



Installation Manual

Installing the
Eigner PLM 5.0
Windows Server
for Oracle 8*i*

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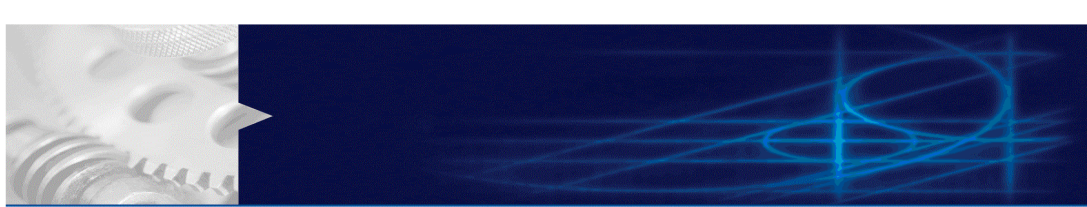
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1 Introduction

This guide describes how to install Eigner PLM 5.0 for Oracle 8i (8.1.7) running under Microsoft Windows 2000 Server.



Windows Operating system versions other than Windows 2000 Server are not supported at this time.

1.1 Where to Go for More Information

The instructions in this guide assume that you will perform the Eigner PLM installation followed by the Oracle 8i installation. If you plan to use Eigner PLM with an existing Oracle 8i installation, refer to the document *Eigner PLM 5.0 Administration Guide* (PLM50_ADMIN.pdf) for instructions on setting up the Eigner PLM environment to work with your existing Oracle databases.

For complete information on installation prerequisites, including required operating system maintenance-level fixes and system patch levels, refer to the document *Eigner PLM 5.0 Prerequisites Guide* (PLM50_INST_REQS.pdf).

For information on installing Eigner PLM 5.0 with Microsoft SQL Server, refer to the document *Installing the Eigner PLM 5.0 Windows Server for Microsoft SQL Server 2000* (PLM50_NT_SRV_SQL.pdf).

For information on database preparation and requirements, refer to the document *Installing Oracle8i for Eigner PLM 5.0 on Windows* (Oralnst817_Win.pdf).



The Eigner PLM installation guides are available in the doc directory on the product CD. To view Adobe® Portable Document Format (PDF) files, use the Adobe Acrobat Reader® software, which is available at no charge at www.adobe.com.

2 Preparing the Installation

This chapter provides an overview of the hardware and software required to install and run Eigner PLM 5.0 with Oracle 8i, as well as instructions for setting the installation prerequisites.

Before installing Eigner PLM 5.0, do all of the following:

- Review the hardware and software requirements for your platform.
- Set the necessary installation prerequisites.
- Follow the instructions in the next chapter to set up licensing.

2.1 Hardware and Software Requirements

This section describes the minimal hardware and software requirements for performing an initial installation of Eigner PLM in a small test environment. For complete information on the requirements for a production environment, refer to *Eigner PLM 5.0 Prerequisites Guide* (PLM50_INST_REQS.pdf).

To install and run Eigner PLM 5.0, you'll need, at a minimum:

- Intel Pentium 450 MHz equivalent, running Microsoft Windows 2000 Server with Service Pack 2
- Oracle 8i (8.1.7) – installation CD included in Eigner PLM kit
- Memory:
 - Eigner PLM Server: 256 MB, plus additional 20 MB RAM per concurrent user
 - Database server: 6 MB RAM per connected user, plus 100 MB RAM for database services
- Swap space: Three times the amount of RAM
- Disk space for the installation:
 - Eigner PLM: 400 MB
 - Eigner PLM File Server: 100 MB

- Oracle 8i Server: 1,380 MB
- Oracle 8i Client: 350 MB
- Disk space for Oracle tablespaces (initial):
 - system, temp, rbs, redologs, user, tools: 150 MB
 - edb: 100 MB
 - edb_idx: 100 MB
 - edb_lob: 2MB
 - edb_tmp: 2 MB
 - edb_tmpidx: 2MB
- One of the following web browsers (to run the Web Client):
 - Internet Explorer 5.5 with Service Pack 2
 - Internet Explorer 6.0

2.2 Setting the Prerequisites

Before you start the Eigner PLM 5.0 installation, complete the following steps to set the necessary prerequisites:

1.

Set the environment variable TEMP to a temporary directory, using System in the Windows Control Panel.

2.

If you intend to use the Eigner PLM FMS file management system, verify that the disk drives on which the FMS directories will reside use the NTFS file system.

To determine whether a disk drive uses the NTFS file system, check the General tab on the drive properties sheet. If the *File system* property is not set to NTFS for your drives, consult your system administrator for assistance reformatting them.

Administrators and the Eigner PLM user *edbserv* (which is created during the installation) will require full access rights to the FMS directories.

3 Setting up Licensing

To allow users access to PLM functionality, Eigner PLM requires valid licenses. This section describes how to install the license software and insert the required license keys prior to installing Eigner PLM.

3.1 Obtaining Licenses

Eigner PLM 5.0 uses FELICS, a license management tool, to handle licenses. To obtain licenses you will need to provide the host ID of the system on which the FELICS license server will be run.

1.

To determine the host ID, run the `uchostid.exe` program, which is distributed on the Eigner PLM 5.0 CD under the following directory:

```
\licemgr\program files\UniCon\FELICS\
```

2.

Mail the hostid to: vi@eigner.com to get the licenses for your installation.

The FELICS License Software has three components:

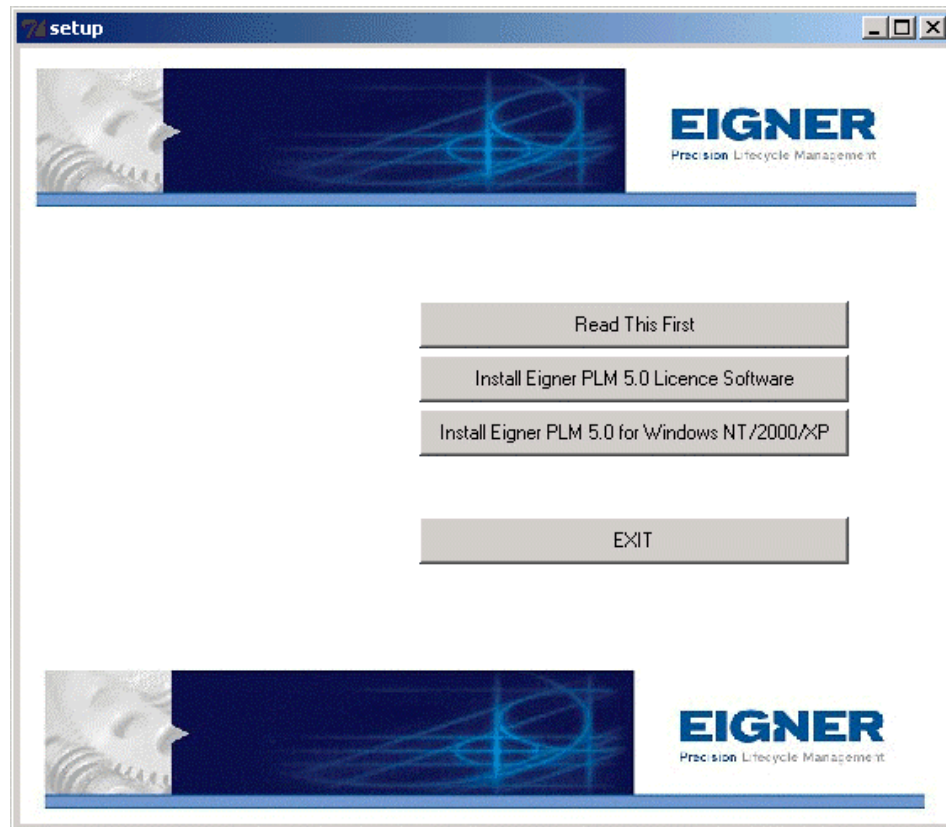
- The FELICS License Server, which hosts the licenses for Eigner PLM. You can install the FELICS License Server on any system accessible by the Eigner PLM Server (also known as the axalant Server). It is advantageous to install it on the database machine.
- The FELICS Agent, which communicates with the FELICS and Eigner PLM Servers to check the validity of licenses for the Eigner clients. The FELICS Agent must be installed on the same machine as the Eigner PLM Server and FileServer.
- The FELICS Tools, which are utilities for importing and managing license keys. The FELICS Tools should typically be installed on the same machine as the FELICS License Server and on the Administrators PC.

3.2 Installing the License Software

Complete the following steps to install FELICS software components.

1. Insert the Eigner PLM 5.0 Installation CD.

If the autostart feature is enabled on the machine, the Eigner PLM main setup window, shown in the following figure, opens automatically.



If the CD autostart feature is not enabled, open the window manually by double-clicking the file **setup.bat** in the root directory of the CD.



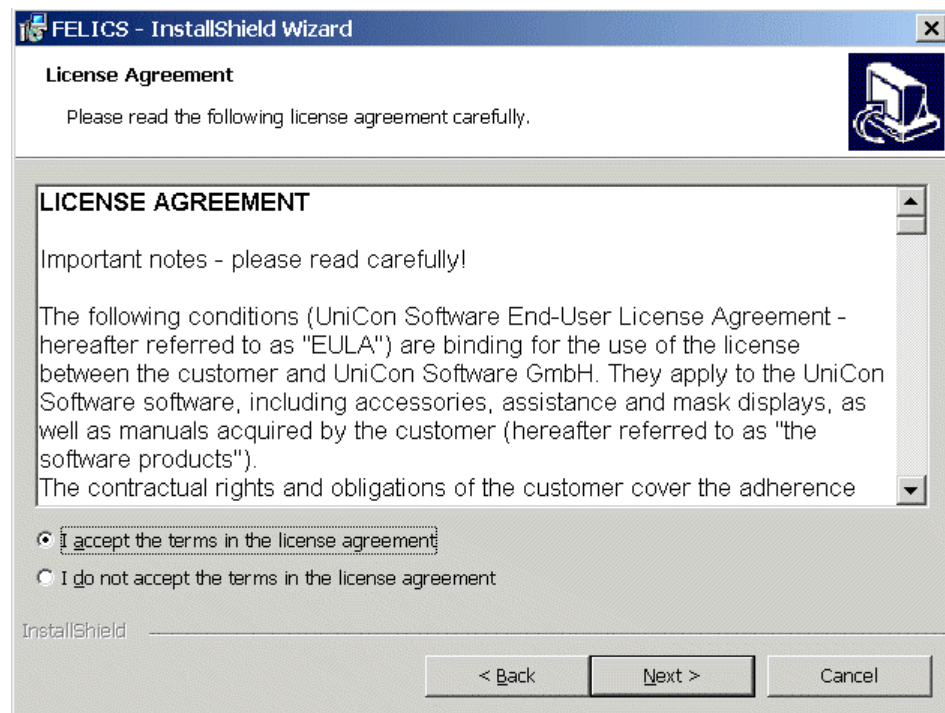
The Windows Installer checks for earlier versions of Eigner PLM installed on your system. If a previously installed version is detected, the Installer presents options for modifying, repairing, or deleting your existing installation. You must delete an existing installation before a new installation can take place.

For the latest information on the Eigner PLM 5.0 installation, click [Read This First](#).

2.

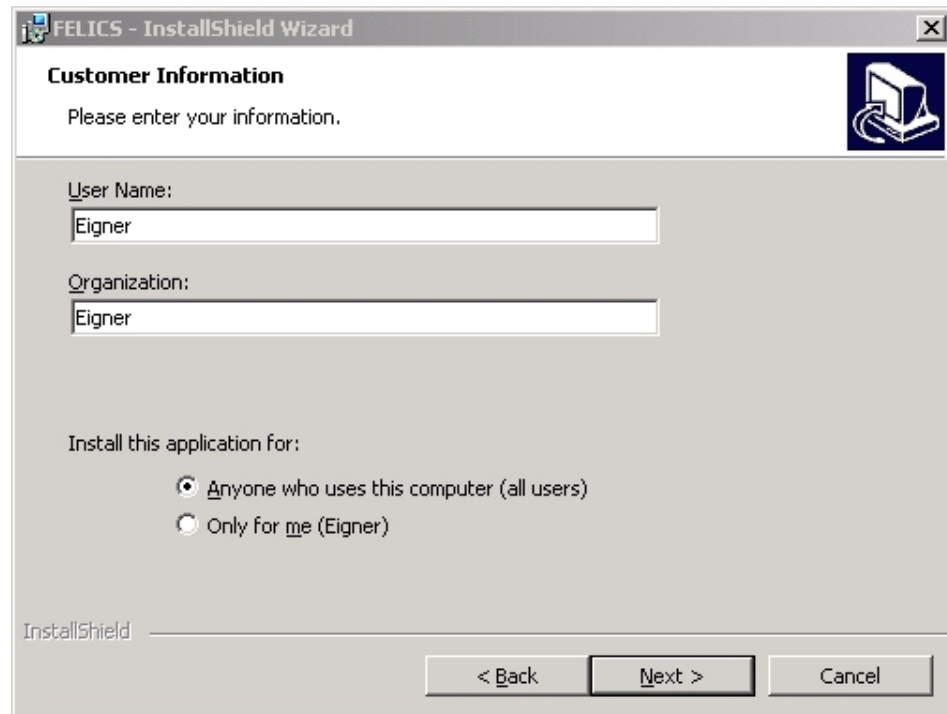
Click Install Eigner PLM 5.0 License Software, **and then select your preferred language in the Language Options dialogue box.**

The License Agreement window shown in the following figure opens.

**3.**

After reading the agreement, select I accept the terms in the license agreement **and then click** Next.

The Customer Information window shown in the following figure opens.



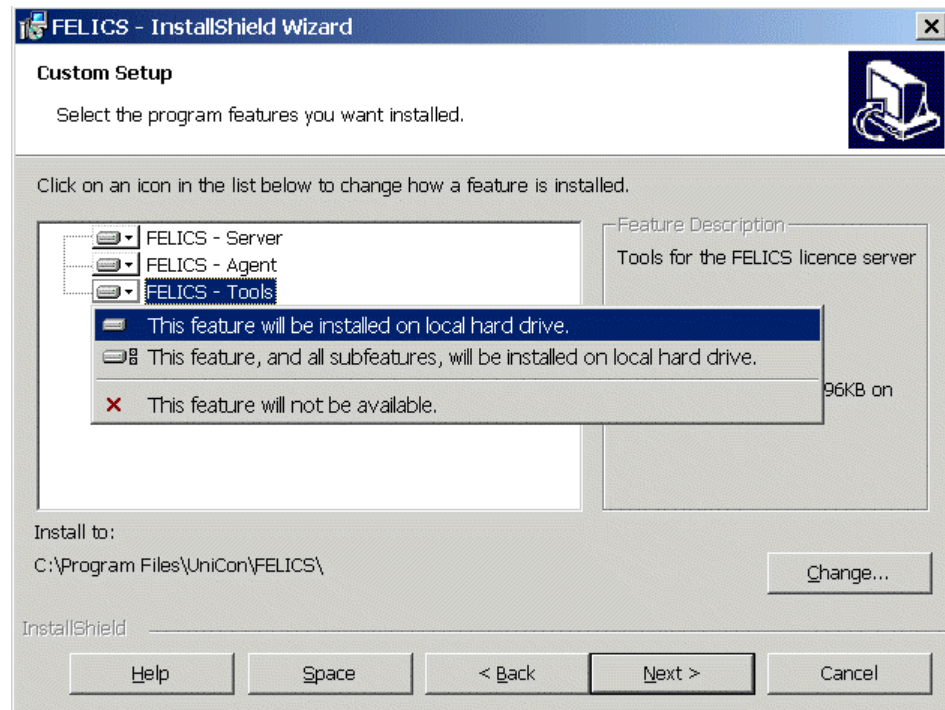
The screenshot shows a Windows-style dialog box titled "FELICS - InstallShield Wizard". The main heading is "Customer Information" with a sub-instruction "Please enter your information." Below this are two text input fields: "User Name:" containing "Eigner" and "Organization:" also containing "Eigner". Underneath is a section "Install this application for:" with two radio button options: "Anyone who uses this computer (all users)" (which is selected) and "Only for me (Eigner)". At the bottom right are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner of the dialog.

4. Update the information in the User Name and Organization boxes if it is not correct.

5. Select one of the following installation options and then click Next.

- Anyone who uses this computer (all users) - recommended
- Only for me

The Custom Setup window shown in the following figure opens.



6.

Install the appropriate FELICS components based on your configuration, and click *Change* if you want to change the directory where the FELICS software will be installed.

To include a component in the installation, select it, right-click, and then select *This feature will be installed on local hard drive*. You can include any of the following components.

- FELICS Server
- FELICS Agent
- FELICS Tools



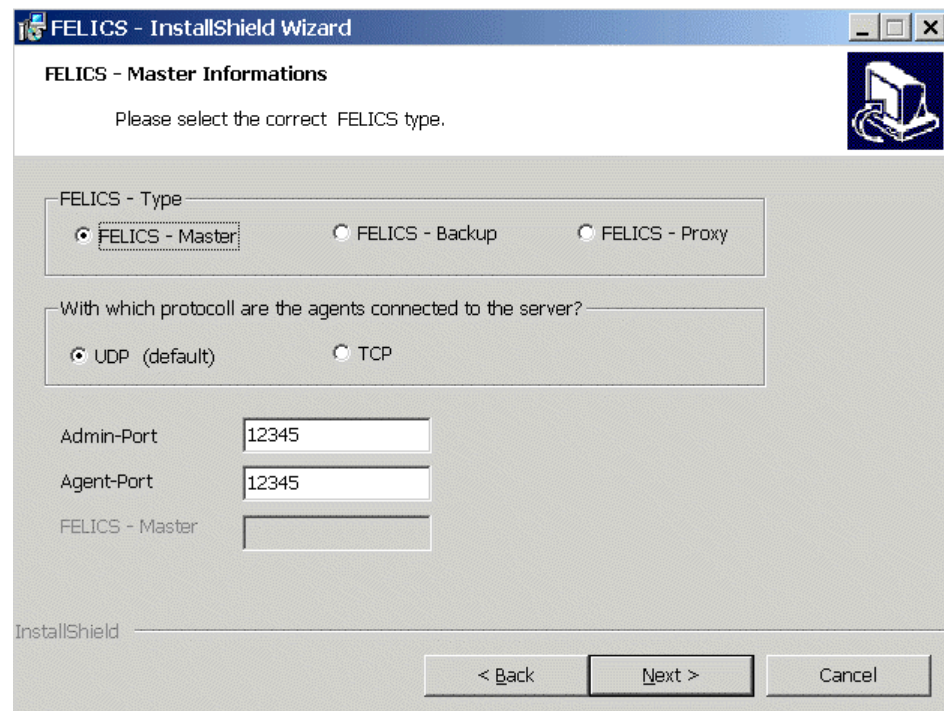
Remember to install the rest of the FELICS components if you are distributing the components to different systems.

You need the FELICS Agent on the Eigner PLM server and the Eigner PLM FileServer machine (DFM). The FELICS License Server is advantageous installed on the database machine. The FELICS Tools should typically be installed on the same machine as the FELICS License Server.

7.

Click **Next** to continue.

If you elected to install the FELICS server, the FELICS - Master Information window shown in the following figure opens. (If you did not elect to install the FELICS server, you'll see the Agent Information window shown at step 8.)



The screenshot shows a Windows-style dialog box titled "FELICS - InstallShield Wizard". The main content area is titled "FELICS - Master Informations" and contains the instruction "Please select the correct FELICS type." Below this, there are two sections of radio button options. The first section, "FELICS - Type", has three options: "FELICS - Master" (selected), "FELICS - Backup", and "FELICS - Proxy". The second section, "With which protocol are the agents connected to the server?", has two options: "UDP (default)" (selected) and "TCP". Below these sections are three text input fields: "Admin-Port" with the value "12345", "Agent-Port" with the value "12345", and "FELICS - Master" which is currently empty. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted, indicating it is the recommended action.

For an initial installation, use the default entries:

- FELICS – Master
- UDP
- Admin-Port 12345
- Agent-Port 12345

If the default port numbers are already in use, change them to port numbers that are available on your machine. Refer to the document *Eigner PLM 5.0 Administration Guide* (PLM50_ADMIN.pdf) for information on determining the active and used ports on your system.

Consult your Eigner Customer Support representative for information about the other options on this window.

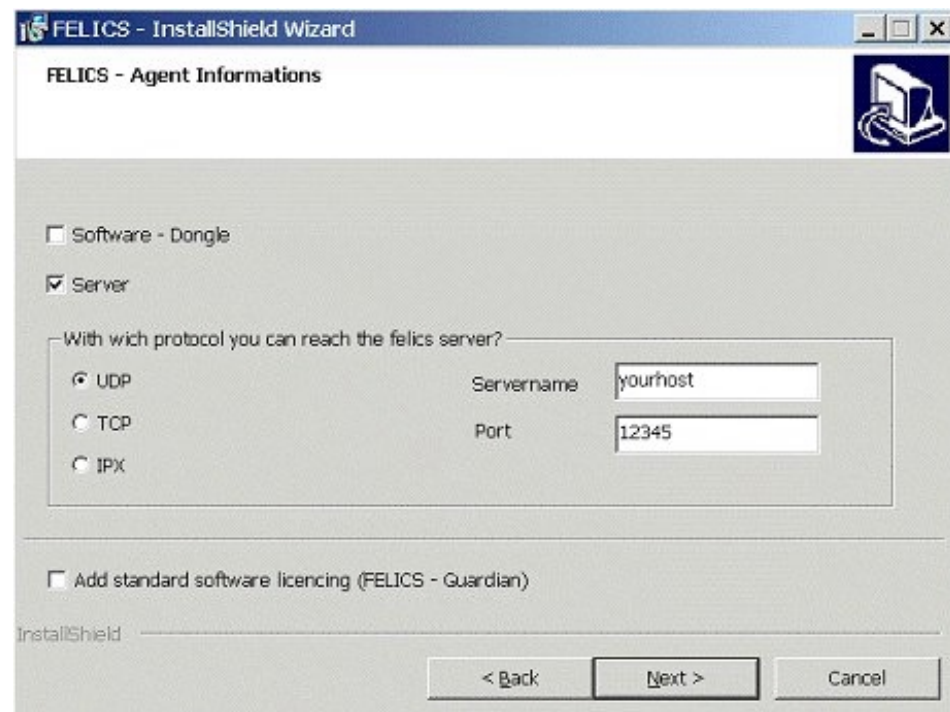


If you select `FELICS-Backup server` or `FELICS-Proxy server`, you must also enter the name of the FELICS Master server.



Click `Next` to continue.

The FELICS Agent Information window shown in the following figure opens.



Select the `Server` and `UDP` options for a typical initial configuration.

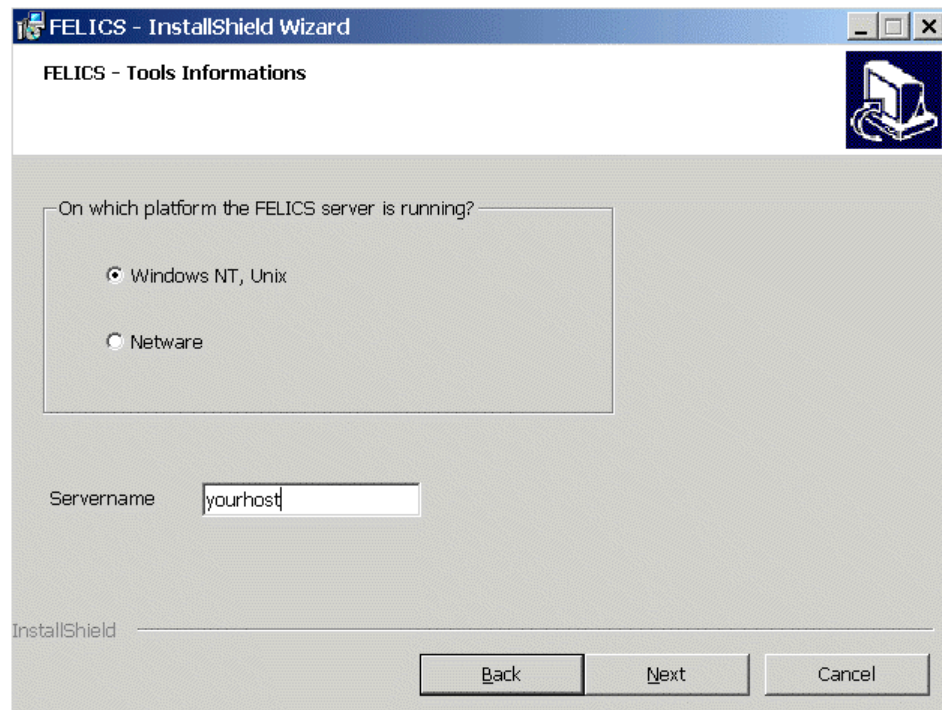


Enter the name of the server where the FELICS License Server is installed (for example, *yourhost*) and the port number at which it can be reached (for example, the default *12345*).

Do not select Add standard software licensing (FELICS - Guardian) for an Eigner PLM installation.

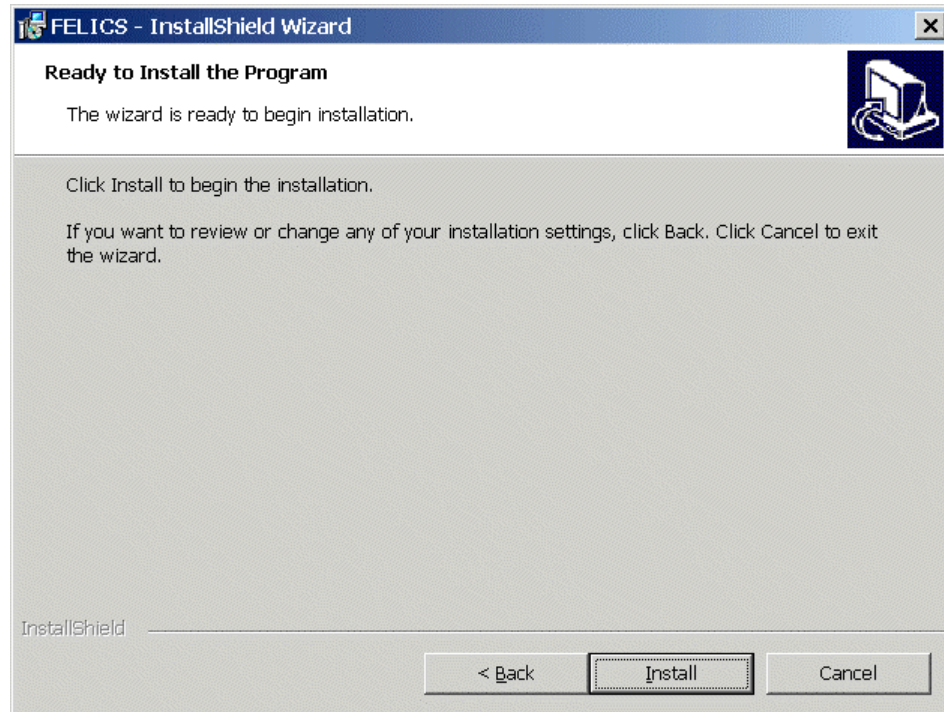
11. Click **Next** to continue.

If you elected to install only the FELICS Tools, the Tools Information window shown in the following figure opens.



12. Select the operating system of the machine on which the FELICS Server will run, enter the server name again, and then click **Next** to continue.

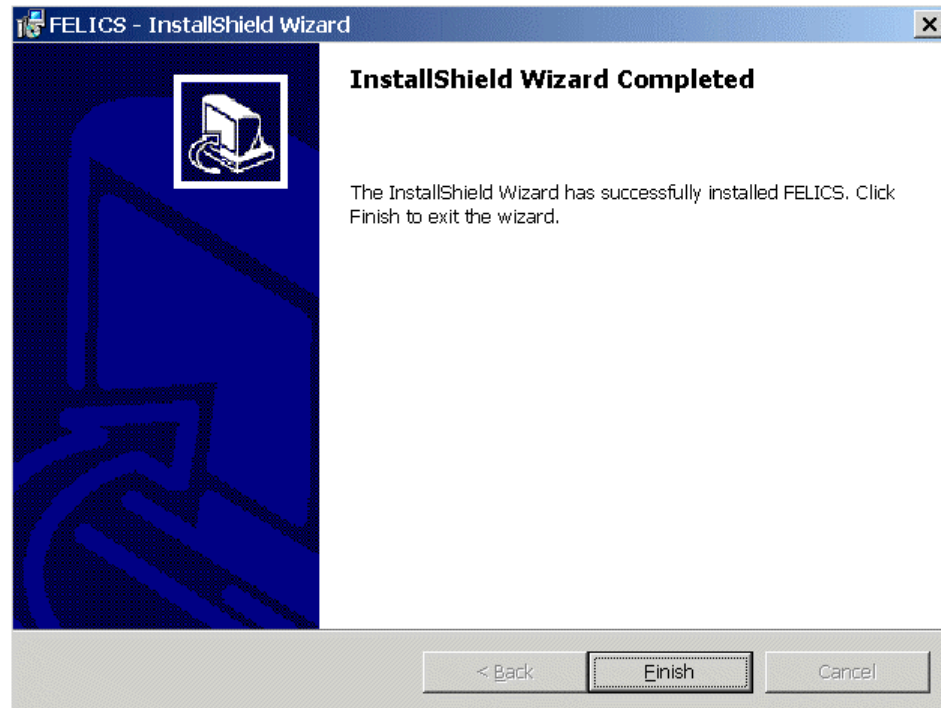
The informational window shown in the following figure opens.



13.

Click Install to start the installation.

When the installation is complete, the window shown in the following figure opens.



14. Click **Finish** to exit the **FELICS** installation.

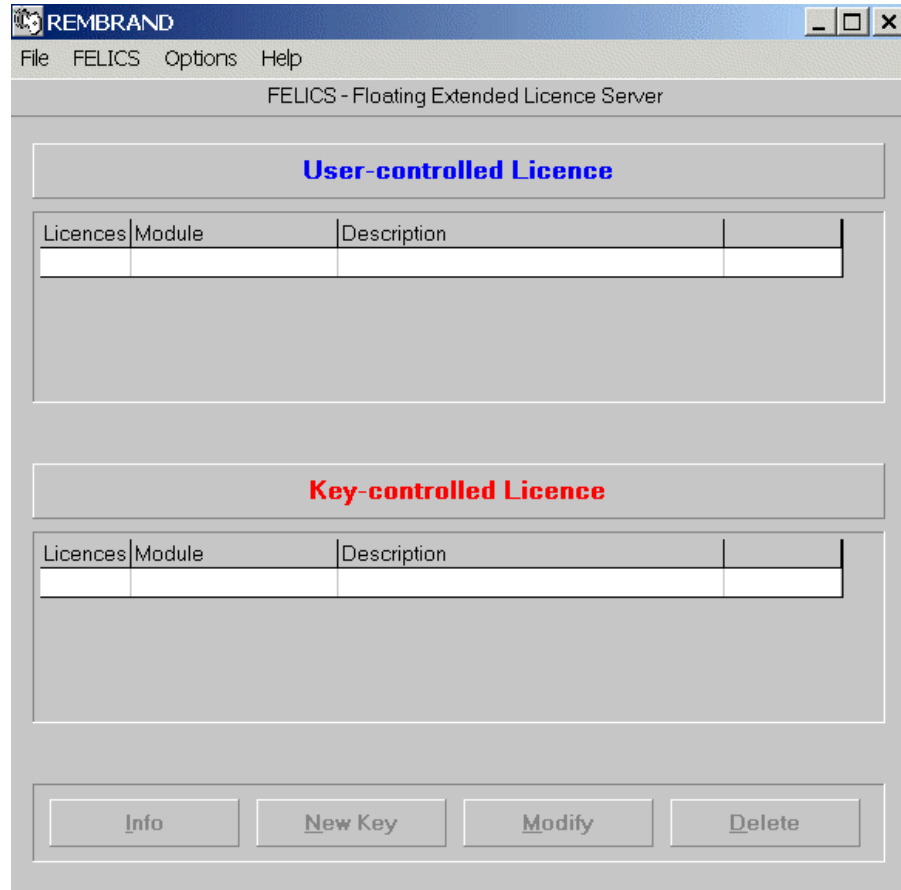
Use the instructions in the following section to insert the licenses needed to run Eigner PLM.

3.3 Inserting License Keys

1. Start the **FELICS** license tool, **REMBRAND**, from the Windows Start menu.
2. Enter the name and port of the machine on which the **FELICS** License Server will run.
3. Click **Connect** to connect to the **FELICS** License Server.

You do not need a password to connect.

The **REMBRAND** license tool, shown in the following figure, opens.



4. Click New Key.
5. Enter the FELICS Server License key provided by the Eigner license administrator and then click OK.

The informational window shown in the following window opens.



6.

Click OK to close the window.

7.

Press New Key again to enter the other licenses provided by the Eigner license administrator.

Be sure to enter the license keys for DataView (usually designated RUN041 and DEV041); otherwise the Eigner PLM clients will not run. It is also useful to fill in the description fields for future reference.

8.

Close REMBRAND.

Use the instructions in the next section to install the Eigner PLM software.

4 Installing Eigner PLM 5.0

Eigner PLM 5.0 is a client-server application that uses a database as the application and data repository. Eigner PLM also features secure, encrypted file management support known as FMS or the File Service.

The installation procedure allows you to choose which of these options to install on your machine:

- Client
- Server
- File Service (FMS)
- Database system: either Oracle or Microsoft SQL Server

Consult your Eigner Technical Support representative for information on how to optimize your system with these components.



Use an account with Windows Administrator privileges to install and uninstall Eigner PLM.

4.1 Preparing to Install on a Pentium 4 Machine

The installation software for Oracle 8.1.7 uses a library file named `SYM CJIT.DLL`, which causes problems on Pentium 4 machines only. Because the file is on the Oracle product CD, you cannot install the Oracle Server on a Pentium 4 machine directly from the CD.

You have two options for installing Oracle on a Pentium 4 machine:

- Install Oracle separately from Eigner PLM, according to the instructions in the document *Installing Oracle 8i for Eigner PLM on Windows* (Oralnst817_Win.pdf).
- Create a new CD image according to the instructions specific to Pentium 4 in the document *Installing Oracle 8i for Eigner PLM on Windows*

(Oralnst817_Win.pdf). Map this image to a network drive on the machine where you are installing the Eigner PLM Server.

After mapping the CD image to a network drive, proceed with the instructions in the next section. When you reach the point in the installation procedure where you are asked to insert the Oracle CD, the Eigner PLM installation program will detect the mounted image and install Oracle automatically, as if the CD was inserted into the machine's disk drive.

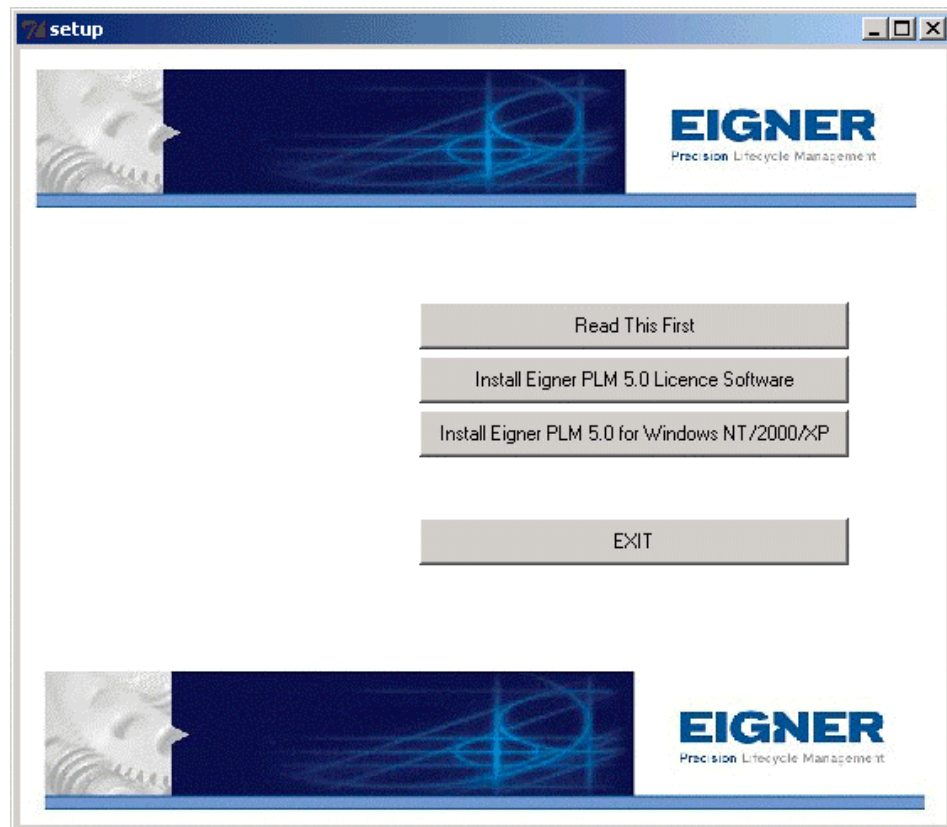
4.2 Starting the Installation

1.

Insert the Eigner PLM 5.0 Installation CD.

If the CD autostart feature is enabled on the machine, Eigner PLM main setup window, shown in the following figure, opens automatically.

If the autostart feature is not enabled, open the window manually by double-clicking the file **setup.bat** in the root directory of the CD.





The Windows Installer checks for earlier versions of Eigner PLM installed on your system. If it detects a previously installed version, the Installer presents options for modifying, repairing, or deleting your existing installation. You must delete an existing installation before a new installation can take place.

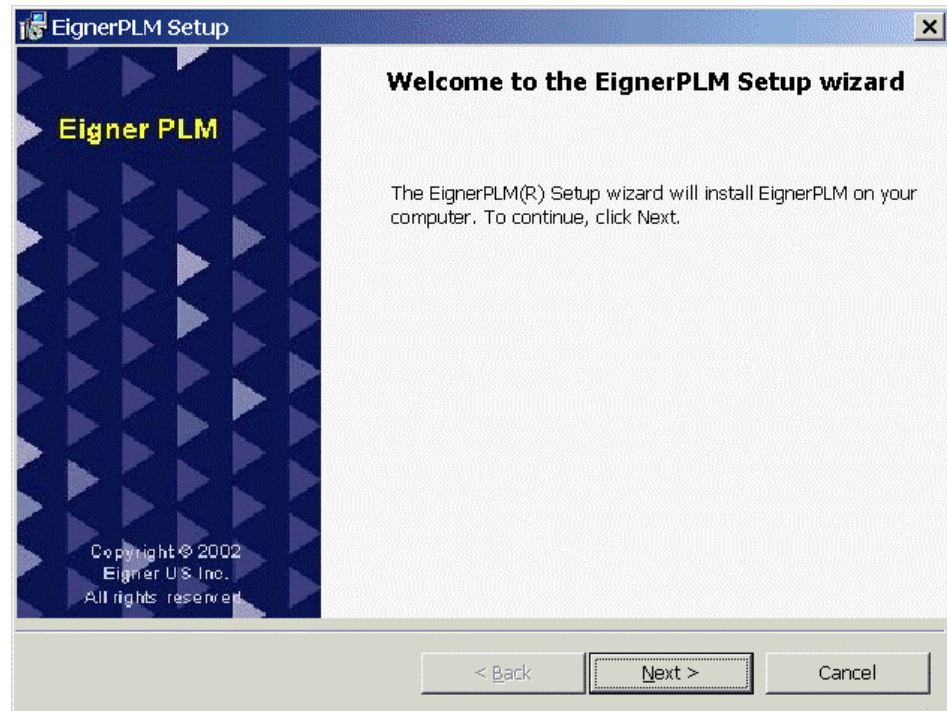
IMPORTANT: Do not use the Repair option presented by the Windows Installer to repair your installation. Instead, use the option from the Windows Control Panel. For more information, refer to Section 4.6.

For the latest information on the Eigner PLM 5.0 installation, click [Read This First](#).



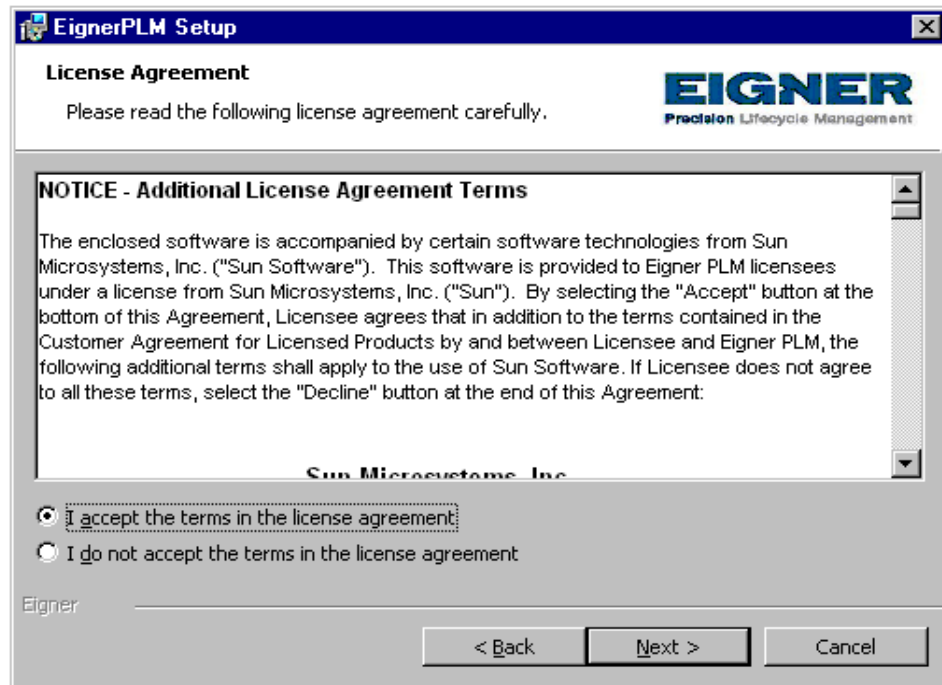
Click Install Eigner PLM 5.0 for Windows NT/2000/XP.

This starts the Eigner PLM Setup Wizard, as shown in the following figure.



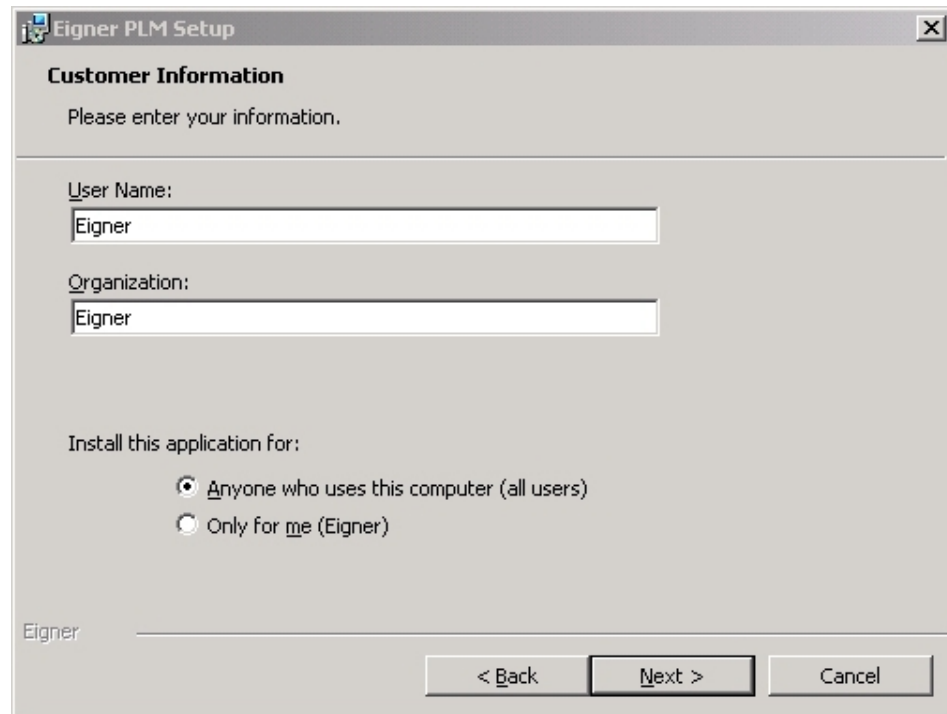
Click Next to continue.

The License Agreement window shown in the following figure opens.

**4.**

After reviewing the license agreement, select I accept the terms in the license agreement and then click Next to continue.

The Customer Information window shown in the following figure opens.



The screenshot shows the 'Eigner PLM Setup' window with the 'Customer Information' section. The window title is 'Eigner PLM Setup'. Below the title bar, it says 'Customer Information' and 'Please enter your information.' There are two text input fields: 'User Name:' with 'Eigner' entered, and 'Organization:' with 'Eigner' entered. Below these fields, it says 'Install this application for:' followed by two radio button options: 'Anyone who uses this computer (all users)' (which is selected) and 'Only for me (Eigner)'. At the bottom left, the name 'Eigner' is displayed. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

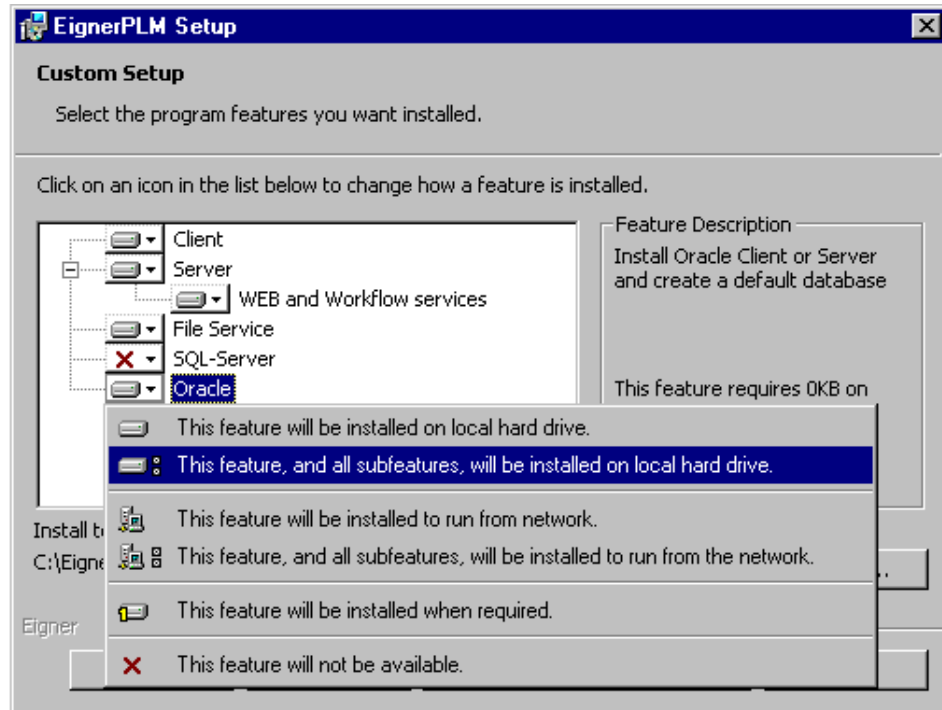
5. Update your user name and the name of your organization if they are incorrect.

6. Select the installation option:

- Anyone who uses this computer (all users) - recommended

7. Click **Next** to continue.

The Custom Setup window shown in the following figure opens.



You can use this window to specify which Eigner PLM components to install on the system. You can also choose to install the database software as part of the Eigner PLM installation.

This guide describes how to install Oracle 8i as part of the Eigner PLM installation. Refer to the document *Installing the Eigner PLM 5.0 Windows Server for Microsoft SQL Server 2000* (PLM50_NT_SRV_SQL.pdf) for information on installing SQL Server with Eigner PLM.

8.

Specify the Eigner PLM components you want to install.

To include a component in the installation, click it and then select *This feature will be installed on local hard drive*. You can include any of the following components:

- Client – the Eigner PLM client software
- Server – the Eigner PLM server software

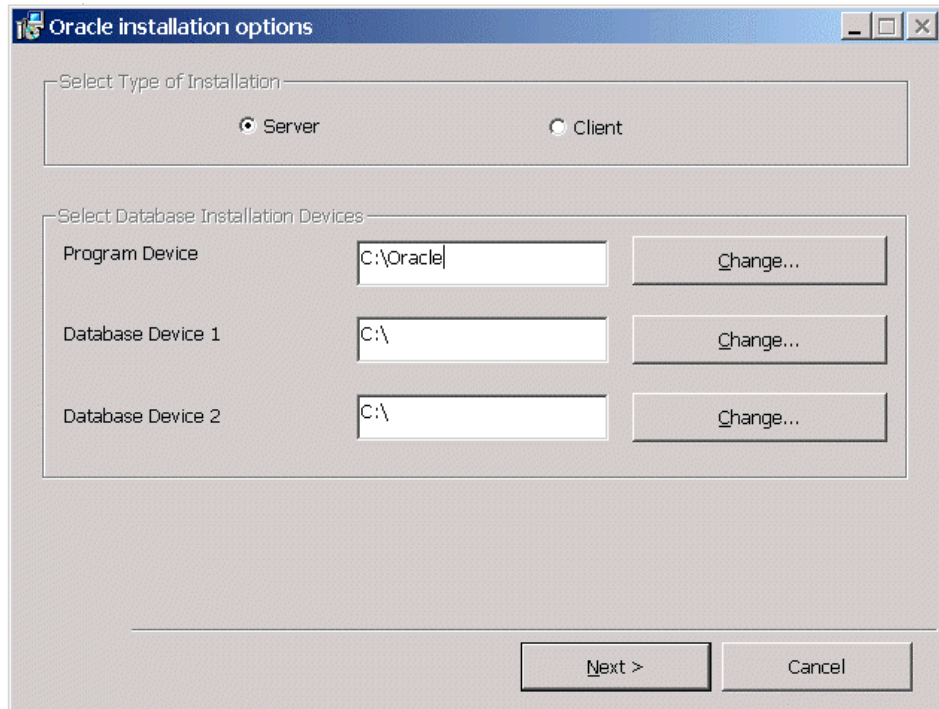
- WEB and Workflow services – the Eigner PLM Business and Presentation Services
Consult your Eigner Customer Support representative for information about these services.
- File Service (FMS) – Eigner PLM encrypted file management support
- Oracle – the Oracle 8i database system
It is not useful to install both the Oracle and SQL Server databases.

9. Click **Change** if you want to change the directory where Eigner PLM will be installed.

! *IMPORTANT: The installation path **must not** contain blank spaces.*

10. Click **Next** to continue.

The Oracle Installation Options window shown in the following figure opens.



11.

For Select Type of Installation, **select one of the following:**

- Server – to install a complete Oracle 8.1.7 Server, which includes an installation of the Oracle software itself and the creation of a database for Eigner PLM.

- Client - to install Oracle 8.1.7 client software only

Select the Client option only if the database to be used with Eigner PLM is installed on a separate database server. With this option, only the Oracle client software will be installed. The Oracle client software enables the communications between the Eigner PLM server and an existing database server.

12.

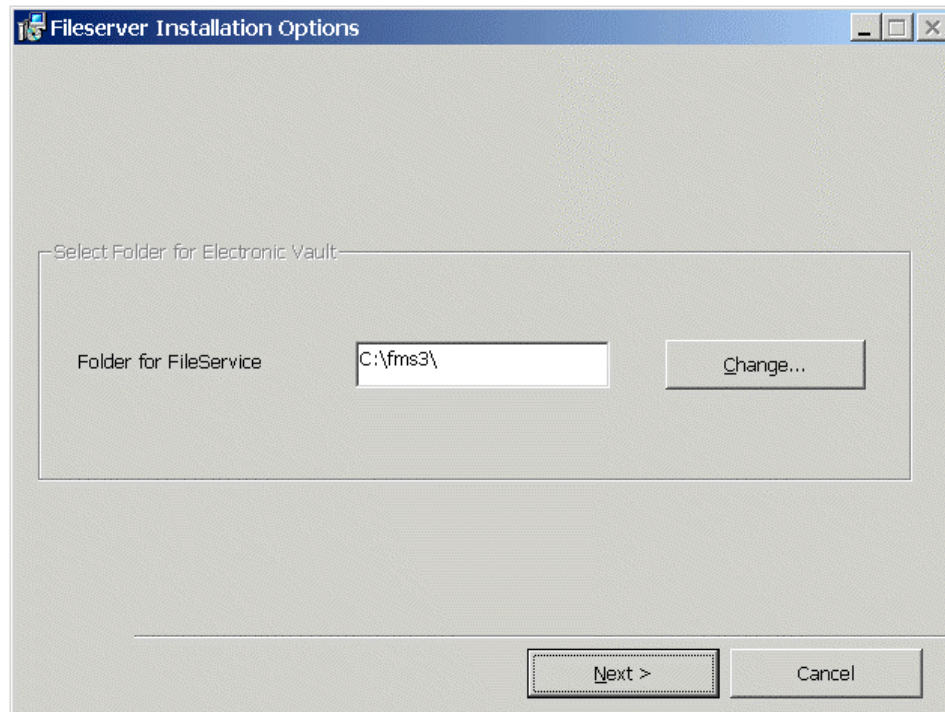
Specify the locations of the physical devices to be used for the Oracle program and databases, and then click `Next` to continue.

The default folders are set to point to the root directory of drive C (“C:\”), but you can specify different drives. The installation program uses the drive information, but ignores any path information, you specify. It creates the following directories on the specified drives:

- `orant` on the drive specified for *Program Device*
- `ora1` on the drive specified for *Program Device*
- `ora2` on the drive specified for *Database Device 2*
- `ora3` on the drive specified for *Database Device 3*

If you specify an incorrect path in any of the fields, the installation program uses the correct information previously entered into the field.

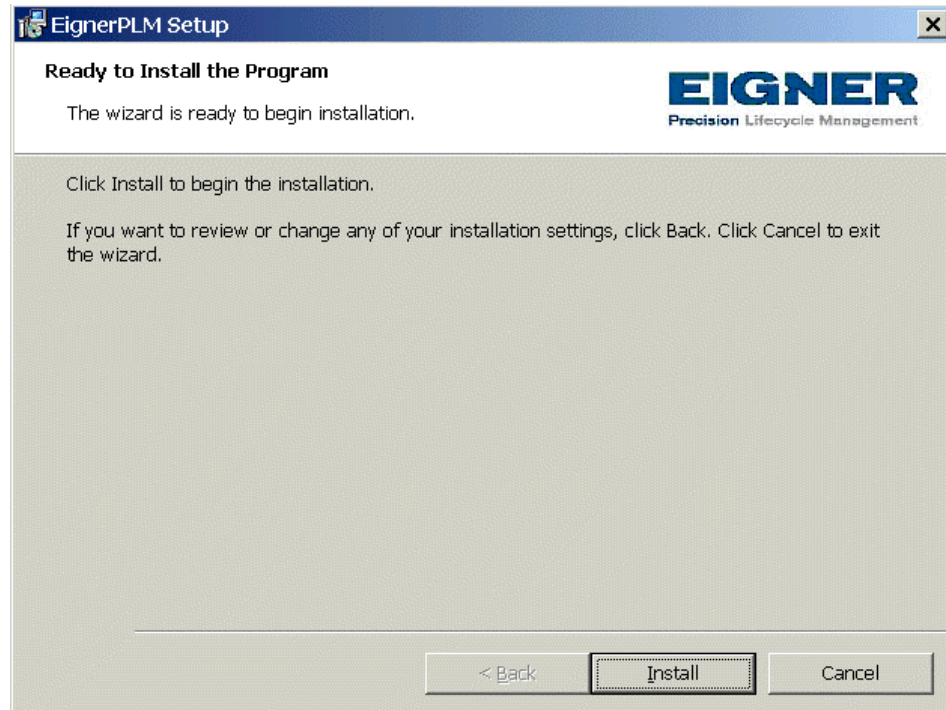
If you chose to install the File Service, the Eigner PLM 5.0 Fileserver Installation Options window, shown in the following window, opens.

**13.**

Enter the correct installation path for the Eigner PLM 5.0 File Service and then click *Next* to continue.

A secure, encrypted file management system will be installed to the folder you specify.

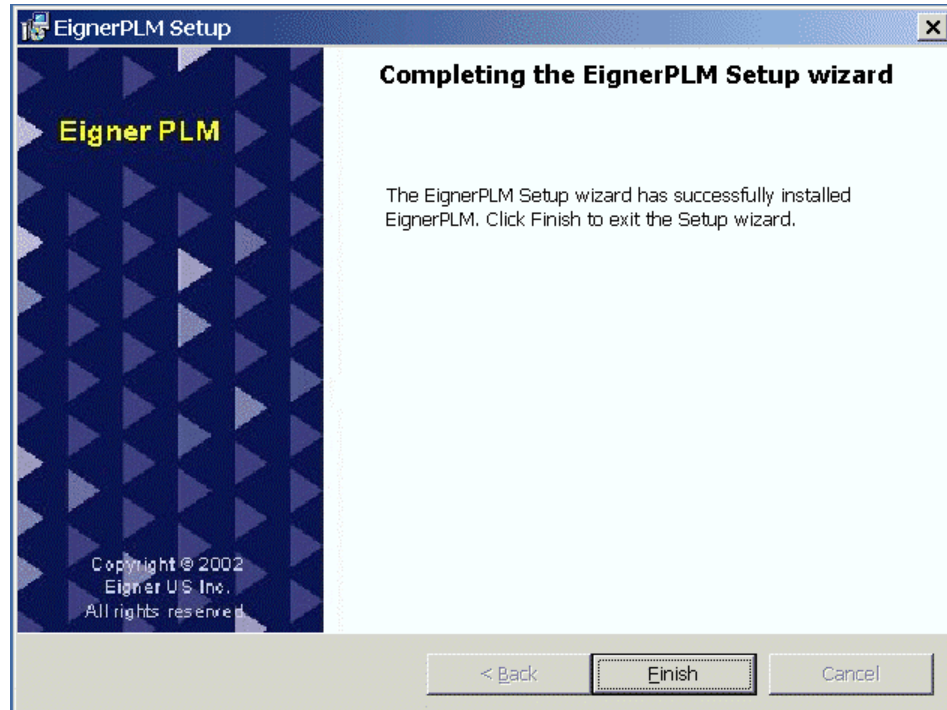
The informational window shown in the following figure opens.



14.

Click Install to start the Eigner PLM installation.

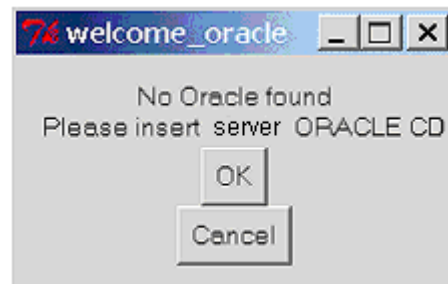
When the installation is complete, the informational window shown in the following figure opens.



15. Click Finish to exit the Setup Wizard.

If you selected Oracle in the Custom Setup window, the Oracle installation is started automatically, followed by the import of the Eigner PLM database dump.

If the Oracle CD is not found, you'll see the message shown in the following figure.



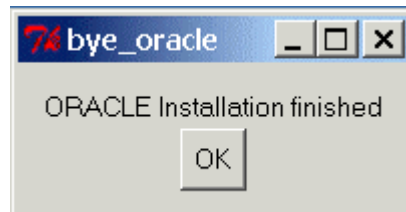
1. Insert the Oracle 8.1.7 Server CD.

2. If the CD autostart option is enabled on the machine, an Oracle Server installation window opens. Close this window and click OK in the

message window shown above to allow the Eigner PLM installation to continue.



IMPORTANT: Wait until the following message appears on your screen before proceeding to the next step. The installation process should take approximately one hour. The actual time will depend on the speed of your machine.



Click OK to complete the installation.



If the Eigner PLM main setup window is open, close it by clicking the Close button in the upper right corner.

A new entry for Eigner PLM 5.0 appears on the Windows Start menu.

To test the Eigner PLM installation, start the Eigner PLM 5.0 Windows Client. For a new installation, the default entries in the Startup window should be acceptable. The password for the default user, *DEMOEP*, is DEMOEP.



IMPORTANT: The first time you click the Mask Generator button in the Windows Client to regenerate a mask, you must be logged into an account that has Windows Administrator privileges.

4.3 Changing the Default Passwords

During the installation process, the system users *axalantrt* and *edbserv* are created for Eigner PLM. For security reasons you should change the default password (4eigner:plm) for these users and adjust their properties so the passwords will never expire.

1.

Open the Windows Control Panel and use the Users and Passwords utility to change the default password for *axalantrt* and *edbserv*.

!

When you change these passwords, you must also update the passwords of the following dependent services accordingly:

- EignerPLMAdmin
- EignerPLMDaemon
- EignerPLMFileserver
- EignerPLMJavaDaemon

These services are accessible from Administrative Tools in the Windows Control Panel, under Services. To change the password for a service, click the Log On tab on its properties sheet.

2.

IMPORTANT: Reboot your machine.

4.4 Administrating Environments and Services

Follow the steps below to administrate your Eigner PLM environments and Web Presentation Service environments. For more information, refer to the document *Eigner PLM Administration Guide* (PLM50_ADMIN.pdf).

1.

Open a web browser and enter the following URL:

`http://localhost:8017/`

In the URL, *localhost* is the server name of the machine on which Eigner PLM was installed.

2.

Click `Administrate Eigner PLM` (User: `plm`, Password: `plm50`) to create or modify PLM environments.

3.

Click `Administrate Web Presentation Service` to configure and start Eigner PLM WEB and Workflow services.

For further help, refer to the Eigner PLM 5.0 *Read This First* document or the online documentation, which can be found under

`\axalant\hlp\doc_ep\` in the directory where you installed Eigner PLM. To view the online help, open the file `plm.chm`.

4.5 About the Modify, Repair, and Remove Options

If you start the Eigner PLM setup program and the Windows installer detects a previously installed version of Eigner PLM on your system, it presents options for modifying, repairing, or removing the existing installation. This section provides an overview of what you can and cannot do to change or remove existing Eigner PLM 5.0 installations.

You can make any of the following changes to an existing installation:

- Add the PLM Business Services to a server installation
- Add the File Service to a server installation
- Modify an installation through the setup program on the Eigner PLM product CD
- Remove an installation through the setup program on the Eigner PLM product CD

You cannot make any of the following changes to an installation:

- Change a client installation to a server installation
- Add an Oracle or SQL Server installation to an existing server installation
- Repair an installation through the setup program on the Eigner PLM product CD (Refer to Section **Fehler! Verweisquelle konnte nicht gefunden werden.** for more information.)
- Modify an installation through the Windows Control Panel (The Modify button is disabled.)

4.6 Repairing Your Installation

You can use the Repair function to fix an Eigner PLM installation that is not working properly. If the Repair function discovers that the key file for an Eigner PLM component is damaged or missing, it restores all parts of the component—such as its registry entries, service entries, shortcut, and files.



*Although the Repair function is available from the Eigner PLM product CD, you **must** initiate the function from Control Panel to successfully restore all files.*



Open Add/Remove Programs in the Windows Control Panel.



Select Eigner PLM from the list of currently installed programs.



Click the link `support information`.



In the Support Info box, click the `Repair` **button.**



Insert the Eigner PLM 5.0 Installation CD.

The repair process will take a few minutes.



When the process is complete, restart Windows.

4.7 Uninstalling Eigner PLM

Eigner recommends that you use the Remove option in the Windows Control Panel to uninstall Eigner PLM.



Open Add/Remove Programs in the Windows Control Panel.



Select Eigner PLM from the list of currently installed programs.



Click the `Remove` **button.**