



Project management – Web based access

InLoox PM 7.x Web App Installation Guide

An InLoox Whitepaper

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General information

The current available version of InLoox is fundamentally different from predecessor generations of the product. The Enterprise Edition now offers a web server program which enables the user to access and modify InLoox data via a web browser. This document describes the system requirements and installation steps.

Supported database management systems with network usage are:

- Microsoft SQL Server (all versions and editions of SQL server 2005 to 2008 R2)
- Oracle (versions 11g, 10g, 9i, 8i, 8,0, “Express“ and “Enterprise“ including “x64“- editions)
- MySQL (versions 5.0)

The database schema of *InLoox PM Web App/InLoox PM Enterprise Edition* is ready for offline and clustering usage.

InLoox PM Web App is internationalized and is on hand in different language versions. Region and language settings are supported for each user. Thus, the foundations for a global usage are laid.

System Requirements

Server

Internet Information Server version 7.5 or higher

.Net Framework 4.0

Optional: Microsoft Exchange Server ® (2010 or 2007 SP1)

The hard- and software requirements depend on the used database system. Please consult the product documentation of the respective manufacturer for valid requirements.

All manufacturers supported by InLoox offer a free database product:

- Microsoft SQL Server express edition
- Oracle Express Edition
- MySQL Community Edition

Web browser

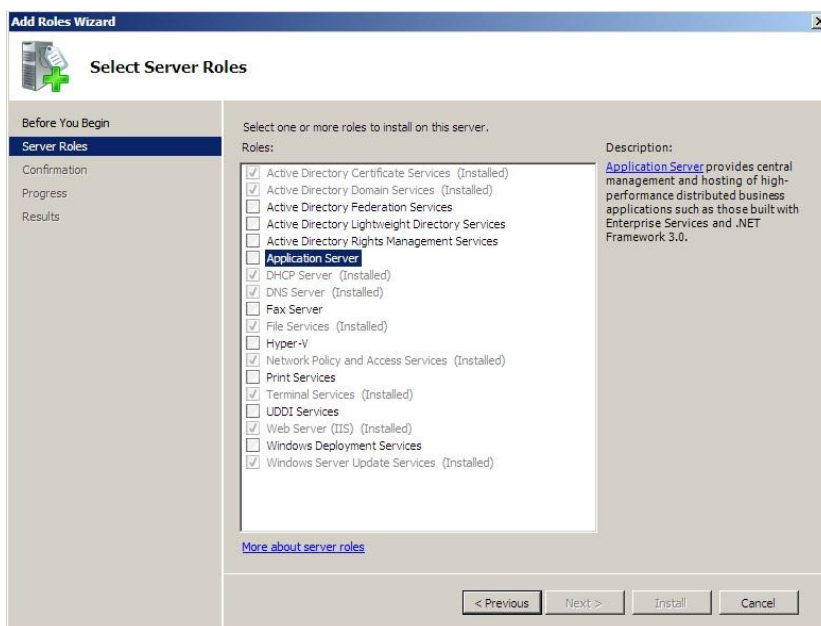
- Firefox Version 9 or higher
- Internet Explorer Version 8 or higher
- Safari 5 or higher (Mac, iPhone, iPad)
- Chrome 15 or higher

IIS Installation & configuration

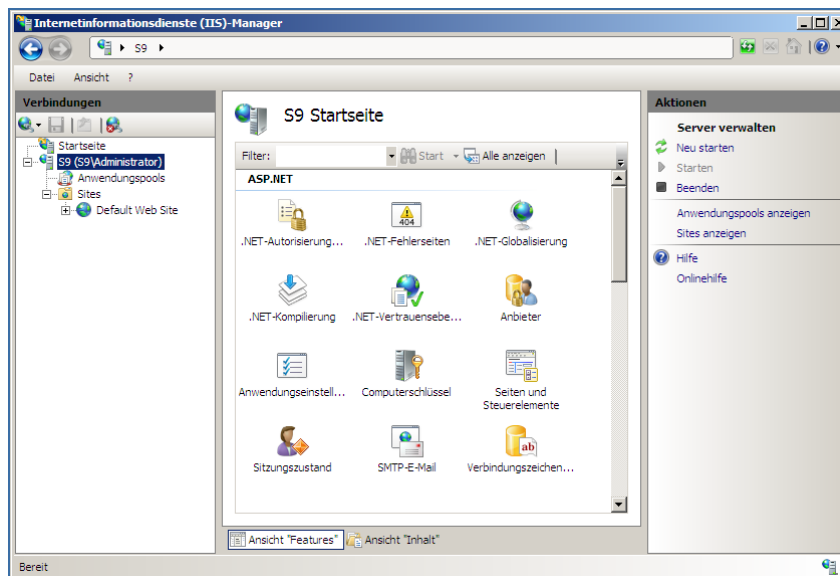
IIS 7.5 configuration

The configuration of an IIS 7.5 can be basically broken down into the following steps:

- Configuration of the virtual folder for InLoox PM Web App
 - Configuration of the IIS SMTP Server
 - Shared printing
-
1. Please make sure that you have installed all necessary system requirements (e.g. .Net 4.0) and the packages for the IIS. Please open the Server Manager to install the IIS packages and add the following roles:
 - Application server - adds the required feature .Net Framework 3.5.1-Features and the according modules
 - Webserver (IIS) – the following modules are the minimal requirements:
 - o Static content
 - o ASP.NET
 - o .NET expandability
 - o Security
 - Default authentication
 - Windows authentication
 - Digest authentication
 - o Management programs



2. After having performed the installation, please open the Internet Information Services Manager.



3. On this page, you can already see an entry for a standard website. Without any further configuration, you can access the page under <http://localhost> or <http://<SERVER NAME>>. Please replace <SERVER NAME> by the name of the server.
4. InLoox PM Web App can be installed as a virtual folder of the standard website. Alternatively, you can create a separate website and install InLoox PM Web App there as a virtual folder. In this case, please consult the respective Microsoft product documentation.

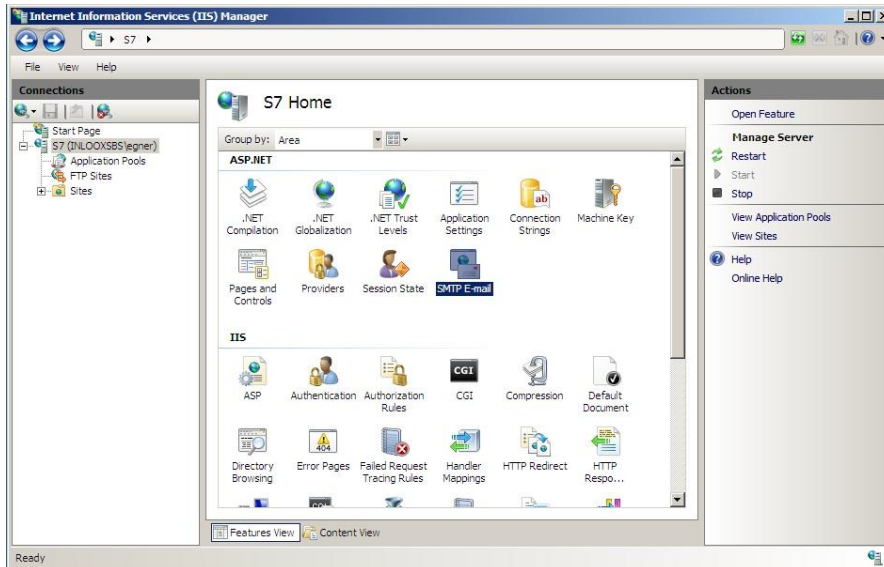
Please note: A Small Business Server (SBS) manages IIS pages in a different way by default. There, you have a separate page for web applications.
5. All necessary access requirements for the installation of InLoox PM Web App, are met now.

Please note: The communication is carried out via HTTP by default and is thus unsecured. This is sufficient for internal use. If you want to access InLoox PM Web App externally, we strongly recommend using a secured connection via HTTPS. For a secured connection via HTTPS, you have to modify the bindings of the page. Please consult the respective Microsoft documentation for this issue.
6. To be able to send notifications via e-mail, the SMTP Server of the IIS has to be configured.
7. Please proceed with the installation of InLoox PM Web App.

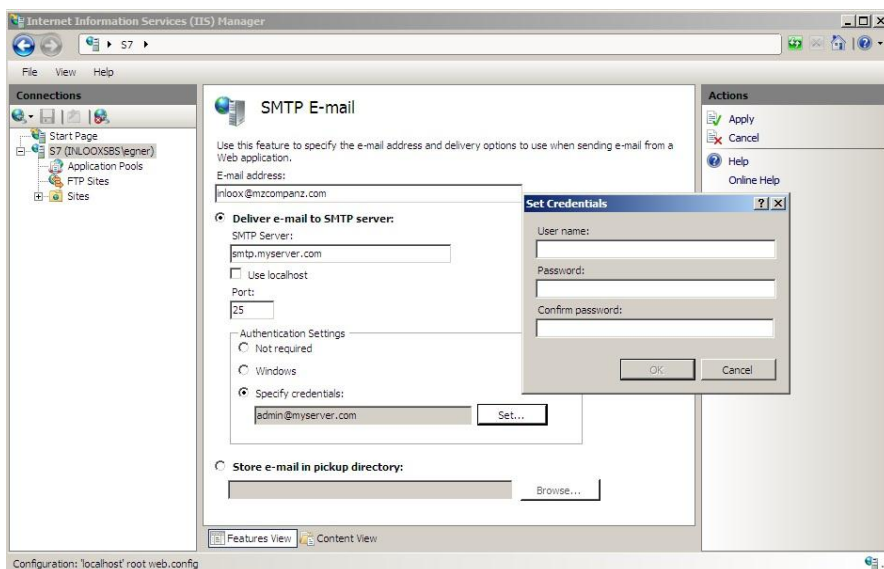
IIS 7.5 – Configuration of the SMTP Server

Even without the configuration of the IIS SMTP Server, you can use InLoox PM Web App as soon as you have installed the product successfully. You are able to log in, to look at projects and to edit them. If resources have been entered by the notification method “InLoox”, they are already at this point informed about modifications. If you have, however, entered resources with other notification methods, they are not informed via e-mail by InLoox PM Web App, because the messages cannot be sent without the configuration of the SMTP Server. If you use other notification methods, please configure the SMTP Server as follows:

1. Please open the SMTP E-Mail Configuration in IIS.



2. Now enter the corresponding connection parameter to the SMTP Server.



3. Then, please click “Adopt”.

Shared printing

The Report Designer requires a shared printer to create reports. As the Report Designer is also used for the notification templates, the correct setting is necessary for the notification, too.

Please set a default printer – most of the time, it is already existent in the system – and share it in the network.

Installation

InLoox PM Web App

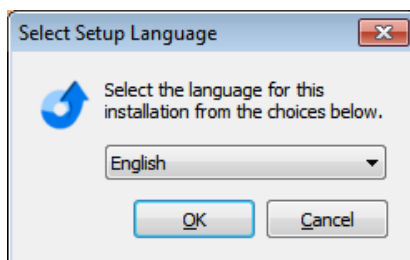
*Important note: **Please install the database server in advance.*** See chapter “System requirements/Server“. All manufacturers supported by InLoox offer a free database product, which is ready for use within a few minutes.

InLoox PM Web App requires a Microsoft IIS Web Server. It is also offered by client systems, such as Windows 7, but we recommend installing it on a server.

1. Run **InLoox_WebApp.exe**
2. Under systems with user access control (e.g. Windows Server 2008 R2), the dialog of the “*User Account Control*” appears. Click on **YES**



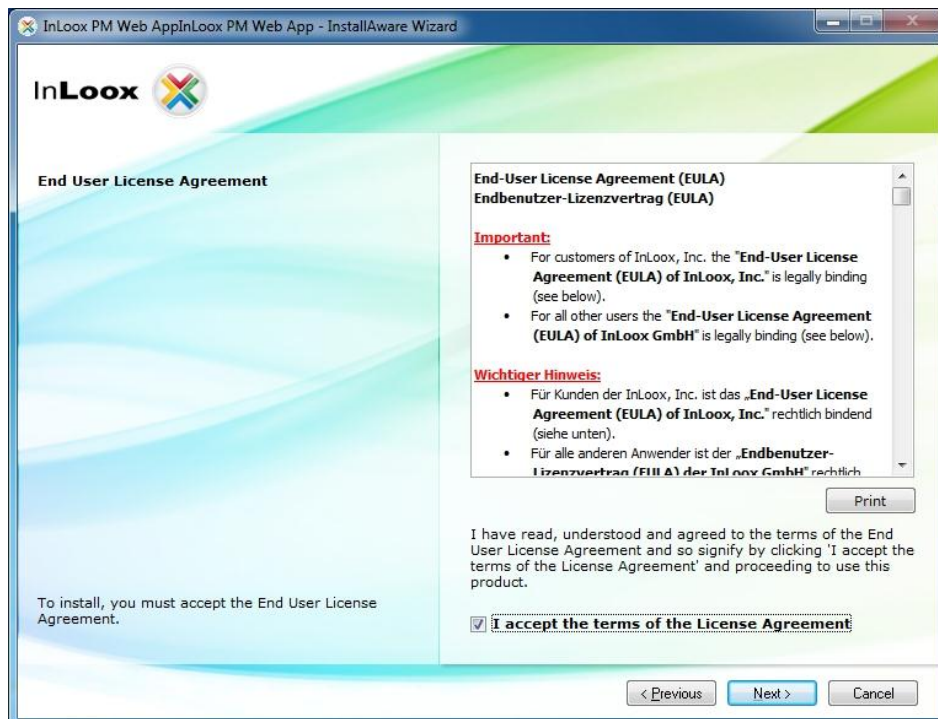
3. The installation assistant is started
Select the desired installation language (e.g. “English”):



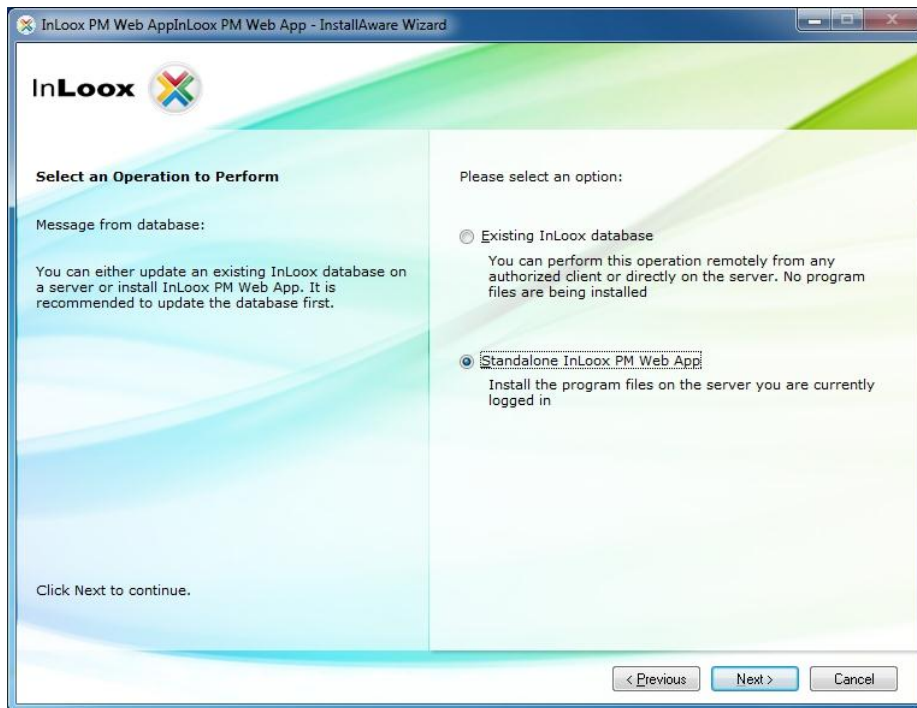
4. The system requirements are examined and if necessary components are installed. Click on "Next". The installation can take several minutes depending on extent.
5. Click on "Next"



6. Click on "I accept the terms of the License Agreement", then on "Next"



7. Choose “Standalone InLoox PM Web App” for a new clean installation




8. Select the database system that is supposed to be used, e.g. “Microsoft SQL server”

You can scan for available “Microsoft SQL Server” on the network. Select a server from the list of available Microsoft SQL Servers. If you use another type of server, please fill in the server name manually.

Please specify the database name of the present InLoox database.

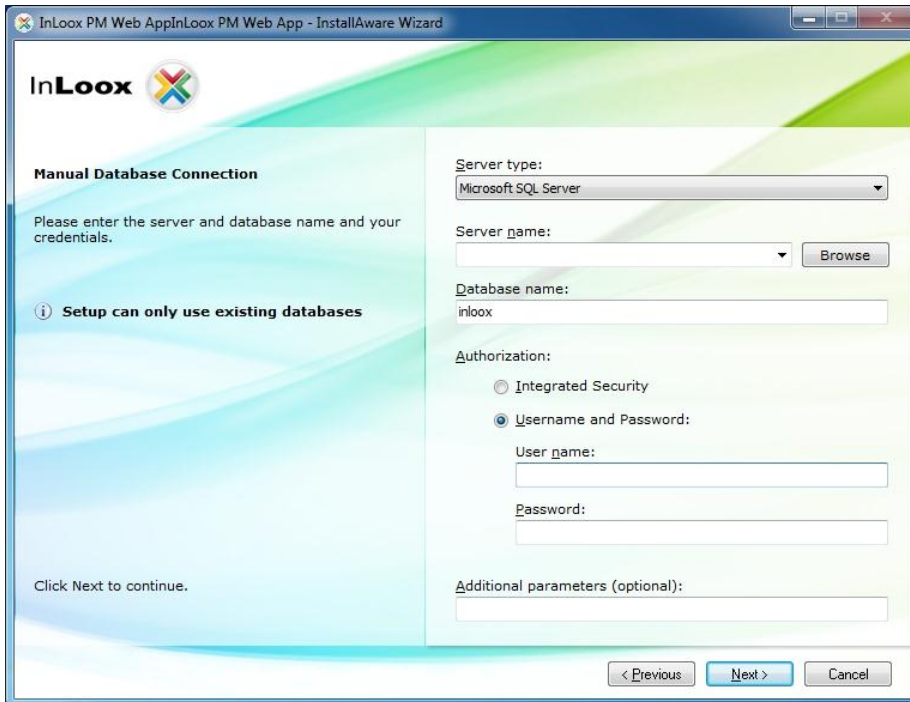
The authorization mode “Integrated Security” is applicable for „Microsoft SQL Server “. Other database manufacturers only offer authorization with user name and password as *default*.

 We recommend the usage of username and password also for Microsoft SQL Server. For the “Integrated Security” you would have to give the IIS process permissions to log on the database.

Please check the chapter “Troubleshooting”, if problems occur.

Additional parameters are needed, in order to set different port numbers or timeout settings. A different setting is normally not necessary.

Click on “Next” after setting the values.



Important! When using “*Integrated Security*” you have to set the permissions for all users.

Please consult the whitepaper “*InLoox 6.x configuration guide for Microsoft SQL Server*” for detailed information.

Examples for the server name:

Microsoft SQL Server:

The server name e.g. for a Microsoft SQL Express installation would be “<server>\SQLEXPRESS” – SQLEXPRESS is the default instance name for this installation.

On a full version of Microsoft SQL Server it would be “<server>” since the default instance name is empty.

(Replace “<server>” by the name or IP of the hosting server)

MySQL:

On MySQL you just specify the name or IP of the hosting server. (“<server>”)

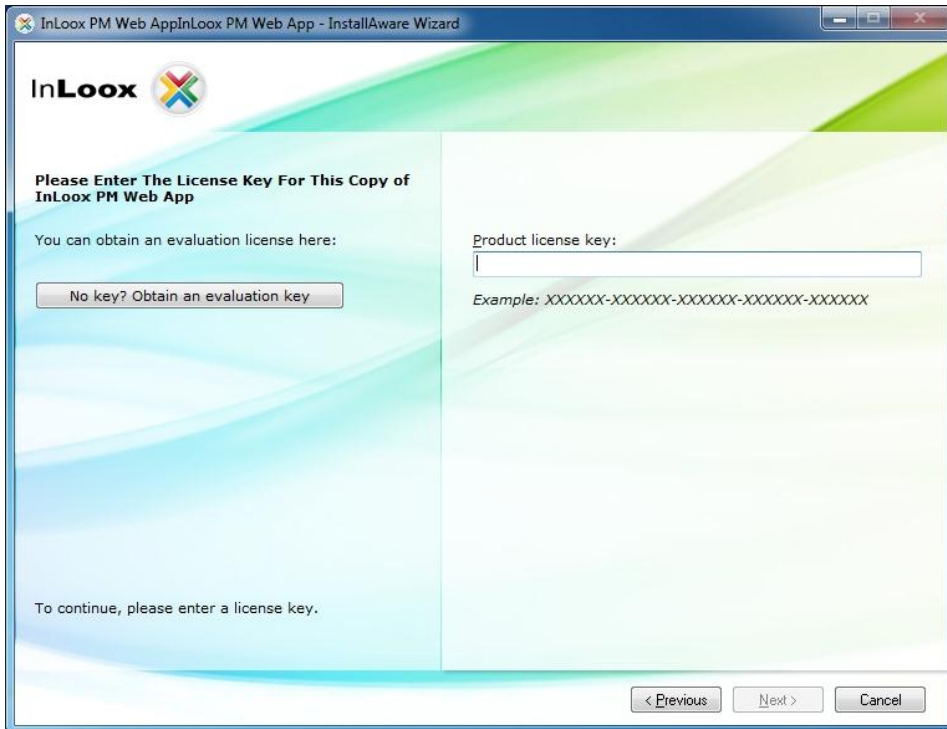
Oracle:

For Oracle specify the name of the hosting server.

Important! Fill in the oracle instance name (SID) for “*Database name*”.

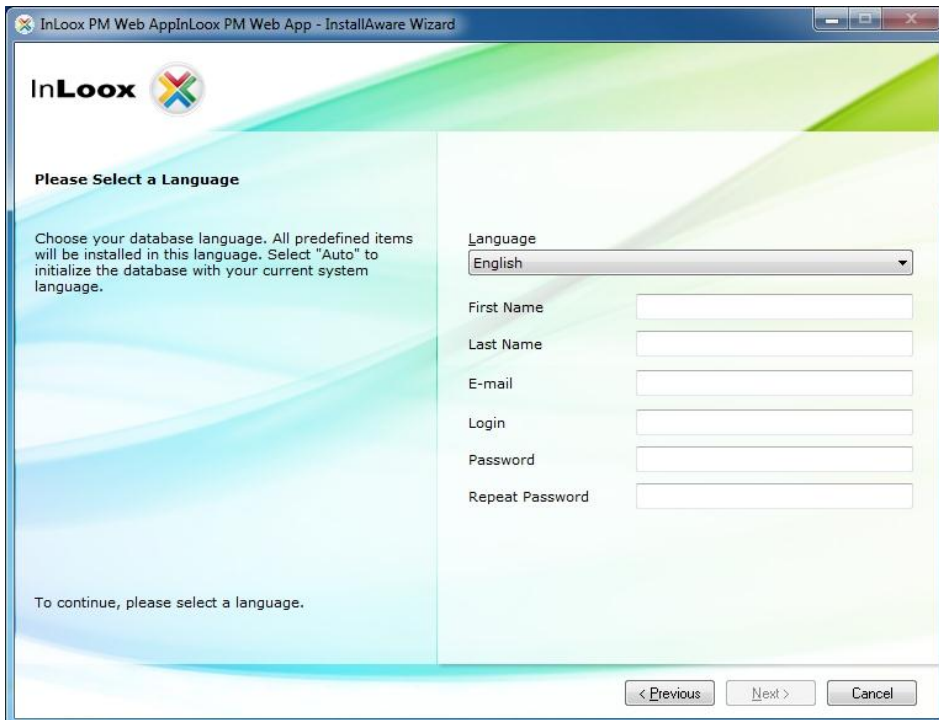
The default name when using Oracle Enterprise Server is “*orcl*” – when using Oracle Express, it is “*xe*”.

9. Enter your InLoox license key and click on “Next”



The screenshot shows the 'InLoox PM Web App - InstallAware Wizard' window. The title bar includes the InLoox logo and the text 'InLoox PM Web App - InstallAware Wizard'. The main window has a light blue and green background. On the left, the text reads: 'Please Enter The License Key For This Copy of InLoox PM Web App'. Below this, it says 'You can obtain an evaluation license here:' followed by a button labeled 'No key? Obtain an evaluation key'. On the right, there is a text input field for the 'Product license key:' with an example: 'XXXXXX-XXXXXX-XXXXXX-XXXXXX-XXXXXX'. At the bottom, there are three buttons: '< Previous', 'Next >', and 'Cancel'.

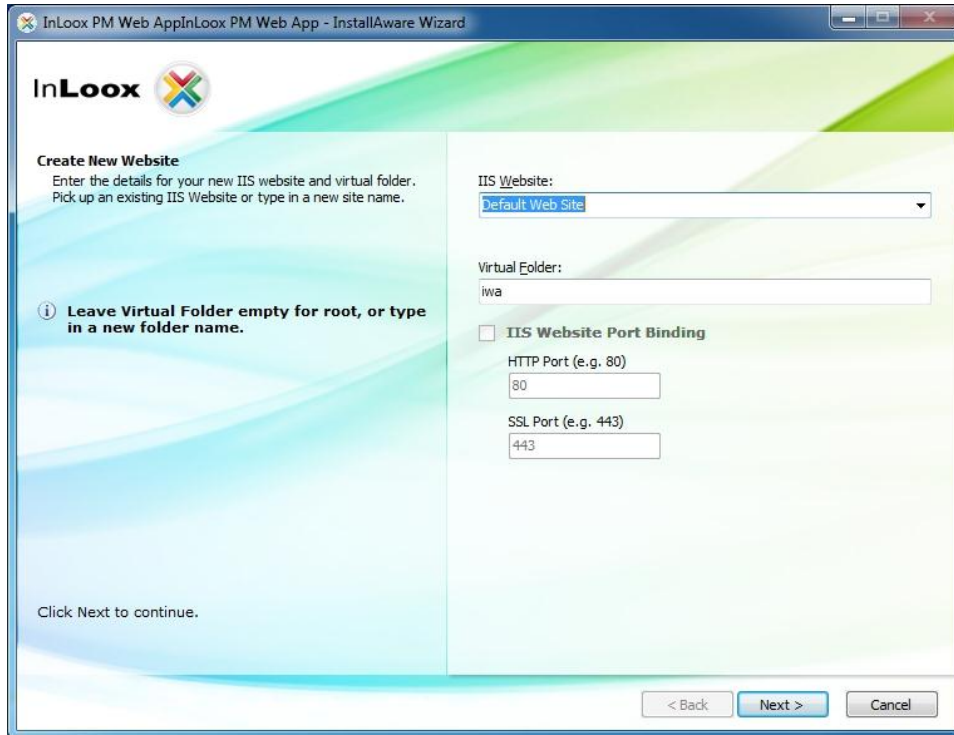
10. Enter your name and set the login credentials



The screenshot shows the 'InLoox PM Web App - InstallAware Wizard' window. The title bar includes the InLoox logo and the text 'InLoox PM Web App - InstallAware Wizard'. The main window has a light blue and green background. On the left, the text reads: 'Please Select a Language'. Below this, it says 'Choose your database language. All predefined items will be installed in this language. Select "Auto" to initialize the database with your current system language.' On the right, there is a dropdown menu for 'Language' with 'English' selected. Below this are input fields for 'First Name', 'Last Name', 'E-mail', 'Login', 'Password', and 'Repeat Password'. At the bottom, there are three buttons: '< Previous', 'Next >', and 'Cancel'.

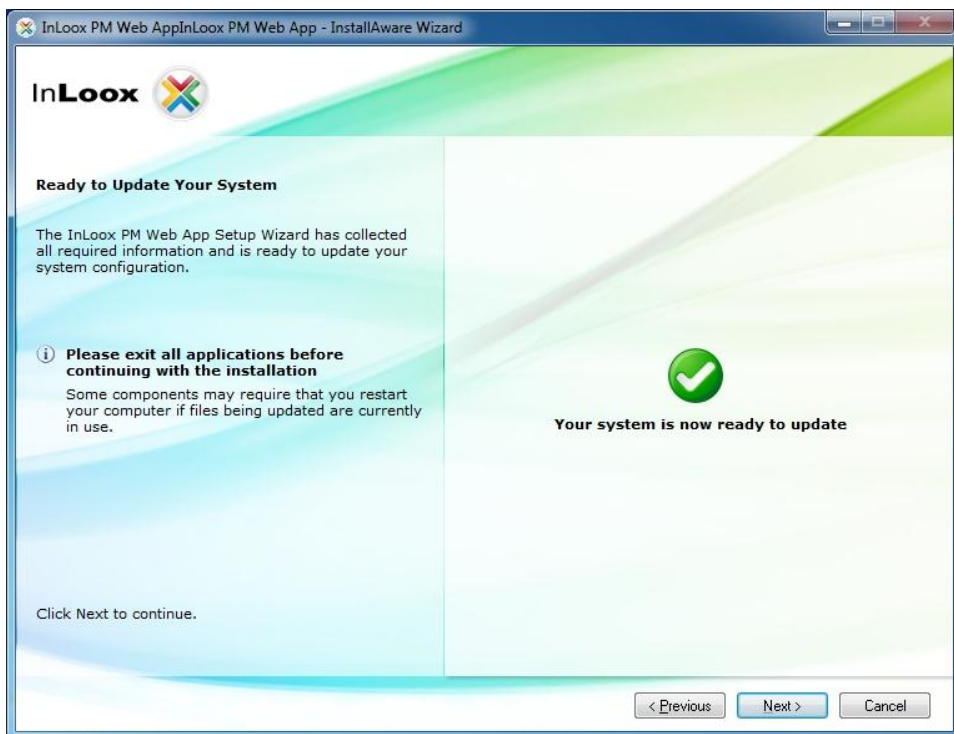
11. Choose an existing Internet Information Server website (IIS-Website) on the IIS server or create a new website. If creating a new website, you can enter an alternative website port binding (http and https).

Enter a virtual folder name where the InLoox PM Web App Server should be reachable (http://server/iwa) and click on “Next”



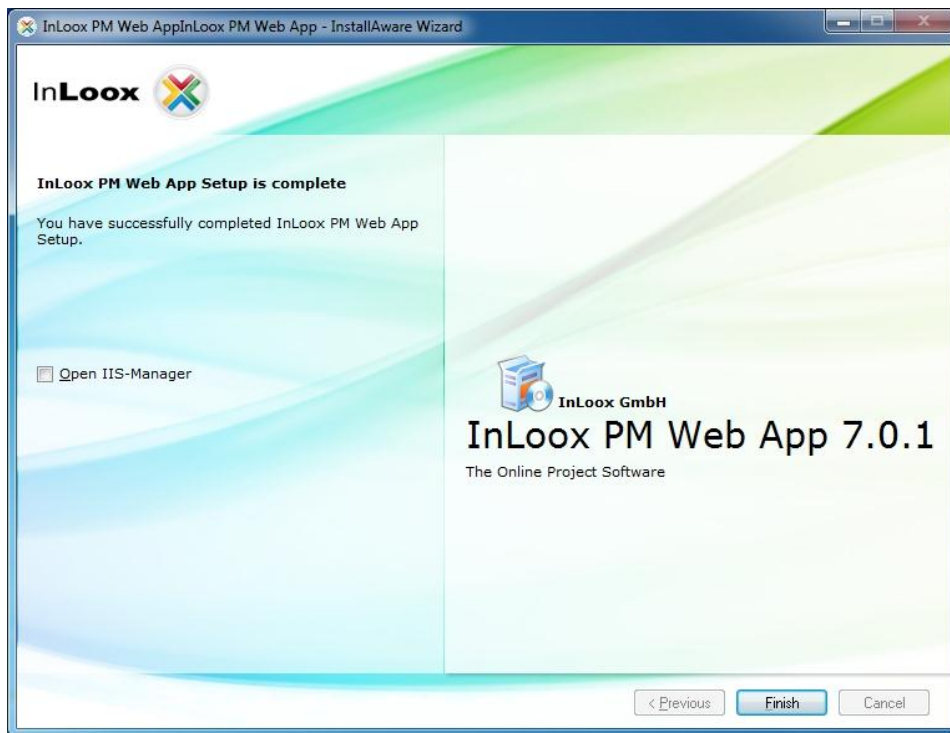
The screenshot shows the 'Create New Website' step of the InLoox PM Web App - InstallAware Wizard. The window title is 'InLoox PM Web App - InstallAware Wizard'. The InLoox logo is in the top left. The main area is divided into two panes. The left pane contains the text: 'Create New Website', 'Enter the details for your new IIS website and virtual folder. Pick up an existing IIS Website or type in a new site name.', and a note: 'Leave Virtual Folder empty for root, or type in a new folder name.' The right pane contains the following fields: 'IIS Website:' with a dropdown menu showing 'Default Web Site', 'Virtual Folder:' with a text box containing 'iwa', and 'IIS Website Port Binding' with a checkbox. Below the checkbox are two text boxes: 'HTTP Port (e.g. 80)' with '80' and 'SSL Port (e.g. 443)' with '443'. At the bottom left, it says 'Click Next to continue.' At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

12. Click on “Next”



The screenshot shows the 'Ready to Update Your System' step of the InLoox PM Web App - InstallAware Wizard. The window title is 'InLoox PM Web App - InstallAware Wizard'. The InLoox logo is in the top left. The main area is divided into two panes. The left pane contains the text: 'Ready to Update Your System', 'The InLoox PM Web App Setup Wizard has collected all required information and is ready to update your system configuration.', and a note: 'Please exit all applications before continuing with the installation. Some components may require that you restart your computer if files being updated are currently in use.' The right pane contains a large green checkmark icon and the text: 'Your system is now ready to update'. At the bottom left, it says 'Click Next to continue.' At the bottom right, there are three buttons: '< Previous', 'Next >', and 'Cancel'.

13. Click on “*Finish*”



Troubleshooting

General errors

If you cannot create a connection to a SQL Server during installation please verify that a SQL Server is installed. Ask your system administrator. If you have access to your server, proceed as follows:

1. Open: *Start >> Control Panel >> Programs and Features* on the server
2. There has to be a SQL server entry in the list of the installed software. See chapter “General Information” for a list of supported servers.
3. Open: *Start >> All programs >> Administration >> Services* on the server
4. There has to be a SQL server entry in the service list. The service must be *started*.

Ensure that the port of the database servers is not *blocked*. Examine the firewall settings on the server, the clients as well as on the network hardware. The standard ports of the databases are:

- MS SQL Server: Port 1433 – for the SQL Browser service open the port 1434 UDP
- Oracle Application Server/Oracle Database: Port 1521
- MySQL Server: Port 3306

Errors related to Microsoft SQL server

Register the appropriate users into the Active directory user group for SQL users.

1. Open: *Start >> All Programs >> Administration >> Active directory user and - computers* on the server
2. Edit the appropriate user (e.g. „*John Doe*“) or the appropriate user group (e.g. „*Coworker selling* “)
3. The dialog „*Properties of...* “ appears. Change to tab „*member of* “
4. Click on *Add..* The dialog „*Select Group*“ appears
5. Enter into object names the input field

SQLServer2005MSSQLUser (for SQL server 2005) and/or **SQLServer2008MSSQLUser** (for SQL server 2008). Click on **Check name**. The name should be resolved as follows:

SQLServer2005MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2005)
SQLServer2008MSSQLUser\$SERVERNAME\$MSSQLSERVER (for SQL server 2008)

The part **SERVERNAME** is in this context the name of the SQL server and/or the primary domain controller (PDC).

6. Click on „*OK*“ in the opened dialog

You can also configure the access permissions via the SQL Server Management Studio for SQL 2005 and 2008. InLoox supports Windows- and SQL-account logon. Please consider the appropriate guide for configuring the authorizations by Microsoft:

<http://support.microsoft.com/?scid=kb%3Ben-us%3B889615&x=5&y=9>