



Version 16.0
Inmagic DB/Text for SQL
Installation and Upgrade Instructions

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Chapter 1: Before You Begin

Inmagic® DB/Text for SQL is an enterprise-wide scalable content management system that combines a robust and flexible database management environment with high speed search and categorization. Its Web publishing capabilities provide the ability to publish, access, and maintain information on corporate intranets and the Internet.

Purpose and Audience

This document explains how to install or upgrade *Inmagic® DB/TextWorks for SQL* (including the DB/Text for SQL Importer) and *WebPublisher PRO for SQL*.

This document is intended for administrators, Inmagic Professional Services, or Partners who are responsible for performing installations or upgrades. Some knowledge of Microsoft SQL Server administration is assumed, in order to be able to configure a new or existing SQL Server instance for use with Inmagic applications. Familiarity with Microsoft Internet Information Services (IIS) is also helpful.

How to Proceed

New Installations

Follow the instructions in this document to install DB/Text for SQL for the first time.

Upgrading an Existing Version

Follow the instructions in this document to upgrade an existing version of DB/Text for SQL.

Information that pertains specifically to upgrades appears in a blue box.

Note that prior to v12, DB/TextWorks for SQL was known as *Content Server* or *CS/TextWorks*, and WebPublisher PRO for SQL was known as *CS/WebPublisher PRO*.

Migrating from the Non-SQL Platform

If you are moving from the non-SQL platform to the SQL platform:

1. **Install DB/TextWorks for SQL.** Follow the instructions in this document as if you were doing a new installation (not an upgrade). We recommend that you install the SQL-based application in a separate location from your existing non-SQL version.
2. **Install WebPublisher PRO for SQL.** Follow the instructions in this document as if you were doing a new installation (not an upgrade). We recommend that you install the SQL-based application in a separate location from your existing non-SQL version.
3. Follow the instructions in the document *Converting to the Inmagic DB/Text for SQL Platform*, a PDF that was installed with your DB/TextWorks for SQL software and is also available from the Product Documentation link on the Customer Extranet page. It explains how to convert your existing non-SQL textbases and menu screens and, if you have WebPublisher PRO, your non-SQL Web files. This is a required step.

Components

The *Inmagic® DB/Text for SQL* suite includes the following components:

- DB/TextWorks for SQL (previously known as Content Server or CS/TextWorks). The DB/Text Importer, a Windows Service for loading records, is installed with DB/TextWorks for SQL.
- Web Publisher PRO for SQL (previously known as *CS/WebPublisher PRO*), the optional Web component, which allows users to search published textbases and edit records (if allowed).

Both components rely on Microsoft SQL Server as the data store.

DB/TextWorks for SQL

DB/TextWorks for SQL (the “desktop component”) is a database and text retrieval system designed to manage diverse types of information including documents, images, and multimedia. DB/Text for SQL uses Microsoft SQL Server as its data store. The textbase files themselves are stored outside of SQL Server. Each textbase consists of files with the same name but different extensions. For example, a textbase called Sales consists of SALES.CBA, SALES.CBS, SALES.CAC, etc. For information about textbase files, see the DB/TextWorks online help.

DB/Text for SQL Importer

This component is a Windows service that runs in the background to load files into textbases. The Importer can load fielded text files (to add, modify, or delete records), XML files, and binary files, such as Microsoft Word documents or PDFs.

WebPublisher PRO for SQL

This optional component (the “Web component”) enables you to publish textbases on the Web, so clients can search for records and optionally add, edit, and delete records over the Web. WebPublisher PRO for SQL uses Microsoft Internet Information Services (IIS) as the Web server for hosting published textbases. IIS is a built-in component of the Windows operating system.

Microsoft SQL Server

Microsoft® SQL Server™ must be installed prior to installing DB/TextWorks for SQL and WebPublisher PRO for SQL. DB/TextWorks stores records, indexes, and textbase lists (validation lists, record classes, etc.) in SQL Server. WebPublisher PRO relies on SQL Server when users search and/or edit published textbases.

Important! For supported versions of SQL Server, please see the Support Matrix, available via the Product Documentation link on the Customer Extranet page. For prerequisites, including configuration requirements, see *Chapter 2: Prerequisites*.

Documentation Resources

In addition to this document and the online help, the following resources are available:

- **README.** Lists known and resolved issues, new features, and other information. This file is installed in the Documentation subfolder of the main installation folder.
- **Support Matrix:** Lists requirements, including prerequisite software and supported versions. The Support Matrix is available via the Product Documentation page (<http://support.inmagic.com/web/>)
- **Inmagic DB/Text for SQL Administrator's Guide.** Explains how to use the Administration program, which is essential to the SQL platform; explains how to back up DB/Text for SQL files; and provides important information about managing security and databases and performing other management tasks. The PDF file is installed with the software and is also available via the Product Documentation page (<http://support.inmagic.com/web/>).
- **Converting to the Inmagic DB/Text for SQL Platform.** This document is only needed if you are currently using the non-SQL version of DB/TextWorks. The PDF is installed with the DB/TextWorks for SQL software and is also available via the Product Documentation page (<http://support.inmagic.com/web/>).

Chapter 2: Prerequisites

This chapter describes supported configurations and lists the prerequisites for installing or upgrading DB/TextWorks for SQL and WebPublisher PRO for SQL.

You must be an Administrator on the machine to install the application. How you install the application depends on whether User Access Control (UAC) is on or off.

- If UAC is on and you have Administrator rights on the machine, right-click the executable or menu item, select **Run as Administrator**, and click **Continue** when prompted for permission to continue. If you do not have Administrator rights, you will be prompted to supply an Administrator password in order to continue.
- If UAC is off, you must be logged in as an Administrator of the machine. You can double-click executables and launch menu items the same way as in earlier Windows operating systems.

Supported Configurations

Microsoft SQL, Inmagic DB/TextWorks for SQL, and Inmagic WebPublisher PRO for SQL can reside on a single server or multiple servers, as long as the requirements stated in the separate Support Matrix and the Prerequisites stated in this chapter are met.

When deciding how to set up your configuration, please take the following into account:

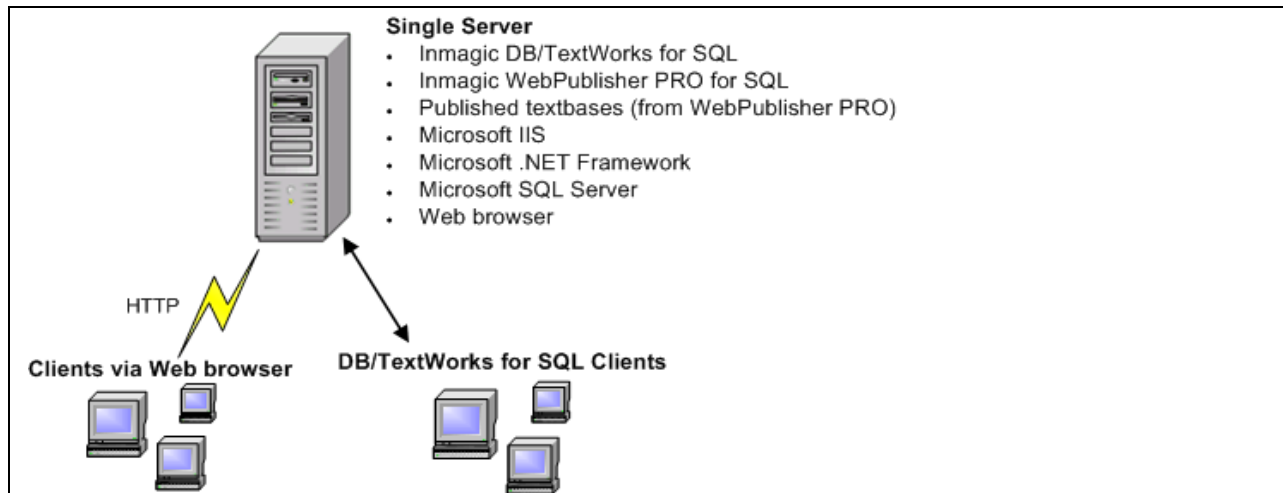
- The **DB/TextWorks application** requires access to Microsoft SQL Server, where record data is stored.
- **DB/TextWorks networked clients** must have access to the textbase files (CBS, CBA, CAC, CBM, image files, etc.) created by DB/TextWorks, which are stored outside of SQL.
- The **WebPublisher PRO application** requires access to the SQL database where DB/TextWorks data is stored. Also requires access to the textbase files listed in the previous bullet.
- **Textbases published by WebPublisher PRO** for end-user searching or editing must reside on a Web server that users can access via a Web browser.

Sample Configurations

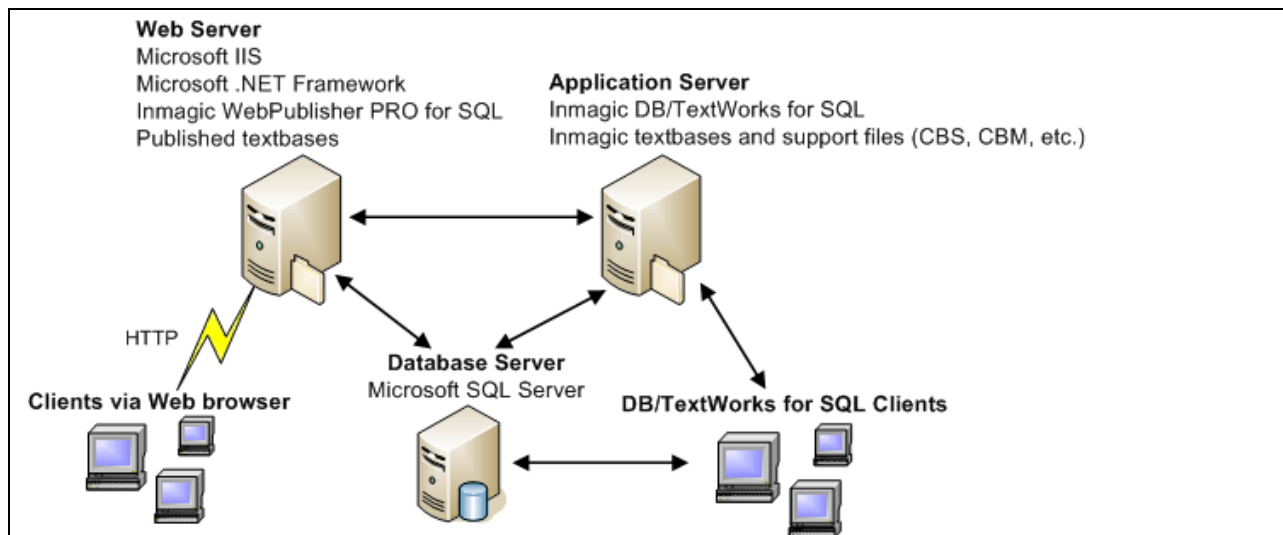
The required components, including SQL Server, can be installed in any reasonable configuration, as long as each component has the necessary access to the components it needs. You can install all components on a single machine, or you can set up a dual-server or multiple-server configuration. Client access also needs to be taken into account.

Your license agreement permits you to install each purchased copy of DB/Text for SQL in one location, such as your local hard drive, a network workstation, or a network server. The desktop and Web components may be on different machines, as long as each component resides in only a single location.

A single-server configuration is shown below, in which all of the applications run on one machine.



An example of a multiple-server configuration is shown below. This configuration could be used on a corporate intranet, for example, where separate servers provide internal and external access. The use of separate database and application servers typically provides the highest performance, as it follows Microsoft's recommendation to run IIS and SQL on separate machines. A high quality network connection between machines is required for optimal performance. This is only an example; your configuration may vary.



Microsoft SQL Server Prerequisites

Before installing DB/Text for SQL, you must ensure that Microsoft SQL Server is configured properly.

- ☐ **Important!** Confirm that you are using a supported version of SQL Server, as stated in the DB/Text for SQL Support Matrix, which is available via the Product Documentation link on the Customer Extranet page.
- ☐ Ensure that the operating system and SQL Server engine have the latest releases and upgrades from Microsoft Corporation. You can use the automatic update tool provided by Microsoft.

☐ Upgrades: Know the SQL Server database instance currently being used by DB/Text for SQL, since you will have to select it during the installation.

☐ New installations: Create a SQL Server database instance that will be used by DB/TextWorks for SQL. Note the instance name, since you will have to select it during the installation.

☐ New installations: You can assign SQL Server a named instance or use the default instance. To use the default instance of SQL Server on any machine, reference it by the machine name (the network name). Do not use "local".

☐ New installations: If DB/Text for SQL will use **SQL Server Authentication**, and/or if WebPublisher PRO for SQL will be installed on a Web server *outside* your firewall, SQL Server must be configured to use **SQL Server and Windows Authentication mode** before installing DB/Text for SQL. For information on how to change the authentication mode, see <http://msdn.microsoft.com/en-us/library/ms188670.aspx>. For instructions on installing WebPublisher PRO for SQL outside your firewall, see [Imagic Knowledgebase article 2848](#).

☐ New installations: If DB/Text for SQL will use **Windows Authentication** to connect to SQL, and your WebPublisher PRO for SQL web site on IIS will allow **Anonymous Access**, you must add your default Internet user account as a database user on SQL Server. (Later, when you install DB/Text for SQL, you will assign this default account the appropriate DB/Text for SQL role membership.)

☐ Upgrades: You must use the same authentication method currently being used by DB/Text for SQL.

☐ The account running the SQL Server service needs Full Control access to the following: Temporary file path for SQL Server Bulk Insert (Express Import, Load New Textbase, and Recover Textbase) AND Paths specified for backup file sets (Back Up Textbase and Restore Textbase).

☐ New installations: Create a shared TEMP folder on the server machine and give SQL Server Full Control access (the ability to read, write, modify, and delete). Inform your DB/TextWorks for SQL users of this location, as it will be needed when a staff member uses Express Import or Load New Textbase in DB/TextWorks. (The software asks where to put temporary files for the SQL Server BULK INSERT operation.)

DB/TextWorks for SQL Prerequisites

☐ **Important!** Confirm that your system meets the Requirements stated in the DB/Text for SQL Support Matrix, available via the Product Documentation link on the Customer Extranet page.

☐ SQL Server must be installed. Know the SQL Server database instance that you will use, since you will have to select it during the installation.

☐ Know your DB/Text for SQL serial number. You will be asked for it during installation.

☐ If DB/Text for SQL will use **Windows Authentication** to connect to SQL, complete the following tasks to ensure that users can be authenticated when logging in to DB/TextWorks for SQL:

1. Ensure that all users and/or groups exist in the Windows domain where SQL Server is a member. For more information, see your Windows documentation.

2. On SQL Server, use the SQL Server Management Studio to create SQL Server logins for each user or group that will be allowed to access DB/Text for SQL.

Note: We recommend that at least one user be made a member of the SQL Server fixed server role of **dbcreator**. (Later, when you install DB/Text for SQL, you should assign this user a role membership of **DB/Text Administrator**.)

For information about creating SQL Server logins, see your Microsoft SQL Server documentation. Also see the *DB/Text for SQL Administrator's Guide*.

- ☐ **Authentication mode for Internet Information Server (IIS).** WebPublisher PRO for SQL supports Anonymous, Basic, or Integrated Windows Authentication on your Web server. If you use Anonymous access, and you are using Windows Authentication with DB/Text for SQL, you must add your default Internet user account as a database user on SQL Server. You must also assign this default account the appropriate DB/Text for SQL role memberships.

WebPublisher PRO for SQL Prerequisites

- ☐ Microsoft IIS and the .NET framework must be installed on the server where WebPublisher PRO for SQL will be installed. **Important!** For supported versions, see the DB/Text for SQL Support Matrix, which is available via the Product Documentation link on the Customer Extranet page.
- ☐ DB/Text for SQL must be installed and accessible to WebPublisher PRO for SQL.
- ☐ New installations: If WebPublisher PRO for SQL will be installed on a Web server outside your firewall, please see [Inmagic Knowledgebase article 2848](#).
- ☐ If you are using IIS 6:
 - Use IIS Manager to enable the following Web Service Extensions: ASP.NET, ISAPI Extensions and/or CGI. (If you enable only CGI, WebPublisher PRO for SQL will not support editing.)
 - If you plan to use Basic Authentication in WebPublisher PRO, it must be enabled in IIS (it is not enabled by default).
 - For IIS 6 on Windows Server 2003 R2 (64-bit), 32-bit Application Pools must be enabled in IIS. For help on getting the .NET framework to work, see <http://support.microsoft.com/kb/911720>.
- ☐ If you are using IIS 7/8.5:
 - IIS 6 compatibility (subcomponent of IIS 7/8.5) is required.
 - Use IIS Manager to install and enable the following Application Development Role Services: ASP.NET, ISAPI Extensions and/or CGI. (If you enable only CGI, WebPublisher PRO for SQL will not support editing.)
 - If you plan to use Basic Authentication or Integrated Windows Authentication in WebPublisher PRO for SQL, those components must be installed and enabled in IIS (Role Services, Security). The default authentication configuration for IIS 7/8.5 enables Anonymous authentication only. See [http://technet.microsoft.com/en-us/library/cc733010\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc733010(WS.10).aspx).

Chapter 3: Installing or Upgrading DB/TextWorks for SQL

The main installation and upgrade tasks are listed below.

1. Confirm that you have met the Prerequisites listed in Chapter 2.
2. Follow the instructions below to install or upgrade DB/TextWorks for SQL.
3. Run **Setup Workstation** on each client that will use DB/TextWorks for SQL.
4. Optionally install the two Sample textbases.

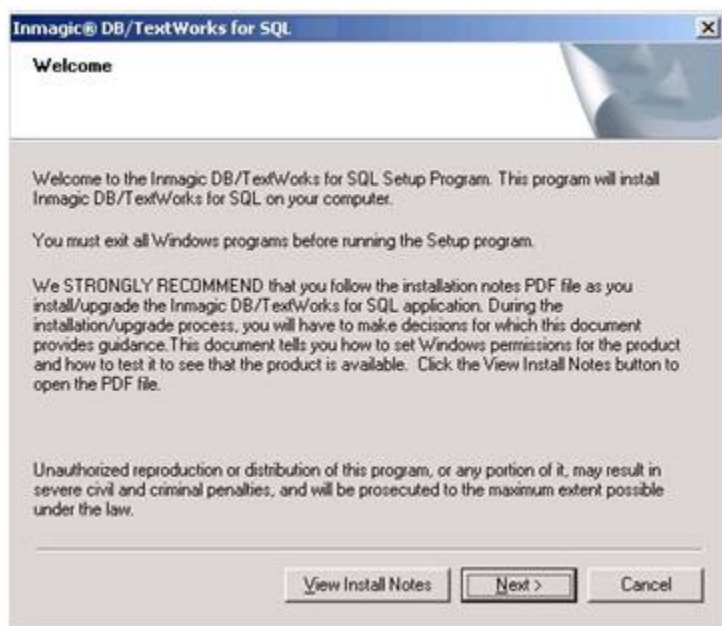
Upgrades can skip step 4, if they have already installed the Sample textbases.

All of these tasks are covered in this chapter.

To Install or Upgrade DB/TextWorks for SQL

These instructions are intended for new installations as well as upgrades.

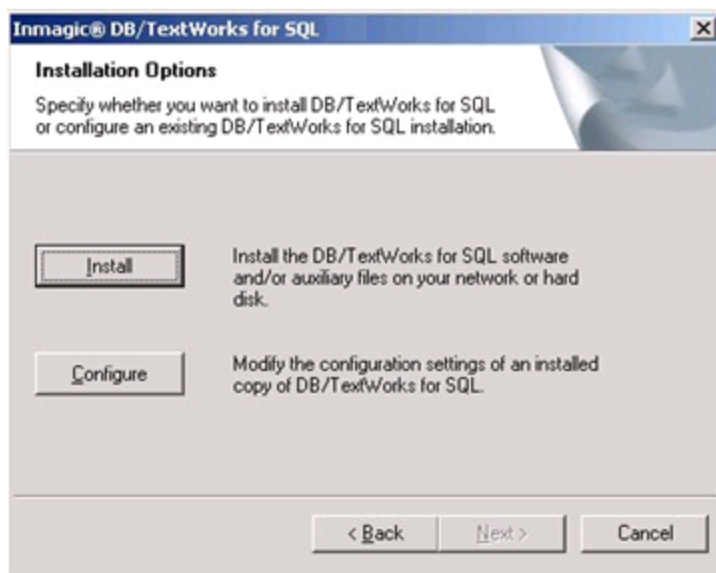
1. If you are upgrading, confirm that all users have exited the software. We strongly recommend that you make a backup copy of your current installation folder.
2. Log in as Local Administrator or a domain user with local administrator privileges. If you are not logged in as an administrator, Setup detects it and a dialog box opens so you can switch accounts (to an administrator account).
3. Exit all Windows applications.
4. Double-click the Setup.exe program for DB/Text for SQL. If you are installing on a 64-bit OS, right-click the Setup.exe and select "Run as administrator".
Note: If anti-virus software is active and you receive an error message about a malicious script, you can safely choose to continue.
5. Read the **Welcome** information and click **Next**.



6. In the **Application Selection** dialog box, select **Install or Configure DB/TextWorks for SQL** and click **Next**.



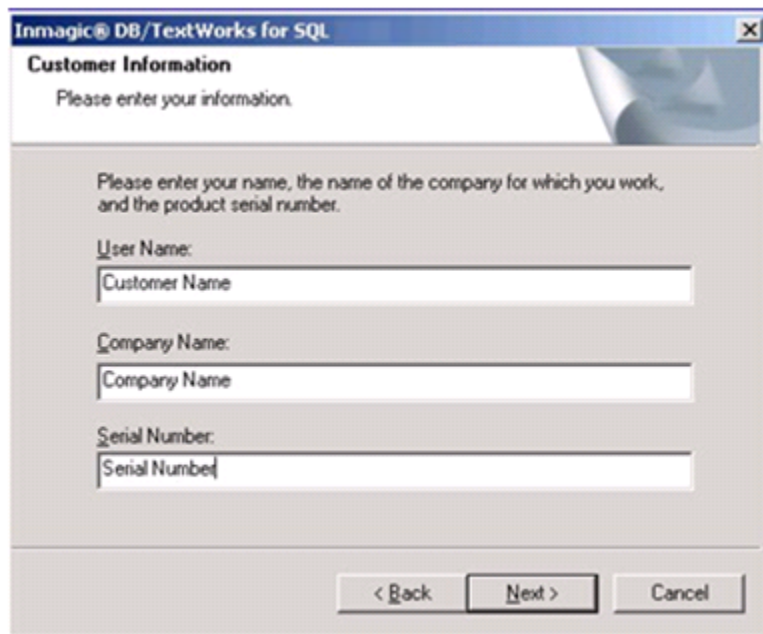
7. In the **Installation Options** dialog box, click the **Install** button.



8. Read the license agreement and respond appropriately.



9. Enter your user name, company name, and serial number, then click **Next**.

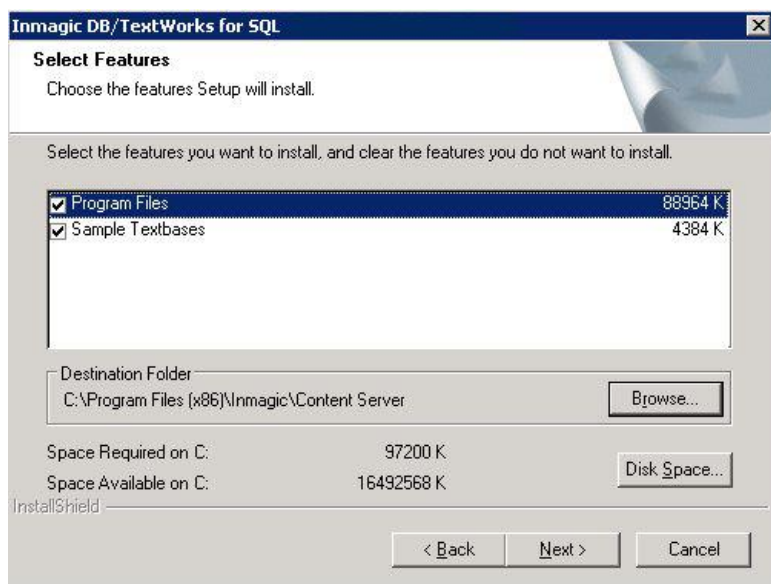


10. Select the features that you want to install, then click **Next**:

- **Program Files:** DB/TextWorks for SQL and DB/Text for SQL Importer.
- **Sample Textbases:** Files for the sample textbases (*Sample1*, *Sample2*).

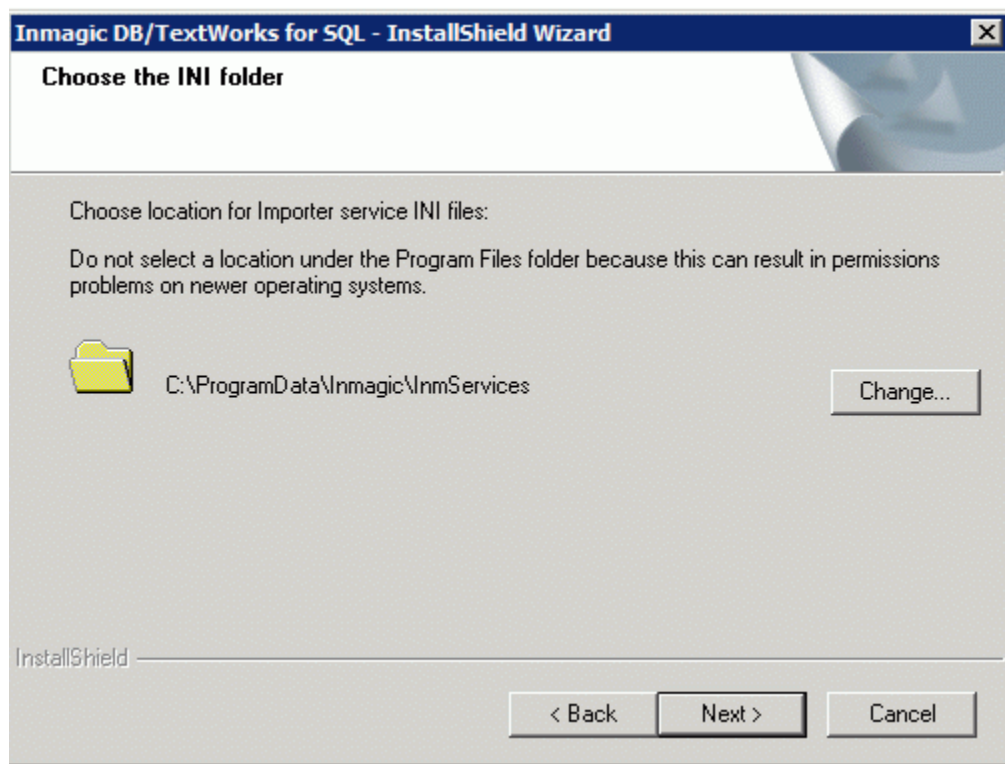
For the **Destination Folder**:

- If this is a new installation, accept the default or click **Browse** to select a different location. A different location may be preferable on Windows 2008 or Windows 2012 R2.
- If this is an upgrade, install the software in the same folder as before. When a message asks if you want to overwrite the existing files, click **Yes**.



11. Choose a location for the Importer INI files.

Important! If you are upgrading from version 13 or newer, choose the same location that was previously in use. If you are not sure of the location, you can verify it by opening the InmServices.ini found in the Content Server folder.

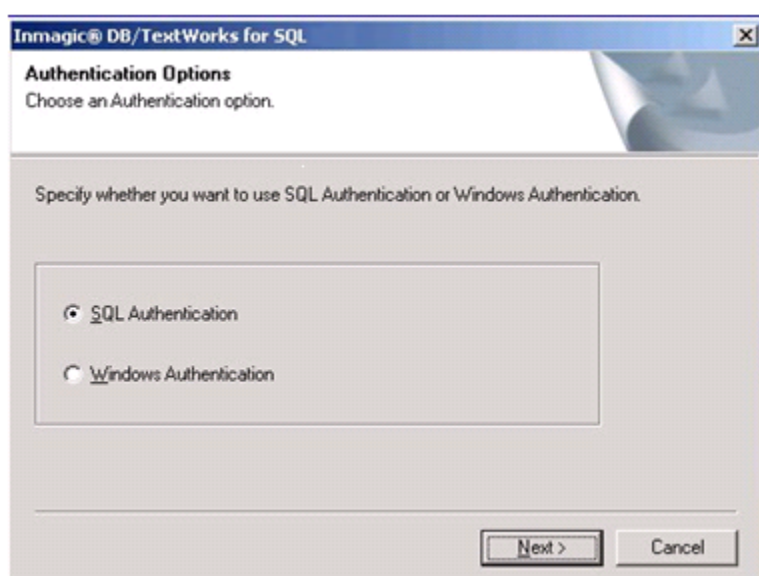


12. The **Setup Status** notification appears. Wait while Setup installs the files.

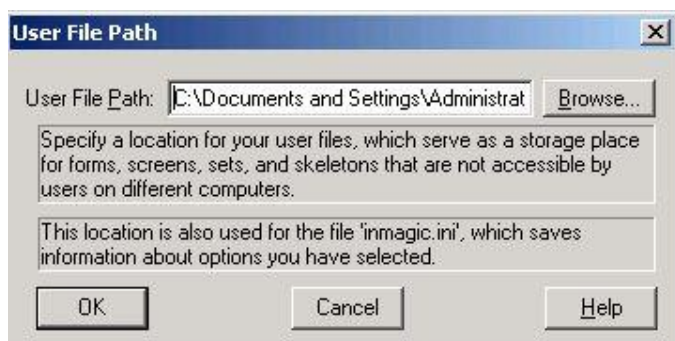
13. In the **Authentication Options** dialog box, indicate how DB/Text for SQL will access SQL Server, then click **Next**.

- **SQL Authentication:** An account called _Inmagic_Content_Server will be created with a default password. You will be required to change the password later in the installation. This account will be used to control access to all textbases. **Note:** If you are going to install WebPublisher PRO for SQL on a Web server that is *outside* of your firewall, you must select SQL Authentication.
- **Windows Authentication:** Users will be authenticated based on their Windows user account. You will be required to assign DB/TextWorks for SQL role memberships to users/groups later in the installation, to determine user rights to DB/TextWorks for SQL.

Important! Upgrades must be sure to select the same authentication method in use for the currently installed version. This should be selected by default. If you want to double-check, open INMCSRV.INI and look for WindowsAuthentication=1 (Windows Authentication) or WindowsAuthentication=0 (SQL Authentication).



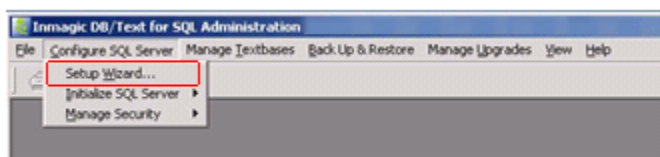
14. If this is a new installation, the **User File Path** dialog box opens, so you can specify where you want to save private textbase elements. You need full rights to the folder you specify. Click **OK**.



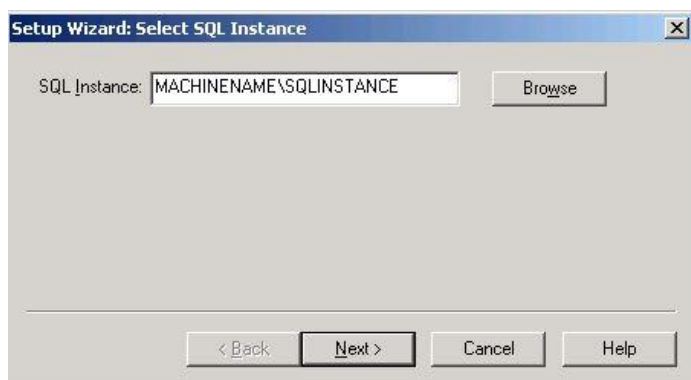
Note: The following steps assume that the SQL Server database instance that will be used by DB/TextWorks for SQL has already been created.

15. Choose **Start>Programs>Inmagic Applications>DB/Text for SQL>Administration (TW-SQL)**. This launches the Administration program so you can configure SQL Server for use with DB/TextWorks for SQL. (Be sure to select the **TW** version of the Administration program.)

16. Open the **Configure SQL Server** menu and choose **Setup Wizard**.



17. When the **Select SQL Instance** dialog box appears, select an existing SQL instance to use. If a **SQL Instance** is not displayed, use the **Browse** button to locate and select an instance. (Note: On a server running Windows 2008 or 2012 R2, enter the name of the SQL Instance manually.)



If you prefer to enter the instance name manually, use one of the following formats:

- Server name followed by a backslash and the instance name.
Example: MACHINENAME\SQL_INSTANCE

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.
Example: 192.168.0.199,1783

18. Click **Next**.

DB/TextWorks will connect to the specified SQL Server instance.

If a connection cannot be made, an error message appears ("Unable to connect to SQL Server"). Please see the Inmagic Knowledgebase (<http://support.inmagic.com/supbase3.htm>) for troubleshooting assistance.

19. If you selected **SQL Authentication** in the Authentication Options dialog box, the **Change SQL Password** dialog box appears.

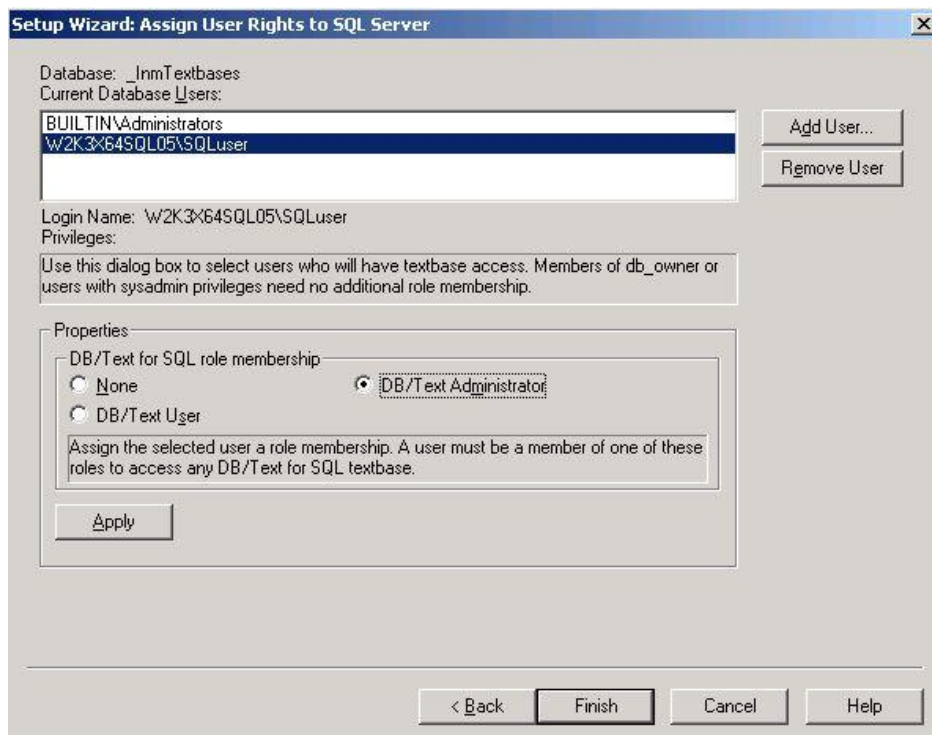


Use the **New password** box to assign a password to the **_Inmagic_Content_Server** account. This is the account that DB/Text for SQL will use to connect to SQL Server.

Click **Finish**, then confirm the password and click **OK**.

Important! Be sure to record the password. You will need to specify the same password during the installation of WebPublisher PRO for SQL. Both products must use the same password.

20. If you selected **Windows Authentication** in the Authentication Options dialog box, the **Assign User Rights to SQL Server** dialog box appears. Follow the instructions below to specify the users or groups that can use DB/TextWorks for SQL and indicate whether they can modify the control database on SQL.



- a. Click **Add User**.
- b. In the **Add Database User** dialog box, select a user from the **Login Name** list. (By default, the User Name matches the Login Name and does not need to be adjusted.) When you click **OK**, the name will be added to the Current Database Users list shown in the previous screen capture.



- c. Use **Add User** to select additional Login Names, if you wish.
- d. Select a user in the Current Database Users list and assign a DB/Text for SQL role membership and click **Apply**:
 - **None.** The user name does not have membership in any DB/Text for SQL role and cannot access SQL Server or the control database. This means the user name will not be able to use the DB/Text for SQL software.
 - **DB/Text User.** The user name has Read and Execute permission. This is required for any user you plan to let open any DB/Text for SQL textbase.
 - **DB/Text Administrator.** An administrator can perform all textbase management functions (for example, renaming and deleting a textbase). The administrator user can also modify tables in the SQL control database. We recommend that this user also be a member of the SQL Server fixed server role of **dbcreator**, which enables textbase creation.

Repeat for each database user in the list. When you are done, click **Finish** to continue.

Note: For users/groups that require broader access than the DB/Text roles allow, grant them membership in additional SQL Server fixed server roles and SQL Server fixed database roles, as appropriate. These additional roles may be needed for non-admin users/groups that will be doing management activities, such as backing up DB/Text for SQL textbases and using Express Import. Note, however, that any user/group with **sysadmin** privileges does not need any role memberships to be able to have full access to the software. For more information, see "Using SQL Server fixed roles" in the *DB/Text for SQL Administrator's Guide*.

21. The Setup Wizard confirms that DB/Text has been successfully configured on SQL Server. Click **OK**.



22. Exit the Administration program.
23. **Important:** Make sure a copy of the INMCSRV.INI file from the Content Server install folder is present in the location for Importer INI files you specified previously in step 11. The Importer will not function properly if the INMCSRV.INI is missing.

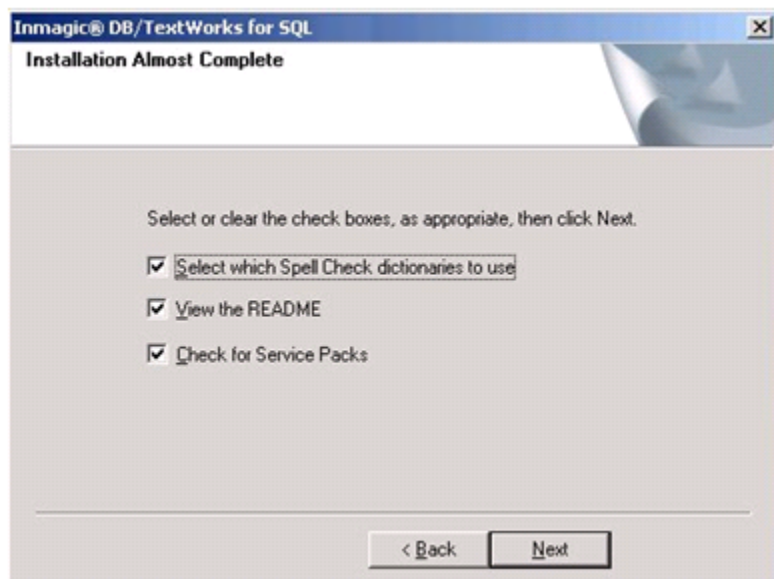
24. Optionally, use the **Configuration** dialog box to change the configuration settings.

For upgrades, your existing settings (from INMCSRV.INI) have been preserved, so you do not need to make any configuration changes.

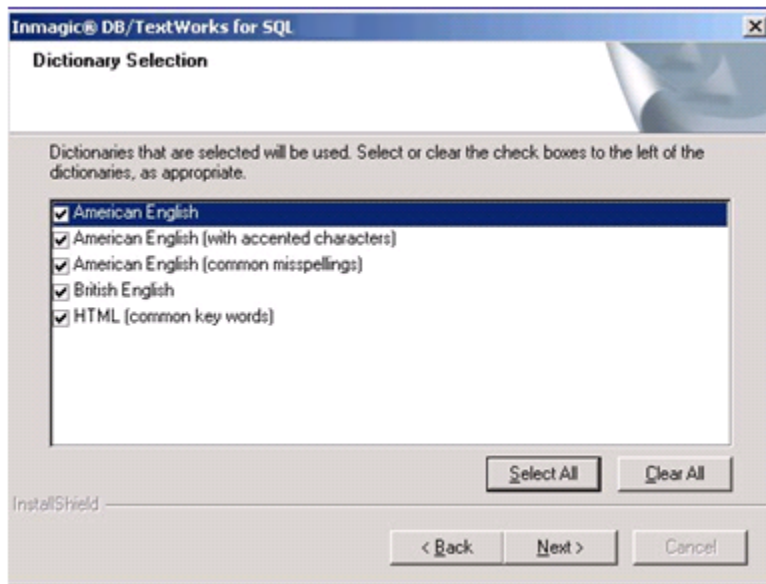


25. Click **Next**.

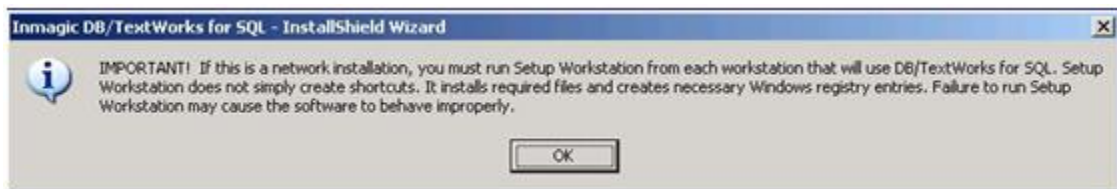
26. In the **Installation Almost Complete** dialog box, check or clear any options, then click **Next**.



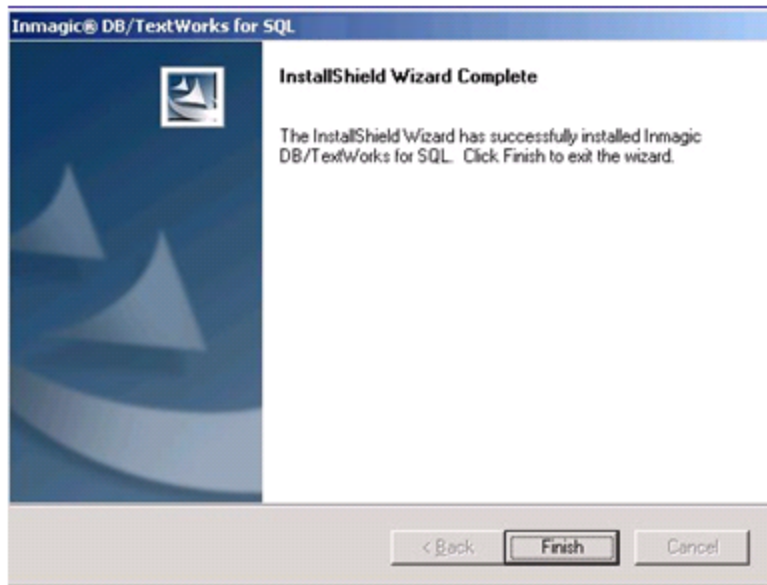
27. If you checked **Select which Spell Check dictionaries to use**, the **Dictionary Selection** dialog opens with a list of available dictionaries, so you can specify which ones to use. For example, users in the United States may want to leave the **British English** check box unchecked, so the Spell Checker will catch words such as “colour” and “centre.” If you do not plan on editing text with embedded HTML tags, you may want to leave the **HTML (common key words)** box unchecked. Click **Next** to continue.



28. A message reminds you that if this is a network installation, you must run Setup Workstation from each machine that will run the software, after the installation is complete. Click **OK**.



29. If you selected **View the README**, the Readme file will open in your Web browser. Read or print the file, then close it to continue with the installation.
30. If you selected **Check for Service Packs**, your browser will open and connect to the Inmagic Service Packs page.
31. When the InstallShield Wizard Complete dialog box appears, click **Finish**.



32. If Setup determines that you have to reboot your computer, there will be an option to restart your computer when you click the **Finish** button.

You have now completed the installation or upgrade process for DB/TextWorks for SQL. The following required items have been created or upgraded on SQL Server:

- The control database on the server, called **_InmTextbases**. This is the database that tracks each textbase created in DB/TextWorks for SQL.
- A database table to store IDs for each textbase.
- A SQL login name (**_Inmagic_Content_Server**) for the server, if you are using SQL Authentication.

Important! If you converted from the non-SQL version of DB/TextWorks to DB/Text for SQL, you must use the Administration program to convert your existing textbases, menu screens, and Web files before you can use them with DB/Text for SQL. After you have completed the instructions in these installation notes, please follow the instructions in the document *Converting to the Inmagic DB/Text for SQL Platform*, a PDF that was installed with your DB/TextWorks for SQL software and is also available from the Product Documentation link on the Customer Extranet page.

Upgrading Textbases from Version 14.5 or below

For upgrades, textbases created with DB/TextWorks for SQL v14.5 or earlier are not compatible with v15 or later and must be upgraded. This is done by opening the textbase in DB/TextWorks for SQL v15 or later. The first time a textbase is opened after upgrading to version 15 or later, you'll be prompted to upgrade the textbase. You must proceed with the textbase upgrade to use the software. It is recommended that a user with full access to all textbases should upgrade each textbase as these elevated permissions will be required.

If using Windows Authentication, to perform the textbase upgrade, the user must have at least dbcreator and bulkadmin privileges. Ideally a user with the SQL sysadmin role should be used.

Note: The upgrade process will discard the list of records in any saved sets (in the same sense Recover Textbase does), so you'll need to use Refresh Sets (and any omissions will be lost).

Configuring Clients (Setup Workstation)

If you installed DB/Text for SQL on a network server, you must run **Setup Workstation** on each client that will use DB/Text for SQL. This configures the client so it can successfully use DB/Text for SQL.

Note: Upgrades are also required to run Setup Workstation on each client.

To Use SMS to Set Up Workstations

Important! Microsoft Visual C++ 2008 Redistributable Package must be present on the target machine. Typically this is installed on machines that are current with Windows updates.

1. Share the Inmagic folder that contains the DB/TextWorks for SQL installation folder on the host machine.
2. From the SMS subfolder of the DB/TextWorks for SQL 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 DB/TextWorks for SQL 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.

To Manually Set Up Workstations

Perform these steps for each workstation that will access DB/TextWorks for SQL.

1. Share the DB/TextWorks for SQL installation folder on the machine hosting DB/TextWorks for SQL.
2. Log in with Administrator privileges on the workstation that will access DB/TextWorks for SQL. You must be logged in as Administrator to run Setup Workstation.
3. From the Windows Start menu, choose **Run**, then run the Setup program from where DB/TextWorks for SQL is installed (for example, \\Servername\DBT4SQL\Setup.EXE, where DBT4SQL is the name of the DB/TextWorks for SQL share), and click **OK**.
4. On the Welcome dialog box, click **Next**.
5. On the Installation Options dialog box, click the **Workstation** button.
6. Wait while Setup installs the files.
7. On the Installation Almost Complete dialog box, check or clear the following options, then click **Next**:
 - **Select which Spell Check dictionaries to use:** If you select this option, you will be asked to specify which dictionaries to use.
 - **View the README:** If you select this option, the README file will open in your Web browser, so you can read or print the file.
8. When the InstallShield Wizard Complete dialog box opens, click **Finish**.
9. During the Setup Workstation process, DB/Text for SQL 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.
10. Repeat this process for each workstation that will access DB/TextWorks for SQL.

Note: When DB/TextWorks for SQL is first accessed by a particular client, that client will be asked to specify a user file path. Tell all clients that they should specify a location on the local machine, not on a network drive.

Installing the Sample Textbases (Sample1 and Sample2)

You can install the sample textbases provided with DB/TextWorks for SQL, then use them for practice purposes. The sample textbases are called *Sample1* and *Sample2*.

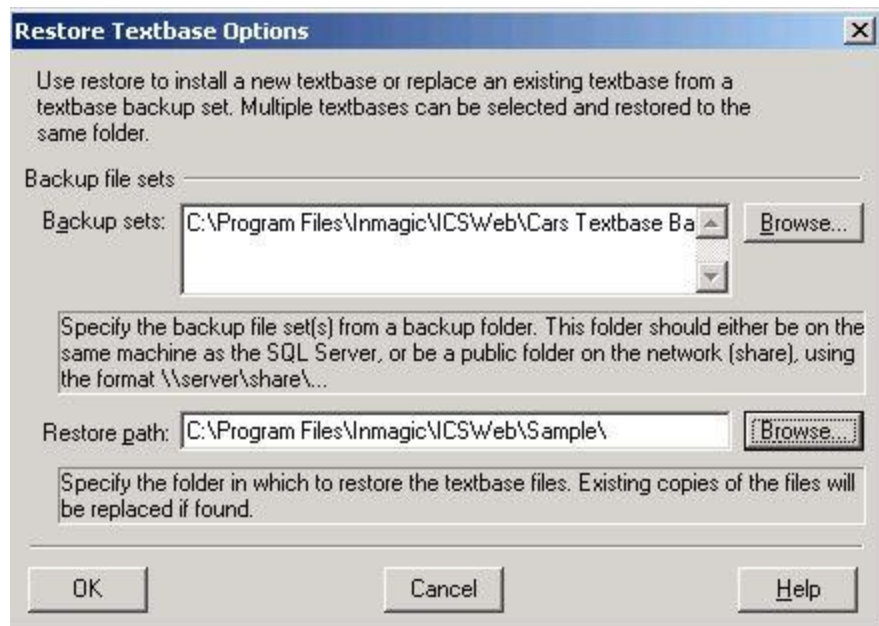
Perform the following steps for each of the sample textbases.

1. Using an account that has Administrator privileges, log in to the machine where DB/TextWorks for SQL is installed.
2. If your SQL Server database instance is on a **different machine** than DB/TextWorks for SQL, you must share the Sample Textbase Backup File Sets subfolder, which is located in the DB/TextWorks for SQL installation folder. The account running the SQL Server service needs Full Control access to the subfolder.
3. Choose **Start>Programs>Inmagic Applications>DB/Text for SQL>Administration (TW-SQL)** to open the Administration program. **Note:** On 64 bit operating systems navigate to the InmCSAdmin.exe file in the DB/TextWorks install folder, right-click on the file and choose "Run as administrator".
4. Choose **Back Up & Restore>Restore Textbases** to open the Restore Textbase Options dialog box.
5. In the **Backup sets** box, use **Browse** to select Sample1.CBA and Sample2.CBA, located in the Backup File Set subfolder under the DB/TextWorks for SQL installation folder (for example, C:\Program Files\Inmagic\Content Server\Textbases\Sample Textbase Backup File Sets\Sample1.CBA).

Important! If your SQL Server database instance is on a **different machine** than the one you are using, specify the sample textbases using the Universal Naming Convention (UNC), not a drive letter.

Additionally, you must use specific log on parameters for the SQL Server service. To do this, right-click the **My Computer** icon on the server where SQL Server is running and select **Manage**. Expand the Services and Applications tree, and then double-click **Services**. Right-click your instance of SQL Server for the *DB/TextWorks for SQL* application and select **Properties**. Select the **Log On** tab and then specify a domain account that has access to SQL Server and full access to all the textbase files or folders that reside on other machines.

6. In the **Restore path** box, enter the path to the Sample subfolder of the DB/TextWorks for SQL installation folder. You can click the **Browse** button and navigate to this location (for example, C:\Program Files\Inmagic\Content Server\Sample).
- Tip!** For the Sample Textbases shortcut menu item to work correctly, the Sample1 and Sample2 textbases *must* be installed in the Sample subfolder of the DB/TextWorks for SQL installation folder.
7. Click **OK** on the Restore Textbase Options dialog box to install the textbase(s) that you specified.



8. If you are using Windows Authentication, a message reminds you that you must use **Configure SQL Server>Manage Security>Assign User Rights to Textbase** to permit users to access the Sample textbase(s). Click **OK** to dismiss the message box.



9. Review the information on the Restore Textbases: Operation Status dialog box and click **Close** when you are done.
10. If you are installing textbases from another backup file set folder, repeat steps 1–9.
11. If you are using Windows Authentication, use **Configure SQL Server>Manage Security>Assign User Rights to Textbase** to permit users to access the Sample textbase(s). See the *DB/Text for SQL Administrator's Guide* for details.
12. Exit the Administration program.

Changing Configuration Settings Later

To modify the configuration settings of an installed copy of DB/TextWorks for SQL, you can run the Setup program again from the installation folder and click the **Configure** button.



This provides access to the **Configuration** dialog, where you can make any desired changes.



When you are done, click **Next** then follow the prompts to save your changes and exit the Setup program.

Chapter 4: Installing or Upgrading WebPublisher PRO for SQL

WebPublisher PRO for SQL (previously called *CS/WebPublisher PRO*) is the optional Web component of DB/Text for SQL. It allows textbases to be searched and optionally edited from a Web browser over a corporate intranet, extranet, or the Internet. Your license agreement permits installation on one Web server.

To Install or Upgrade WebPublisher PRO for SQL

Important! If WebPublisher PRO for SQL is on a Web server *outside* of your firewall, see [Inmagic Knowledgebase article 2848](#) for information on how to set up this configuration.

To install or upgrade WebPublisher PRO for SQL

1. Confirm that you have met the Prerequisites stated in Chapter 2.
2. Log in to the Web server with Administrator privileges.
3. Exit all Windows applications.
4. Upgrade only: Back up your current WebPublisher PRO for SQL (or *CS/WebPublisher PRO*) installation folder. You may need some of the content in step 7. It's especially important to back up ICSWEB.INI, which includes textbase locations.
5. Upgrade only: If you are upgrading from a version prior to v12.0, uninstall the previous version before proceeding. **IMPORTANT:** Before uninstalling, make a note of the IIS authentication setting for the ics-wpd virtual directory (anonymous authentication, integrated windows authentication or basic authentication). You will need this information when you install v16.0.
6. Double-click the **Setup.exe** program for DB/Text for SQL. **Note:** On 64 bit operating systems, right-click on Setup.exe and select "Run as administrator". Select **Install WebPublisher PRO for SQL** and click **Next**.

Note: If anti-virus software is active and you receive an error message about a malicious script, you can safely choose to continue.

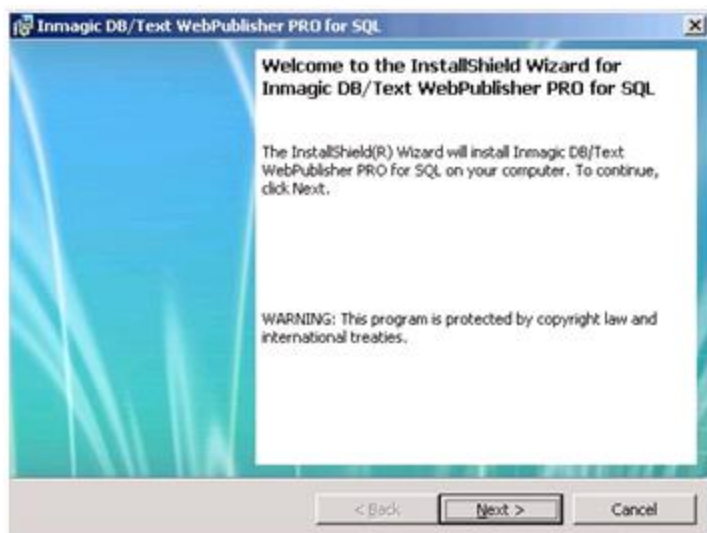
If the prerequisite software is not detected, the Setup program will not proceed. See the Support Matrix for details.

7. Upgrade only: If you are upgrading from a version prior to v12.0, compare your newly installed .INI files with the ones backed up in step 5. Restore the backup copy if necessary.
8. Upgrade only: If you are upgrading from a version prior to v15, the Inmagic Browse web.config (default: C:\Program Files\Inmagic\ICSWeb\InmagicBrowse\web.config) must be updated to have their requestEncoding and responseEncoding be UTF-8. <globalization requestEncoding="UTF-8" responseEncoding="UTF-8" />
9. Upgrade only: If you are upgrading from a version prior to v15 and you have exported HTML edit screens (for creating new records) you will need to re-export them so they will use the new HTML edit page (wpp_edit.aspx) instead of the old .ASP page (icsw-edit.asp).
10. Upgrade only: If you are upgrading from a version prior to v15 and your search results or expanded display look significantly different than they did in prior versions, you may have Raw HTML or Inline Images in the forms. Open the form in the Form Designer, choose **Tools>Form Properties** from the menu, select the HTML tab, uncheck **Use Cascading Style Sheets to preserve formatting**, OK your changes, and save the form. Check the WebPublisher output again. Perform these steps for each affected form.

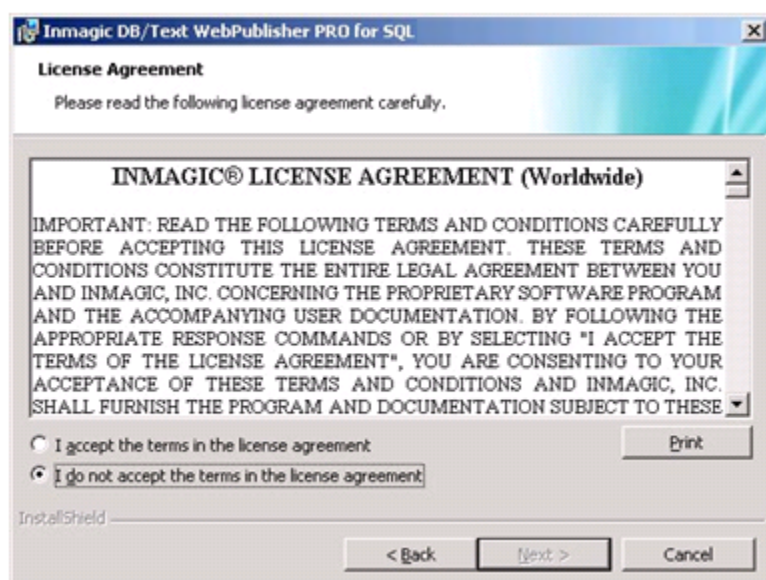
11. In the Application Selection dialog box, select **Install DB/Text WebPublisher PRO for SQL** and click **Next**.



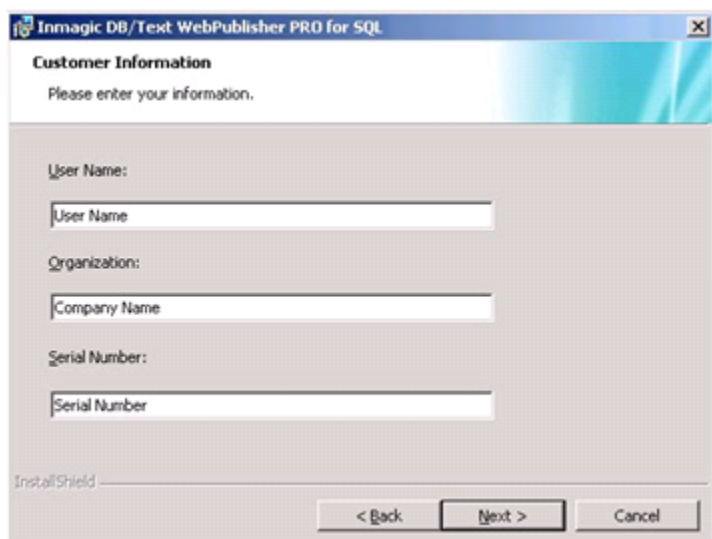
12. On the **Welcome** dialog box, click **Next**.



13. Read the license agreement and respond appropriately.

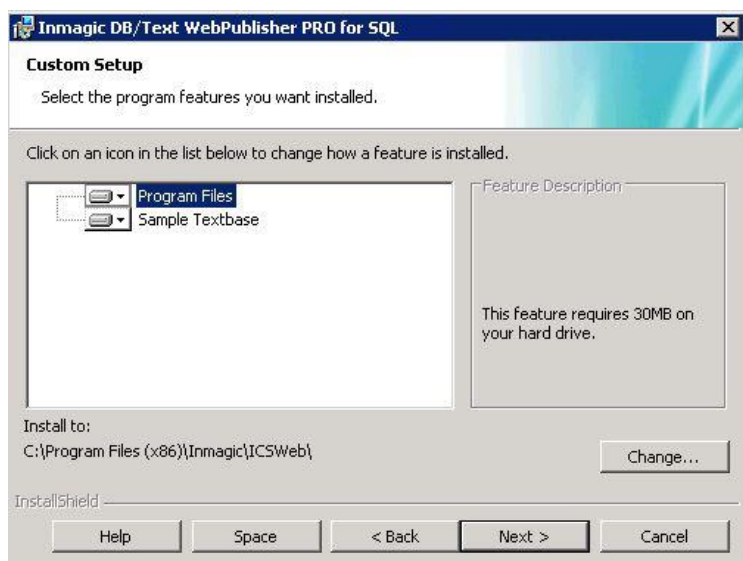


14. Enter your user name, company name, and the DB/Text for SQL serial number, and click **Next**.



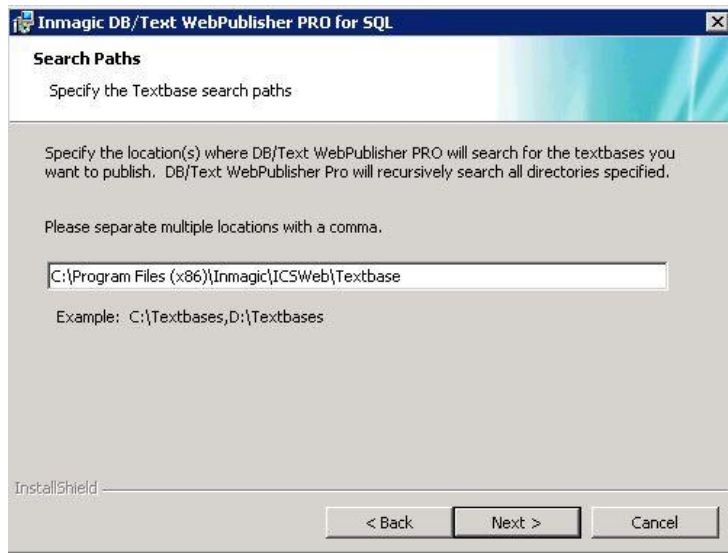
15. In the **Custom Setup** dialog box, click **Next** to accept the default locations for the WebPublisher PRO for SQL Program Files and the Cars Sample Textbase, or use the **Change** button to change the locations.

- If this is an upgrade, install the software in the same folder as your current version. When a message asks if you want to overwrite the existing files, click **Yes**.



16. Use the **Search Paths** dialog box to specify one or more locations where WebPublisher PRO for SQL will look for published textbases. The software will recursively search all subfolders under the specified location(s).

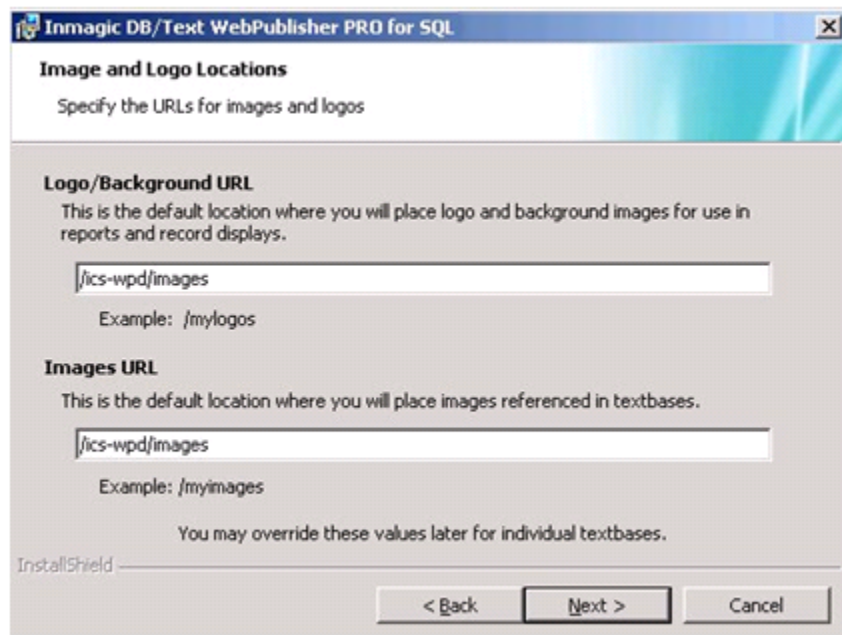
Note: The **Search Paths** are the folders that will contain the textbase files that reside outside of SQL Server (CBS, CBA, CAC, CBM, etc.). To specify multiple locations, use a comma between path names. To specify a machine other than the HTTP server, use the Universal Naming Convention (UNC) instead of a drive letter. The following example specifies three locations, with the last one using a UNC: C:\ICSWEB\TEXTBASE\, D:\DATA, \\SERVER2\TBS



Note: The search paths are written to an initialization file called ICSWeb.INI, located in the installation folder. You can edit that file if you ever want to add or change locations.

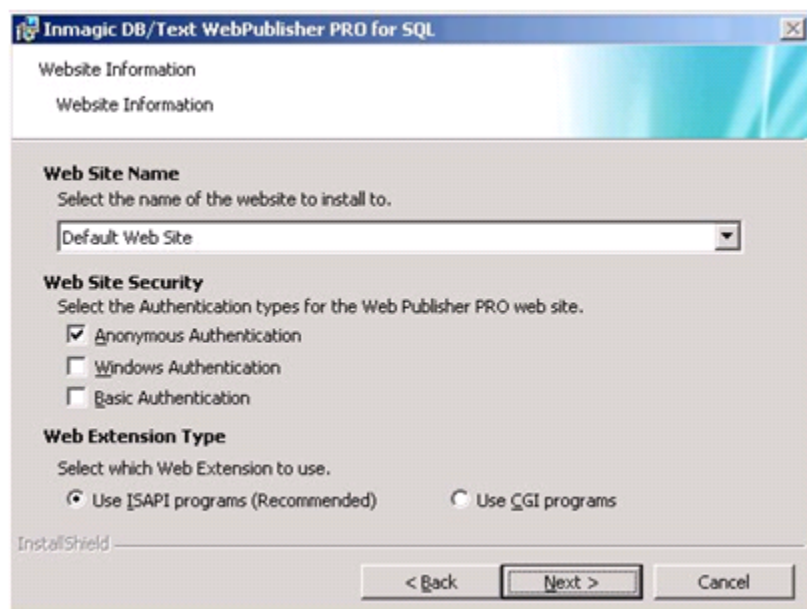
17. Click **Next**.
18. In the **Image and Logo Locations** dialog box, specify a default Web directory for **Logo/Background URL** and **Images URL**.

We recommend that you accept the default location (the virtual directory `/ics-wpd/images`) and store your images in the `Images` subfolder of the 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 will be written to the **ICSWeb.INI** file, in the installation folder. Later, you can edit that file to change the location, if desired.



19. Click **Next**.

20. Follow the instructions below to use the **Website Information** dialog box to specify the IIS web site settings for WebPublisher PRO.



Web Site Name

Select the IIS web site to use for DB/Text Web Publisher PRO.

New installations: We recommend that you use the Default Web Site. Two required virtual directories (**ics-wpd** and **InmagicBrowse**) will be created under the IIS web site that you specify. To use a non-default web site, see [Inmagic Knowledgebase article 2846](#).

Upgrades: Select the same web site that is currently being used (Default Web Site by default). The **ics-wpd** and **InmagicBrowse** virtual directories should already exist on that web site; they will not be created. If you want to change these virtual directories, see [Inmagic Knowledgebase article 2846](#).]

Web Site Security

Select an option to specify how to authenticate clients who will access textbases published on the IIS web site. For more information, see: [http://technet.microsoft.com/en-us/library/cc733010\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc733010(WS.10).aspx).

Upgrades: It is **very important** that you select the authentication method that is currently in use. The correct option is selected by default.

Anonymous Authentication is the default for new installations. This method does not prompt for a user name or password. Instead, IIS provides stored credentials to Windows using the IUSR_ *machinename* account (or IUSR for Windows Server 2008 or 2012 R2). **Note:** If the published textbases are on a different machine than the Web server, Anonymous Authentication *cannot* be used. You must use a valid domain account with the proper security permissions.

Windows Authentication is best suited to an intranet environment, where client computers and Web servers are in the same domain. This method is available only if Windows Authentication is enabled in IIS.

Basic Authentication prompts for a user name and password. Each user who will access the published textbases must have a Windows account. Users must have "log on locally" permissions on the Web server. This method is available only if Basic Authentication is enabled in IIS.

Web Extension Type

ISAPI is recommended for better performance, or you can use CGI. (If you choose CGI, editing is supported in WebPublisher PRO for SQL only if *both* CGI and ISAPI are enabled in IIS.)

Note: If you need to switch later, run ISAPI.BAT in the JScript subfolder to use ISAPI, or run CGI.BAT to use CGI.

21. Click **Next**.

22. In the **Authentication Options** dialog box, select the same option that you used for DB/TextWorks for SQL (either **SQL Authentication** or **Windows Authentication**), then click **Next**.

Important! It is essential that you choose the same authentication method that you chose for DB/TextWorks for SQL. This should be selected by default. If you want to double-check, open INMCSEVR.INI and look for WindowsAuthentication=1 (Windows Authentication) or WindowsAuthentication=0 (SQL Authentication).

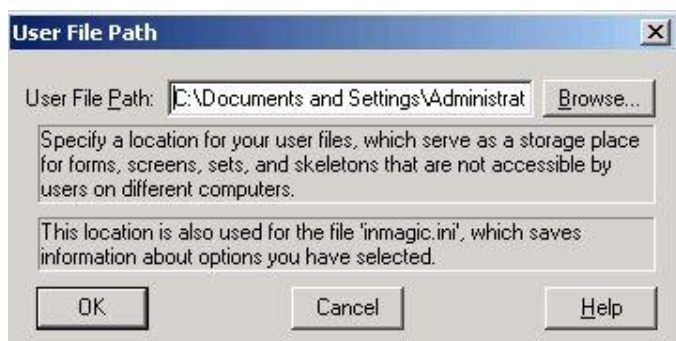
Note: To install WebPublisher PRO for SQL on a Web server that is outside of your firewall, you must use **SQL Authentication**.



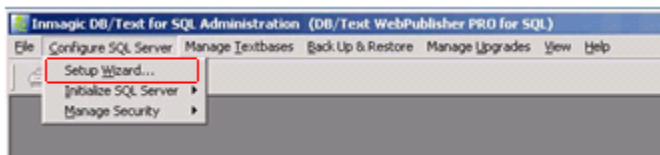
23. In the Ready to Install the Program dialog box, click **Install**.



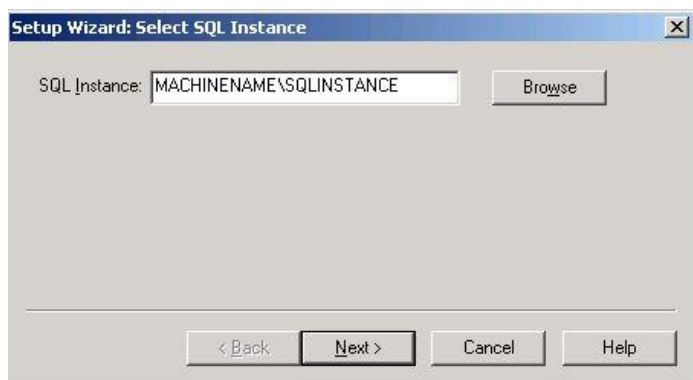
24. Setup launches the Administration program so you can configure SQL Server for use with WebPublisher PRO for SQL. If this is a new installation, the **User File Path** dialog box opens, so you can specify where you want to save private textbase elements and the INMAGIC.INI file. Note that you need full rights to the folder you specify. Click **OK**.



25. Open the **Configure SQL Server** menu and choose **Setup Wizard**. **Important!** You must do this for upgrades as well as new installations.



26. The **Select SQL Instance** dialog box appears. If a **SQL Instance** is not displayed, use the **Browse** button to select the instance of SQL that you will use. (Note: On a server running Windows 2008 or 2012 R2, enter the name of the SQL Instance manually.)



If you prefer to enter the instance name manually, use one of the following formats:

- Server name followed by a backslash and the instance name.
Example: MACHINENAME\SQL_INSTANCE

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.
Example: 192.168.0.199,1783

Record your information here for future reference:

SQL Server Instance selected: _____

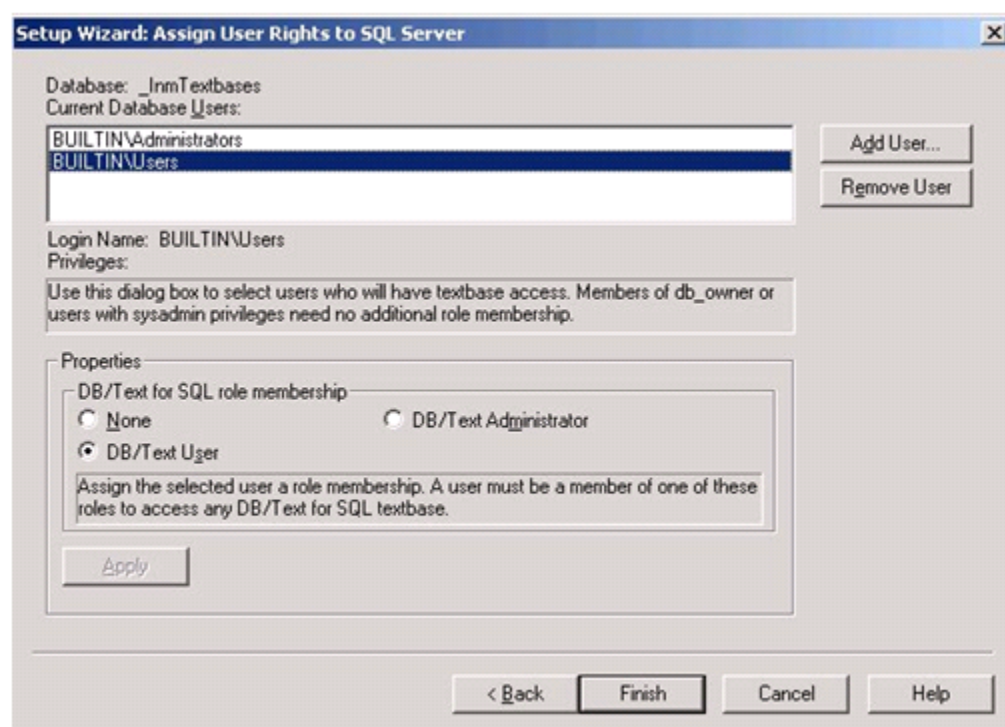
27. Click **Next**.

28. If DB/TextWorks for SQL cannot connect to the SQL instance, an error message appears. For troubleshooting assistance, see the Inmagic Knowledgebase (<http://support.inmagic.com/supbase3.htm>).
29. If you selected **SQL Authentication** in the Authentication Options dialog box, the **Change SQL Password** dialog box appears.

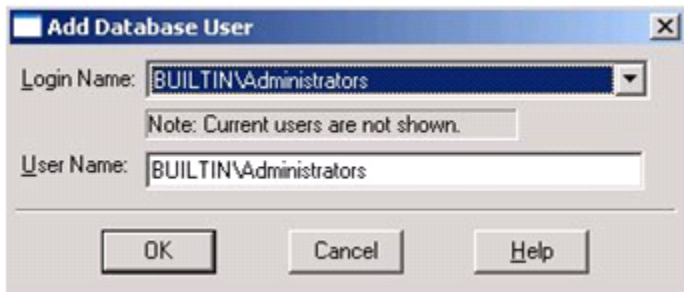


Important! You must specify the same password that you used when you installed DB/TextWorks for SQL. Both DB/TextWorks for SQL and WebPublisher PRO for SQL must use the same password to connect to SQL as the “_Inmagic_Content_Server” account. Click **Finish**. Confirm the password and click **OK**.

30. If you selected **Windows Authentication** in the Authentication Options dialog box, the **Assign User Rights to SQL Server** dialog box appears.



- a. Click **Add User**.
- b. In the **Add Database User** dialog box, select a user from the **Login Name** list. (By default, the User Name matches the Login Name and does not need to be adjusted. The User Name is the name that will appear in the Current Database Users list shown in the previous screen capture.) When you click **OK**, the name will be added to the Current Database Users list.



- c. Use **Add User** to select additional Login Names, if you wish.
- d. Select a user in the Current Database Users list, assign a DB/Text for SQL role membership, and click **Apply**.
 - **None.** The user name does not have membership in any DB/Text for SQL role and cannot access SQL Server or the control database. This means the user name will not be able to access published textbases.
 - **DB/Text User.** The user name has Read and Execute permission. This is required for any user you plan to let open published textbases.
 - **DB/Text Administrator.** The user can perform all textbase management functions (for example, renaming and deleting a textbase). The user can also modify tables in the SQL control database. We recommend that this user also be a member of the SQL Server fixed server role of **dbcreator**, which enables textbase creation.

Repeat for each database user in the list. When you are done, click **Finish** to continue.

Note: For users/groups that require broader access than the DB/Text roles allow, grant them membership in additional SQL Server fixed server roles and SQL Server fixed database roles, as appropriate. These additional roles may be needed for non-admin users/groups that will be doing management activities, such as backing up DB/Text for SQL textbases and using Express Import. Note, however, that any user/group with **sysadmin** privileges does not need any role memberships to be able to have full access to the software. For more information, see "Using SQL Server fixed roles" in the *DB/Text for SQL Administrator's Guide*.

31. In the **InstallShield Wizard Completed** dialog box, check or clear any options, then click **Finish**. We recommend that you view the readme and check for the latest service packs.
 - **View Readme**
 - **View Schema** (<http://support.inmagic.com/Web/DBTWandWPPv13/InputSchemaWPP13.html>)
 - **Check for Service Packs** (http://support.inmagic.com/downloads/extranet-files/service_packs.html)
 - **Show the Windows Installer log** (This option only appears for certain operating systems.)



Read or print the information that appears (readme, schema, installer log).

In some cases, you may be prompted to restart your computer, or you can choose to restart later.

You have now finished installing or upgrading WebPublisher PRO for SQL.

If you selected **Windows Authentication** or **Basic Authentication**, you must set Windows permissions for each user account that will access WebPublisher PRO for SQL (see below).

Important! If you converted from the non-SQL version of WebPublisher PRO for SQL, you must use the Administration program to convert your existing Web screens and forms for use with the new software. After you have completed the instructions in this document, please follow the instructions in the document *Converting to the Inmagic DB/Text for SQL Platform*, a PDF that was installed with your DB/TextWorks for SQL software and is also available from the Product Documentation link on the Customer Extranet page.

Setting Windows Permissions

Upgrades: If permissions were set and working before the upgrade, you can skip this step.

If you selected **Anonymous Access** for the Web Site Security, you can skip this step.

If you selected **Windows Authentication** or **Basic Authentication**, you must set Windows permissions for each user account that will access WebPublisher PRO for SQL.

- a. In Windows Explorer, right-click the folder or file (see table below) and choose **Properties**.
- b. Select an account on the **Security** tab. If necessary, use the **Add** button to add an account.
- c. Specify the permissions indicated in the table below, then click **OK** to close the dialog box.
- d. Repeat for each file or folder listed below.

Folder or File	Permission
WebPublisher PRO for SQL installation folder (default: C:\Program Files\Inmagic\ICSWeb)	Read
QSets subfolder (example: C:\Program Files\Inmagic\ICSWeb\QSets)	Full Control
Sample subfolder (if you plan the use the <i>Cars</i> textbase on the Web)	Read: Search only. Full Control: Search, edit, add, delete records.

Textbase folders that will be searched	Read
Textbase folders that will be searched, updated and/or deleted	Full Control
ICSWeb.INI file (in the WebPublisher PRO for SQL installation folder)	Full Control

Installing the Sample Textbase (Cars)

Upgrades will need to upgrade the Cars textbase prior to use in WebPublisher PRO for SQL.

WebPublisher PRO for SQL provides a sample textbase called *Cars*, which you can install and use for practice purposes.

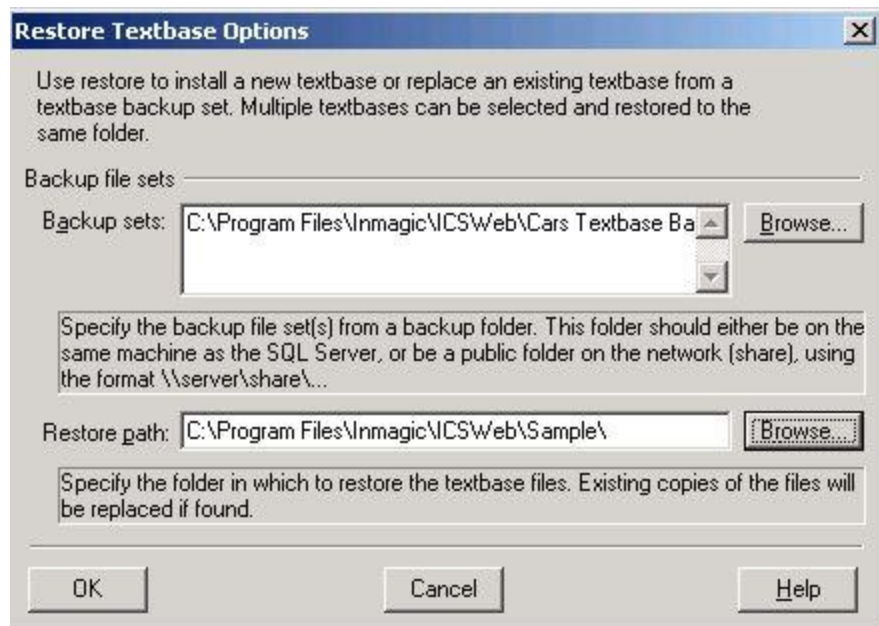
Perform the following steps.

1. Using an account that has Administrator privileges, log in to the machine where WebPublisher PRO for SQL is installed.

If the SQL Server database instance is located on a machine *other than* the one you are using:

- Use an account that has access to SQL Server and full access to all the files or folders that reside on other machines.
- If you are using **Windows Authentication**, the account must be a domain user on the domain server, but does not need to be a member of any domain Admin group. This account should be a part of the local Admin group on the machine. (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 DB/TextWorks for SQL application, and select **Properties**. Select the Log On tab and then specify the account.)
- You must share the CARS Textbase Backup File Set subfolder, which is located under the WebPublisher PRO installation folder. The account running the SQL Server service needs Full Control access to the subfolder.
- Throughout these instructions, use the Universal Naming Convention (UNC) file path instead of a drive letter, when specifying paths.

2. Choose **Start>Programs>Inmagic Applications>DB/Text for SQL>Administration (WP-SQL)**. (Be sure to select the **WP** version of the Administration program.) **Note:** On 64 bit operating systems, navigate to the InmCSAdmin.exe tool in the Exec subfolder of the WebPublisher PRO install directory; right-click on the file and choose "Run as administrator".
3. Choose **Back Up & Restore>Restore Textbases** to open the Restore Textbase Options dialog box.
4. In the **Backup sets** box, select the path to the textbase you want to install: Click the **Browse** button and navigate to the Cars Backup File Set subfolder, under the WebPublisher PRO for SQL installation folder (for example, \\Server\Program Files\Inmagic\ICSWeb\Cars Textbase Backup File Set). Select **Cars.CBA** and click **Open**.
5. In the **Restore path** box, enter the path to the Sample subfolder of the WebPublisher PRO for SQL installation folder, or use **Browse** to navigate to this location.
6. Click **OK** on the Restore Textbase Options dialog box to install the textbase.



7. If you are using Basic or Integrated Windows Authentication, a message reminds you that you must use **Configure SQL Server>Manage Security>Assign User Rights to Textbase** to permit users to access the textbase(s). Click **OK** to dismiss the message box.



8. Review the information on the Restore Textbases: Operation Status dialog box and click **Close** when you are done.
9. Exit the Administration program.
10. If you are using **Basic** or **Integrated Windows Authentication** for IIS, you must provide the proper Windows permissions to the folder in which the Cars textbase resides. See [Setting Windows Permissions](#).

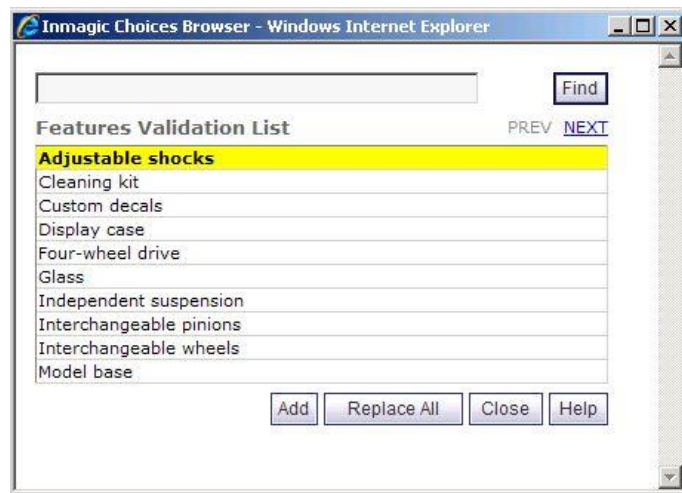
Testing WebPublisher PRO for SQL

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

To test access to *WebPublisher PRO for SQL*

1. Point your Web browser to **http://<WebServerName>/ics-wpd/sample/carsqs.htm**, using the name of the Web server where WebPublisher PRO for SQL 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 Inmagic Choices Browser should look like the following example. (Depending on the version of InmagicBrowse you are using, the Find button may not appear. If that is the case, the list will automatically scroll to the nearest matching term.)



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.

Chapter 5: Using the Software

To access installed programs, go to the Windows **Start** menu and choose **Programs>Inmagic Applications>DB/Text for SQL**. Depending on the options selected during Setup, you may see some or all of the following options:

- **Administration (TW-SQL)**. Run the Administration program for DB/TextWorks for SQL.
- **Administration (WP-SQL)**. Run the Administration program for WebPublisher PRO for SQL.
- **Importer**. Open the Inmagic Importer Settings dialog so you can configure the Importer service. For instructions, see the *Inmagic DB/Text for SQL Textbase Importer Service User's Guide* available via the Product Documentation link on the Customer Extranet page.
- **DB/TextWorks for SQL**. Start DB/TextWorks for SQL.
- **Online Help**. Open the online help.
- **README**. Open the README file.
- **Sample Textbases**. Access the *Sample1* and *Sample2* textbases supplied with DB/TextWorks for SQL. Use these textbases to practice searching and other operations.
- **Setup Workstation**. Configure clients so they can use DB/TextWorks for SQL. Setup Workstation must be run on each client that will access DB/TextWorks for SQL, (This option does not install software; it configures client machines.)

Administration and Maintenance

Securing the Administration Programs (TW-SQL, WP-SQL)

The **Administration** programs (**TW-SQL** and **WP-SQL**) are available to anyone who can access them, either from the **Start** menu or the command line. These programs are intended only for administrator use, and should be restricted from regular users.

Therefore, it is recommended that you secure access to both instances of the executable file (**InmCSAdmin.EXE**). It is installed in the same location as the DB/TextWorks EXE file and also in the same location as the WebPublisher DLL. You can use standard Windows methods to restrict permissions (right-click the file, choose Properties, Security).

Management and Maintenance

For consistent, optimal performance, it is important that you regularly monitor SQL Server in relationship to DB/Text for SQL, and that you maintain DB/TextWorks for SQL and its databases on SQL Server. For information about textbase management and database maintenance, please see the *Inmagic DB/Text for SQL Administrator's Guide*. This PDF file is installed with the DB/TextWorks for SQL software and is also available via the Product Documentation link on the Customer Extranet page.

Performance Adjustments for Index Browsing

To enhance performance of the Query Choices Browser, we recommend that you set the computation method for the scroll bars to be faster, by adding the `LargeListOption=4` textbase-specific parameter to all `<textbase>.INI` files, as shown below.

A value of 4 specifies faster scroll bars for all field types. A value of 3 affects only Term and Word-indexed on Text and Code fields. (Values of 0, 1, and 2 are ignored.)

To improve performance for the Query Choices Browser and Inmagic Choices Browser, optionally add `LargeHitsOption=4` to all `<textbase>.INI` files. A value of 4 suppresses hit counts (hides the record

count column in the browsers) for all field types. A value of 3 affects only Term and Word-indexed on Text and Code fields. Values of 0, 1, and 2 are ignored.

```
[LargeQueryLists]
LargeListOption=4
LargeHitsOption=4
```

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