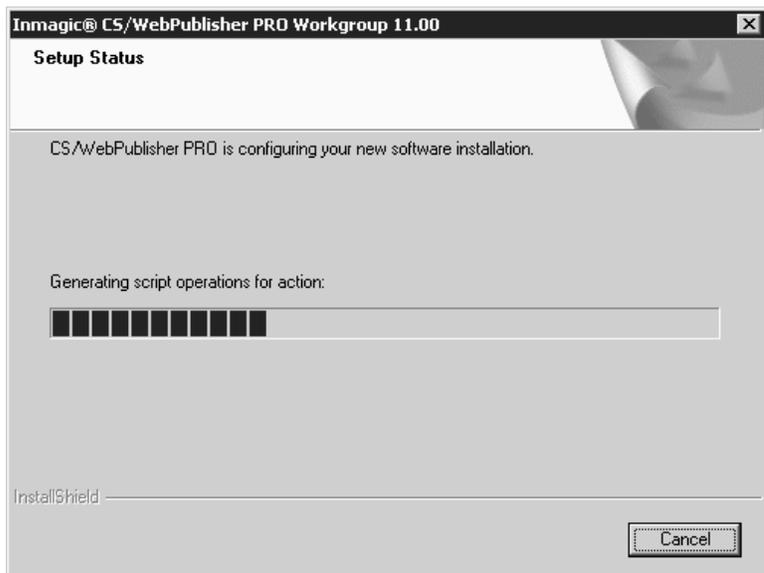
14. **Specify Virtual Directory Settings.** On the Specify Virtual Directory Settings Dialog box, specify which Web server Setup should use to create and configure the ics-wpd and InmagicBrowse virtual directories as well as the authentication method to use. Click **Next** when finished.
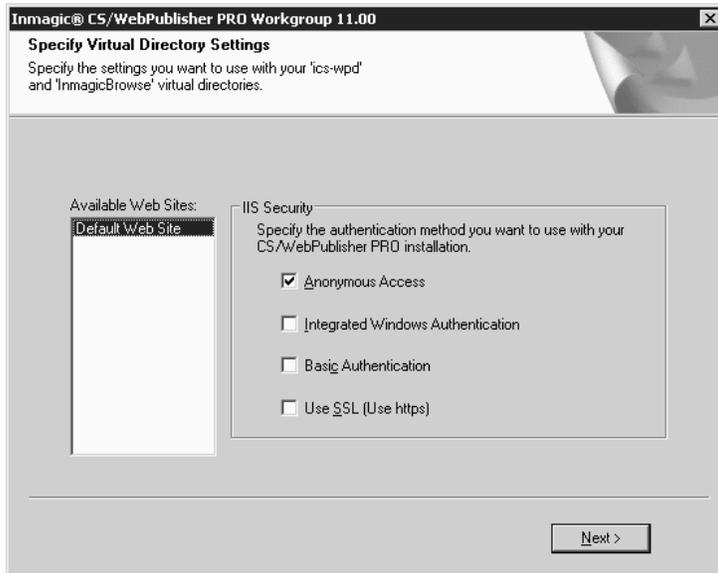

- **Available Web Sites.** Specify the Web site on which you want to create the virtual directory for CS/*WebPublisher PRO*, which will be called ics-wpd, and the Inmagic Browse application used by CS/*WebPublisher PRO,* which is called InmagicBrowse.
- **IIS Authentication.** Select the authentication method you want to use with CS/*WebPublisher* PRO. For example, you can select Anonymous Access with or without SSL.

Note: If the textbases are on a different machine than the Web server, then the **IUSR_<machine>** account cannot be used. You must use a valid domain account with the proper security permissions.

Note for upgrade installations: To successfully upgrade, select the Web server where the CS/*WebPublisher PRO* virtual directories where originally created.

15. CS/*WebPublisher PRO* is registered.

16. The .NET Framework is registered, and Setup checks for MDAC 2.7 or later and installs it if necessary.

17. Setup automatically launches the Content Server Administration program so you can configure the SQL Server for use with CS/*WebPublisher PRO*. The User File Path dialog box opens (only appears the very first time you run the software on that machine). Specify where you want to create user files and temporary files, and then click **OK**. You can accept the suggested path or specify a different one. You need full rights to whichever folder you specify.
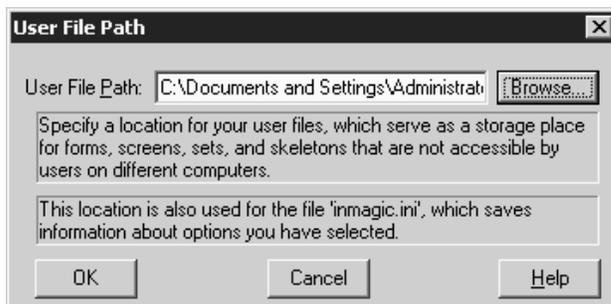
18. **Setting up Database Connectivity using the Content Server Administration program**

Before you can use CS/*WebPublisher PRO*, you must use the Content Server Administration program to set the configuration to access the database.
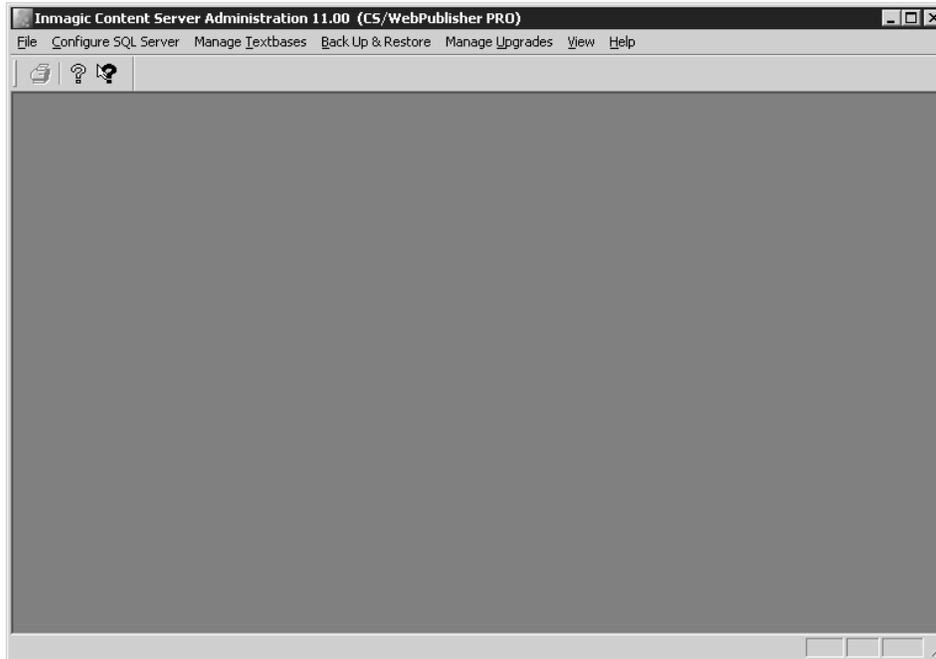
Note that the Content Server Administration program may also be started from the Windows Start menu. Choose **Programs>Inmagic Applications>Content Server>Administration (CSWPP)**.

There are different steps to follow depending on the type of installation. Identify the type of installation being performed and follow those instructions. When you are finished, go to step 19.

- New Installation – 18a
- Upgrading from CS/*WebPublisher PRO* v1.3 – 18b

18a. **New Installation**

The following steps assume that the *Content Server* database (SQL Server Express or MSDE) has already been installed.
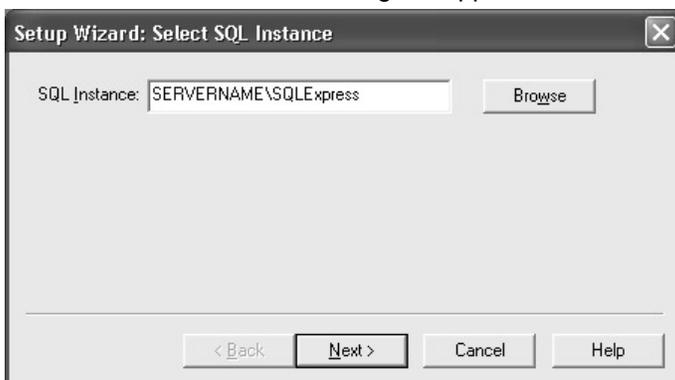
A Setup Wizard is available to set up SQL Server Express or MSDE connectivity for *Content Server*. The Setup Wizard will guide you to set up the following:

- □ Select SQL Instance
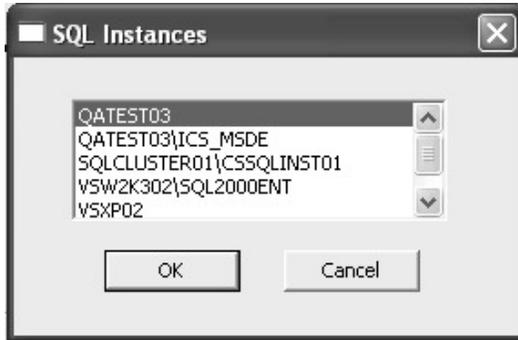- □ Change SQL Password

Select **Configure SQL Server>Setup Wizard** to run the wizard.
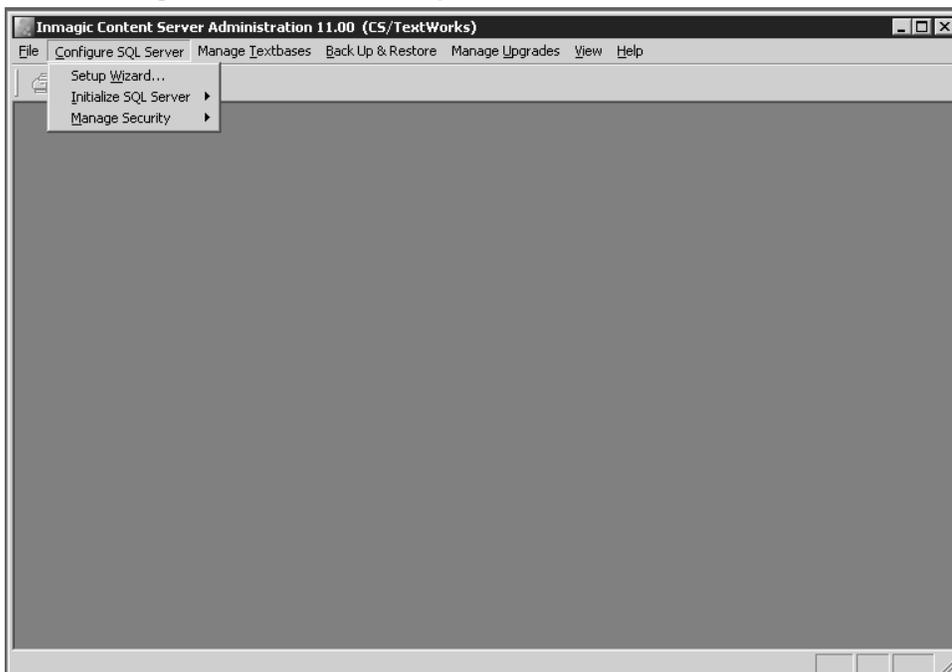
The **Select SQL Instance** dialog will appear.

If the *Content Server* SQL Instance is not displayed, click the **Browse** button. Find the *Content Server* SQL Instance you will be using and select it. Click **OK**.

If you do not find the *Content Server* SQL Instance, you must manually enter it.

Use one of the following formats:

- Server name followed by a backslash and the instance name (for example, SERVER03\SQLExpress).

  Tip! You can press the period (.) key to enter your server name.

- IP address followed by a comma and the port number on the SQL Server (for example, 192.168.0.199, 1783).

Once you have entered your SQL instance, click **Next**.

SQL Server Instance selected: _____ (note here for future reference)

If *Content Server* could not successfully communicate or connect to the SQL instance, an error message will be displayed, for example:
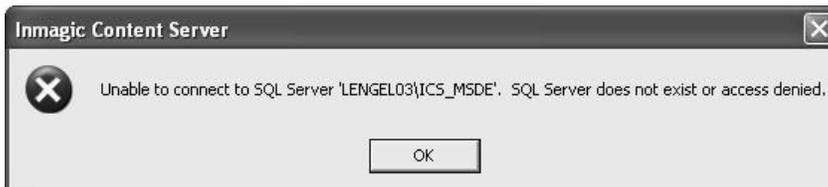
Refer to the Inmagic Knowledgebase (http://support.inmagic.com/downloads/extranet.html) for troubleshooting assistance.

When *Content Server* successfully connects to your SQL instance, the Change SQL Password dialog will appear.

- Enter a password in the **New password** box, and then click **Finish**.
- Confirm your password and click **OK**.

IMPORTANT: Be sure to make note of the password; you will need to specify the <u>same</u> password during the installation of CS/TextWorks. CS/TextWorks and CS/*WebPublisher PRO* require that they both use same password.

SQL Password entered: _____ (note here for future reference)

The Setup Wizard will provide confirmation of the configuration. Click **OK**.

Exit the Content Server Administration program.

Proceed to step 19.

18b. **Upgrading CS/*WebPublisher PRO* v1.3 or v9.00**

Select **Configure SQL Server>Setup Wizard**. Specify the SQL instance used by *Content Server.* This will identify to CS*/WebPublisher PRO* which SQL instance to use by adding the following line in the inmcsrv.ini file.
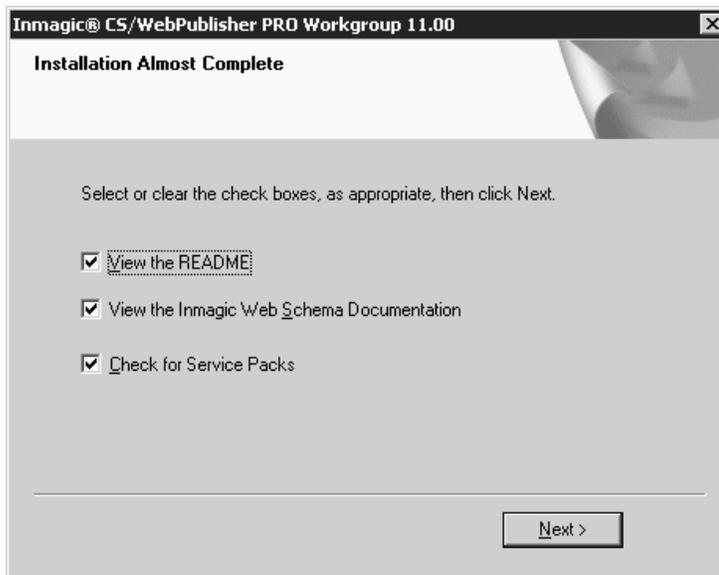
> For example:
> SQLDataSource=SERVER03\ICS_MSDE

If *Content Server* was able to successfully connect to the SQL instance, the following will be displayed. Click **OK.**


Exit the Content Server Administration program.

Proceed to step 19.

19. **Installation Almost Complete**. Select or clear the check boxes, as appropriate.

Click Next to view the documents you selected, if any. When finished, close the document(s) to continue with the installation.

20. **InstallShield Wizard Complete**. Click the **Finish** button to complete your installation of CS/*WebPublisher PRO*. Continue to Step 21 on the next page - **Setting Windows Permissions**.
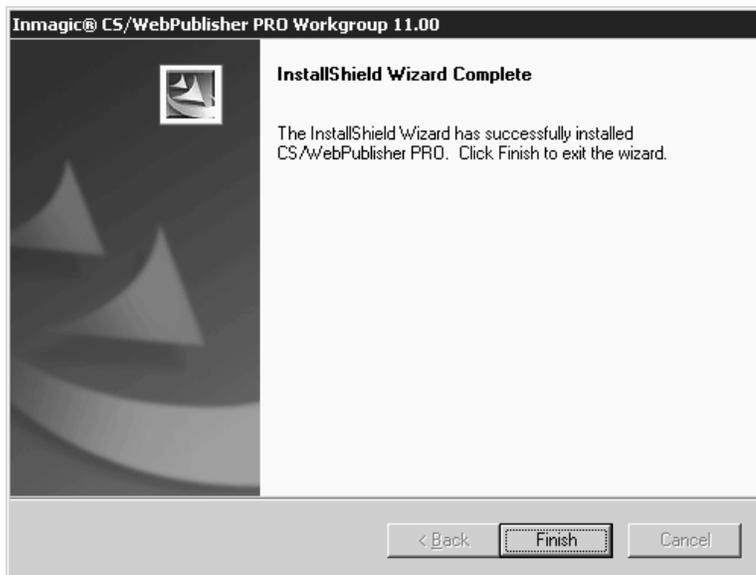
Note: During installation, Setup may have updated existing files on your computer. If any of those files were in use during installation, you are asked to reboot. Select the **Yes, I want to restart my computer now** or the **No, I will restart my computer later** option button, then click **Finish**.

Setting Windows Permissions

If you selected Integrated Windows Authentication or Basic Authentication in Step 14, you need to set Windows permissions for users who will be accessing CS/*WebPublisher PRO*. If you selected Anonymous Access, Setup automatically set the necessary Windows permissions for the Anonymous account.

Using Windows Explorer, set the following Windows permissions for each account that will be accessing CS/*WebPublisher PRO*.

> To set Windows permissions for the account on a folder or file:

> > o   Right-click the folder or file for which you want to set Windows permissions (for example, the QSets subfolder) and choose **Properties** from the shortcut menu.
> > o   On the Security tab, in the Name list, select the account for which you want to set permissions. If this account is not there, click the **Add** button and locate it, then click **OK** to move it to the Names list.
> > o   Select the permissions you want to apply from the Permissions list, and then click **OK**.

Set the Windows permissions for the following folders/files:

☐ CS/*WebPublisher PRO* installation folder (for example, C:\Program Files\Inmagic\ICSWeb)
> o   **Read** permission

☐ QSets subfolder (for example: C:\Program Files\Inmagic\ICSWeb\QSets)
> o   **Full Control** permission

☐ ICSWeb.INI file (located in the CS/*WebPublisher PRO* installation folder)
> o   **Full Control** permission

☐ Sample subfolder (if you plan the use the *Cars* textbase on the Web)
> o   **Read** allows only searching
> o   **Full Control** allows searching, editing, adding, and/or deleting records.

☐ Textbase folders that will be searched
> o   **Read** access

☐ Textbase folders that will be searched, updated and/or deleted
> o   **Full Control** access

Note: The instructions in this section apply only to operating systems using NTFS for storing and retrieving files on a hard disk.

> o   If you stopped your World Wide Web Publishing Service, restart it now (using the Services window).
> o   Congratulations, you have completed setting up CS/*WebPublisher PRO* Workgroup!

Installing the Sample Textbases

Use the sample textbases to familiarize yourself with the products. Before you can do so, you must install the sample textbases on your instance of SQL Server Express.

For CS/TextWorks, the sample textbases are called *Sample1* and *Sample2*.

If you also purchased and installed CS/*WebPublisher PRO*, the sample textbase is called *Cars*. Note that prior to using the *Cars* textbase on the Web, if you are using Basic or Integrated Windows Authentication, you must provide the proper Windows permissions to the folder in which it resides.

To install the sample textbases

1.   Perform the following steps for each of the sample textbases.

   Log in to the appropriate machine with an account that has Administrator privileges.

   ▪   If you are installing the *Sample1* and *Sample2* textbases, log in to the machine on which CS/TextWorks is installed.

   ▪   If you are installing the *Cars* textbase, log in to the machine on which CS/*WebPublisher PRO* is installed.

2.   If your SQL Server Express instance is located on a machine **other than** the one you are using, you must share the subfolder containing the backup files for the textbase(s) you are installing. Note that the account running the SQL Server service needs Full Control access to the subfolder containing the backup files for the textbases you are installing.
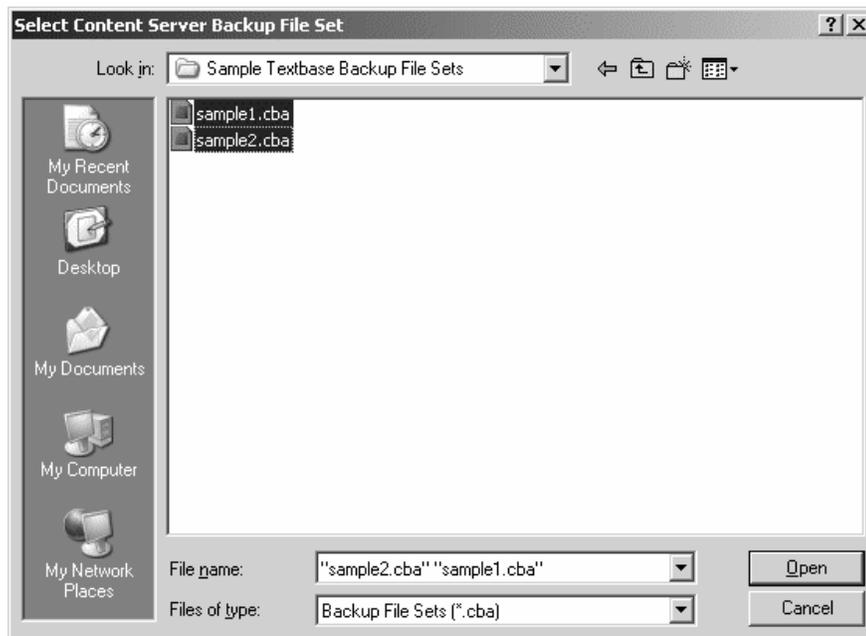
   The subfolders for the sample textbases are located in their respective component's installation folder.

   ▪   For CS/TextWorks, share the Sample Textbase Backup File Sets subfolder.

   ▪   For CS/*WebPublisher PRO*, share the CARS Textbase Backup File Set subfolder.

3.   Start the Content Server Administration program.

   ▪   If you are on the machine on which CS/TextWorks is installed, from the Windows Start menu, choose **Programs>Inmagic Applications>Content Server>Administration (CSTW)**.

   ▪   If you are on the machine on which CS/*WebPublisher PRO* is installed, choose **Programs>Inmagic Applications>Content Server>Administration (CSWPP)**.

4.   Choose **Back Up & Restore>Restore Textbases** to open the Restore Textbase Options dialog box.

5. In the **Backup sets** box, enter the path to the textbase you want to install:

> *Important!* If your SQL Server Express instance is located on a machine **other than** the one you are using, you must also do the following:

- Use the Universal Naming Convention (UNC) file path to the backup file set using the format \\Server\Share\Backups (for example, \\<Server Name>\Sample Textbase Backup File Sets\Sample1.CBA).

- Use specific log on parameters. To do this, right-click the **My Computer** icon on your desktop and select **Manage**. Expand the Services and Applications tree, then double-click **Services**. Right-click your instance of SQL Server for the *Content Server* application, and select **Properties**. Select the Log On tab and then specify the account. Use an account that has access to the SQL Server and full access to all the files or folders that reside on other machines.

a. Click the **Browse** button and navigate to the applicable Backup File Set subfolder:

- If you are installing the *Sample1* or *Sample2* textbase, the Backup File Set subfolder is under the CS/TextWorks installation folder (for example, C:\Program Files\Inmagic\Content Server\Textbases\Sample Textbase Backup File Sets).

- If you are installing the *Cars* textbase, the Backup File Set subfolder is under the CS/*WebPublisher PRO* installation folder (for example, C:\Program Files\Inmagic\ICSWeb\Cars Textbase Backup File Set).

b. Select the .CBA file(s) for the textbase(s), and then click **Open**.

- For CS/TextWorks: Sample1.CBA, Sample2.CBA
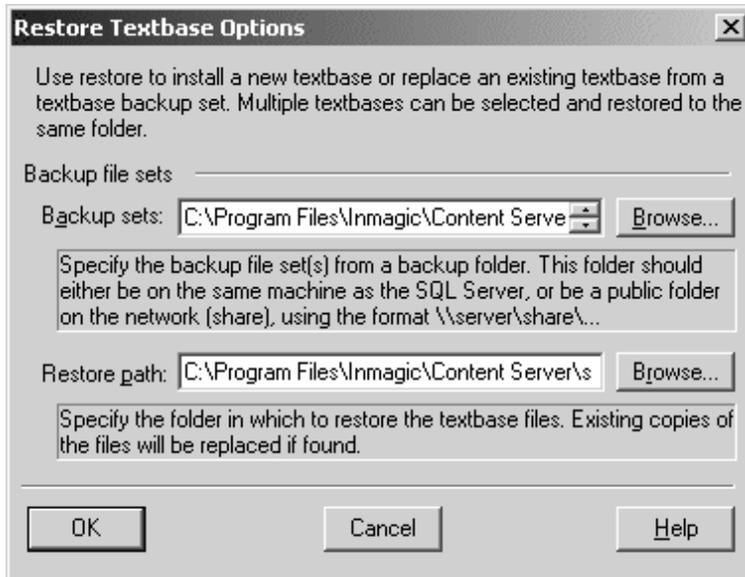
- For CS/*WebPublisher PRO*: Cars.CBA

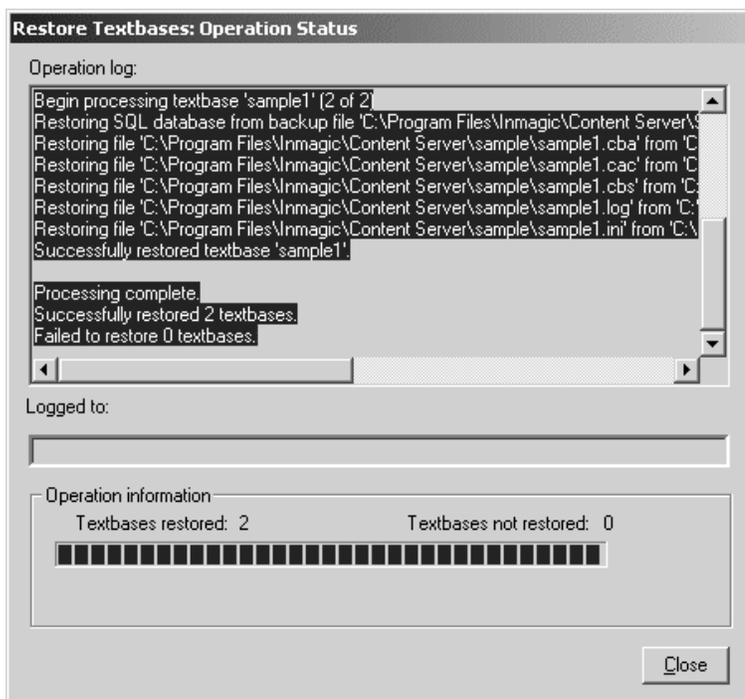**Select Content Server Backup File Set dialog box with multiple textbases selected**

6 In the **Restore path** box, enter the path to the Sample subfolder of the CS/TextWorks or CS/*WebPublisher PRO* installation folder, as appropriate. You can click the **Browse** button and navigate to this location (for example, C:\Program Files\Inmagic\Content Server\Sample).

> *Tip!* In order for the **Sample Textbases** shortcut menu item to work correctly, the *Sample1* and *Sample2* textbases must be installed to the Sample subfolder of the CS/TextWorks installation folder.

7. Click **OK** on the Restore Textbase Options dialog box to install the textbase(s).

Restore Textbase Options

Use restore to install a new textbase or replace an existing textbase from a textbase backup set. Multiple textbases can be selected and restored to the same folder.

Backup file sets

Backup sets: `C:\Program Files\Inmagic\Content Serve` [Browse...]

Specify the backup file set(s) from a backup folder. This folder should either be on the same machine as the SQL Server, or be a public folder on the network (share), using the format \\server\share\...

Restore path: `C:\Program Files\Inmagic\Content Server\s` [Browse...]

Specify the folder in which to restore the textbase files. Existing copies of the files will be replaced if found.

[OK]   [Cancel]   [Help]

8. Review the information on the Restore Textbases: Operation Status dialog box and click **Close** when you are done.

Restore Textbases: Operation Status

Operation log:

Begin processing textbase 'sample1' (2 of 2)
Restoring SQL database from backup file 'C:\Program Files\Inmagic\Content Server\
Restoring file 'C:\Program Files\Inmagic\Content Server\sample\sample1.cba' from 'C
Restoring file 'C:\Program Files\Inmagic\Content Server\sample\sample1.cac' from 'C
Restoring file 'C:\Program Files\Inmagic\Content Server\sample\sample1.cbs' from 'C:
Restoring file 'C:\Program Files\Inmagic\Content Server\sample\sample1.log' from 'C:'
Restoring file 'C:\Program Files\Inmagic\Content Server\sample\sample1.ini' from 'C:\
Successfully restored textbase 'sample1'.

Processing complete.
Successfully restored 2 textbases.
Failed to restore 0 textbases.

Logged to:

Operation information

Textbases restored: 2   Textbases not restored: 0

[Close]

Testing CS/*WebPublisher PRO*

To test access to the CS/*WebPublisher PRO* product

After you have completed the installation of CS/*WebPublisher PRO*, perform the following test to make sure it is accessible. If any of these steps fails, then there may be a problem with the installation. If an error message appears, refer to the Inmagic Knowledgebase (http://support.inmagic.com/supbase3.htm) for troubleshooting assistance. For further assistance, call Inmagic Technical Support.

1. Open your Web browser and point to http://<WebServerName>/ics-wpd/sample/carsqs.htm. Fill in the name of your Web server where the CS/*WebPublisher PRO* product resides. Note that the ics-wpd virtual directory was created during the installation process.

2. On the Search Cars page, type an asterisk (*) in the **Model Type: Assembled or Kit?** box, then click the **Submit Query** button.

3. On the Search Results page, select **Prices (edit links)** from the drop-down list.

4. Click the first **Edit Record** link (in the **1935 Ford** row).

5. Click the **Features** link. The following illustration shows what the Inmagic Choices Browser should look like.
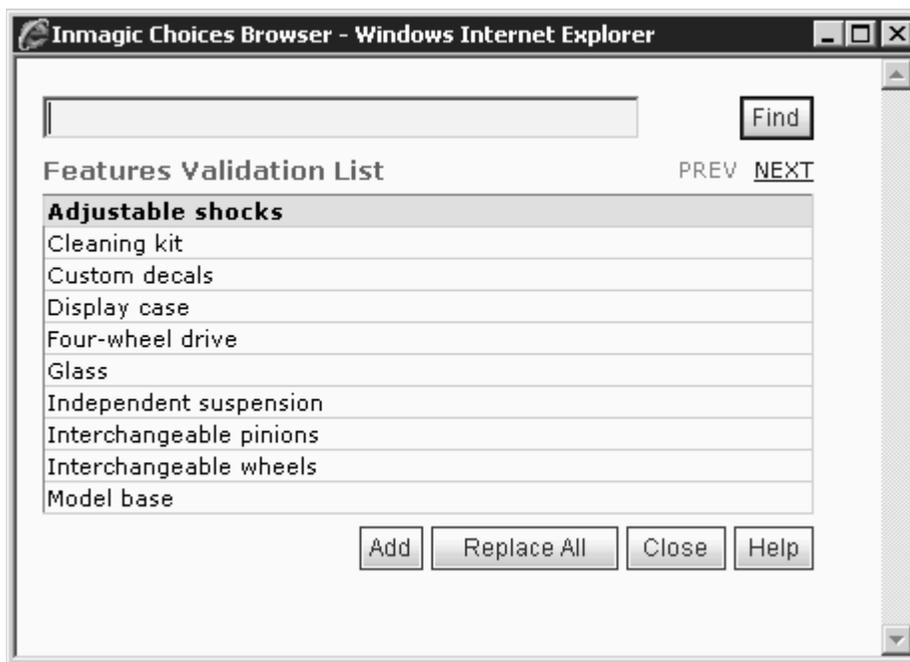
6. Close the Inmagic Choices Browser.

7. On the Edit Cars Record page—do not make any changes to the record—click the **Submit Record** button. Verify that your record was saved.

Getting Started with *Content Server*

To start CS/TextWorks, from the Windows Start menu, choose **Programs>Inmagic Applications>Content Server>CSTextWorks**. Note that whether you log in with Administrator privileges or with a non-Administrator account, you will have to set the user file path the first time you open CS/TextWorks with that login.

To see which program items were installed, open the Inmagic Applications folder on your desktop: From the Windows Start menu, choose **Programs>Inmagic Applications>Content Server**. Depending on the options selected during Setup, you may see some or all of the following commands:

- **Administration (CSTW).** Provides access to the Content Server Administration program for CS/TextWorks, which lets the Content Server Administrator perform a number of administrative and maintenance tasks.

- **Administration (CSWPP).** Provides access to the Content Server Administration program for CS/*WebPublisher PRO*, which lets the Content Server Administrator perform a number of administrative and maintenance tasks.

- **CSImporter.** Opens the Inmagic CS/Importer Settings dialog box so you can configure and start the CS/*Importer* service.

- **CSTextWorks.** Starts CS/TextWorks.

- **Online Help.** Opens the *Content Server* online help.

- **README.** Opens the README file, which tells you what is new with this version, lists issues resolved from the previous release and any late-breaking information, and contains other important information.

- **Sample Textbases.** Provides access to the sample textbases supplied with CS/TextWorks. Use *Sample1* and *Sample2* to practice searching and other operations.

- **Setup Workstation.** Runs the Setup Workstation program, which you can use to set up workstations. You cannot install the software using this command. To install files, run the Setup program from the installation CD or electronic download.

Documentation

All documentation available for *Content Server* is available from the following sources:

- *Content Server* Installation CD

- Electronic download page for *Content Server*

- The Inmagic Customer Extranet (http://support.inmagic.com/downloads/extranet.html)