

EIGNER

Precision Lifecycle Management



Installation Manual

Installing the Eigner PLM 5.0 Windows Server for Microsoft SQL Server 2000

Part Number WQ501a

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1 Introduction

This guide describes how to install Eigner PLM 5.0 for Microsoft SQL Server 2000 running under Microsoft Windows 2000 Server.



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

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 SQL Server installation. If you plan to use Eigner PLM with an existing SQL Server installation, refer to *Eigner PLM 5.0 Administration Guide* (PLM50_ADMIN.pdf) for information on setting up the Eigner PLM environment to work with existing SQL Server databases.

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

For information on installing Eigner PLM 5.0 with Oracle 8i, refer to *Installing the Eigner PLM 5.0 Windows Server for Oracle 8i* (PLM50_NT_SRV_ORA.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 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 Microsoft SQL Server 2000, 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 III 450 MHz equivalent, running Microsoft Windows 2000 Server with Service Pack 2
- Microsoft SQL Server 2000 – installation CD included in Eigner PLM kit
- Memory:
 - Eigner PLM Server: 256 MB, plus additional 20 MB RAM per concurrent user
 - Database server: 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
 - SQL Server: 270 MB

- SQL Server Client: 70 MB
- %TEMP%: 150 MB
- Disk space for one Eigner PLM database in the SQL Server:
 - Master device and log: 20 MB
 - Device: edb: 20 MB
 - Index device: edb_idx: 20 MB
 - Lob device: edb_lob: 5 MB
 - Temporary tables device: edb_tmp: 5 MB
 - Temporary table indexes device: edb_tmpidx: 5 MB
- One of the following web browsers (to run the Web Client):
 - Internet Explorer 5.5 with Service Pack 2
 - Internet Explorer 6.0



IMPORTANT: Server parameters for the manual installation of SQL Server 2000 must be as shown in the following table.

Parameter	Value
Collation designator	<i>Latin1_General</i>
Sort order	<i>Case sensitive, accent sensitive</i>
After the server is installed, run the Query Analyzer to execute the following: <code>exec sp_configure 'nested triggers'</code>	<i>'config_value' and 'run_value' for the output must be '0'. If they differ, run: <code>exec sp_configure 'nested triggers', 0 reconfigure</code></i>

2.2 Setting the Prerequisites

When you install Eigner PLM, you have the option of installing secure, encrypted file management support known as the File Service, or FMS. If

you intend to install FMS, 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 will be created during the installation) will require full access rights to the FMS directories. In addition, use of “Distributed Objects” will require a license (known as the PLM-DOT license). In this case, at least the FELICS Agent must be installed on the FileServer machine. Refer to Chapter 3 for more information.

2.3 Choosing an Installation Type

Eigner supplies two different types of Microsoft SQL Server 2000 installation CDs. Choose the appropriate CD for your installation type:

- The SQL Server Workstation CD (Windows 2000 Professional) can be used for test environments only.
- The SQL Server Enterprise Edition CD (Windows 2000 Server only) should be used for production installations.

3 Setting up Licensing

For users to access the 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 5.0.

3.1 Obtaining Licenses

Eigner PLM 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. The host ID can be found by running the `uchostid.exe` program distributed on the Eigner PLM product CD under the following directory:

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

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 License Server and Eigner PLM Server 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. In most cases, the FELICS Tools should be installed on the same machine as the FELICS License Server and on the Administrators PC.

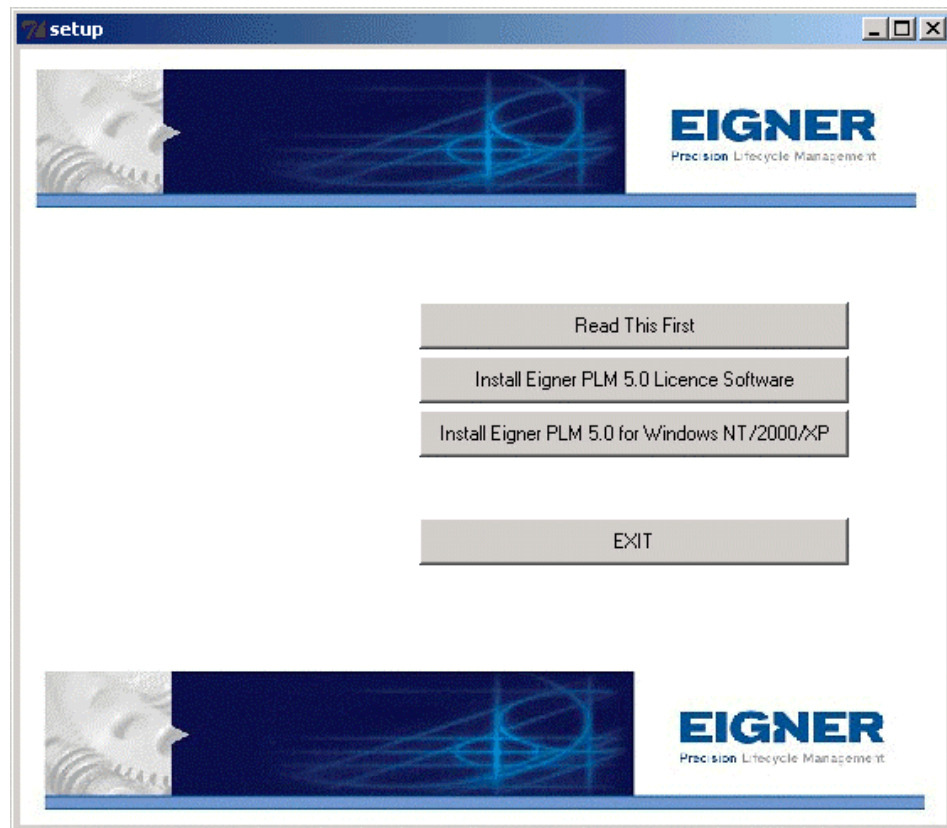
3.2 Installing the License Software

Complete the following steps to install *FELICS* software components.

1.**Insert the Eigner PLM 5.0 Installation CD.**

If the CD autostart feature is enabled on the machine, the Eigner PLM 5.0 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.

**!**

*For the latest information on the Eigner PLM 5.0 installation, click **Read This First**.*

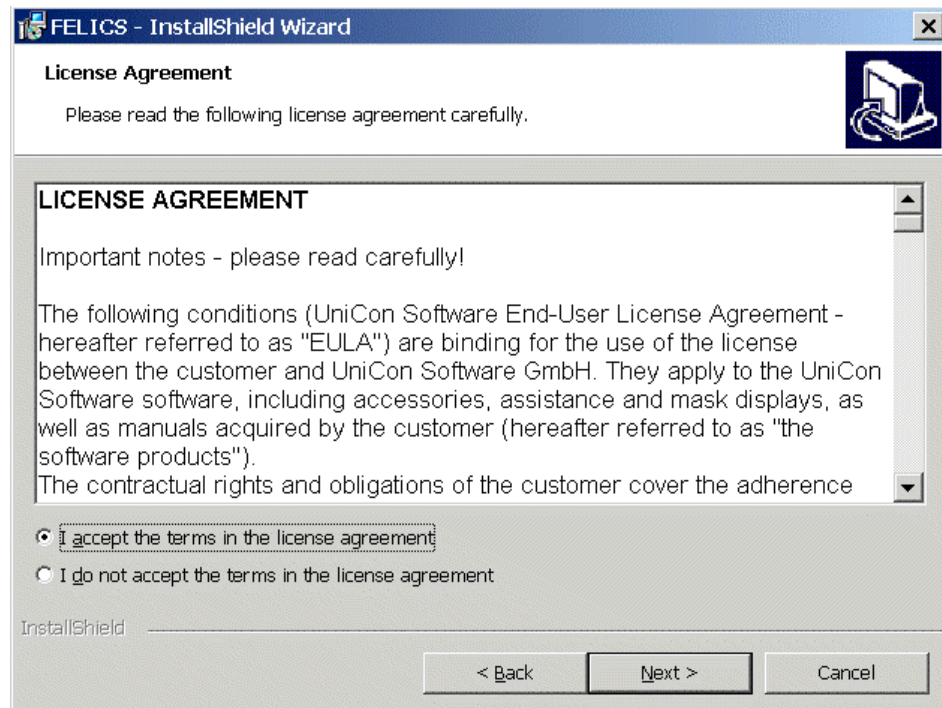
The Windows Installer will check to see if there is an older version of the Windows Installer installed on the system. You may need to restart your computer after this check.

2.

Click Install Eigner PLM 5.0 License Software.

Select your preferred language in the Language Options dialog box.

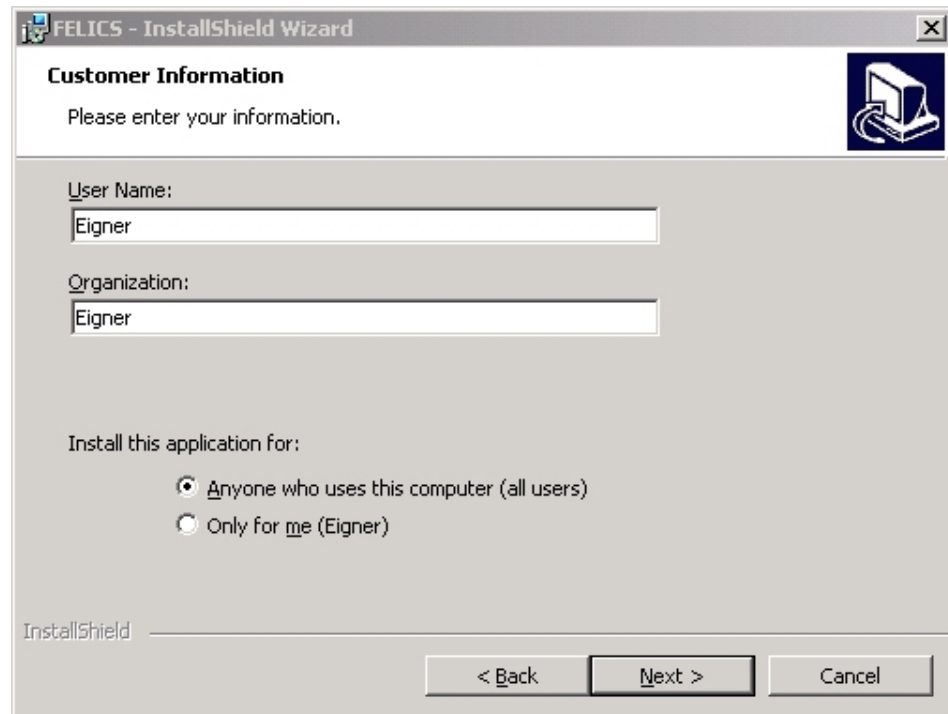
The License Agreement window shown in the following figure opens.



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.



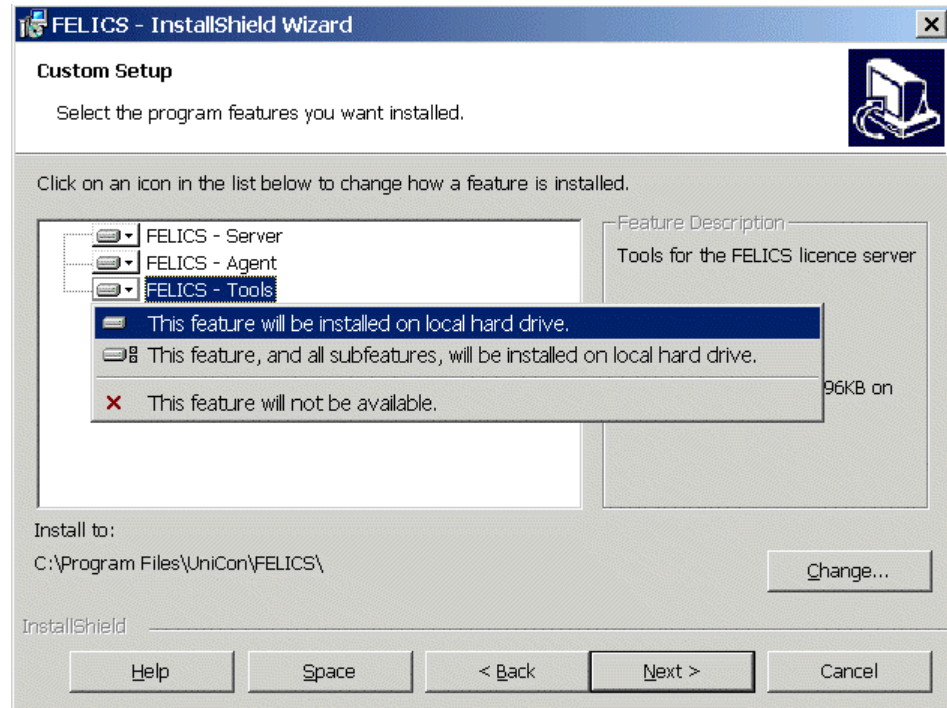
The screenshot shows a Windows-style dialog box titled "FELICS - InstallShield Wizard". The main heading is "Customer Information" with a sub-instruction "Please enter your information." Below this are two text input fields: "User Name:" containing "Eigner" and "Organization:" also containing "Eigner". 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, there 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, click it 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

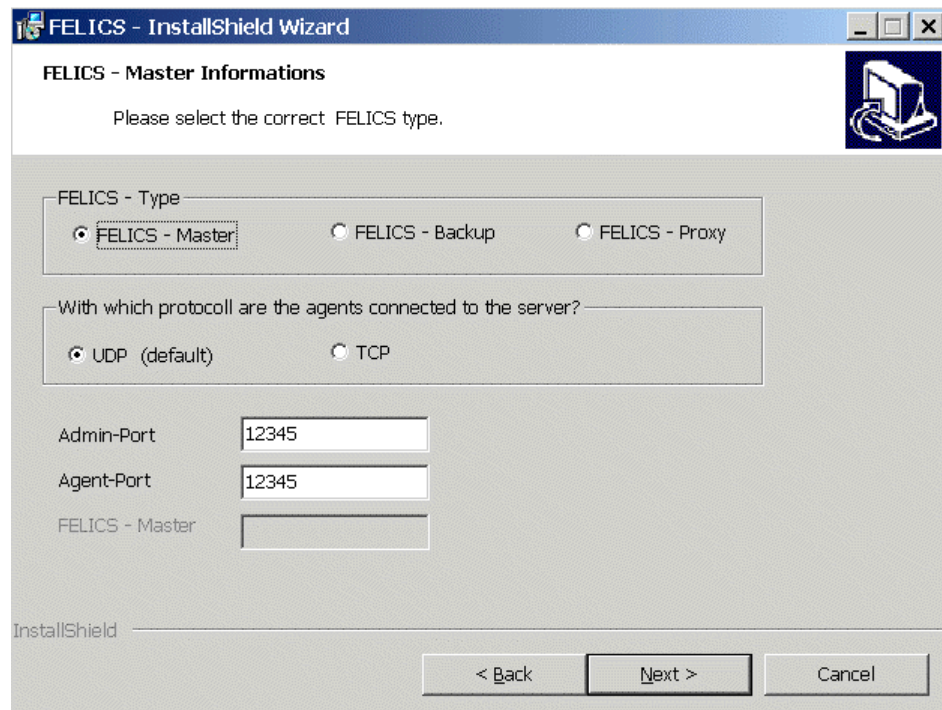
!

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

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 the 'FELICS - Master Informations' window from the 'FELICS - InstallShield Wizard'. The window title is 'FELICS - InstallShield Wizard'. The main heading is 'FELICS - Master Informations' and the instruction is 'Please select the correct FELICS type.' There are three radio button options for 'FELICS - Type': 'FELICS - Master' (selected), 'FELICS - Backup', and 'FELICS - Proxy'. Below this, there are two radio button options for 'With which protocol are the agents connected to the server?': 'UDP (default)' (selected) and 'TCP'. There are three text input fields: 'Admin-Port' with the value '12345', 'Agent-Port' with the value '12345', and 'FELICS - Master' which is empty. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

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 *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 in 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.

This opens the window shown in the following figure.

FELICS - Agent Informations

Software - Dongle

Server

With wich protocol you can reach the felics server?

UDP Servername

TCP Port

IPX

Add standard software licencing (FELICS - Guardian)

InstallShield

< Back Next > Cancel



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



For Servername enter the name of the server where the FELICS License Server is installed, and for Port enter the port number at which it can be reached (default: 12345).

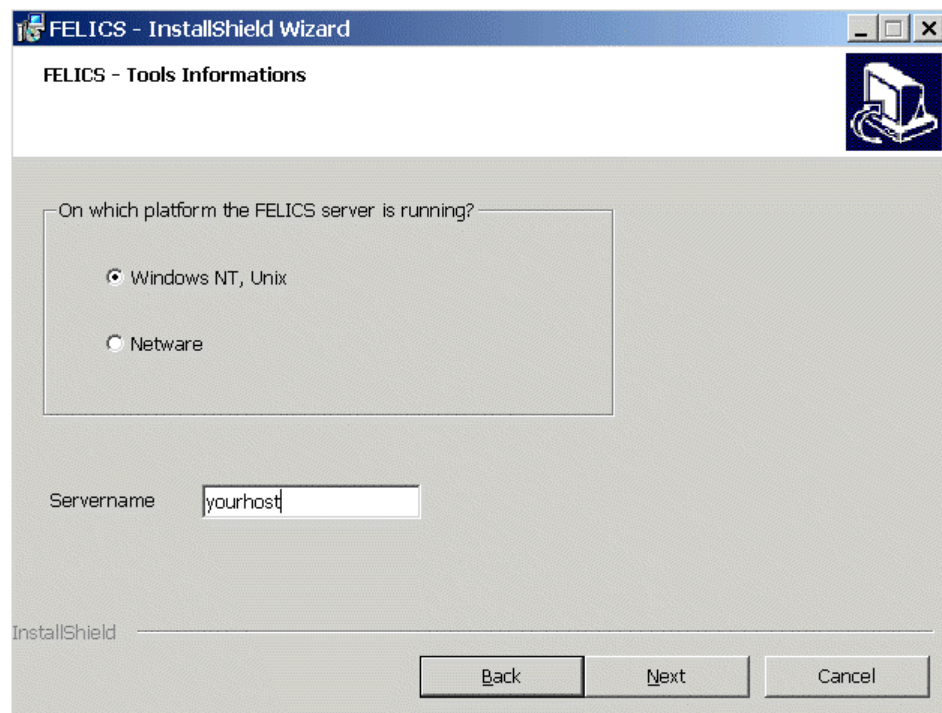


Do not select Add standard software licensing (FELICS - Guardian) for an Eigner PLM installation. Consult your Eigner Customer Support representative for information about the other options in this window.



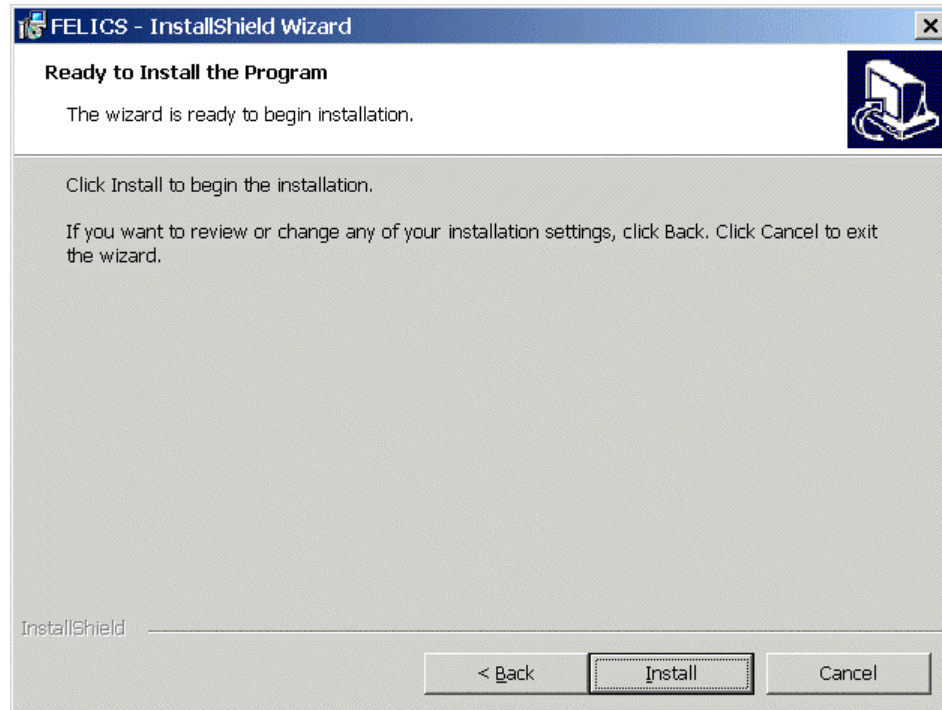
Click Next to continue.

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



Select the operating system of the machine on which the FELICS Server is running, enter the server name again, and then click Next to continue.

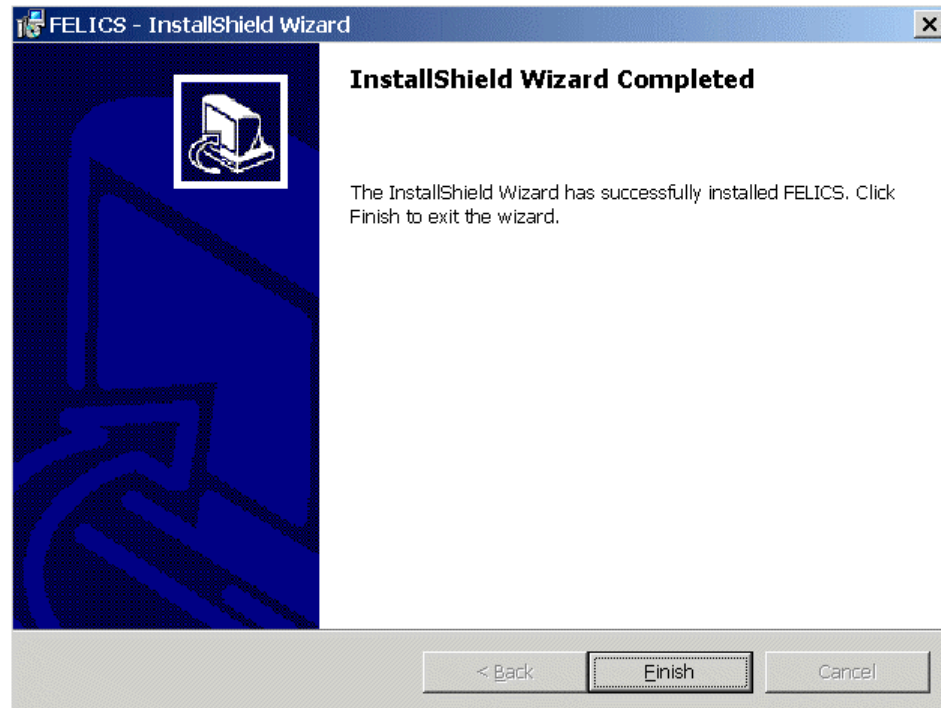
The window shown in the following figure opens.



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.**

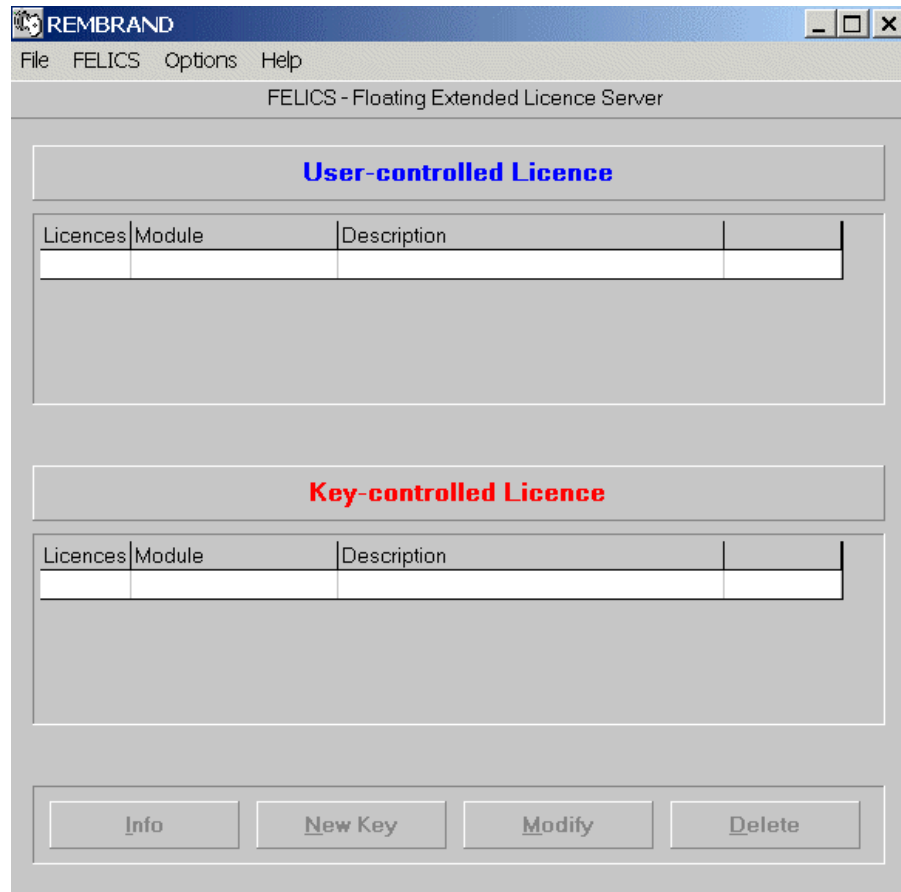
Use the instructions in the next section to insert the licenses needed to run Eigner PLM.

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.

The following window opens.



5. Enter the FELICS Server license key provided by the Eigner license administrator, and then click OK.

6.

Click OK to close the window.

7.

Press the `New Key` button 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 following 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 the File Service, or FMS.

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

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

Consult your Eigner Customer Support representative for information on optimizing your system with these components.



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

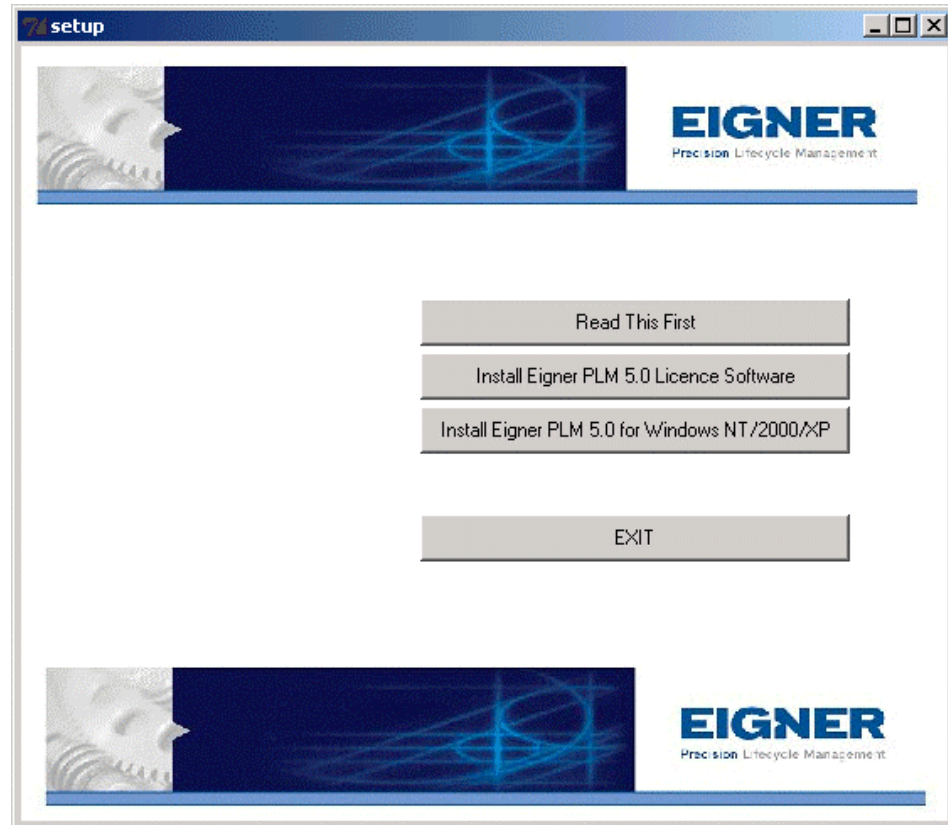
4.1 Starting the Installation



Insert the Eigner PLM 5.0 Installation CD.

If the CD 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 it detects a previously installed version, the Installer presents options for modifying, repairing, or removing your existing installation. You must remove an existing installation before a new installation can take place. For more information on the Modify, Repair, and Remove options refer to Section 4.5.

***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*.*



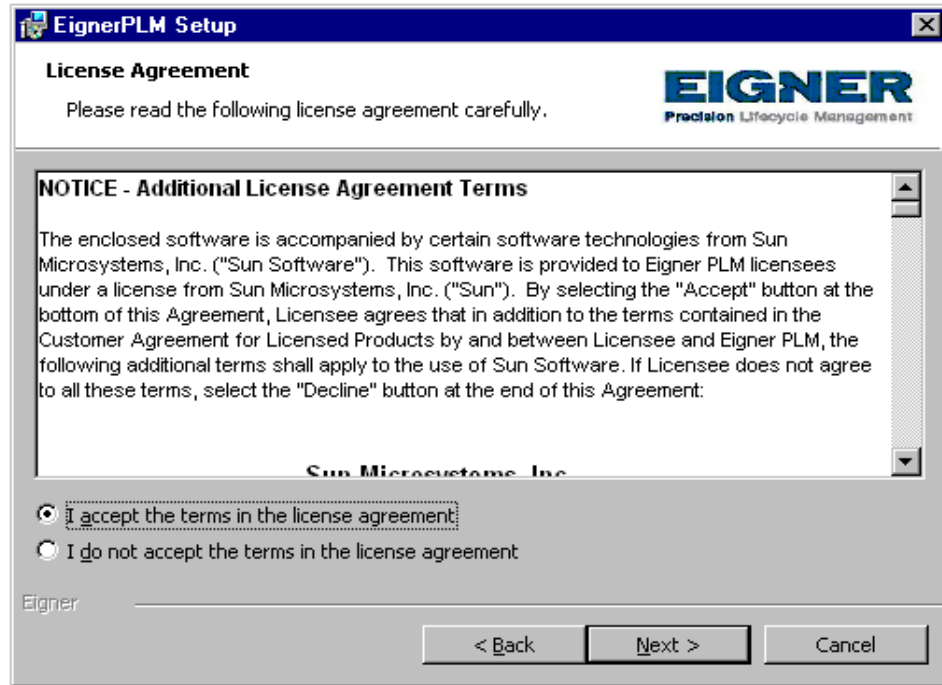
Click Install Eigner PLM 5.0 for Windows NT/2000/XP.

This starts the Eigner PLM 5.0 Setup wizard, shown in the following figure.



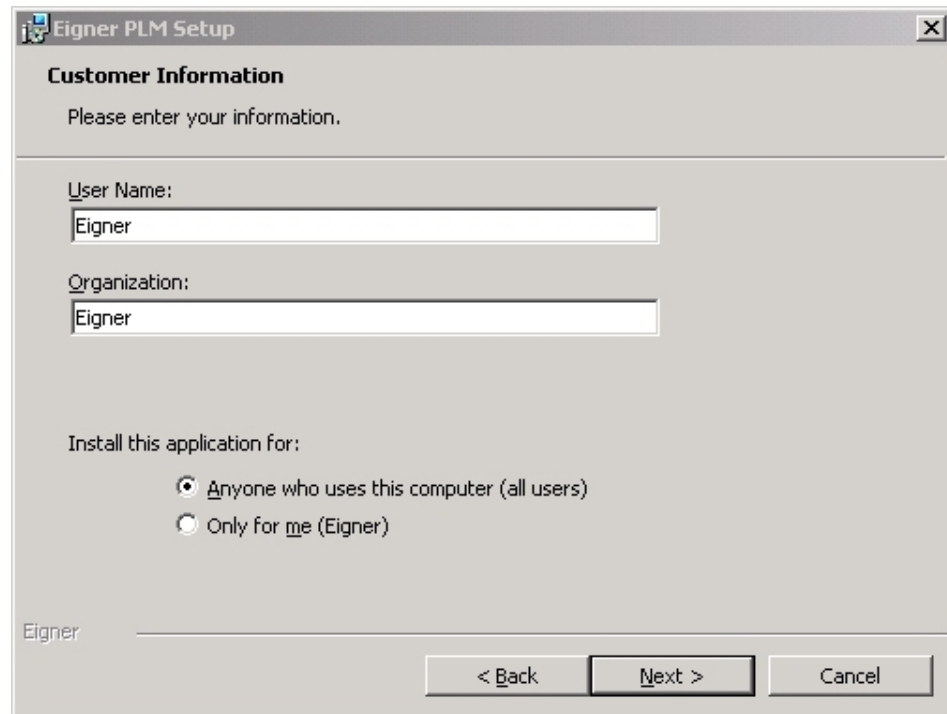
3. Click **Next** to continue.

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.

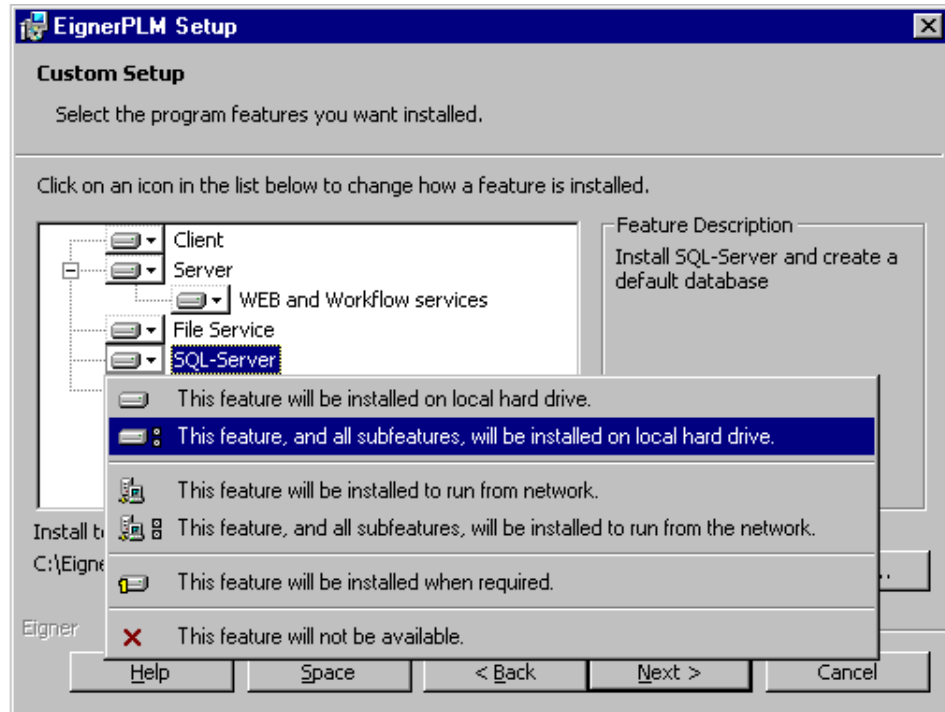
The Customer Information window shown in the following figure opens.



The screenshot shows the 'Eigner PLM Setup' window with the 'Customer Information' section. The 'User Name' and 'Organization' fields both contain the text 'Eigner'. Under the heading 'Install this application for:', the radio button for 'Anyone who uses this computer (all users)' is selected, while the radio button for 'Only for me (Eigner)' is unselected. At the bottom, 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).
- 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 you want to install on this system. You can also choose to install the database software as part of the Eigner PLM installation.

This guide describes installing SQL Server as part of the Eigner PLM installation. Refer to *Installing the Eigner PLM 5.0 Windows Server for Oracle 8i* (PLM50_NT_SRV_ORA.pdf) for information on installing Oracle 8i 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
- SQL Server – the Microsoft SQL Server database system

It is not useful to install both the SQL Server and Oracle databases.

9.

If necessary, change the installation path (for example, C:\EignerPLM) to the directory where you want to install Eigner PLM.

!

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

10.

Click *Next* to continue.

This opens a window you can use to select SQL Server installation options.

11.

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

- Server – to install a complete SQL Server 2000, which includes an installation of the SQL Server 2000 software itself and the creation of a database for Eigner PLM.
- Client – to install SQL Server 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 SQL Server client software will be installed. The SQL Server client software enables communications between the Eigner PLM server and an existing database server.

12.

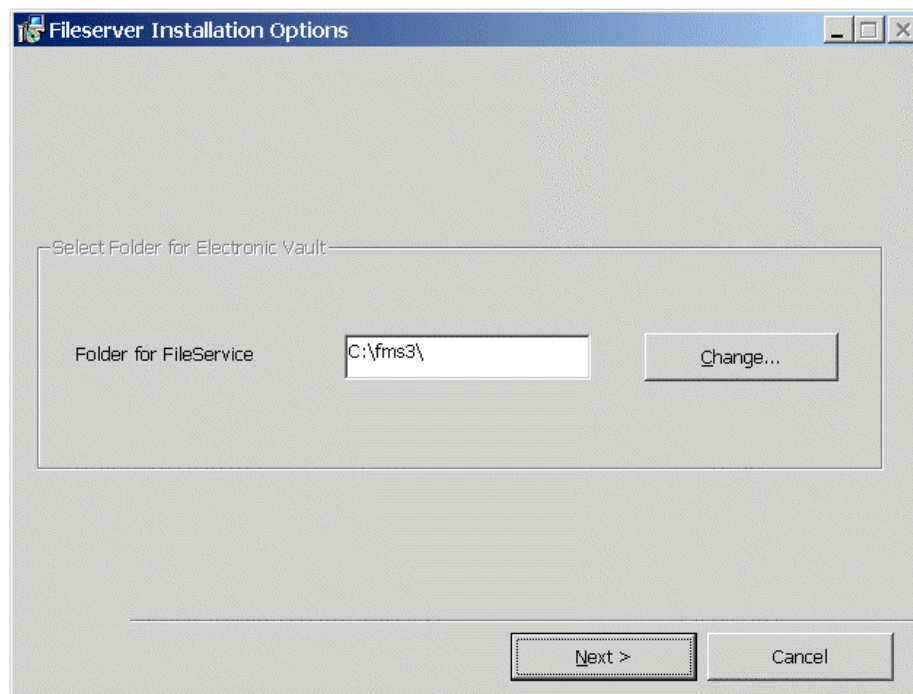
Specify the locations of the physical devices to be used for the SQL Server program and databases, and then click *Next* to continue.

The default folders are set to point to the root directory of drive C (“C:\”). Note the following:

- If you change the default folder for the SQL Server program to point to the root directory of another drive, the SQL Server program files are installed in the directory: <Drive>:\MSSQL and the system databases are installed in the directory <Drive>:\MSSQL\Data.

- If you specify a directory other than the root folder, the SQL Server program files are installed in the folder `<Folder>\MSSQL` and the system databases are installed in the folder `<Folder>\MSSQL\MSSQL\Data`.
- If you specify only a root directory for the database devices, the system databases are installed to the directory `<Drive>\MSSQL\Data`; otherwise they are installed to the folders you specify.
- If you specify an incorrect path in any of these fields, the installation program uses the correct information previously entered into the field.

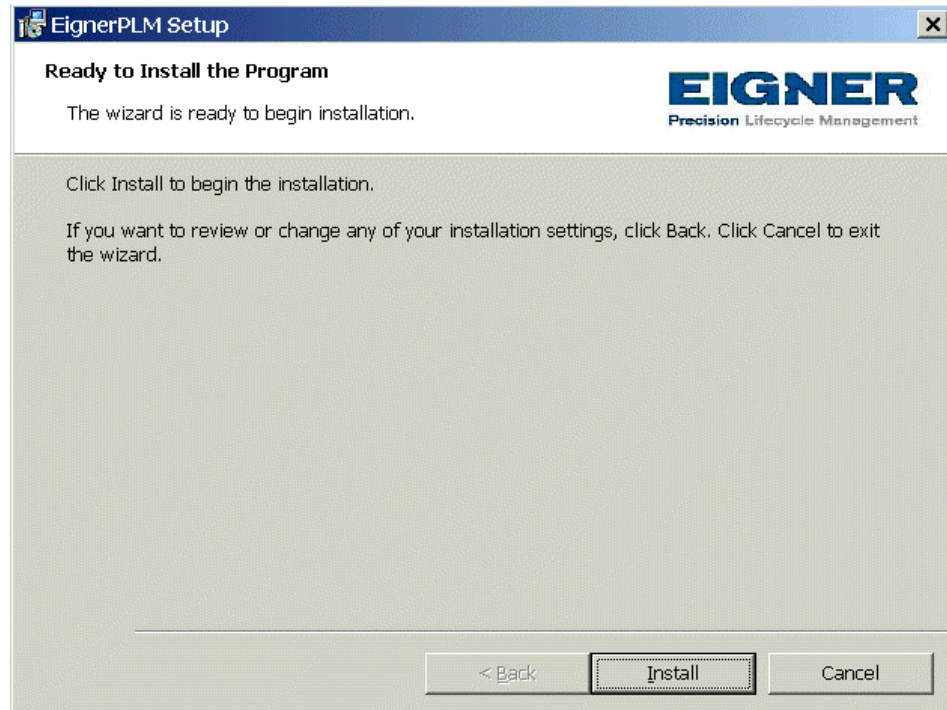
If you chose to install the File Service, the window shown in the following figure opens.

**13.**

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

The File Service will be installed to the folder you specify.

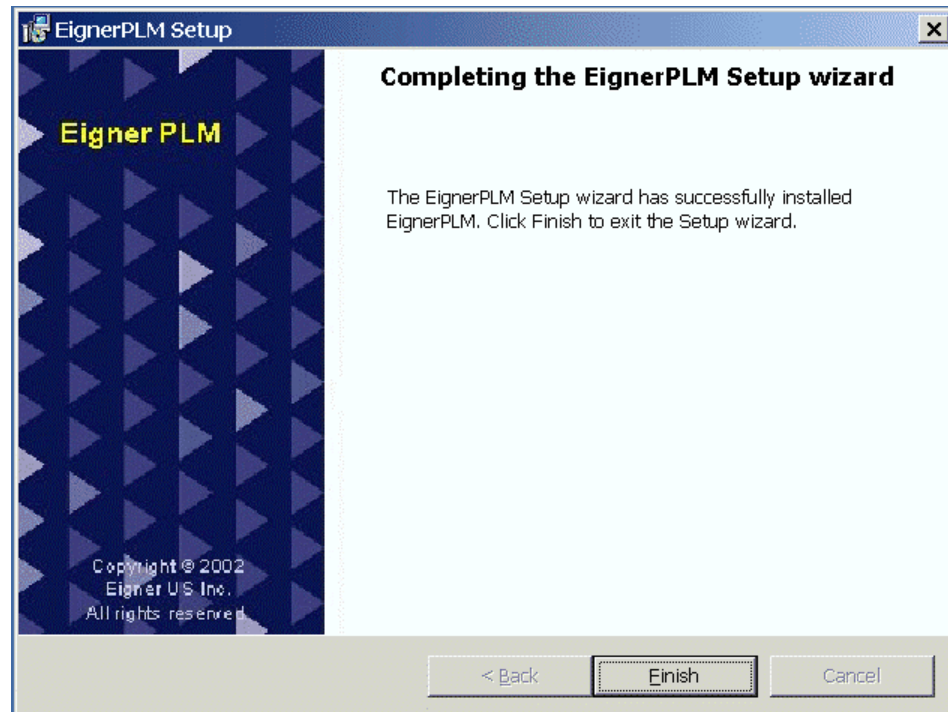
The window shown in the following figure opens.



14.

Click Install to start the Eigner PLM installation.

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

**15.****Click Finish to exit the Setup wizard.**

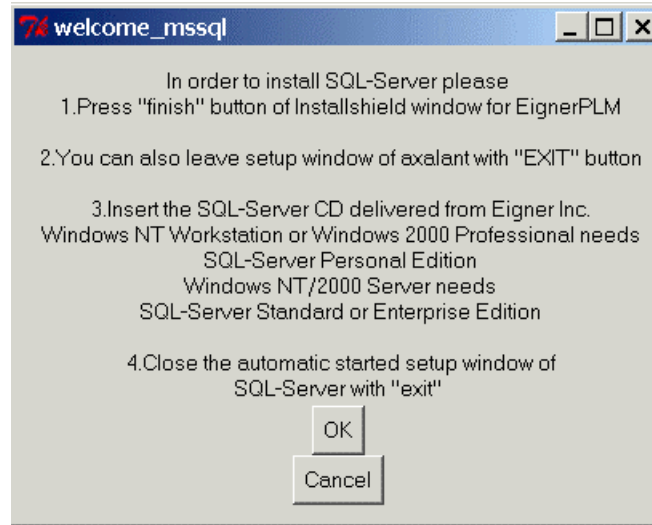
If this is an initial installation on a new system, the Setup wizard will request a reboot. Perform the reboot now.

After logging in again, start a command window, change to your Eigner PLM installation directory and call the SQL Server installation:

```
cd c:\EignerPLM  
axalant\cmd\mssqlinstall
```

If you selected SQL Server in the Custom Setup window, the SQL Server installation starts automatically, followed by the creation of the Eigner PLM database.

If the SQL Server CD is not found, the window shown in the following figure opens.

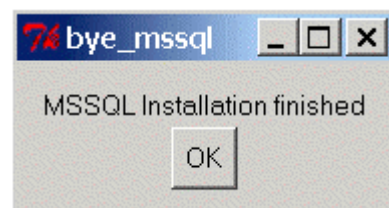


1. Insert the SQL Server 2000 CD.

You can also mount the installation image as a network drive.

2. If the CD autostart option is enabled on the machine, a SQL Server installation window opens. Close this window and click **OK in the 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 will take between 15 minutes to one hour, depending on the speed of your machine.*



3. Click **OK to complete the installation.**

4. 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 PC 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.

4.2 Downloading Files Needed by the PLM Business and Presentation Services

If you selected the *Web and Workflow services* installation option to install the PLM Business and Presentation Services, you'll need to download and install the Microsoft SQL Server 2000 driver for JDBC. This version of the JDBC driver is required by the PLM Business and Presentation Services.

You will need to download the JDBC driver and accept the license agreement only once, even if you have multiple PLM Server installations. After you have installed the driver, you can just copy .jar files created during the installation to other machines that host a PLM Server. You will not need to install the driver on each machine.

Until you have completed the following steps, new and existing Eigner PLM 5.0 environments for which the PLM Business and Presentation Services are enabled will not work.



Open the following page in your web browser:

<http://go.microsoft.com/fwlink/?Linkid=9141>



Select the appropriate language version for your operating system.



When prompted, save the executable file `setup.exe` to your local server.



Run the downloaded `setup.exe` to install the JDBC files in the default installation directory (`c:\Program Files\`) or to a directory you specify.

This creates the following files in the `lib` folder: `msbase.jar`, `mssqlserver.jar`, and `msutil.jar`.

5.

Copy the .jar files from the lib folder to the directory <InstallDir>\ext\bin\java for each of your PLM Server installations.

For <InstallDir>, substitute the name of the directory where Eigner PLM is installed.

For example, if you used the default installation for the JDBC driver and you installed Eigner PLM 5.0 to C:\EignerPLM, your Command Prompt window will look similar to the following figure when you copy the .jar files.

```
cd c:\program files\Microsoft SQL server 2000 Driver for JDBC\lib
dir
msbase.jar
mssqlserver.jar
msutil.jar
copy *.jar c:\EignerPLM\ext\bin\java
```

After you copy the .jar files, version 2.2 of the JDBC driver will be available automatically for use with the PLM Server installation.

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, to ensure that 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*.

!

If the passwords for *axalantrt* and *edbserv* are changed, the passwords of the following dependent services must also be updated with the appropriate passwords:

- EignerPLMAdmin
- EignerPLMDaemon
- EignerPLMFileserver
- EignerPLMJavaDaemon

These services are accessible from Administrative Tools in the Windows Control Panel, under Services. The password for each service can be found on the Log On page of its Properties dialog box.

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 *Eigner PLM Administration Guide* (PLM50_ADMIN.pdf).

1. Point your web browser to the following address:

<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 and to configure and start the PLM Business and Presentation Services.

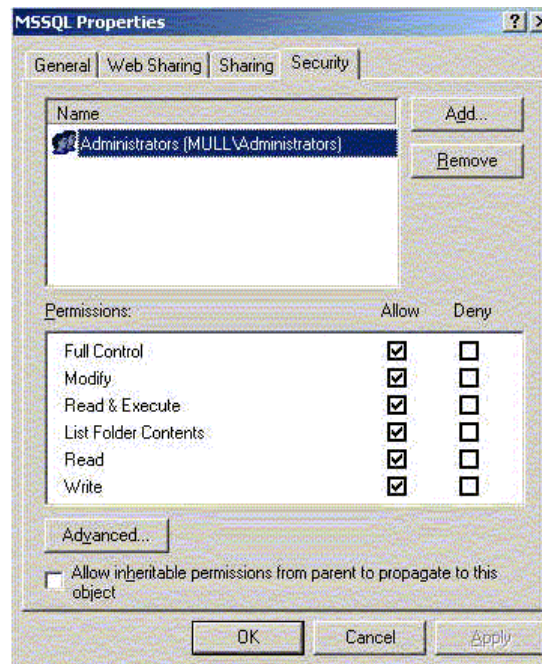
3. Click `Administrate Web Presentation Service` to configure and start the Web Presentation Service.

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`.

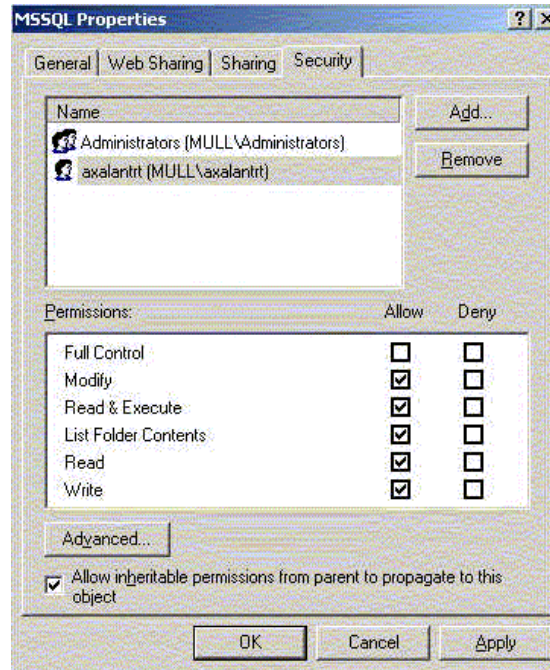
4. IMPORTANT: After installing EIGNER PLM on Windows 2000 with SQL Server, check access rights on the folders for the database files

(Program and Database devices), to ensure that you will be able to create databases for customer environments.

For example, when the installation is complete, right-click the `C:\MSSQL` folder and then select *Properties*. You may see the settings shown in the following figure.



Only members of the **Administrators** local system group have access to the database folder `C:\MSSQL`. To ensure that you can successfully create databases, make sure the **axalantrt** local system or domain account also has access to that folder by changing the account rights as shown in the following figure.



You can also give access rights to the **Authenticated Users** local system or domain group, if doing so will not compromise your company's security policy.

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 4.6 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 from the Windows Control Panel to fix an Eigner PLM installation that is not working properly. If the Repair function determines 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.**

The repair process will take a few minutes.



Insert the installation CD.



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.

1. **Open Add/Remove Programs in the Windows Control Panel.**
2. **Select Eigner PLM from the list of currently installed programs.**
3. **Click the `Remove` button.**