

VisionFM 12 Enterprise Server

Configuration Manual

VisionFM 12 ENTERPRISE SERVER CONFIGURATION MANUAL

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Vision Facilities Management Limited

180 Jardin Drive, Suite 9

Concord, Ontario, Canada

L4K 1X8

www.visionfm.com

(888) 654-9435

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VisionFM 12 Configuration Manual

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Overview

This guide is part of a set of guides created specifically for IT personnel to install the various parts of the VisionFM management system, including:

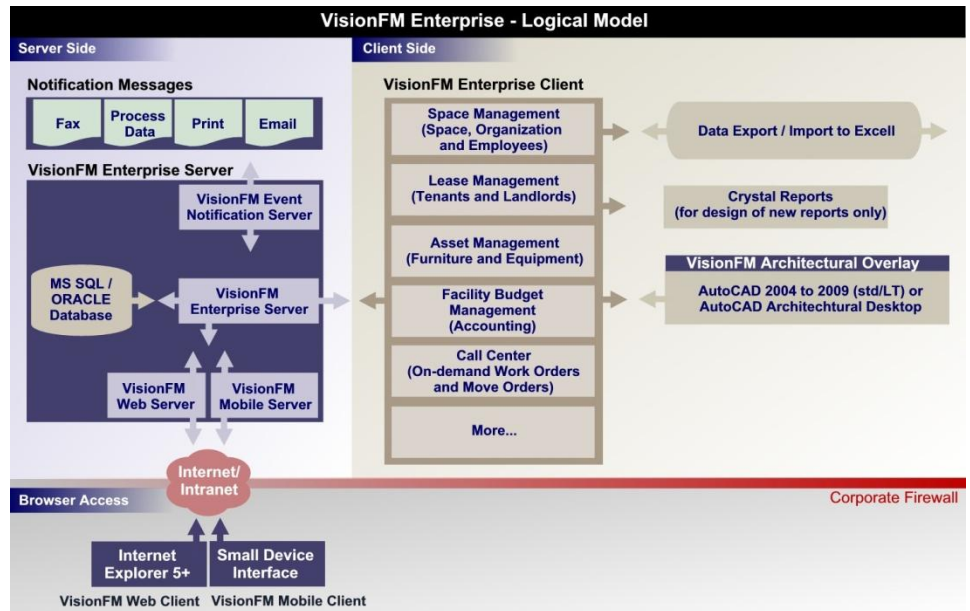
- VisionFM Enterprise Server
- VisionFM Enterprise Client
- VisionFM Web Server
- VisionFM Event Notification Server (ENS)

The VisionFM Server is the initial component of the VisionFM System. To install this product, you should already have an SQL or Oracle database running on the network.

Also included in this manual is the VisionFM Enterprise Client. The Client is the second component of the VisionFM System. Typically, it will be installed on the VisionFM Server to test the Server Configuration as soon as the VisionFM Enterprise Server is installed. To install the Client, you should already have the VisionFM Enterprise Server installed.

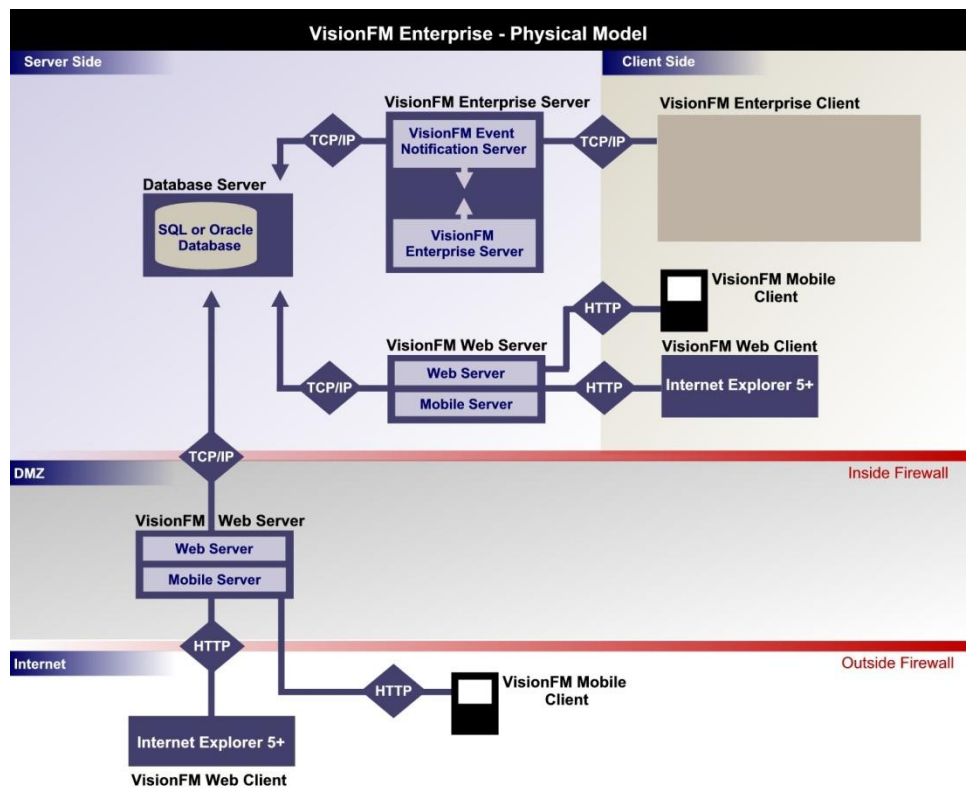
Concepts

VisionFM is comprised of two primary applications, the VisionFM Client and the VisionFM Server. The client contains the majority of features including modules, queries and the interface to drafting software, while the Server does most of the data processing and communication to other VisionFM applications. Communication between the client and server uses the TCP/IP protocol for both local and wide area networking.



Three optional applications, the VisionFM Web Server, the VisionFM Event Notification System, and the VisionFM Mobile server work with the VisionFM Enterprise Server Application. Their functions are described below.

In addition to the applications mentioned, users may also work with AutoCAD drawings and attach images. These files can be located anywhere on the network but the path must be a single location for all users, since the drawing path is stored in the database.



Order of installation:

Setup the VisionFM Server

1. Install the Databases. You will need to have the SQL or Oracle databases installed prior to installing VisionFM Server. Selecting your existing database is part of the VisionFM Server installation.
2. Install the VisionFM Server on the server computer.
3. Install the VisionFM Client on the Server for testing.

Setup the VisionFM Event Notification System (if required)

4. Install the VisionFM Event Notification Service on the VisionFM Server computer.

Setup VisionFM Client Computers

5. Install AutoCAD, if required. For each client who uses AutoCAD, you will need to have AutoCAD installed first on their computer before installing VisionFM client. A new menu is added to AutoCAD when it is designated during VisionFM client install.
6. Install VisionFM Client(s)

Setup the VisionFM Web Server (Could be either the same computer as the VisionFM Server or another server)

7. Install IIS: Internet Information Service, an optional component of Windows 2000, 2003, 2008, is required.
8. Install the VisionFM Web Server
9. Install Optional Components
 - a. VisionFM Active Directory Employee Mirroring System
 - b. VisionFM Automated Profile Creation System

VisionFM Enterprise Server

Introduction

Welcome to VisionFM Enterprise 12.

The Server installation accomplishes the following tasks:

- Installs the core schema configuration file (vfm.ddv).
- Creates directories for global resources, such as drawings, images, reports, and blocks.
- Provides a tool to edit the database schema of the installed service.
- Provides a tool to update database connectivity information.
- Provides a directory containing the installation files for VisionFM Enterprise Clients
- Provides a directory containing the installation files for the default VisionFM SQL database.

Server Requirements

VisionFM Server may be installed with the database (Oracle or SQL) on a single server or on a separate server. For the purposes of this document we will call the configuration where both VisionFM Server and the database are on the same server a **one server** configuration. Where the database is installed on a separate server, or is part of a cluster of servers, we will call it a **two server** configuration.

In a one server configuration, the VisionFM Server is also the database server.

Figure 1 shows the basic configuration for the two servers (SQL and VisionFM Server) and client. In a one-server scheme, the SQL database, or Oracle database, would be required on one machine.

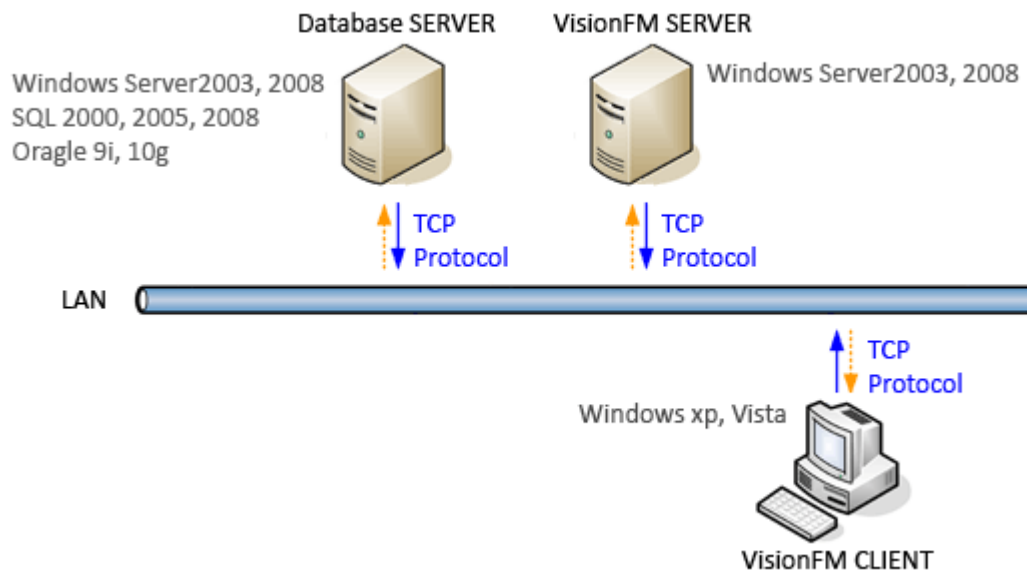


Figure 1

Server 1: The VisionFM Server

The VisionFM Enterprise Server Application utilizes Microsoft SQL or Oracle as its database. For a typical installation the SQL database and log files will require 500 Mb of hard drive space and will be loaded into memory if enough RAM is available. SQL supports multiple servers and takes advantage of multiple processors in a single server. In addition to the VisionFM Server application, the Event Notification System and Web Server can be loaded on the same computer. If multiple applications will be run on the server, a minimum of 2 GB of RAM is recommended.

If the number of concurrent users will be five or less, the VisionFM Enterprise Server will operate comfortably on a workstation (or Windows 2000 Professional / Windows XP Professional). Less than 20 concurrent users will work comfortably on a shared server. Greater than 20 users should have a dedicated server, especially if the Web Server will also reside on the same computer.

The server can be a Pentium 3 or greater, running on Windows 2000, 2003 or 2008.

VisionFM Server Specifications		
	Minimum	Recommended
Computer	Single Core Latest Model Pentium or AMD	Dual Core Latest Model Pentium or AMD
Operating System	Win 2003 Server	Win 2008 Server
RAM	2GB	Highest available
Hard Drive Space	1 GB	2 GB
Display	1024x768	1280x1024

Figure 2

The VisionFM Server installation (provided on CD) is, in most cases, the first VisionFM product installed. It simply requires Windows Server 2003 or 2008.

No other windows components or other software is required.

In the case of a two server configuration, the two servers must be able to communicate over the local LAN using normal TCP protocol communication.

Checklist:

- Windows 2003 or 2008 Server

Server 2: The Database Server

In the case of a two-server configuration some of the required hard drive space on the VisionFM Server can be reduced. The Database server must have the hard drive space instead. Otherwise the servers should be similar.

Database Server Specifications	
Minimum	Recommended

Computer	Single Core Latest Model Pentium or AMD	Dual Core Latest Model Pentium or AMD
Operating System	Win 2003 Server	Win 2008 Server
RAM	2GB	Highest available
Hard Drive Space	1 GB	2 GB
Display	1024x768	1280x1024

Figure 3

IMPORTANT: Before installing any VisionFM products, SQL or ORACLE services must be installed and properly configured on the database server.

Whether this is a one or two server configuration, ensure database services are available and running. There is no need for a default or sample database. The actual VisionFM database will be installed later.

This is the only required software application for this machine. After the VisionFM Server is installed you will return to the Database Server to install the database files.

Checklist:

- Win2003 or Win2008 Server
- SQL 2000, 2005, 2008 (option 1)
- Oracle 9i, 10g (option 2)

Before installing...

You will need:

- The VisionFM Web Server Installation CD (The install serial number can be found on the CD case)
- SQL or Oracle Server installed on the local server or another server in the network.
- A VisionFM Serial Number
- Access to a telephone to obtain a registration number (required)
- Administrator access rights
- A telephone. During installation a validation code will be generated. This number will need be given to a VisionFM attendant, who will return a final install code.

Installation Procedure

IMPORTANT: The VisionFM Server requires a SQL or Oracle database to operate. The database may be installed on the same server or on another server in the same local area network. The VisionFM Server comprises the server component of a client-server environment. For communication with clients, all clients must be installed on the same local area network. The clients are not designed to communicate with the server over a wide area network. Another product, VisionFM Web Server, is designed for wide area network communications.

Installation Steps

On the VisionFM Server:

Step 1: To begin, test network connectivity. If a separate database server will be used, test communications by navigating to the second server using windows explorer.

Step2: Insert the CD you received VisionFM Enterprise Server, and run the Setup.exe. The Installation wizard will open taking you through the steps of installing the software. You will:

1. Read and Accept the Licensing terms of the installation.
2. Enter your Name, Company Name, and Serial Number. They must be entered as they appear in the documentation provided with the CD.
3. You will be presented with a 'confirmation' number and a telephone number. Call the telephone number to give the confirmation number to a VisionFM representative. You will receive an installation code. Enter the code to proceed.
4. Choose an installation folder for VisionFM Enterprise Server.
5. Setup your visionserver directory (that you created in the last step) as a network share, which is required for communications between VisionFM Clients and the VisionFM server. Enter the network share to proceed.
6. Choose which version of SQL or Oracle database you use.
7. Enter the name of the database server.
8. Select a location for the VFCSetup folder, which contains all of the VisionFM Client installation files. Later you will share this folder and use it to install VisionFM Clients.
9. Select a location for the VFDSetup folder, which contains the VisionFM Database installation files. Later you will share this folder and use it to install the VisionFM database on your database server.
10. Select a program folder. The wizard will finish installing the product.
11. Create a network share for c:\VFCSetup called [\\yourserver\VFCSetup](#) . Share security should allow READ access to any group that has to set up VisionFM clients.
12. Create a network share for c:\VFDSetup called [\\yourserver\VFDSetup](#) . Share security should allow READ access to any administrator who has to set up the database.

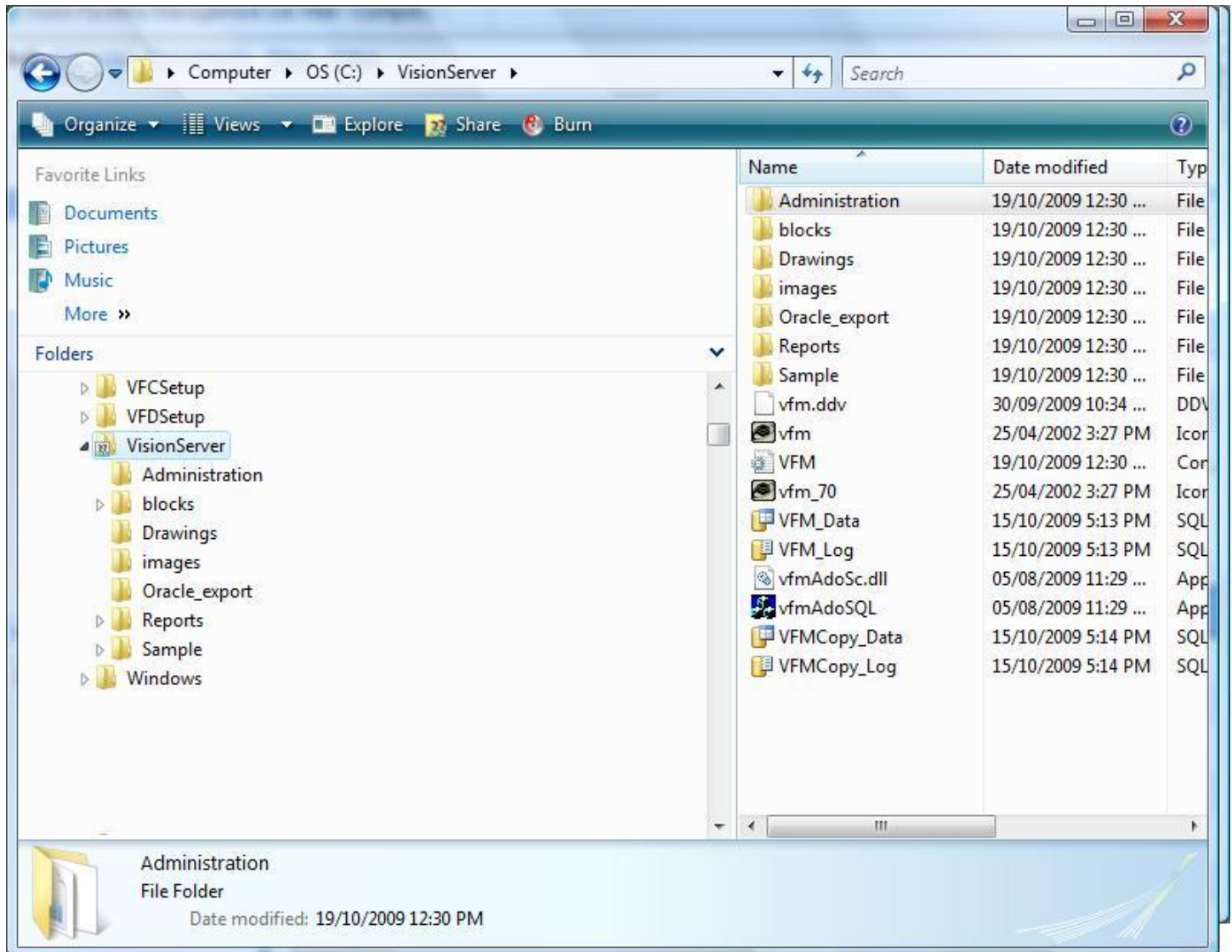
On the database server: Install the VisionFM Database

The VisionFM Database is a sample database provided for SQL only. Oracle databases need to be arranged separately.

1. Locate the shared VFDSetup folder on the VisionFM Server using the UNC path created in the last step above, and run the Setup.exe file.
2. Follow the steps in the installation. You will:
 - a) Select the SQL database version'
 - b) Enter the Login and Password of an SQL Logon user that has permission to install the database.
 - c) Enter the Server Name of the SQL server.
 - d) Enter the SQL Instance name for configurations that use instances. (optional)
 - e) Choose a folder path to hold the VisionFM Database files. The wizard will finish the installation.
3. Test the server installation by installing and running a VisionFM Enterprise Client. (See VisionFM Enterprise Client Configuration Manual)

Server Components

Included files and folders



When you install the VisionFM Server, the following components are installed.

Administration Folder

The Administration folder contains a utility called **DBDesigner12.exe**, that allows administrators to view and edit the many database tables used by VisionFM, and the inter-relationships between them. It is an indispensable tool for form and query design, and system customization. Most Administrators will not need to alter the table relationships.

Blocks Folder

Used to hold CAD block objects for central access

Drawings Folder

Used to hold CAD drawings for central access

Images Folder

Used to hold images for central access

Oracle_export Folder

Used to temporary files for exporting data from SQL to Oracle

Reports Folder

Used to hold Crystal Reports files for central access.

Sample Folder

Used to sample files.

VFM.ddv File

A configuration file used to set and maintain the settings, and the relationships of the various tables in the database. This is the file that is opened by the **DBDesigner12.exe utility** to manage the database table relationships.

VFM_Data and VFM_Log Files

SQL Database files containing the sample database.

vfmAdoSQL.exe File

VFMAOSQL.exe is a utility used for SQL only. When databases are detached and then attached (moving a database from one server to another, for example), the connections between SQL Login users and SQL database users are lost. VFMAOSQL.exe reconnects SQL Login Users to SQL Database Users automatically, simplifying an otherwise complicated process.

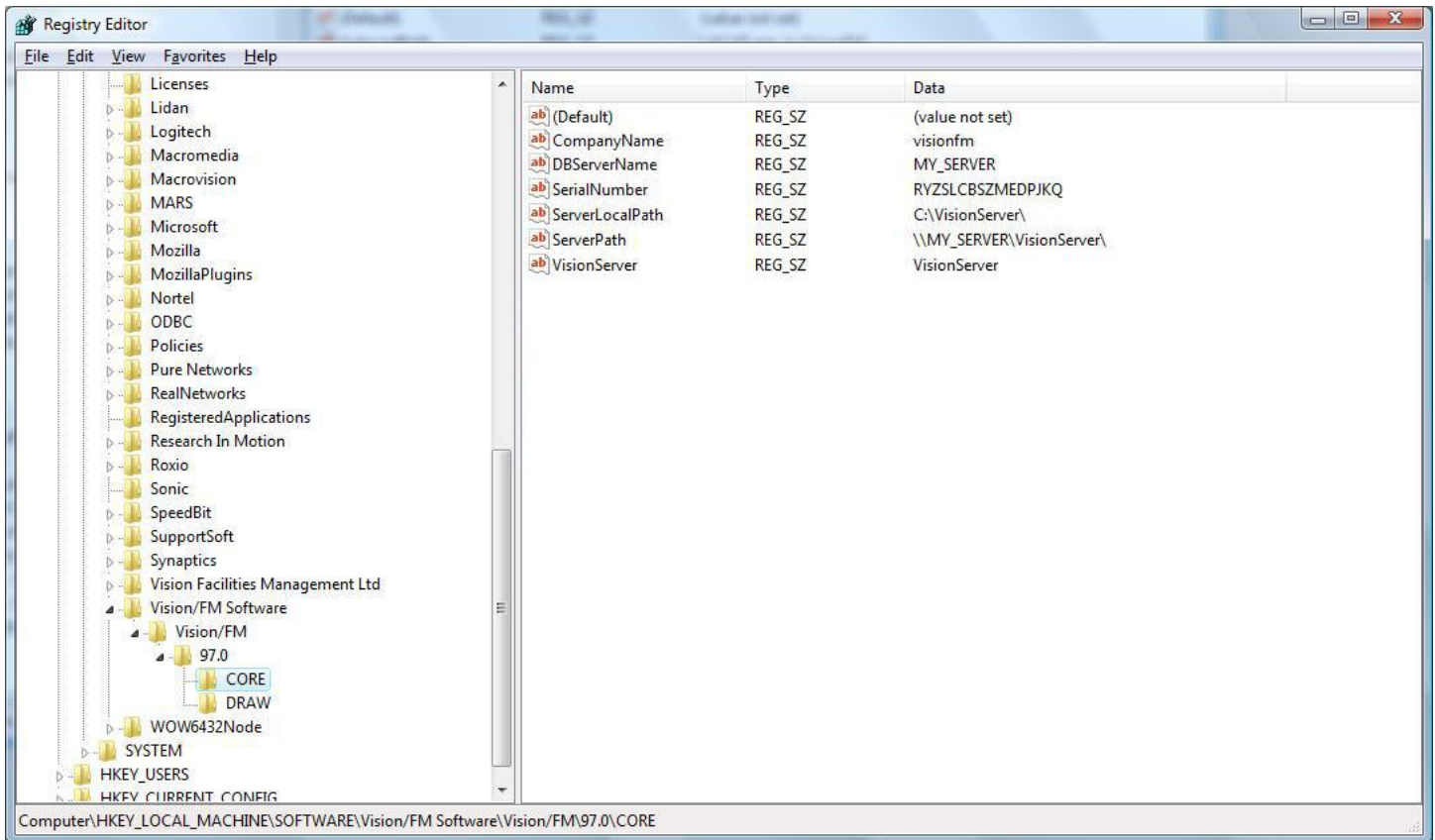
VFMCopy_Data and VFMCopy_Log Files

Blank database copies used for exporting data from the main database.

Technical Specifications

The Registry

Unlike most software you install, the distributed nature of VisionFM sometimes requires that you check the paths and addresses of the different machines you are working with. Currently, this is easiest to do through the registry. The registry settings for VisionFM Enterprise Server are shown below.



WARNING:

Mismanagement of registry settings can cause permanent data loss and permanent loss of functionality to your operating system and programs without recourse. A knowledgeable system administrator should always perform any alteration, addition, or deletion from the registry. Vision Facilities Management Ltd. takes no responsibility for the results of such actions. It is strongly recommended that, if you decide to change a registry setting, you only change the VisionFM Enterprise keys, and that this only be done by a professional system administrator. If you are not a professional system administrator, do not proceed. Instead forward this information to the appropriate personnel.

To get to your registry settings, click your Start button and select 'Run...'. Type 'REGEDIT' and click 'ok'. The registry editor should appear. Navigate to "HKEY_LOCAL_MACHINE/SOFTWARE/VISIONFM SOFTWARE/VISIONFM/97.0/CORE"

Description of registry keys For VisionFM Server

The following is an example of registry settings for a machine that is set up as a single server configuration.

Registry Key	Description
(Default)	Do not Alter
Company Name	Do not Alter; Combined with the SerialNumber field below to enable (i.e. unlock) the software.
DBServerName	If you are using SQL it is the name of SQL server. For Oracle, it is the name of the 'global database' (i.e. vfm)
SerialNumber	Do not Alter Combined with the CompanyName field above to enable (i.e. unlock) the software.
ServerLocalPath	The local path of the 'VisionServer' directory on the VisionFM Enterprise Server computer. (only used for liveupdates)
ServerPath	The UNC path of the 'VisionServer' directory on the VisionFM Enterprise Server computer. (not used directly by VisionFM Server, but by VisionFM client)
VisionServer	Do not Alter

Registry Differences for Oracle

The only differences in registry settings occur depending whether you use an Oracle or SQL database:

SQL: DBSERvername will indicate the name of the database server (i.e. My_Server)

Oracle: DBSERvername will say global database name for oracle server (i.e. vfm)

Security Settings

Levels of Security:

There three basic security levels involved with the VisionFM Server:

- A. Windows NTFS security:
 - a. Client users must be able read from the shared visionserver directory on the VisionFM Server.
- B. QL Logon Users must be connected to SQL Database Users. This is seamless when the database is installed, but if the databases were ever to be moved the connections become lost. In this case there is a utility, vfmAdoSQL.exe, in the visionserver directory that will connect the users.
- C. VisionFM Users. Once VisionFM is configured users log into the system using a proprietary list of users and passwords. Each one is administered by the VisionFM administrator from within VisionFM.

Network Considerations

1. If they are not the same machine, the VisionFM Enterprise Server must be able to see the Database Server with a tcp_ip connection. This means that 'File and Print Sharing For Microsoft Networks' must be enabled on both

machines local area connections. Simple Test: (A) If 'ping' is not blocked on your network, you should be able to ping either machine. (B) Browse your network in Windows Explorer to view the other machines folders.

Windows NT Security, Minimum Recommended Settings

The following folders and security contexts indicate standard minimum recommended settings.

ONE SERVER CONFIGURATION

c:\visionserver

[group of VisionFM client users] or Everyone = read - allows Clients to access the database.

TWO SERVER CONFIGURATION

c:\visionserver

[group of VisionFM client users] or Everyone = read - allows Clients to access the database.

Connectivity Checklist

Use the following checklist to help resolve connectivity issues.

1. Check Windows Security. Make sure your security settings meet the minimum requirements. See: 'Windows NT Security, Minimum Recommended Settings under Security Settings, above.
2. Check the registry on the server(s). Make sure all settings are correct.

If any of these are out of sync, changing it here will correct the problem.

a) On a Single Server Configuration

Click START... RUN... type 'REGEDIT'. The registry will appear.

Navigate to 'HKEY_LOCAL_MACHINE\SOFTWARE\VISIONFM SOFTWARE\VISIONFM\97.0\CORE'.

The following list of keys pertain to proper connectivity:

DBServerName must be the name of the Vision Server computer.

ServerPath must be the UNC path of the VisionFM Enterprise Server on the VisionFM Server machine. (i.e. \\MyComputer\C\visionserver\).

VfmPath must be the path of the VisionFM Client on this machine (if installed) (i.e. c:\Program Files\VisionFM\).

b) On a two-server Configuration

i) On the Server Computer

Click START... RUN... type 'REGEDIT'. The registry will appear.

Navigate to 'HKEY_LOCAL_MACHINE\SOFTWARE\VISIONFM\SOFTWARE\VISIONFM\97.0\CORE'.

The following list of keys will be available:

DBServerName must be the name of the Database Server computer.

ServerPath must be the UNC path of the VisionFM Enterprise Server on the VisionFM Server machine.
(i.e. \\MyComputer\C\visionserver\).

VfmPath must be the path of the VisionFM Client on this machine (if installed) (i.e. c:\Program Files\VisionFM\).

ii) On the VisionFM Client

Click START... RUN... type 'REGEDIT'. The registry will appear.

Navigate to 'HKEY_LOCAL_MACHINE\SOFTWARE\VISIONFM\SOFTWARE\VISIONFM\97.0\CORE'.

The following list of keys will be available:

DBServerName must be the name of the Database Server computer.

ServerPath must be the UNC path of the VisionFM Enterprise Server on the VisionFM Server machine.
(i.e. \\MyComputer\C\visionserver\)

VfmPath must be the path of the VisionFM Client on this machine (if installed) (i.e. c:\Program Files\VisionFM\).

3. Check the SQL server. On the SQL SERVER:

Click on Start... Programs... Microsoft SQL Server... Enterprise Manager.

i) Make sure the database is turned on (green).

4. Run the VisionFM Client.

This will verify that the registry settings are correct. If VisionFM does not run, these settings may be wrong.

The VisionFM Client must run properly before you can expect the web site to function properly.

5. Check the user's profile

In the VisionFM Client, click on the file menu and select **User Profile**. Select one of the users. Check the profile to make sure that at least one module and one activity (query, form, report) are chosen.

Installing Updates

Introduction

Periodically Vision Facilities Management Limited will make available mid-release updated to enhance existing features.

An installation program will be provided by Vision, to be run on the mobile device server. All data is stored in the database which is not affected by mobile device updates so installing an update will not affect your existing information.

Before running the update ensure that all mobile device users are logged out and have synchronized their latest data collection with the database.

Installing Updates on the Server

Updates made available from Vision will be distributed as a single installation file, which is run only on the server. As each user logs into VisionFM, the Client program automatically checks the server for updated files and installs them.

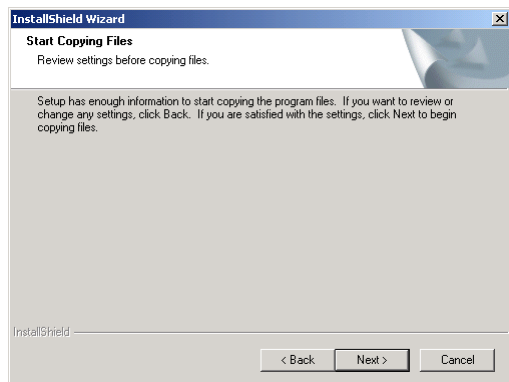
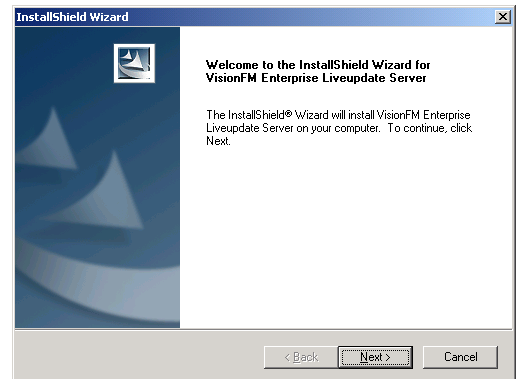
Before installing, make sure that you have Windows user writes to install software and create directories.

Note:

Read any readme.txt files and the notes presented during installation of updated carefully. The installation of patches may require server applications to be shut down or the server rebooted after installation.

The installation program will be an executable (.exe) file. Save the file to your hard drive on the server then locate the file with Windows Explorer and double-click on it to start the installation.

The installation dialog box will notify you that the installation program has started. Click the **Next** button to continue.

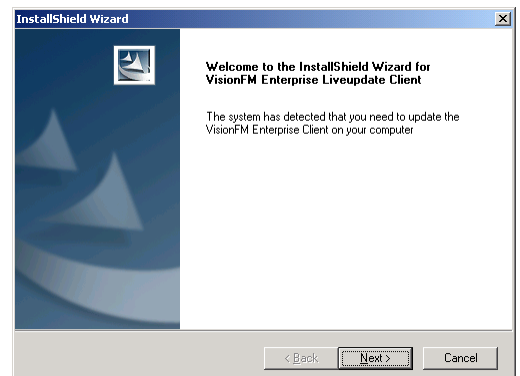


The installation program will search for VisionFM server components. Once located, the dialog box will display a message that it is ready to continue with the installation. Click the **Next** button to complete the installation process.

Installing updates on the Client

After installing an update on the server client computers will be updated as each user logs into VisionFM. Upon login they will be presented with the following dialog box.

All they have to do is press the **Next** button to install the files.



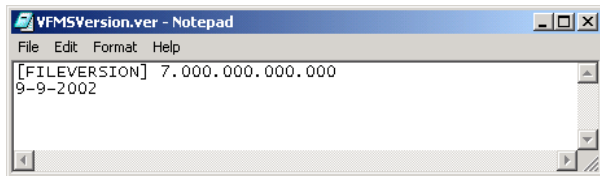
Web users will also be presented with a similar dialog box for updating Web Client files.

Distributing Custom Files

When a VisionFM update is installed on the server the files that are to be distributed to the VisionFM Client's will be installed in \\VisionServer\LUCient\VisionFM. Any files located in subdirectories on the Client will be in subdirectories under the LUCient directory as well. For example, if you wanted to distribute new icons to all users the icons need to be installed in the VisionFM\Images directory so on the server they would be in \\VisionServer\LUCient\VisionFM\Images.

To trigger an update to all users a text file needs to be edited. On each user's computer is a version number that VisionFM compares to the version number in the \\VisionServer\VFMSVersion.ver file (this file is hidden). If the numbers are different it triggers the installation of all files in the LUCient directory.

The version number starts with the release (11). The next two sets of zeros are reserved for Vision. The third set of zeros can be edited by the Administrator to trigger an update. The last set of zeros is currently not in use. For example, adding a new VFM.SAV file in \\VisionServer\LUCient\VisionFM and then editing the number in VFMSVersion.ver to read 110.000.000.001.000 would cause that file to be distributed to the C:\Program Files\VisionFM directory on each VisionFM user's computer.



Licensing

License Agreement Summary

VisionFM Server can be installed on one computer only.

VisionFM Server includes the MS SQL Express 2005, VisionFM Server, VisionFM Database Designer, and application files installed by the VisionFM Server installation program.

VisionFM Client can be installed on any computer as long as the VisionFM Client is exclusively accessing the single installation of the VisionFM Server application.

Each VisionFM Client installation can use all the VisionFM Modules and the link to AutoCAD. There are no additional licensing costs for VisionFM Clients or Modules.

AutoCAD is not included in VisionFM. If you wish to work with AutoCAD, the install program on the VisionFM CD will ask you for the path during the installation of each client station.

Crystal Reports Viewer is built into VisionFM Client. The Viewer allows reports to be run and the results displayed and printed. For editing reports a copy of Crystal Reports 2008 will be required (not included).

VisionFM Software License Agreement

IMPORTANT - READ CAREFULLY

This License Agreement, for the use of the Bundled Products, Software Products and limited warranty (herein referred to as the "Agreement") is a legal agreement between you, the end user (herein referred to as the "Customer"), and Vision Facilities Management Limited, a company incorporated under the laws of the Province of Ontario, Canada (herein referred to as "Vision") for a non-exclusive license to use VisionFM Enterprise and the Bundled Products. The Bundled Products, incorporated in the computer program as part of the software programs, and sold as a single package under VisionFM and not in combination with other products, include Microsoft SQL 2000 Desktop Engine, VisionFM Database Designer, together with user manuals, instructions, associated media, printed materials and on-line or electronic documentation for the Bundled Products. The Bundled Products, VisionFM Enterprise and VisionFM's user manuals, instructions, printed materials and on-line or electronic documentation is referred to herein as the "Software Products" or "VisionFM".

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- (b) The Customer may install the server version of VisionFM on one machine only. The VisionFM Client installation may be installed on any machine as long as it exclusively accesses the single server installation. The VisionFM Internet Client has its own licensing agreement.

The Customer shall use each of the Bundled Products and the data and associated documentation related specifically to each of the Bundled Products and Software Products only as part of VisionFM and only for the facilities management application provided by VisionFM.

Use of the bundled products are included in the VisionFM license and contain the following stipulations;

- (i) Microsoft SQL Desktop Engine, including all versions or equivalent database software from Microsoft, are installed as part of VisionFM and must reside on the same computer running VisionFM Server version.
- (c) The Customer agrees that each of the Bundled Products shall be used only under this license which incorporates those terms and conditions as set forth hereafter:

- (i) the Customer is granted a personal, non-transferable and non-exclusive right to use the executable version of each of the Bundled Products as part of VisionFM and on a single, central processing unit;
- (ii) each of the Bundled Products may only be used with VisionFM. Accessing data that is not created by, or used by, VisionFM is in violation of this license;
- (iii) the Customer will not copy any of the Bundled Products except as necessary to use VisionFM and for back-up and archival purposes only;
- (iv) except as herein stated, the Customer is not granted a right (whether by license, ownership or otherwise) in or to any proprietary rights in any of the Bundled Products;
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- (viii) the Customer will not remove, alter or destroy any formal copyright notice, proprietary markings or confidential legends placed upon or contained within the Software Products;
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- (xii) in the event of conflict as to the wording of this Agreement, the provisions of this paragraph takes precedence.

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