CelerisSystems

iRIS Software Installation Guide

Introduction

Use this guide to upgrade your current version of iRIS or to perform a software new installation.

General System Requirements

iRIS is a Windows-based application that requires the installation of executable "client" file on your computer which will interact with a host Microsoft SQL Server database. The minimum system requirements are as follows:

- Desktop PC (or a Macintosh with PC emulation)
- Windows operating system capable of running IIS (server 2016 or newer recommended)
- Hard drive available disk space: 200 MB
- Processor with at least 8Gb of RAM
- Microsoft .NET Framework 4.0 or later
- Modern browser (recommend Chrome)
- Windows XP SP3 or later

Basic Installation Workflow:
Step 1: Install the Microsoft SQL Server 2016 Database Instance
Step 2: Attach the iRIS Database to the SQL Server Instance
Step 3: Install Microsoft Internet Information Services (IIS)
Step 4: iRIS desktop client installation

Getting Started

Step 1: Microsoft SQL Server 2016 Database Installation
iRIS v5.1 is designed for compatibility with SQL Server 2016 Standard Edition. Any version of SQL 2016 Standard Edition may be used for iRIS, but is preferrable to run the latest service pack for best performance (Cumulative Update Package 17 for SQL Server 2016 SP2 - KB5001092).

During installation, please use the following iRIS configuration settings:
- Ensure both SQL Server and Windows authentication modes are available.
- Ensure TCP/IP is enabled
- The SQL installation requires the creation of a celerisuser account that is a member of .dbo, .datareader, and .datawriter data membership roles for each project database user mapping.
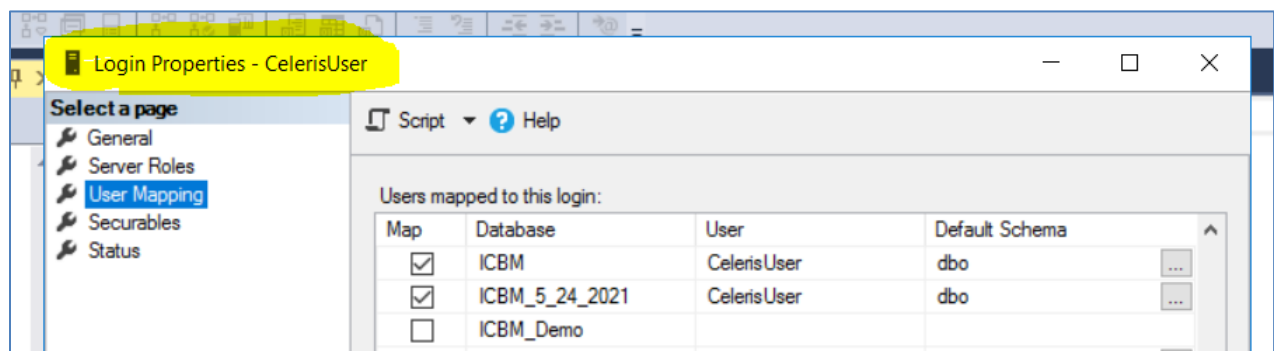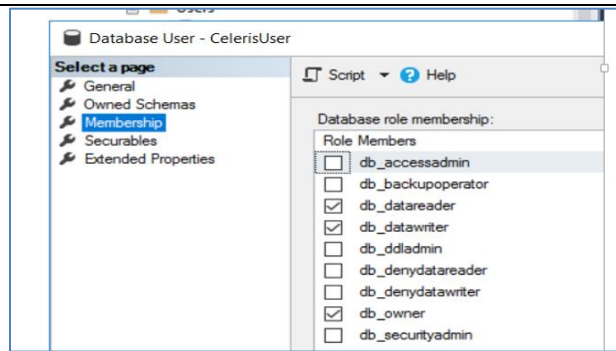
Please refer to detailed Microsoft SQL Server installation instructions found at this link:
https://docs.microsoft.com/en-us/sql/sql-server/editions-and-components-of-sql-server-2016?view=sql-server-ver15

Step 2: Install the iRIS Database

This step must be completed before Internet Information Services (IIS) can fully installed and tested (step 3).

- Restore the project database to SQL server using provided backup file (ICBM_6_1_2021.bak).
- Delete the celerisUser account from the project's security.
- Create a celerisUser in SQL (do not require password expiration) and map that user to the project database with .dbo, .datareader, and .datawriter roles. Note the SQL server\ instance, username, password for use in the web.config configuration for the project.

Step 3: Microsoft Internet Information Services (IIS) Installation

General IIS Requirements:

- IIS server, or Role must be installed.
- All security and application development options must be selected. (see images below)
- Local user account for IIS to manage web application. If this user is set up against a group policy, then the password must be updated manually for the application folder every time password restrictions hit.
- It is recommended to create a local user with no password expiration, and minimal rights; sufficient to areas of the filesystem required by IIS. (The web app folder, and .net temporary folders at minimum)
- ZIP packaged files/folders for web application. (Celeris provided), or previous web application folder.
- It is recommended to get the latest version, which stores database passwords in the web.config file, which can be encrypted, if required.
- Access to elevated user privileges, or admin rights for certain operations is required.

Installation:

- Install IIS Role with required options.
- Extract ZIP packaged files to the web root folder (ie, c:\inetpub\wwwroot is this path required). This path will be established during the IIS installation.

- Open web.config file, and update the<connectionStrings> section
    - o There are two sections in the <add> subheading
        - name: Check the project Name within the tag: "ICBM"
            - The name is the name of the database / project. (ICBM)
        - Connection String: Check to make sure that all the following are present:
            - **Data Source**: Server name and instance name in format **serverName\instancename**
            - **InitialCatalog:** The database's actual name "ICBM"
            - **User ID:** celerisUser
            - **Password:** password for SQL user celerisUser, can be copied from previous installation or re-assigned.
            - **Integrated Security:** this setting may be copied from previous installation, or removed. Generally set to false for multi-user installations
- Run IIS' inetmgr management console
    - o Expand Server/Sites / Default Web Site tree to appropriate web folder
    - o Right Click - Convert To application
        - click 'connect as'
            - enter details of the local user account listed in the requirements
            - click ok
        - click 'test settings'
            - verify green check-marks for both Authentication and Authorization
            - click 'close'
- **Binding**: You may update the binding for the web app to use SSL / Certificates
    - o The **ENDPOINT** will include the protocol and endpoint of the web app (i.e. https://mydomain.com/cs_data or https://10.0.2.10/pro_1)
    - o Test communication with SQL / file permissions
        - With the web app selected in the tree, switch the 'Content View' tab
        - right click on DBData.asmx and select 'Browse'
        - find and click getAllVSSs
        - Enter ICBM for the program
        - click 'invoke'
        - You should see XML data
            - If we get an error, check the message and see if it is an access denied message to a .net temp folder. If it is, grant the prerequisite user full control of that folder.
- Update Client (shared machines must update each separate account)
    - o If the server's URI has changed (the location of the web server)
        - Click the Computer icon on the login screen
        - enter the new URI
        - enter the project name
        - log in as usual.
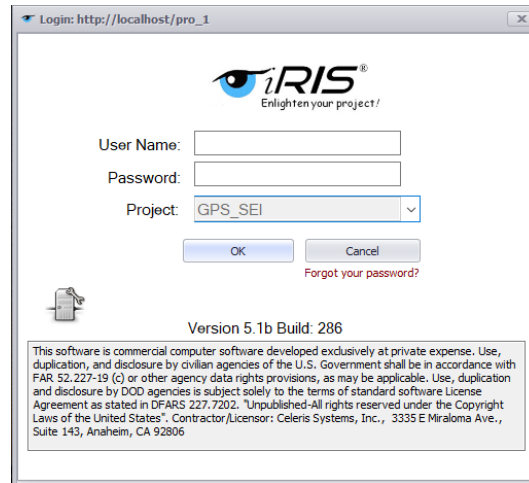
IIS Security options:
Security:

IIS Application Development options:
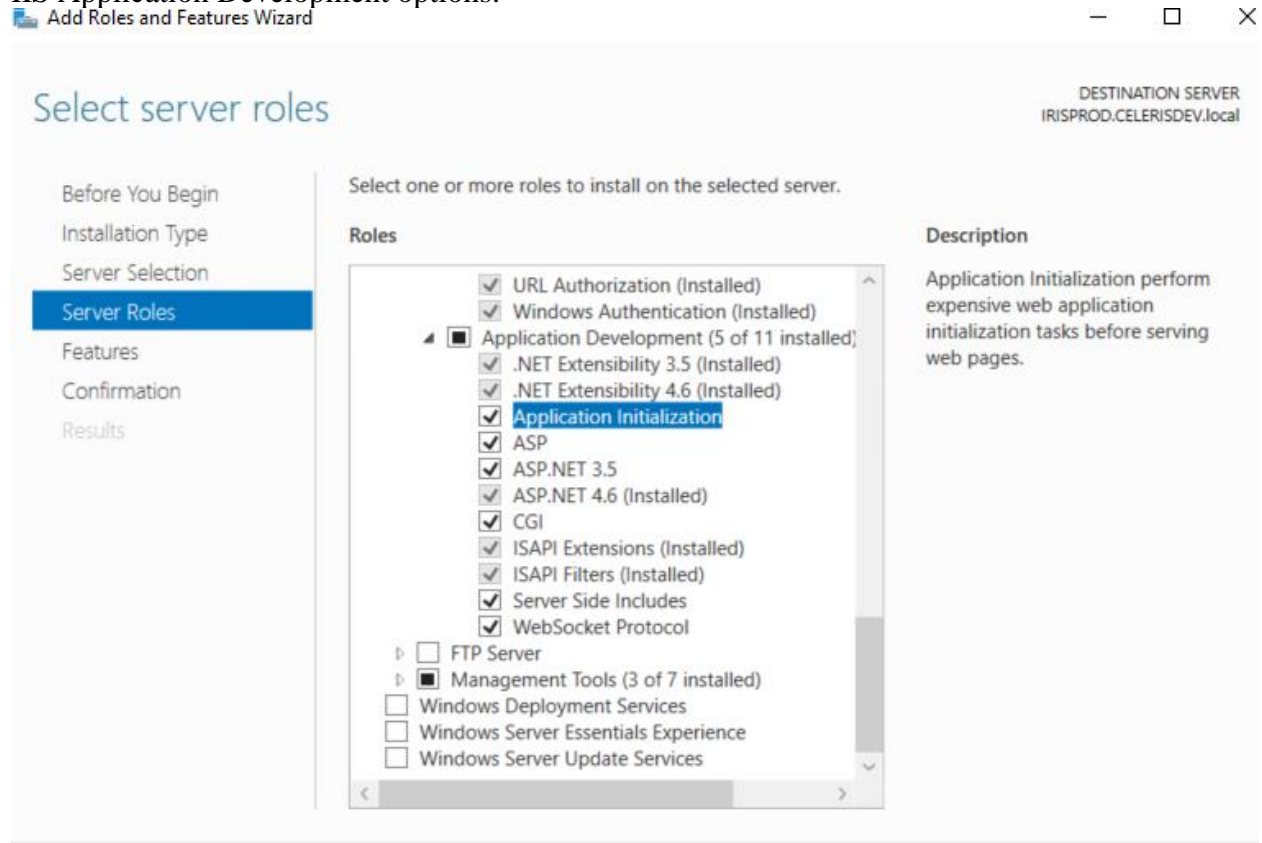
Step 4: Install the iRIS Client

Launch the Windows Installer by double-licking the file named "iRIS 5.1b Build 286" and select the defaults throughout the installation. Depending on your computer and network security settings, some users may need to perform this operation in an "elevated mode". Contact your system administrator to see if this mode applies to your installation.
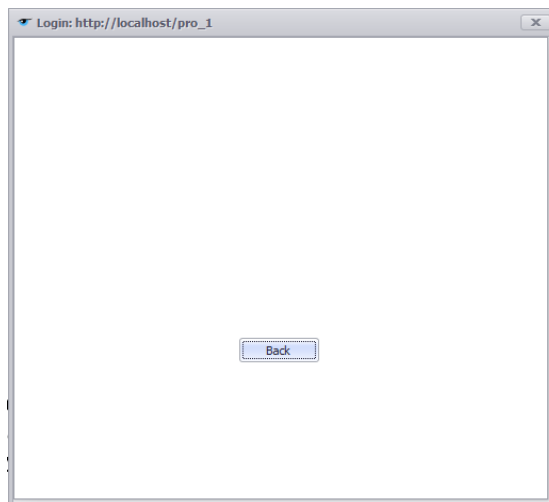
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Once the installation is complete, launch the application and the following login screen will appear:

Set the Project Name and

Double-click the iRIS logo at the top of the form, click the "Back" button, and click the down-arrow button to select your project which will be provided by your system administrator: :

Enter the Server Address

Double-click on the server/wrench icon (above and to the right of the disclaimer) and the following form will appear:

Enter the server path which is the endpoint created after configuring our bindings in IIS above.

Login to iRIS

For your initial login, enter the username, password and project name provided by your system administrator. You will be prompted to change your password and answer a security question as shown below:

Once your password has been changed, you will be returned to the login screen and you may now enter your username and new password. Note the connection path and project name should now appear in the login form.