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Uniform

Commercial Premises Connector 10.4.1

Installation and Configuration Guide

Document history

Version	Date	Author	Changes
1.0	06/06/2019	Idox Group	Issued.
1.1	03/10/2019	Idox Group	Prerequisites updated.

Contents

About this guide

This guide provides an overview of how to install and configure the Uniform Commercial Premises Connector 10.4.1.

For information about the connector settings common to all Uniform Web Service Connectors, see the *Common Configuration Settings for Connectors* document.

For more information about the Commercial Premises Connector 10.4.1, see the *Commercial Premises Connector V10 Product and Technical Information* document (no updates were required to this document for V10.4.1 of the connector).

1 Introduction

This document has been produced for anyone involved in the installation, setup, and configuration of the Commercial Premises Connector 10.4.1 web service component.

This document and the *Commercial Premises Connector V10 Product and Technical Information* document are available from the My Uniform customer portal.

1.1 Overview

Prior to installing this software, there are a number of server software and hardware requirements that must first be met.

Please refer to the *Commercial Premises Connector V10 Product and Technical Information*, *Platform Recommendations Guide* and *Compatibility Matrix* as appropriate, all of which are available at https://myuni-form.com.

- This Connector makes use of another Idox Connector component – the Uniform Web Service – which must be installed and configured separately. For information regarding this, please refer to the *Uniform Web Service Installation and Configuration Guide 10.4.1,* also available at My Uniform.
- This connector also requires Uniform V10.3.2 or above.

Here is a summary of the steps involved in the installation and configuration of the Connector:

1. Ensure all system requirements and prerequisites are met.
   - Ensure that you are using Uniform version 10.3.2 or above.
   - Obtain a Uniform module licence for module code Y1 (via your Idox Account Manager) and ensure that this has been successfully applied to the appropriate Uniform system(s).
   - All Connectors from v8.2 onward require Microsoft .Net Framework v4, so ensure that Microsoft .Net Framework 4 is installed on the Server that will host the Connector.
2. Install and configure (if not already done) the Uniform Web Service 10.4.1.

   If the Uniform Web Service has been installed before, but not "linked" to this Uniform instance (for example it has been linked to TEST, but you are now installing the connector for LIVE), then follow the section on linking for this Uniform instance in the *Uniform Web Service Installation and Configuration Guide*.
3. If you have an existing version of the Commercial Premises Connector installed:
   a. Back up the web.config file located in the Connector directory.
   b. Uninstall the existing version of the Connector, as described in section 2.2 - Uninstalling the Connector.
4. Install the Connector as described in section 2 – Installing the Connector.
5. Modify the web.config file, as described in section 3 – Configuring the Connector.

   If you backed up your old version of the file in step 3, copy the settings from this to the new file.
6. Optionally, if your authority wants to use free and open source software to test or try the connector methods, sample tests have been provided for all the methods. To use these :
   a. Install SoapUI.
   b. Copy the SoapUI project XML provided (which includes sample tests).
   c. Use SoapUI to check the Connector is working OK.

2 Installing the Connector

2.1 Pre-installation configuration

Before installing the Connector, you will need to do the following on the Connector server, if you did not do this when installing another Connector or a previous version of this Connector on the server:

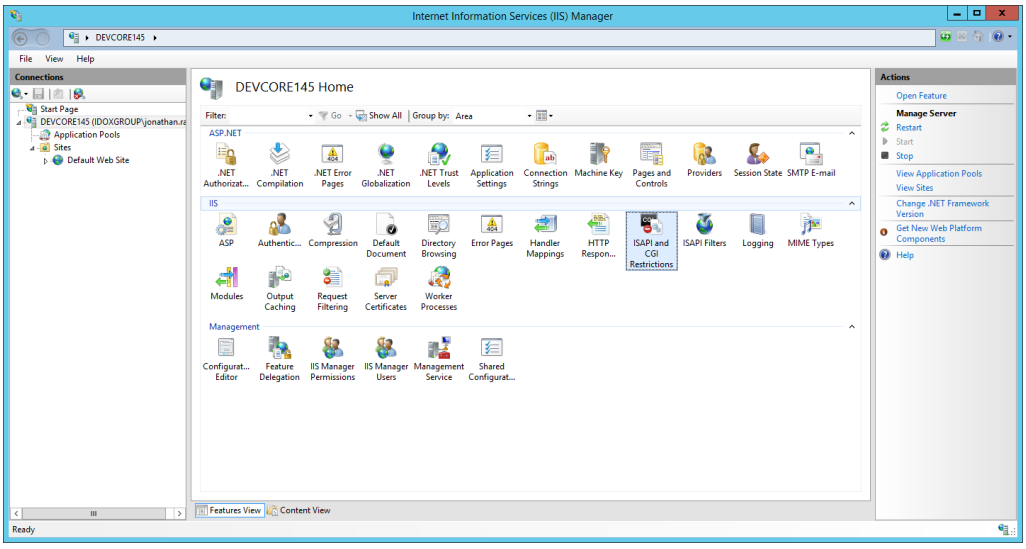
- In Internet Services Manager, configure the ISAPI and CGI restrictions for IIS 7 – see 2.1.1 - Configuring ISAPI and CGI restrictions for IIS 7 on page 4.
- In Internet Services Manager, ensure that there is only one HTTP binding for the Connector's website – see 2.1.2 - Checking that the Connector website has only one HTTP binding on page 5.

  Note: If there are multiple bindings defined for the website in IIS 7 or later, the whole array of bindings is returned and the installation will fail.
- In Server Manager, select the IIS 6 management compatibility options – see 2.1.3 - Setting IIS 6 compatibility on page 6.

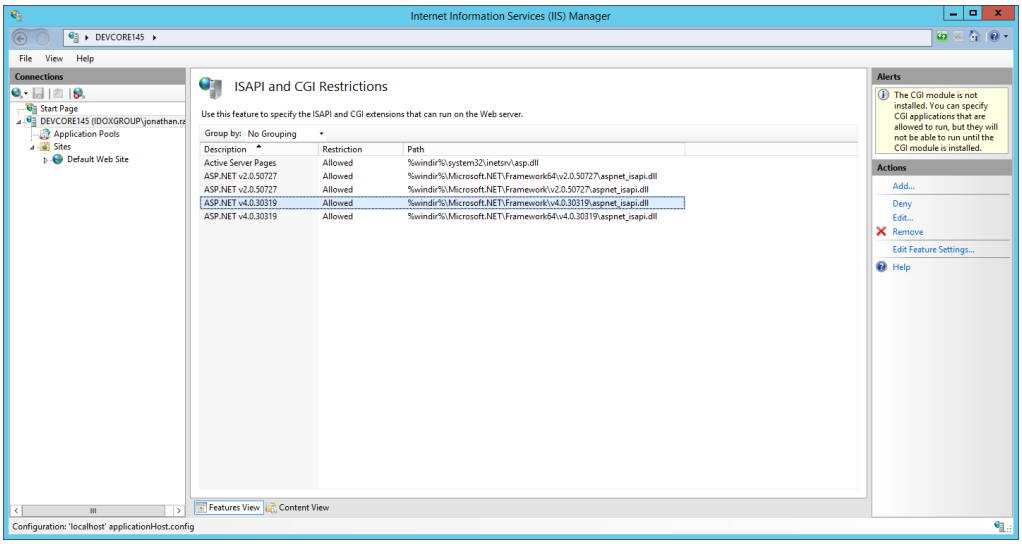
2.1.1 Configuring ISAPI and CGI restrictions for IIS 7

To configure the restrictions for IIS V7:

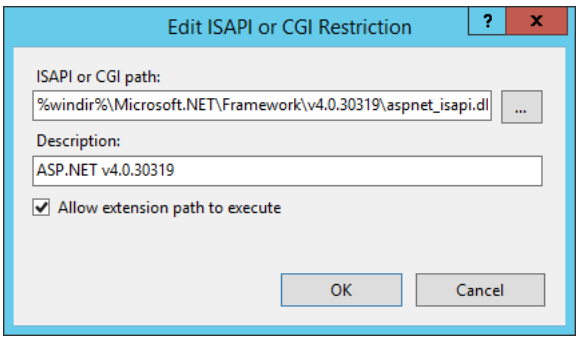
1. In Internet Information Services Manager, click on the Server Name in the left pane, and then in the right pane, double click “ISAPI and CGI Restrictions”.



2. On ISAPI and CGI Restrictions page, double click “ASP.NET v4.0.30319” (the one that does not have 64 in the Path).



3. In the window displayed, check the “Allow extension path to execute” checkbox, and click OK.

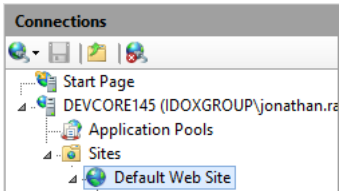


This should set the Restricted column for this entry to “Allowed”.

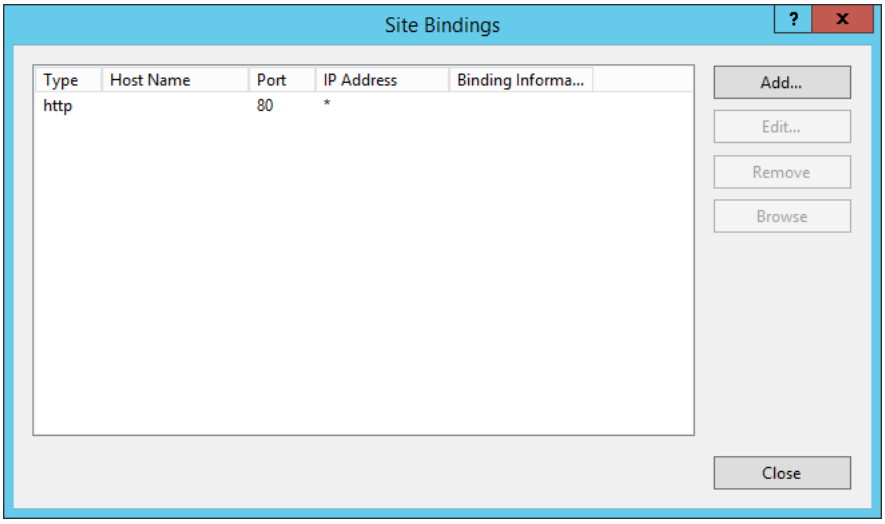
2.1.2 Checking that the Connector website has only one HTTP binding

To check that the website for the Connector only has one binding which has a type of HTTP:

1. In Internet Information Services Manager, click on the Server Name in the left pane, and then expand the tree to display Sites, then expand that and select Default Web Site.



2. In the right pane, select Bindings. The Site Bindings window opens.

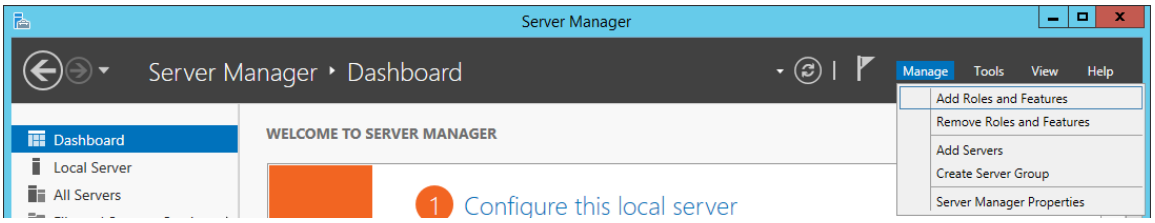


3. If more than one binding of a type of HTTP is listed, select each unrequired binding in turn and click the Remove button.
4. Click Close to save your changes and close the Site Bindings window.

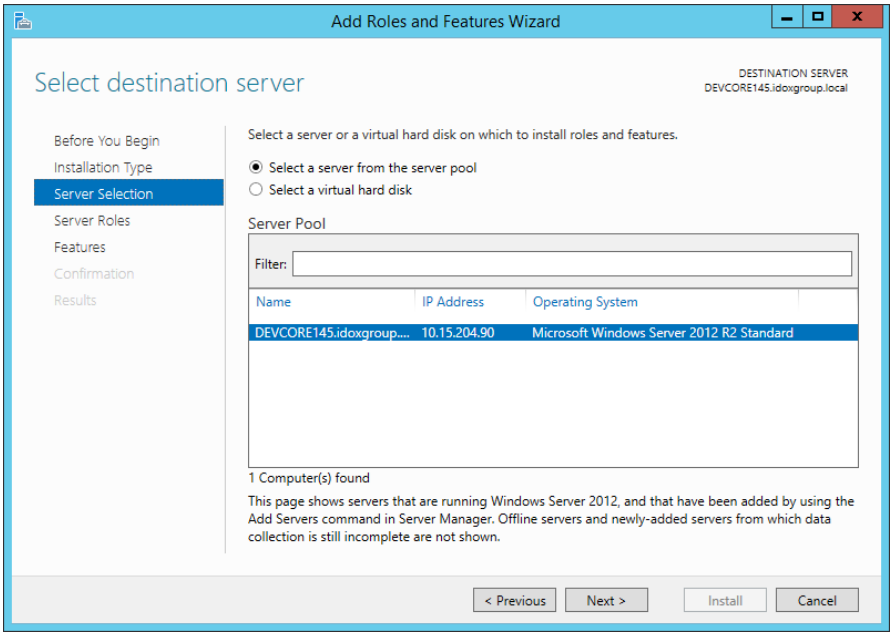
2.1.3 Setting IIS 6 compatibility

To select the IIS 6 management compatibility options:

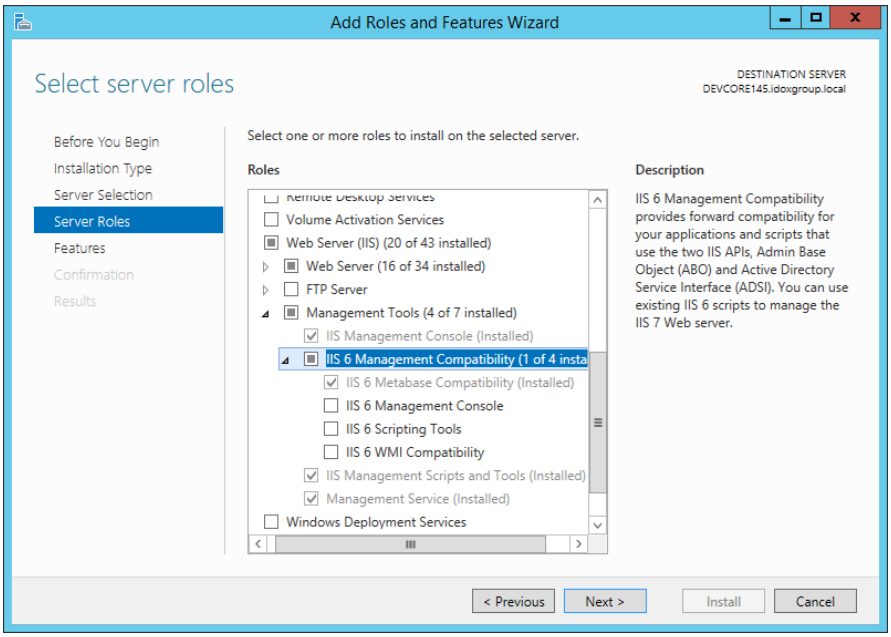
1. In Microsoft Server Manager, select Manage, and then Add Roles and Features.



2. In the wizard, select Server Selection in the left pane, and ensure that the Connector server is selected in the list.



3. Select Server Roles in the left pane, and expand Web Service > Management Tools > IIS 6 Management Compatibility in the Roles list.



4. Select all of the IIS 6 options.
5. Click the Next button, and then click Install.

2.2 Uninstalling the Connector

If you have a previous version of the Connector already installed, you will need to back up the configuration files and then uninstall the connector using the original installation program, before installing the new version.

To use the installation program to uninstall the Commercial Premises Connector:

1. Follow steps 1 to 12 of the instructions in section 2.3 - Installing the Connector on page 8.

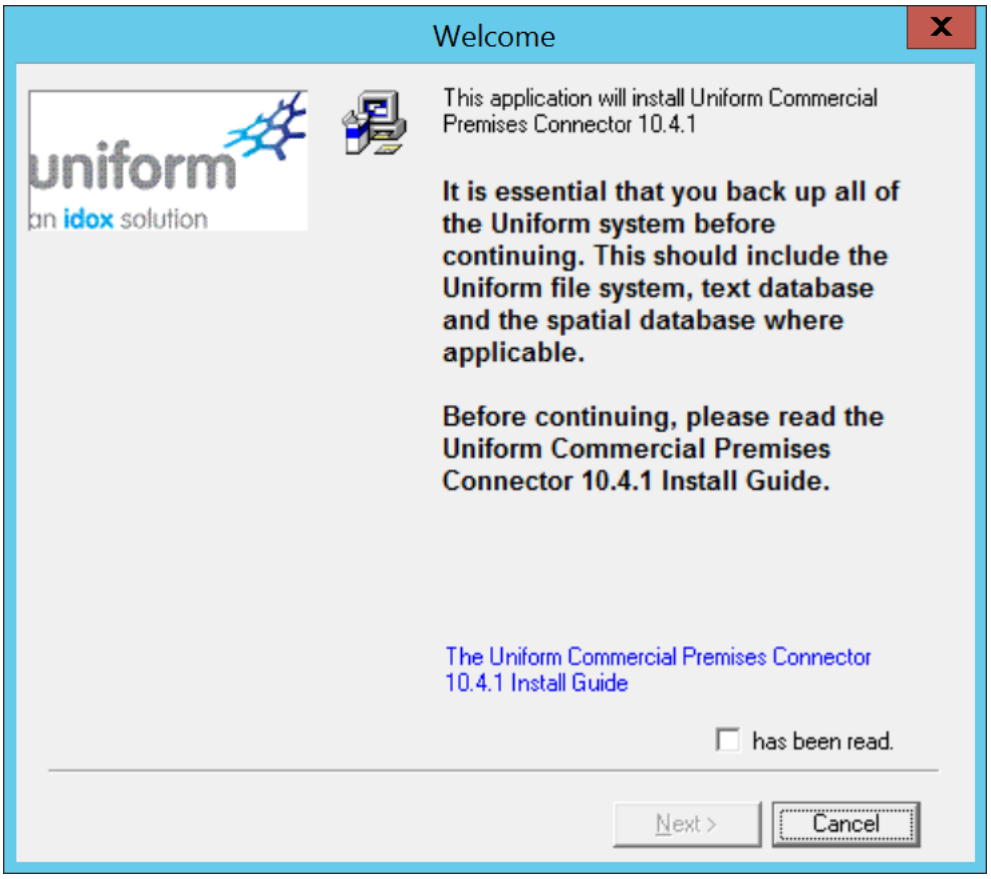
   The Idox Uniform Commercial Premises Connector Setup Welcome window is shown. It will detect that the Connector is already installed and refer to changing or removing it from your computer.
2. Click the Next button. The Change, Repair, or Remove Installation window opens.
3. Click the Remove button. The Ready to Remove window is displayed.
4. Click the Remove button. The installer removes the files.

   Once the files have been removed, the Completed window is displayed.
5. Click the Finish button. The Installation Complete window is displayed.
6. Click Finish again to complete the uninstallation process.

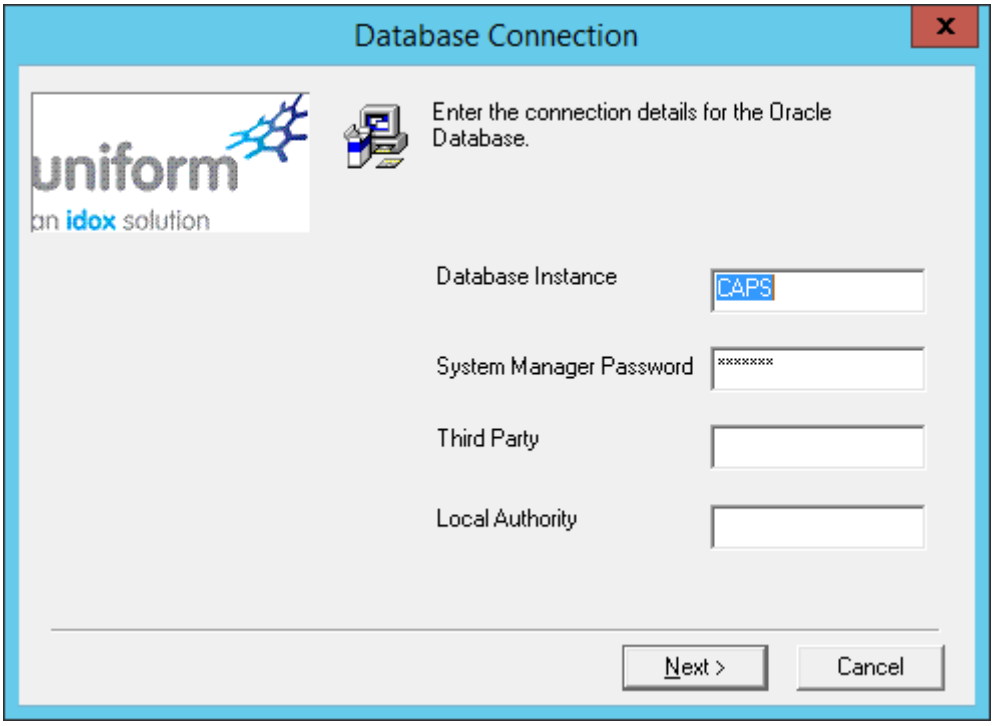
2.3 Installing the Connector

To install the Connector:

1. Run the Uniform Commercial Premises Connector 10.4.*n*.exe (where *n* is the build number) as an Administrator to install the components. The Welcome window is displayed.



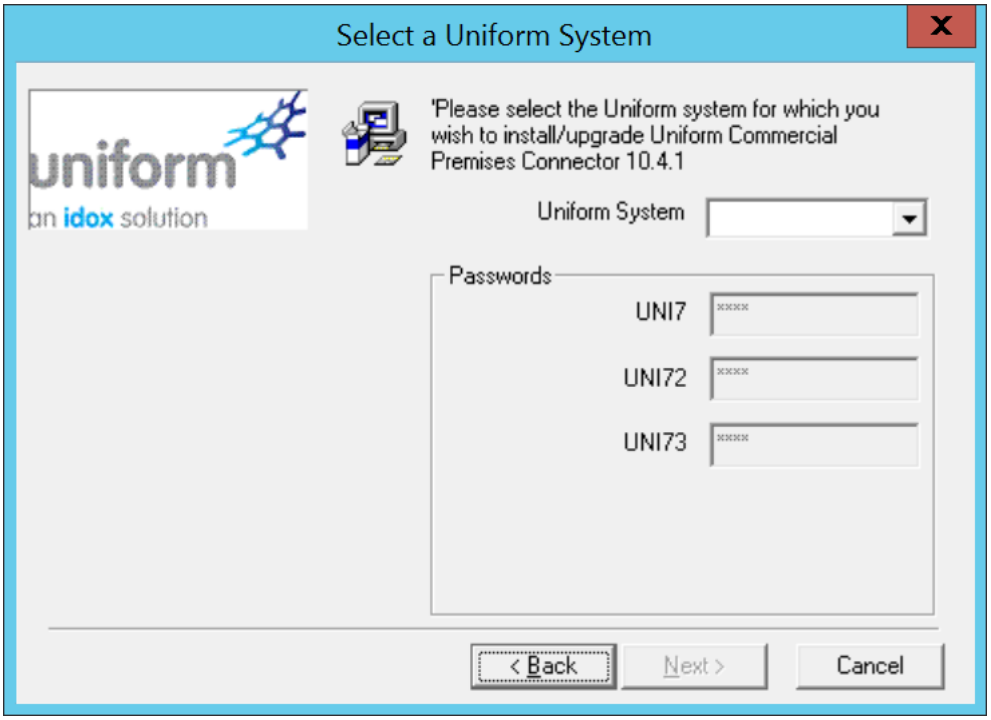
2. Once you have read this installation guide, click the “has been read” checkbox and select the Next button. The Database Connection window is displayed.



3. Insert the Database Instance and System Manager Password.
4. Details for Third Party should be left blank unless the authority has more than one Third Party system that is using the Connector (for example, Lagan and Kirona), in which case the Connector should be installed for each one, entering the name of the relevant Third Party here (this will then be included in the default IIS Virtual Directory name). This enables the configuration details for both to be different.
5. If the Connector is being used as part of a shared service, enter the Local Authority code of the authority for which the Connector is being configured – this will be used as part of the default Windows service name to allow multiple installations on the same server (there should be separate installations of the Connector for each local authority).

   If the Connector is not being used as part of a shared service, leave the Local Authority field blank.
6. Click Next. The Database Instance and System Password will be validated, during which a message is displayed stating "testing the database details for a successful connection".

If successful, the Select a Uniform System window is displayed.



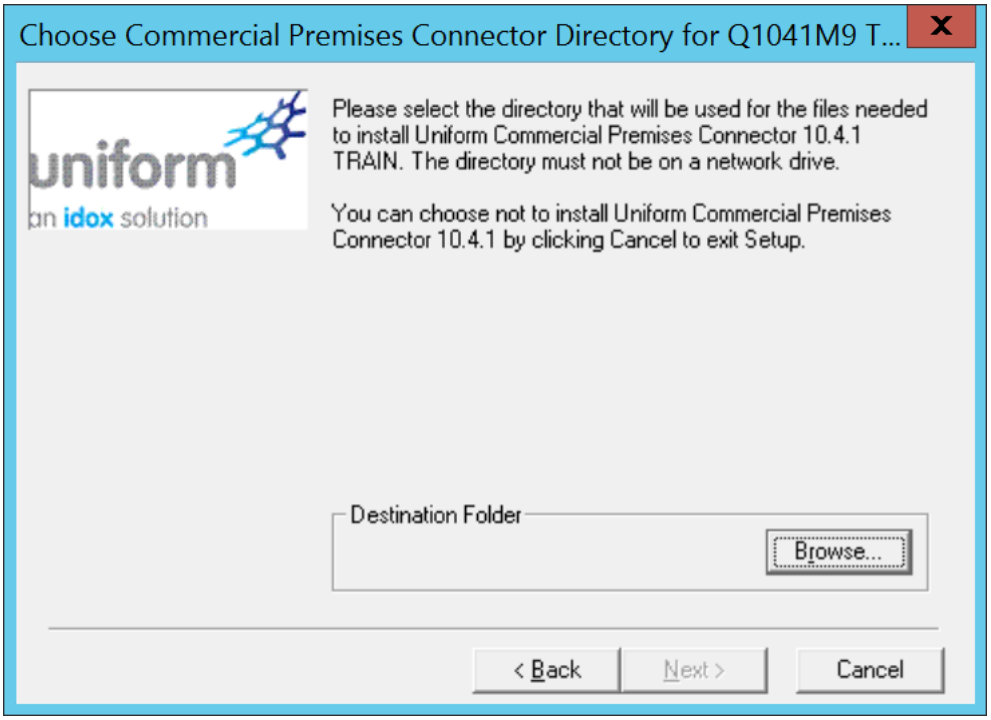
7. Select the Uniform System that the installation of the Connector is for and set the relevant passwords.

   The Uniform System will then be included in the default IIS Virtual Directory name (for example, ..._LIVE), after the Local Authority custodian code (if applicable) and Third Party name (if applicable). This enables Test systems to use a Commercial Premises Connector 10 end-point ending in _TEST, which can be separately upgraded when a new version is released, without affecting the LIVE system's ability to use the previous Commercial Premises Connector 10 version at the same time.

   Including the Local Authority custodian code for authorities in a shared services environment will allow new versions of the Commercial Premises Connector 10 to be used for one local authority before another and will allow each local authority's configuration details to be configured separately.

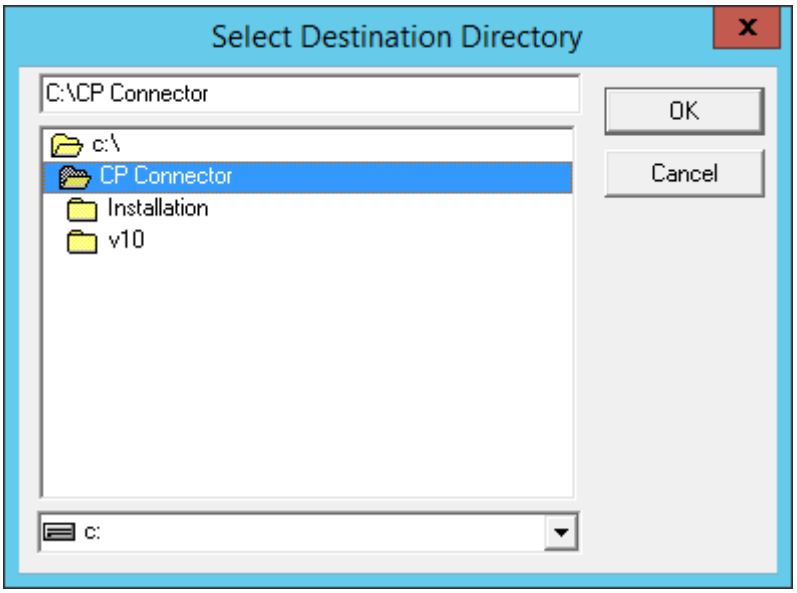
8. Click the Next button.

The Choose Commercial Premises Connector Directory window is displayed.



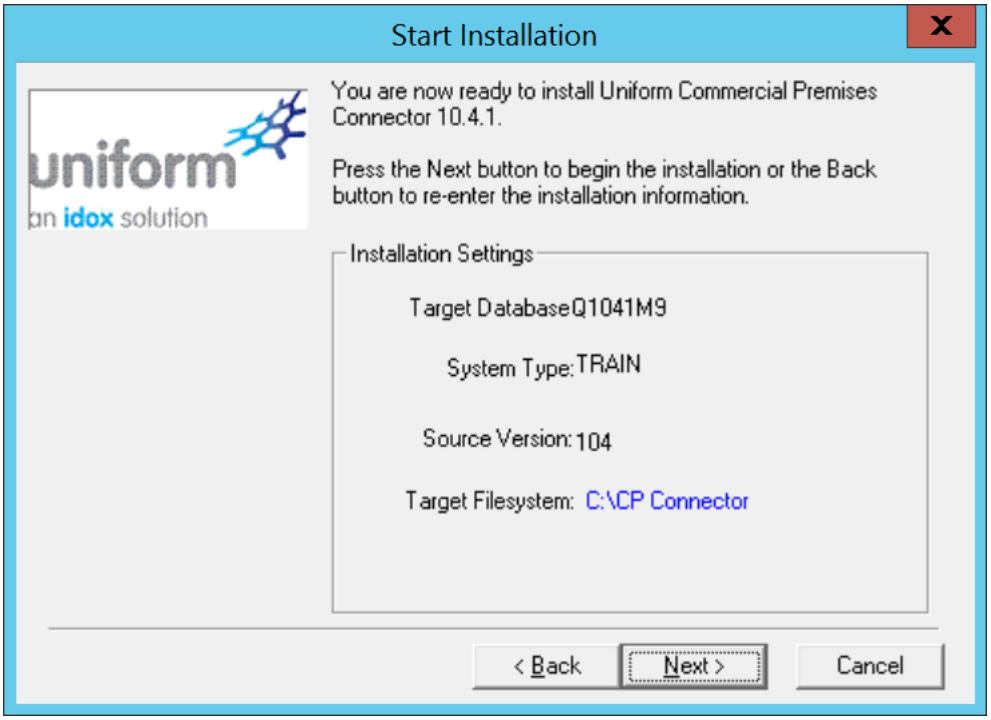
9. Click Browse to select the directory the installation will use for holding temporary files and for saving the installation log (for example, C:\Temp).

   Note: This is not the directory into which the actual connector software will be installed – this will be selected at step 13.



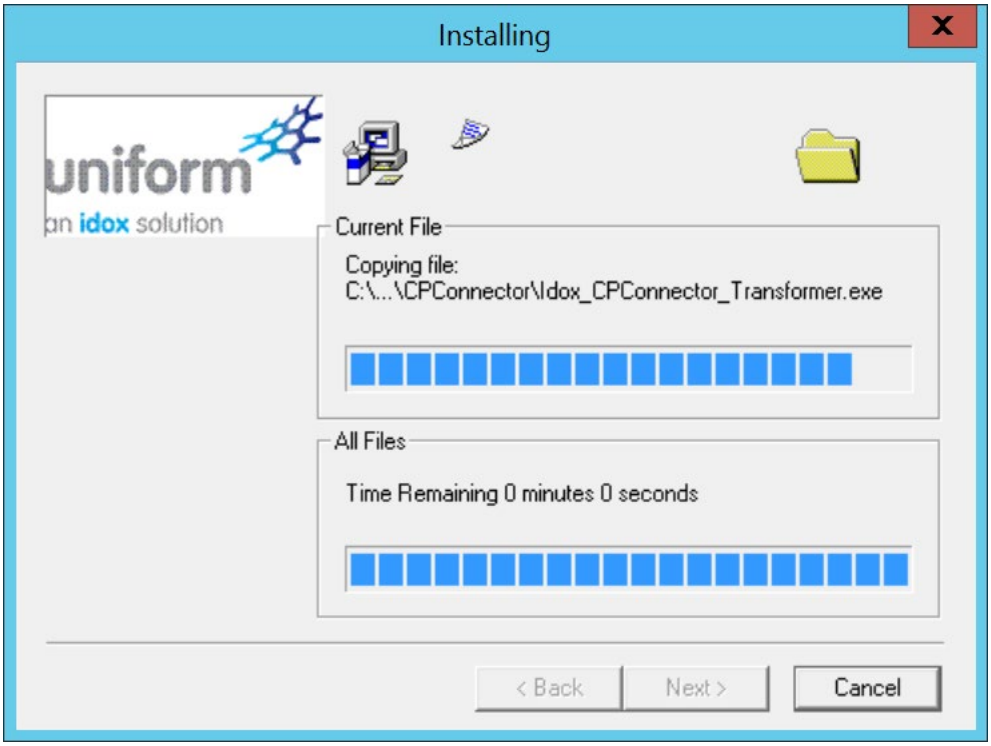
10. Click the OK button to confirm the location and return to the Choose Commercial Premises Connector Directory window.

11. Click Next. The Start Installation window is displayed.

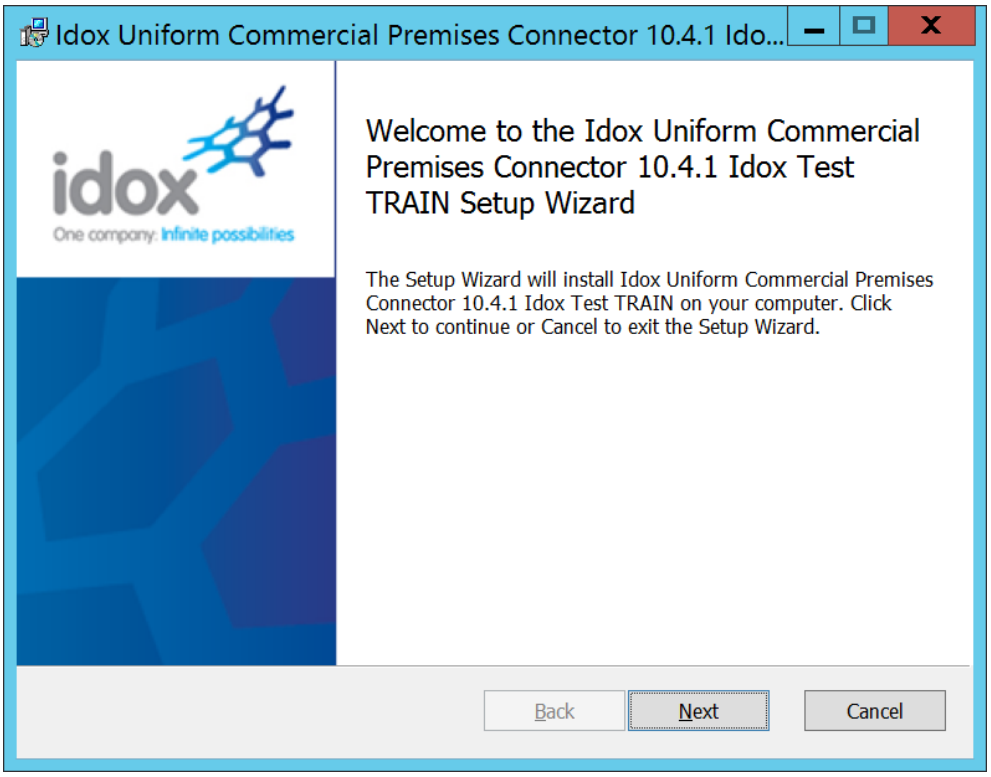


Note: If a message is displayed stating "Cannot find a Commercial Premises Connector Licence" then the Connector has not been licensed. You need to obtain the licence key from Idox and then enter it in Uniform using File menu > Administration > Licence Details (in Uniform 9.1) or Modules pane > Admin tab > Licence Details (in Uniform 10), and then creating a new record with a Module Code of Y1 and with the Licence Key provided by Idox.

12. Click Next on the Start Installation window to proceed with the installation of SQL scripts. The installation status of the scripts is displayed in the Installing window.

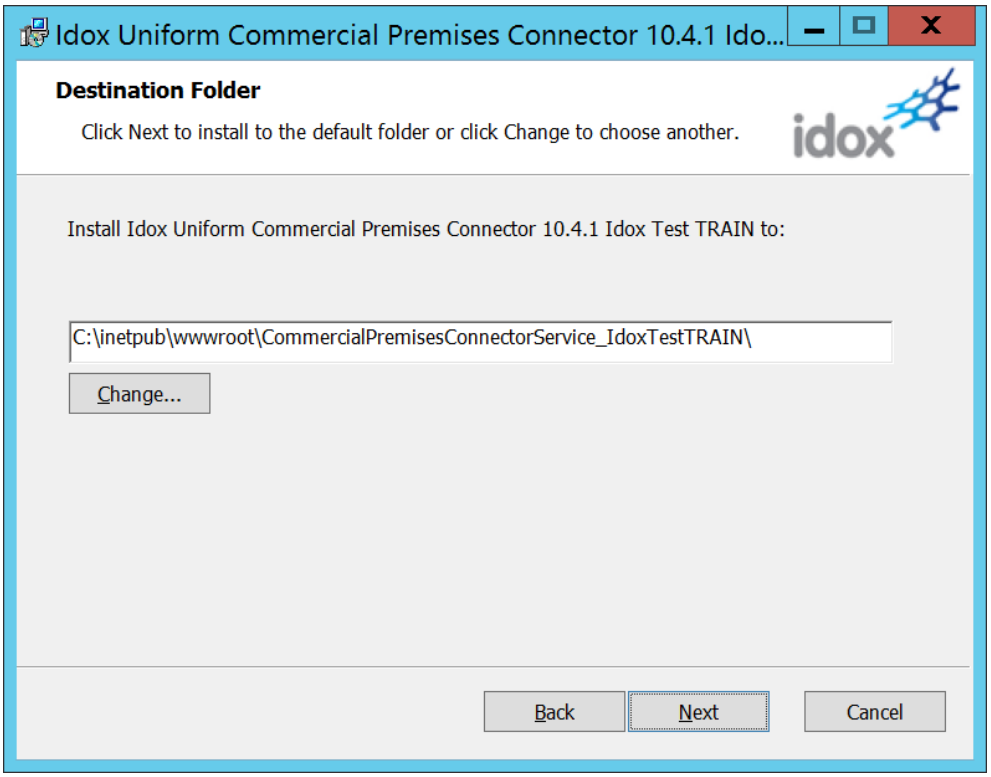


Once the SQL has been installed, the Idox Uniform Commercial Premises Connector 10... Setup Wizard window is displayed.



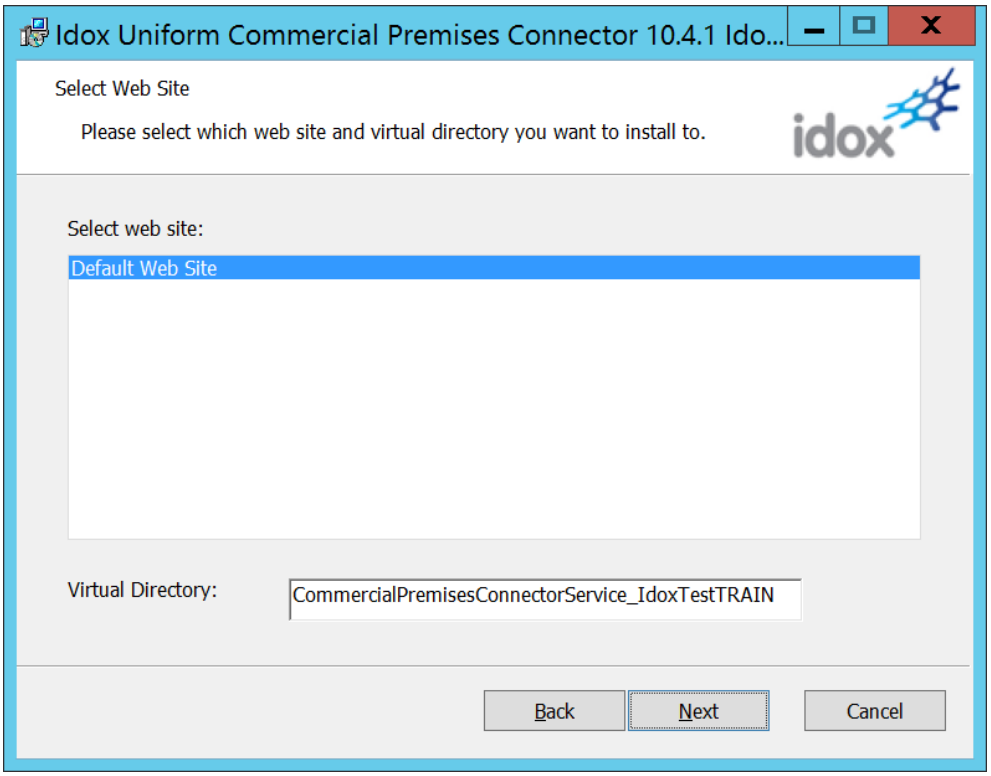
13. Click Next to proceed to the Destination Folder window.

    The installation will default to install the Connector within C\inetpub\wwwroot including the name of the Uniform System (and optionally the Third Party Name and/or Local Authority custodian code). You can change this either by manually entering the path or using the Change button to browse and select a directory.



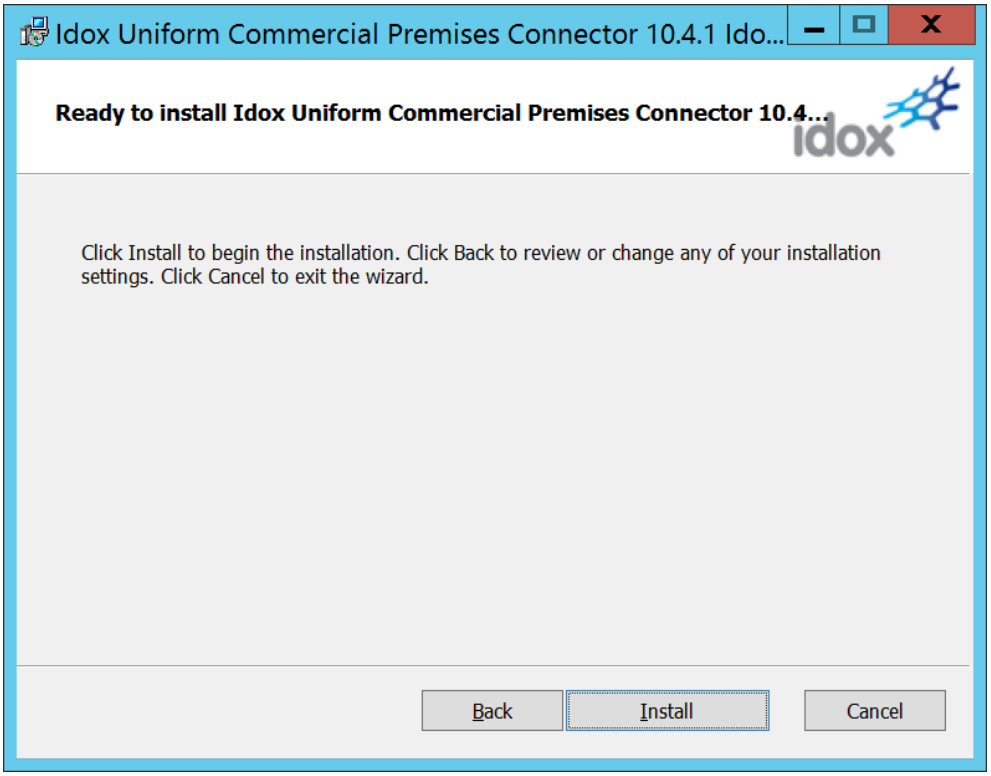
14. Click Next to proceed.

    The Select Web Site window is displayed, showing the Default Web Site and the Virtual Directory name (which again, may optionally include the Third Party Name and/or Local Authority code, and which can be overridden)..

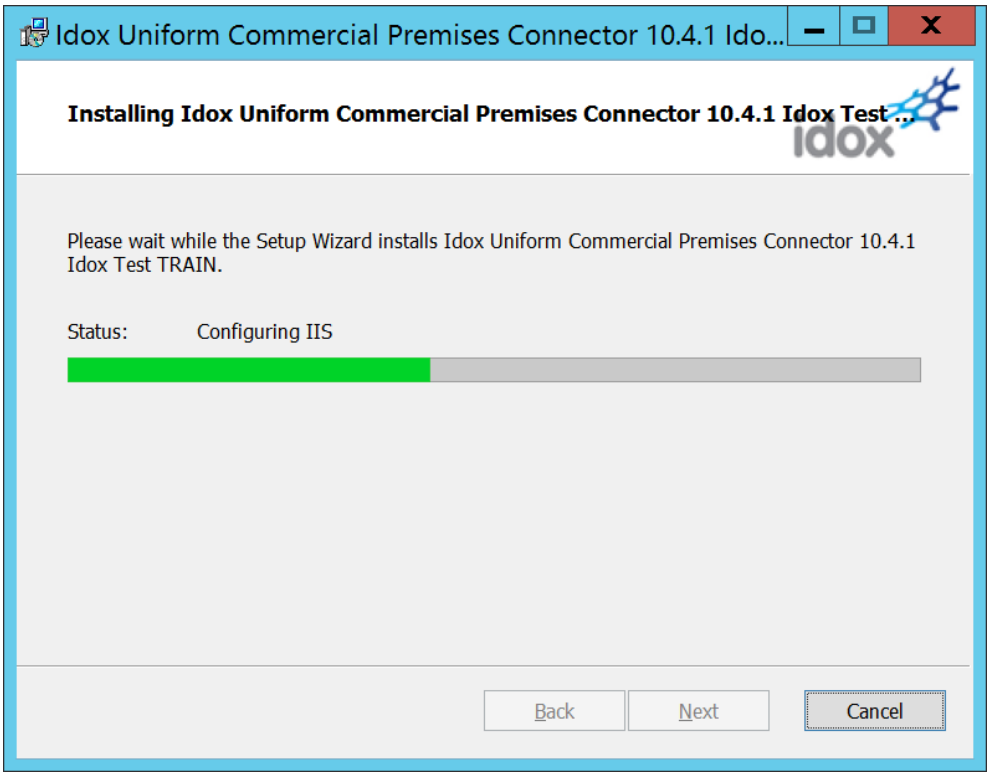


15. Click Next to proceed.

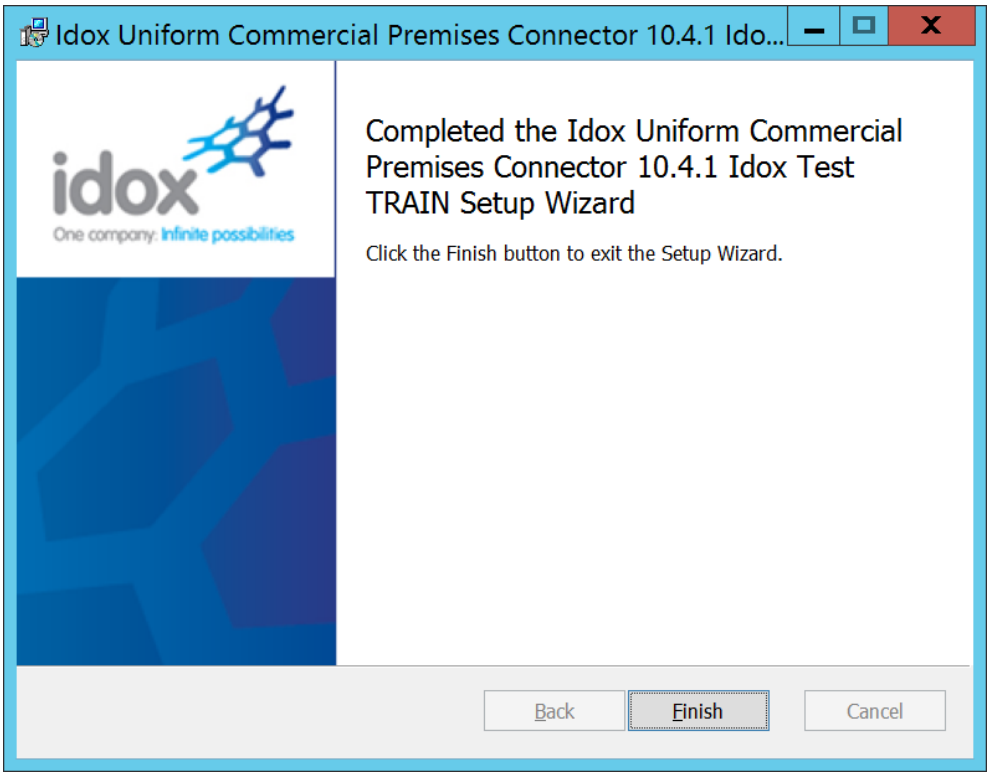
    The Ready to Install window is displayed.



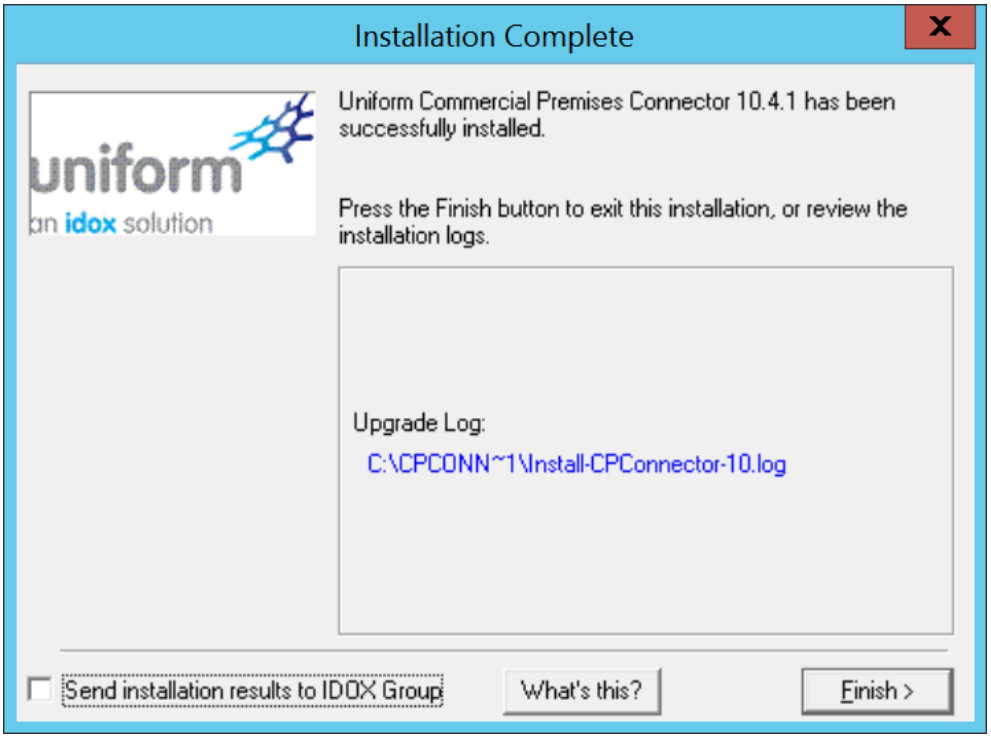
16. Click Install to start the installation. The progress of the installation is displayed in the Installing window. If required, you can click the Cancel button to abandon the installation.



The Completed window is displayed.



17. Click Finish to proceed to the final window.



18. Click Finish to end the installation process.

    Note: Once the installation has finished, ensure that the user that IIS uses has "Full Control" permissions on the Destination folder that was selected at step 13.

19. You can now make any changes to the Commercial Premises Connector 10 configuration – see section 3 - Configuring the Connector.

    Note: Authorities that are upgrading and have not chosen the previous Destination Folder at step 13 (or are doing a new install for TEST) can copy details from the previous web configuration.

20. Restart IIS (or relevant Application Pool for later versions of IIS).

    Note: Be aware that this will affect other products using IIS (or the Application Pool), which may include those for Live use.

The connector is now ready – using the following URL in a browser on the connector server should show the list of methods (replace the highlighted text with the relevant Virtual Directory from step 14 if amended).

http://localhost/**CommercialPremisesConnectorService_TRAIN**/CommercialPremisesConnectorService.asmx

Further detailed testing can be done using SoapUI – see section 4 - Connector SoapUI samples. It may be useful to do this to get a better understanding of any method before doing development to use the method.

2.4 Installed files and components

A typical install of the Commercial Premises Connector will install the files to the web root of Internet Information Server (web server) -c:\inetpub\wwwroot\…

The *CommercialPremisesConnectorService...* folder contains the core Connector components along with the web.config file. This file contains the configuration parameters (web.config is the standard mechanism for configuring ASP.NET applications) – for further details, see section 3 - Configuring the Connector.

The following Commercial Premises Connector specific documents are available from My Uniform:

- Commercial Premises Connector Product and Technical Information
- Commercial Premises Connector Installation and Configuration Guide

The following generic Connector documentation is also available from this location:

- Common Configuration Settings for Connectors

The following documentation for Connectors that can be used in conjunction with the Commercial Premises Connector for specific modules is available from this location also:

- Common Connector: Installation and Configuration Guide; Product and Technical Information document
- IVA Connector: Installation and Configuration Guide; Product and Technical Information document
- Risk Assessment Connector: Installation and Configuration Guide; Product and Technical Information document
- Samples Connector: Installation and Configuration Guide; Product and Technical Information document

3 Configuring the Connector

The Uniform Commercial Premises Connector web service has a number of local authority-specific settings that must be configured prior to use. These settings are of two types:

- Common settings used by all connectors.
- Settings specific to the Commercial Premises Connector.

This document describes the second of these, the configuration settings that are specific to the Commercial Premises Connector. For information on the common connector settings, see the *Common Configuration Settings for Connectors* document.

Note: The endpoint URL for the Uniform Web Service must be set in <UniformWSURL>, for example http://*servername*:*portnumber*/uniface/services-*uniforminstance*/cnscconnwebsdlw?wsdl

All configuration settings are specified in an XML file named "**web.config**" located in the Connector web directory. This document describes each of the XML configuration elements to be found in the file.

The XML configuration elements

It is recommended that an Idox consultant undertakes any modifications made to the files mentioned in this section. Incorrect edits to these files can cause the Connector application to cease functioning and all changes should be made with care. In particular, the content of the file must be valid XML.

3.1 CPConnectorConfiguration section

The <CPConnectorConfiguration> section contains application configuration information used internally to control the behaviour of the connector web service.

3.1.1 EmailNotificationConfiguration element

This relates to email notifications for monitoring Connector activity. The emails sent by the Connector are sent using SMTP. The SMTP server used to send these emails can be on the host machine or on a different server.

<SmtpServer> element

If a local SMTP service is unavailable the Connector can route emails directly through an SMTP server on another machine.

<SmtpServerName> element

The SmtpServerName element is an optional parameter to route email through another server. The configuration requirements for this are identical to those for the option above.

<NewCPEmailNotification> element

When the Connector creates a new commercial premises record within Uniform an email may be sent to notify any required individuals. The following child elements can be used to configure the email:

- <From>
- <To>
- <Cc>

- <Bcc>
- <Subject> – By default this is set to “UNI-form CP Connector: New Commercial Premises Notification”

<WarningEmailNotification> element

This email is sent when the Connector call was successful, but a warning (for example, that code(s) are invalid) is required. This will include non-serious input validation errors. The following child elements can be used to configure the email:

- <From>
- <To>
- <Cc>
- <Bcc>
- <Subject> – By default this is set to “UNI-form CP Connector: Warning Notification”

<ErrorEmailNotification> element

This email is sent when the Connector raises an error. This will include serious input validation errors. The following child elements can be used to configure the email:

- <From>
- <To>
- <Cc>
- <Bcc>
- <Subject> – By default this is set to “UNI-form CP Connector: Error Notification”

3.1.2 UWSSettings element

This relates to settings that are passed to the Uniform Web Service.

<UWSParamTrace> element

This is set to true to get the Uniform Web Service to include a trace of the input XML and its return XML (generally used for support purposes & should be reset to false afterwards).

<ConnectorCodeMaps> element

If code mapping is to be applied (usually just for external packaged systems being implemented for multiple authorities) this is to be set to the same Uniform Map name set in the ConnectorCodeMaps element (see the *Common Configuration Settings for Connectors* document for configuring ConnectorCodeMaps).

This can be used where the authority already has a different value for a general code than the external package default, therefore the connector needs to ‘map’ the default value that is being updated by the external package to the value in Uniform for the authority that the connector should actually update, with reverse mapping for general code values being retrieved.

To achieve this, the relevant code list needs mapping details entering in Uniform for the map name defined here (and the Map Name creating if not already done).

The ‘mapped’ values should be the default values used by the external package.

<ConnectorCodeExclusions> element

If ‘exclude’ code mapping is to be applied (usually just for external packaged systems being implemented for multiple authorities) this is to be set to the same Uniform Map name set in the ConnectorCodeExclusions element (see the *Common Configuration Settings for Connectors* document for configuring ConnectorCodeExclusions).

This can be used where the external package retrieves a list of general code values for a code list usually for selection (for example, in a drop-down of an online form or mobile application screen), but the authority wants to exclude certain codes from the selection (for example, ones just used internally)

To achieve this, the relevant code list needs mapping details entering in Uniform for the map name defined here (and the Map Name creating if not already done).

The ‘mapped’ values should be left blank for those codes the authority want to be included, but any non-blank value (recommended to be EXCLUD) for those codes they want to be excluded.

<UWSSearchLimit> element

The results returned for the Get…BySearchCriteria method are limited to 1000 records to prevent heavy searches via the connector

- Affecting the performance of the Uniform Oracle database.
- Causing the call to the connector to time-out due to the length of time required to return large amounts of data,

However, should these issues still occur, then the limit can be set even lower by adding this element; for example, `<UWSSearchLimit>500</UWSSearchLimit>` would limit the results returned to 500 records.

3.1.3 XtraMappings element

If CPXTRA initial values mapping is to be applied (usually just for packaged systems being implemented at multiple authorities) this section is to include an **XtraMapping** entry for each initial value.

This can be used where the authority already has a different value for a CPXTRA initial value name than the external package default, therefore the connector needs to ‘map’ the default value that is being updated by the external package to the value in Uniform for the authority that the connector should actually update, with reverse mapping for initial values being retrieved.

<ExternalXtraName> element

This is set to the default CPXTRA initial value name used by the package.

<UniformXtraName> element

This is set to the Uniform CPXTRA initial value name that the authority uses.

4 Connector SoapUI samples

The installation package includes a number of sample connector interactions which, if required, you can use to help your understanding of the function and usage of the Connector. These samples require the use of SOAPUI, which is freely available from http://www.soapui.org/.

SOAPUI is not supported by Idox, and the samples are offered "as-is" as an assistive tool, not part of the supported content of the Connector.

This section provides some guidance for how to use the samples – however, for any further guidance on how to use SoapUI, refer to the SoapUI web site.

4.1 Editing the CP Connector SoapUI samples

The **CP-Connector-soapui-project.xml** SoapUI samples are not included in this setup. The CP-Connector-soapui-project.xml will need to be saved (to where SoapUI has been installed) and then edited (following the instructions carefully) as shown below.

Use any text editor to search and replace, changing the following

Replace this	With this
Devcore44	*Server name* – the name of the server the connector has been installed on (plus the port number if not the default).
ThealeIDOXTRAIN	*Uniform-Database-Instance* – the database instance that the Connector has been installed against. **Note:** If something was entered during installation for Local Authority (only if the relevant module is a shared service) or Third Party (only if multiple third-party systems call the connector), then precede the instance by those values, in that order – local authority, then third party.
train10	Whatever Uniform User the connector tests should use. If that is `conusr`, then you do not need to do this step.
${empty}	The password for the Uniform User the connector tests should use. If the password is blank, then you do not need to do this step.

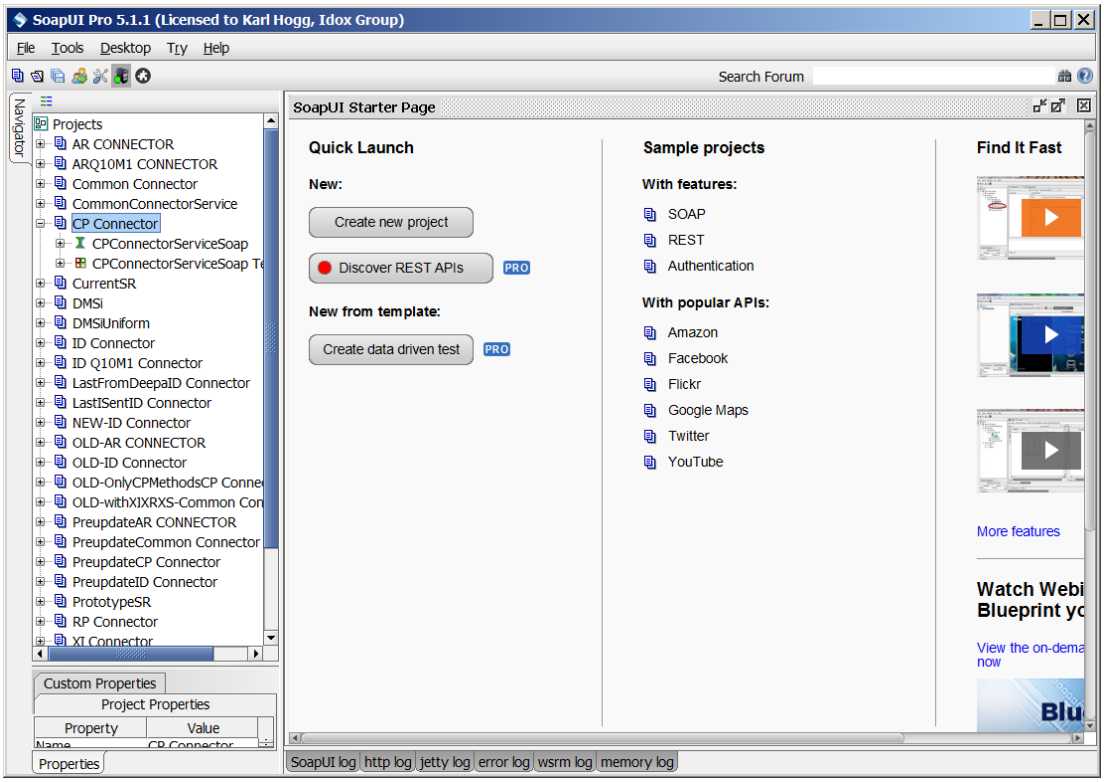
4.2 Using the SoapUI samples

Note: The data in the SoapUI samples may not be valid for your Uniform system – for example, the code values used may be different – therefore change these when running the samples:

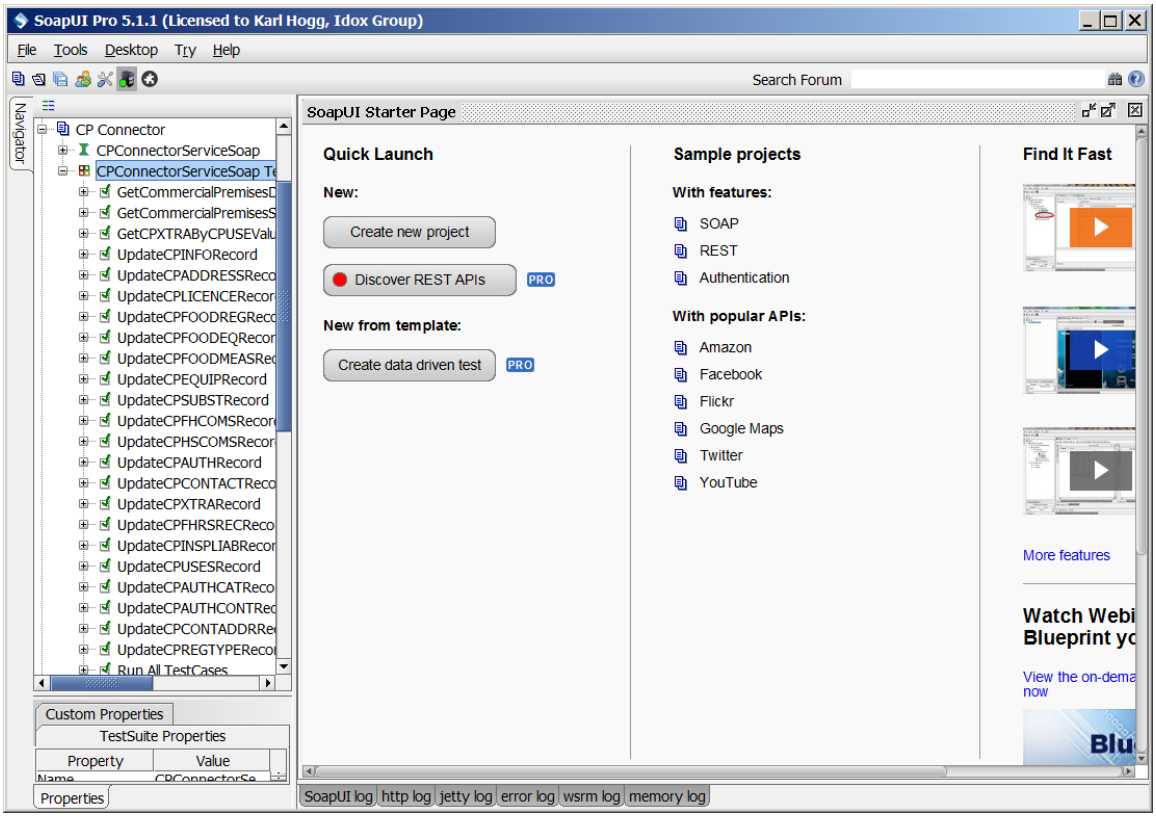
To use the SoapUI samples:

1. Start SoapUI.
2. Unless you have already done so, select the CP-Connector-soapui-project.xml as follows:
   a. Right-click on Projects, and select Import Project.
   b. Browse to where you have saved the CP-Connector-soapui-project.xml, select the file and click Open (or double-click on the file).

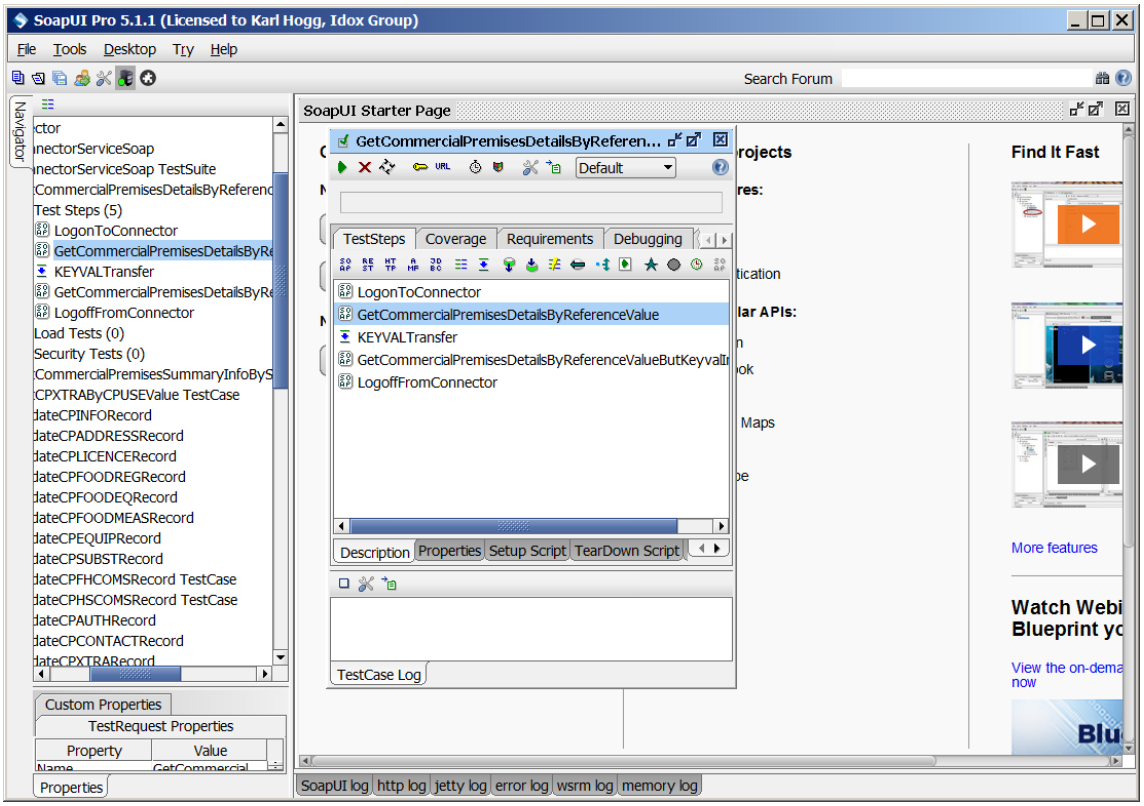
   The window should look like this.



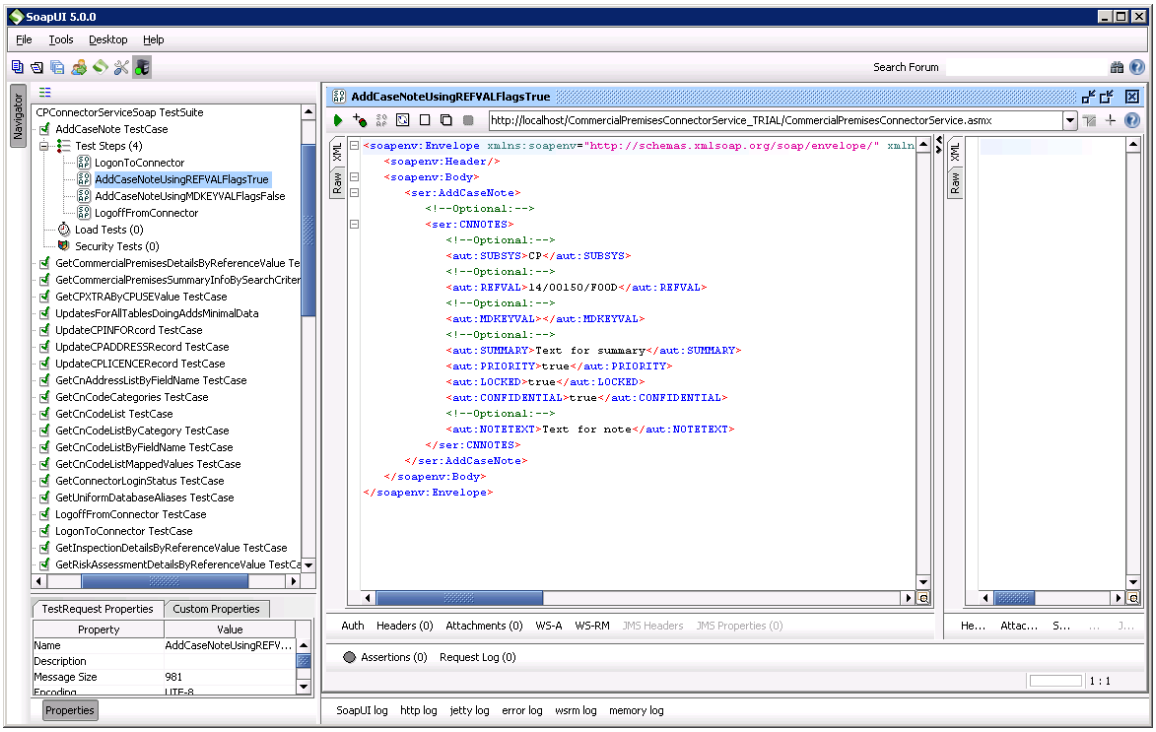
3. Open CP Connector and then the CPConnectorServiceSoap TestSuite. The samples are all listed.



4. Double-click on any sample (for example, GetCommercialPremisesDetailsByReferenceValue). A window is displayed showing the test steps.



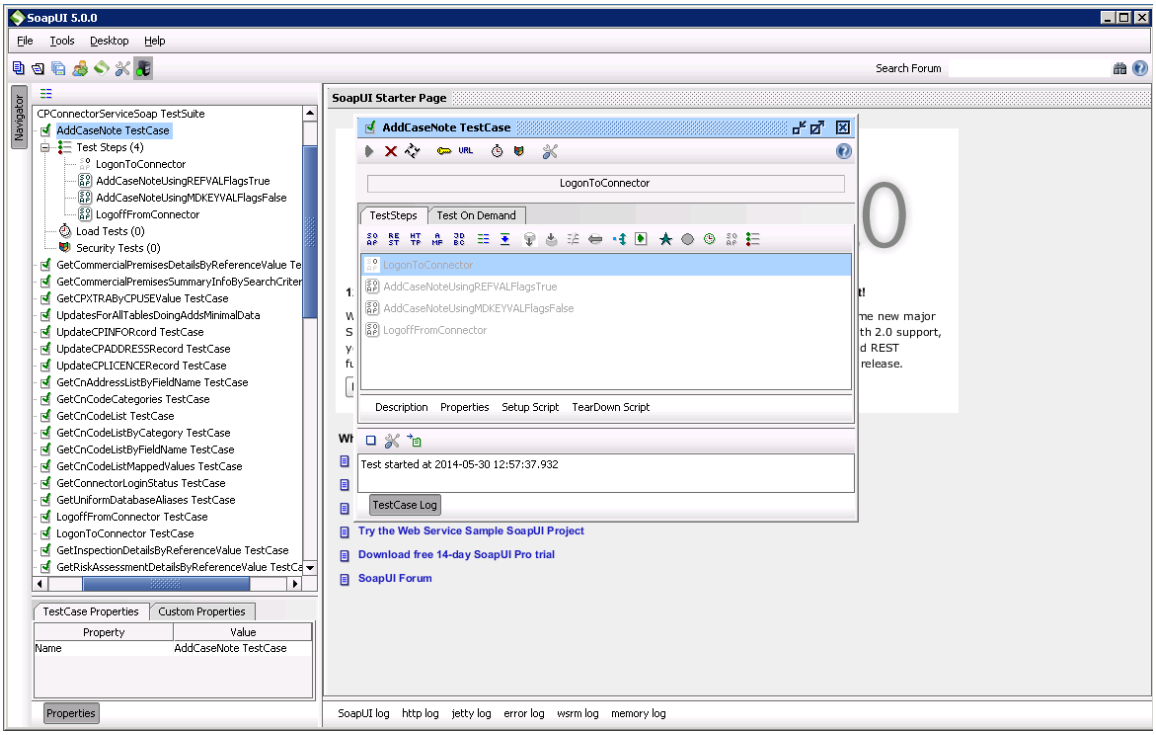
5. Double-click on the test steps that need data changes (see 5.3). A window is displayed showing the input xml and output xml for the step.



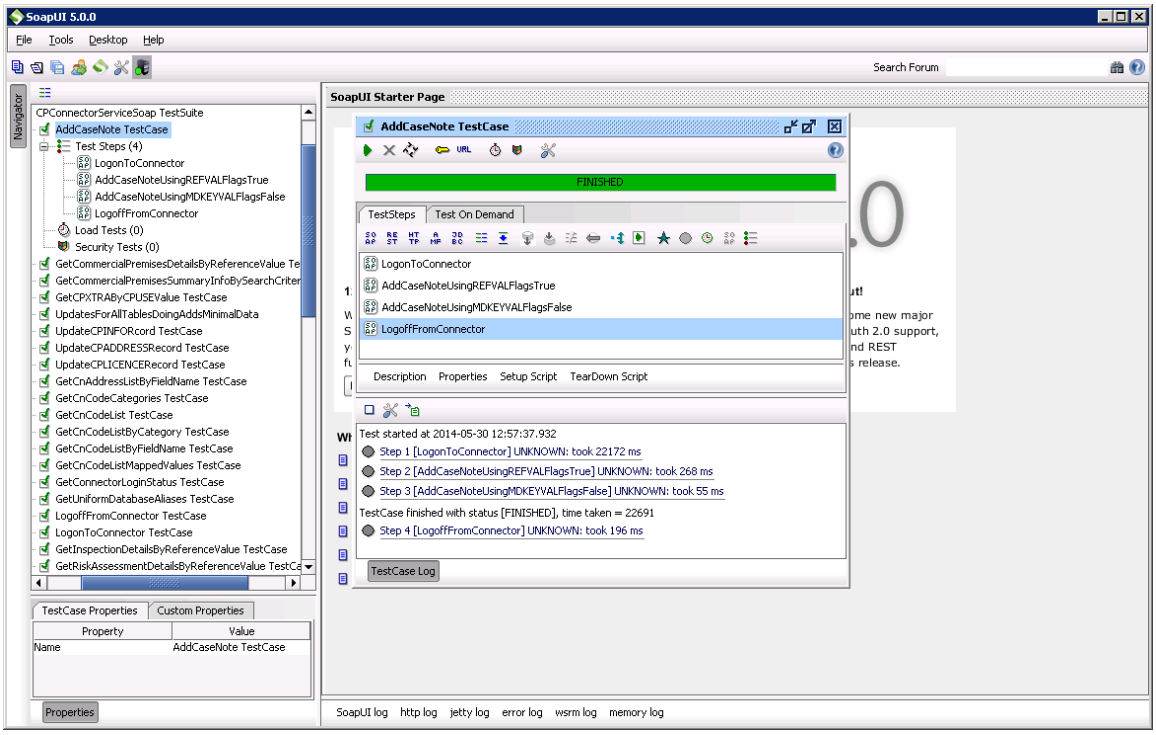
6. Edit the input xml, and then close this window.

7. On completion of the data changes, click the left-most icon  (with a tool-tip saying "Runs this testcase").

Soap UI shows progress by highlighting the step currently being undertaken (letters S O A P also cycle showing the step is proceeding as sometimes this is delayed, for example on the first call to connector).

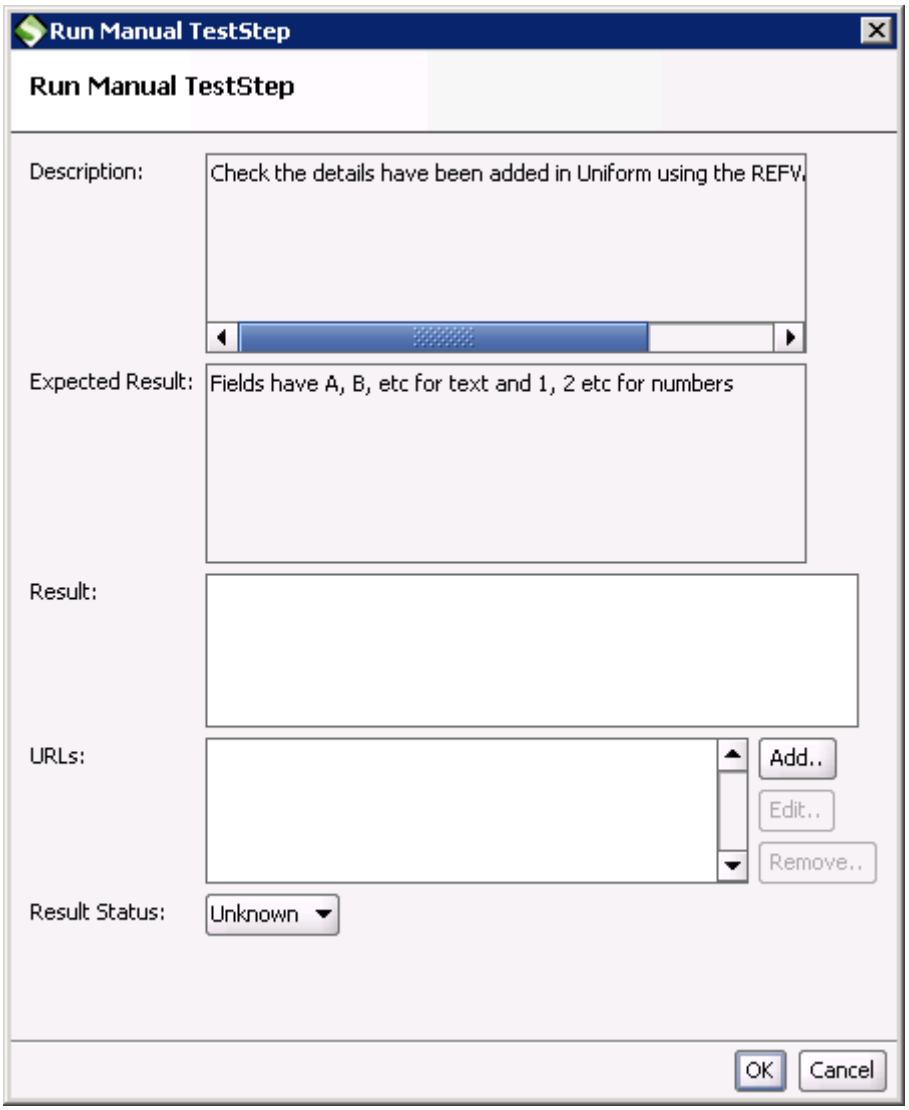


In addition, the TestCase log at bottom indicates what steps have been done, and a progress bar at the top says FINISHED once all the steps have been done.



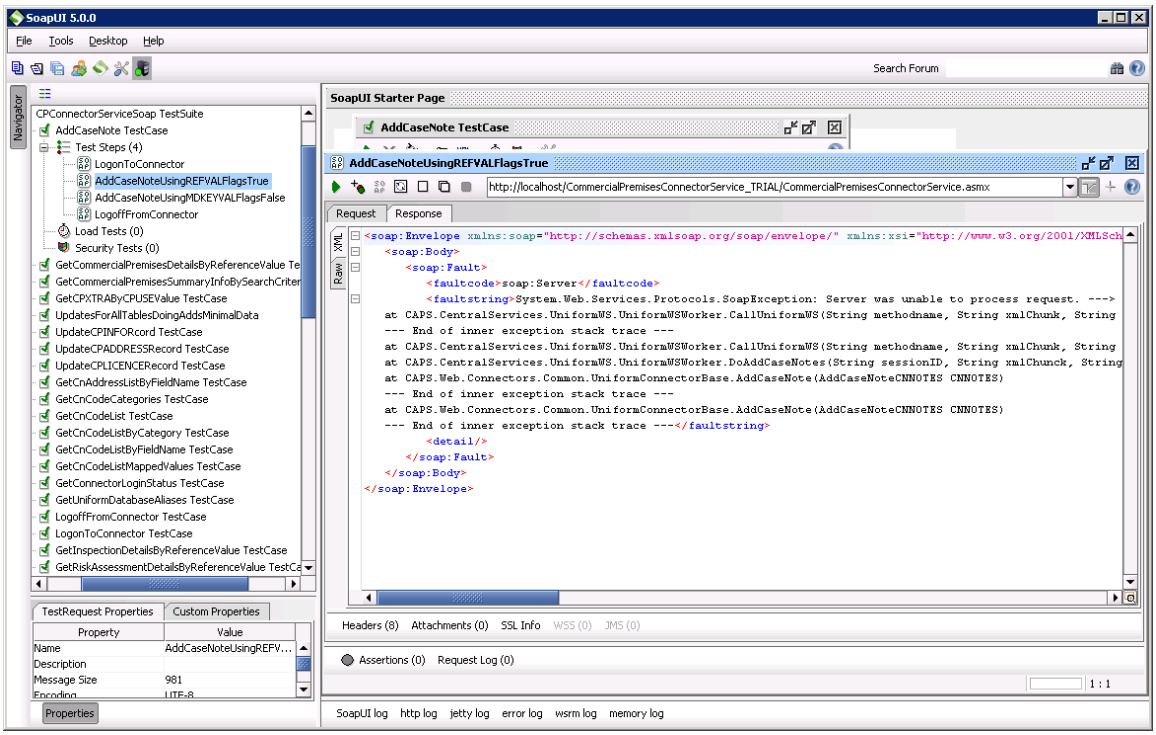
8. During the run for Update… methods, SoapUI stops with a screen awaiting confirmation to proceed (OK). This provides an opportunty to check in Uniform that the relevant record has been added, updated or deleted at each of those stages.
   - If it has, click OK.
   - If it has not, click Cancel to abort the run, then double-click on the appropriate step to see if there was a Soap error (possibly requiring input xml data to be changed).

     Note: If the step output xml does not have a soap exception, then you may be checking the wrong Uniform record (for example, if the parent table for the relevant table being updated has multiple records for the specified case, then check each of those parent records as the update will be to the first one created, which might not be the first one shown by Uniform).

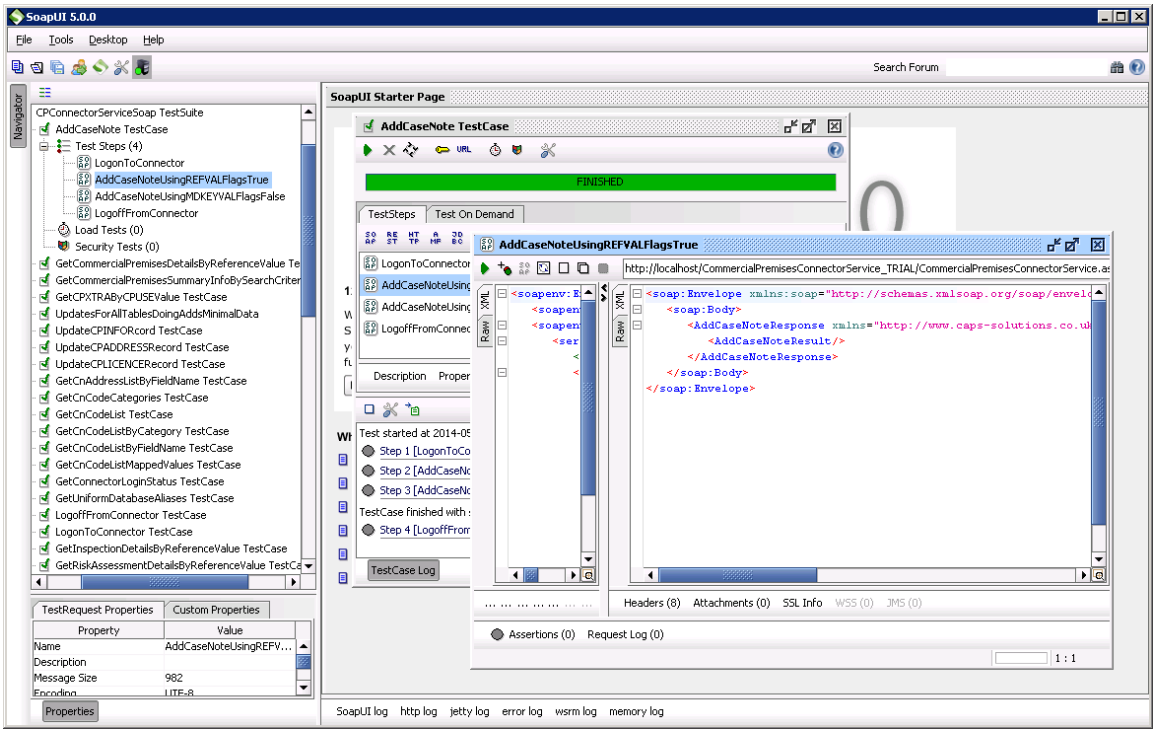


9. For Add… methods, double-click on relevant step to see the output xml returned – a new window is displayed showing details.

   The following example shows an error (scrolling to right says ‘Unable to retrieve Record’), so in this situation you would repeat steps 5 and 6 to change input xml, and then repeat step 7 to rerun the sample.

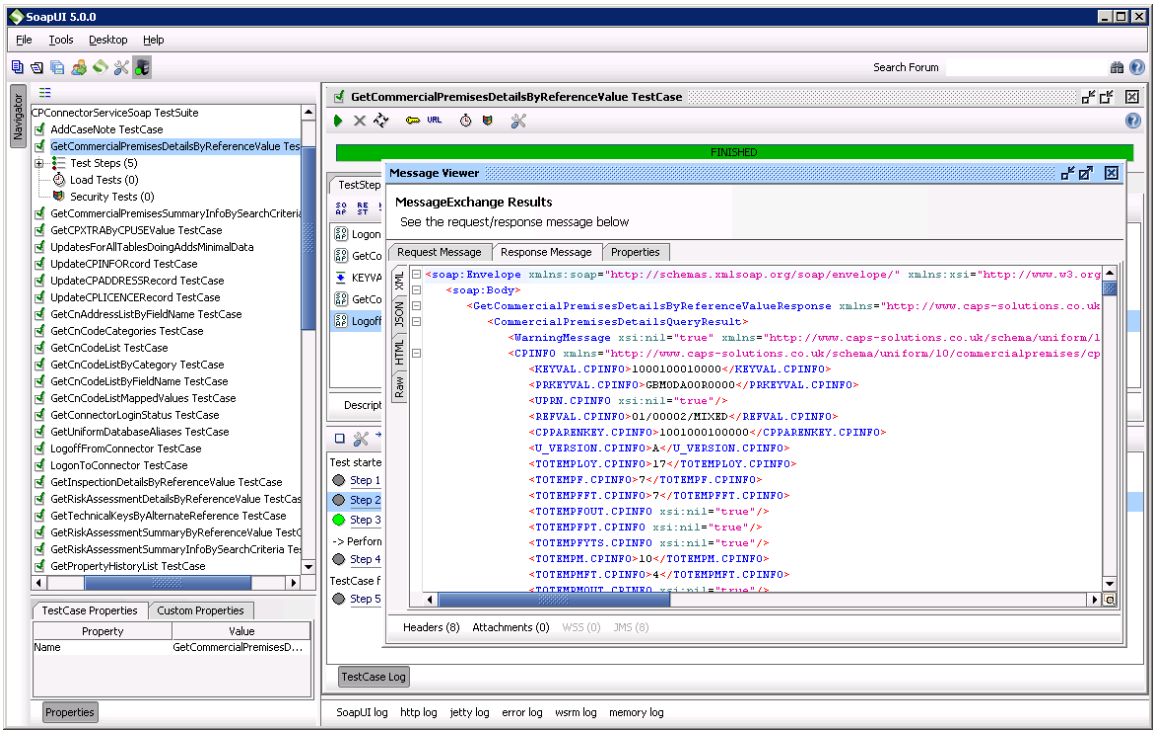


In the following example no soap exception was returned, as a valid REFVAL was used.



10. For Get… methods, double-click on the relevant step to see the output xml returned – a new window is displayed showing details.

    In the following example, data was returned, but if the specified record does not exist a soap exception would be shown (though an empty list for Search…ByCriteria methods).



4.3 Setting the input xml data

For a description of the fields and their maximum data length for any method, plus explanations of how the fields are used (particularly for …BySearchCriteria methods), refer to the Product and Technical Information documentation for the connector.

- Typically, any values for REFVAL will need to be set to a valid case reference in the Uniform system, with the case record depending upon the connector , for example whether for Commercial Premises, IVA, Risk Assessments, and so on.
- In addition, for add and update methods, set any fields that Uniform would validate if entered manually to a valid value. These would be fields such as general, address, officer, ward, and parish codes.
- As the data being set is within xml, any special characters will need ‘escaping’, for example, use & instead of just &.

The input data that needs setting when running the samples depends upon the type of method, as detailed in the Product and Technical Information document.