# Chem & Bio Office Enterprise 10

*Chem & Bio Office Enterprise 10.0*

## *Installation Guide*

**CambridgeSoft**®

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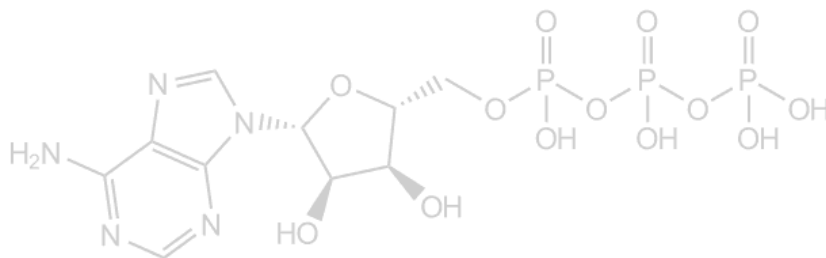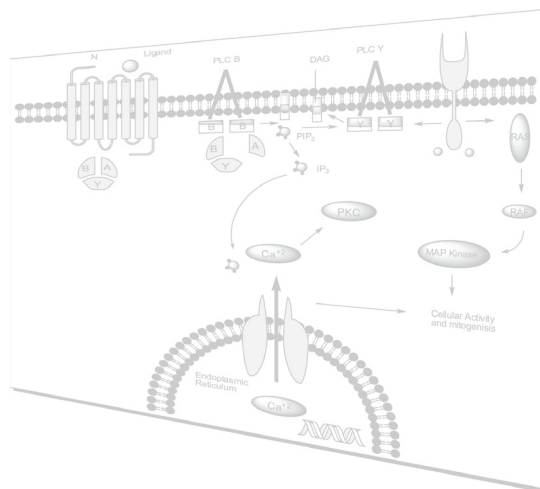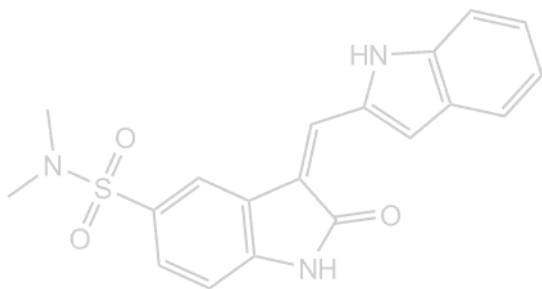
# Contents

# Chem & Bio Office Enterprise 10 Installation Guide

## About this Guide

Welcome to the Chem & Bio Office Enterprise 10 Installation Guide. Inside this guide, you will find complete instructions on how to install Chem & Bio Office Enterprise applications. This guide is available in print (this file), CHM, and Web-based format.

## Introducing Chem & Bio Office Enterprise 10

Chem & Bio Office Enterprise 10 is a comprehensive suite of applications that enables you to manage all your chemical information across your network. Through a Web browser, you can use the Chem & Bio Office Enterprise 10 Web applications to search databases for chemical information. Chem & Bio Office 10 Suite comprises the following applications:

- E-Notebook Version 9.0.2
- Registration Version 10
- Inventory Version 10
- BioAssay 10.2
- Doc Manager version 10
- ChemACX Version 10
- Cartridge Version 11
- DrugDeg10
- ChemDraw Ultra V 10 User Guide
- ChemDraw Ultra V 11 User Guide
- ChemDraw Ultra plug Read Me
- BioSAR version 10

*NOTE: Export to Excel requires the same version of ChemOffice on the client and the server. Versions 9.0.x and 10.0.x are supported as indicated above.*

*NOTE: Export to BioVIZ requires ChemOffice 10.0.x on the client.*

This guide covers the installation and initial verification of the configured components.

You can either fully install Chem & Bio Office Enterprise 10 applications afresh or upgrade from Chem & Bio Office Enterprise 9.0 SR3.

This installation guide consists of the following two sections, which distinguish a fresh installation from an upgrade:

- Installing Chem & Bio Office Enterprise 10
- Upgrading to Chem & Bio Office Enterprise 10

## Chem & Bio Office 10 Supported Platforms

Client Tier

**Hardware**

| Hardware | OS/Version | 32/64-bit | Service Pack |
|----------|------------|-----------|--------------|
| Intel | Windows XP | 32-bit | SP2 |
| Intel | Windows 2000 | 32-bit | SP4 |

**Third-party Software**

| Application | Version | Used with |
|-------------|---------|-----------|
| Microsoft Office | 2003 | • E-Notebook<br>• BioAssay<br>• BioSAR |
| Microsoft Office | 2007 | • BioSAR xls export<br>• BioSAR xls import<br>• BioAssay xls export<br>• Integration<br><br>*NOTE: Office 2007 is not supported for E-Notebook 9.0.2 and BioAssay 10.1.4* |
| Adobe Acrobat | 7 | • E-Notebook<br>• Inventory<br>• BioAssay |

| Application | Version | Used with |
|---|---|---|
| Adobe Acrobat | 8 | • BioSAR Reports only<br>• Inventory Reports only<br>• BioAssay Reports only |
| Microsoft Internet Explorer | 6 | All CambridgeSoft Web-based applications |
| Microsoft Internet Explorer | 7 | All CambridgeSoft Web-based applications |

## Middle Tier

**Hardware**

| Hardware | OS/Version | 32/64-bit | Service Pack |
|---|---|---|---|
| Intel | Windows 2000 | 32-bit | SP4 - U.S. English |
| Intel | Windows 2003 Advanced Server | 32-bit | AS SP1 - U.S. English |

**Third-party Software**

| Application | Version | Used with |
|---|---|---|
| Oracle Client- U.S. English | 9.2.0.8 | CambridgeSoft Enterprise middle tier |
| Oracle Client - U.S. English | 10.2.0.3 | CambridgeSoft Enterprise middle tier |
| Microsoft Office | 2003 | Microsoft Excel and Access |

## Database Tier

**Hardware**

| Hardware | OS/Version | 32/64-bit | Service Pack |
|---|---|---|---|
| Intel | Windows 2003 Advanced Server | 32-bit | SP1 - U.S. English |
| Intel | Red Hat Linux RH4 AS | 32-bit | |

| Hardware | OS/Version | 32/64-bit | Service Pack |
|---|---|---|---|
| Intel | Red Hat Linux RH4 AS | 64-bit | |
| Windows | Windows 2003 | 64-bit | |
| RISC and Itanium | HP-UX: B.11.11 | 64-bit | |
| IBM | AIX 5.2.0.0 | 64-bit | |
| Sun-Solaris | Sun OS 5.8 | 32-bit | |
| Sun-Solaris | Sun OS 5.8 | 64-bit | |

**Third-party Software**

| Application | Version | Used with |
|---|---|---|
| Oracle Database - U.S. English | 10.2.0.3 | CambridgeSoft Enterprise Database Tier |
| Oracle Database - U.S. English | 9.2.0.8 | CambridgeSoft Enterprise Database Tier |

*NOTE:  If you are installing BioAssay for use with a Web Service connection, install the following patch: "Oracle 10g Release 2 ODAC".*
*This patch includes OLEDB Patch 10.2.0.20 as well as the Oracle Database Extensions for .NET version 10.2.0.2.20. The patch is located at: http://www.oracle.com/technology/software/tech/windows/odpnet/utilsoft.html.*

*After starting the "setup.exe" file, select the correct ORACLE_HOME (which is often not selected correctly by default) and Oracle Data Provider for .NET 2.0.10.2.0.2.20, Oracle Provider for OLE DB 10.2.0.2.20, and Oracle Objects for OLE 10.2.0.2.20.*

*NOTE: The decimal separator in the "Regional Settings" in Windows must be set consistently on all client computers that will be running the E-Notebook client software.*

*NOTE: If you are installing BioAssay and using Direct connection (as opposed to the more common WebService connection) you will need to install the Oracle Client on the client PC as well as the patch "Oracle 10g Release 2 ODAC". Consult with CambridgeSoft® for details specific to your installation.*

## Chem & Bio Office Enterprise Installation Instructions

OBJECTIVE

To install all software components on the Web server computer intended to run Chem & Bio Office Enterprise 10.

INSTRUCTIONS

Execute the steps (mentioned in the following two sections) on the Web server computer intended to run Chem & Bio Office Enterprise 10:

- Installing Chem & Bio Office Enterprise 10

- Upgrading to Chem & Bio Office Enterprise 10

OUTLINE FOR NEW INSTALLATION OF ENTERPRISE 10

The following outlines the major applications that need to be installed. If you do not have a license for a particular application, skip to the next step.

1. MSXML4
2. Chem & Bio Draw Ultra
3. Oracle Cartridge
4. Web server Core
5. Registration Enterprise
6. Inventory Enterprise
7. BioSAR Enterprise
8. ChemACX Enterprise
9. BioAssay Enterprise

10. DocManager Enterprise

11. Drug Degradation

Use the table below to record information about the Web server used for this installation.

| | |
|---|---|
| Server Name | |
| Server Location | |
| Hardware Specifications | |
| Operating System Version | |
| Oracle Client Version | |
| Oracle Provider for OLE DB Version | |
| <WebRoot> The location where the Web server root is located, and will run. Where the Chem & Bio Office Web server folder will reside. Examples: • <webroot> = C:\Inetpub\wwwroot\ • <webroot>\ChemOffice\ = C:\Inet-pub\wwwroot\ChemOffice\ | |
| Installation Goods (Folder, Install CD) The location(s) where the Informatics Installation Goods are located during the installation. If there is more than one location, include information on which goods are each folder. Examples: • Install CD & Version • C:\CambridgeSoft® Install\SR2_to_SR3\ | |
| Additional Notes/Details | |

PRE-REQUISITES

Before you begin installing Chem & Bio Office Enterprise 10, be sure to verify the Oracle database version you are using.

## Installing Chem & Bio Office Enterprise 10

### Verifying Oracle Database version

Chem & Bio Office Enterprise 10 supports both Oracle 10g and Oracle 9i. If you are using Oracle 10g, follow the steps mentioned in "For support of Oracle 10g" on page 7. If you are using Oracle 9i, follow the steps mentioned in "For support of Oracle 9i" on page 8.

FOR SUPPORT OF ORACLE 10G

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The sql command prompt should show that the Oracle version is 10.2.0.3. The version of sqora32.dll file should be 10.2.0.3.0. The version of oraoledb.dll file should be 10.2.0.2.20. | ___ Initials |

1. Verify that you are using Oracle 10.2.0.3 before performing any installation. If you are not, update your database to Oracle 10.2.0.3.

2. Verify that you are using the latest Oracle ODBC and OLEDB drivers

    • ODBC patch 10.2.0.3.0 (currently- 5699495): To verify this, check the version of sqora32.dll file located at: C:\oracle\product\10.2.0\db_1\BIN.
    • OLEDB patch 10.2.0.2.20 (currently): To verify this, check the version of OraOLEDB10.dll file located at C:\oracle\product\10.2.0\db_1\BIN.

*NOTE: If you are not running the appropriate driver, update the driver as needed.*

FOR SUPPORT OF ORACLE 9I

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The sql command prompt should show that the Oracle version is 9.2.0.8. The version of ODAC should be 9.2.0.7. The version of ODBC patch should be 9.2.0.6.5d. The version of OLEDB patch should be 9.2.0.7.00. | ___ Initials |

1. Verify that you are using Oracle 9.2.0.8 before performing any installation. If you are not, update your database to Oracle 9.2.0.8.
2. Verify that you are using ODAC 9.2.0.7.
3. Verify that you are using the latest Oracle ODBC and OLEDB drivers:

   • ODBC patch 9.2.0.6.5d: To verify this, check the version of sqora32.dll file located at: C:\oracle\ora92\bin.
   • OLEDB patch 9.2.0.7.00: To verify this, check the version of oraoledb.dll file located at C:\oracle\ora92\bin.

*NOTE:  In case you are having an earlier version of ODAC, OLEDB, or ODBC driver, contact your DBA to update the driver.*

**Verifying MSXML 4.0 Installation**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The System32 folder of the Operating System should contain the files: msxml4.dll and msxml4r.dll. | ___ Initials |

MSXML 4.0 may already be installed. To check, search for the following files in the System32 folder:

- msxml4.dll
- msxml4r.dll

---

*NOTE:   The System32 folder is located at: C:\winnt\system32 or C:\WINDOWS\system32*

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The search confirms the presence or absence of MSXML 4.0. If these files are present, then MSXML 4.0 is already installed; skip the remainder of this section and go to the next topic "Verifying Oracle Cartridge Installation" to continue the Chem & Bio Office Enterprise 10 installation. If the files are not present, you need to install MSXML 4.0.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The System32 folder of the Operating System should contain the files: msxml4.dll and msxml4r.dll. | ___ Initials |

To install MSXML 4.0:

1. Open the **Installers** folder on the Installation CD. Double-click the **msxml.msi** file. The **Welcome to MSXML 4.0 SP2 Parser and SDK Setup Wizard** dialog box appears.

2. Click **Next**. The license agreement page appears.
3. Read the license statement. If you agree to it, accept the agreement and click **Next**. The customer information page appears.
4. Enter a name and company if not already specified then click **Next**. The **Choose Setup Type** page appears.
5. Click **Install Now**. After a few moments, the installation is complete.
6. Click **Finish**. The wizard closes.

**Verifying Oracle Cartridge Installation**

Chem & Bio Office Enterprise 10 supports the CambridgeSoft® Oracle Cartridge 9.0.8 or higher. You can check the version of the Oracle Cartridge using the GLOBALS table (under Version) in the CSCartridge Oracle schema.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | The Cartridge version should be 9.0.8 or higher. The version information is contained in the GLOBALS table. | ___ Initials |

To verify the cartridge version:

1. Click **Start**>**Run**. The **Run** dialog box appears.
2. Type **sqlplus** in the **Run** dialog box and click **OK**. The sqlplus command window appears.
3. Type the following:

cscartridge/cscartridge@<your_service_name>. The SQL prompt appears.

4. Type the following:

select * from GLOBALS;

The Cartridge version information appears along with other information about the GLOBALS table.

5. Close the command window.

ORACLE CARTRIDGE INSTALLATION

If you verify that the correct version of Oracle Cartridge is not installed, install it.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Oracle Cartridge is installed. The GLOBALS table displays the version of the Oracle Cartridge installed. The version should be 11.0.0. | ___ Initials |

To install Oracle Cartridge:

1. Open the **Installers** folder on the Installation CD.
2. Double-click **SetupCartridge.exe** file within the **CS_Oracle_Cartridge_11.0.0** folder. The **Cs Cartridge Version "11.0.1.207" installation** dialog box appears.
3. Enter service name and password for 'sys' user in the **Oracle Service** section.
4. Click the **OK** button. The **Select Oracle home directory** dialog box appears.
5. Click the **OK** button. After a few seconds, a success message appears.
6. Click the **OK** button. The Oracle Cartridge User Guide and a text file appears.
7. Close the user guide. Also close the text file that opens along with the user guide.

### Configuring IIS and ASP on Web Server

ON WINDOWS 2000 SERVER PLATFORM

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A folder "Inetpub" is created in the drive containing the OS. The ASP page test1.asp is displayed in the web browser. | ___ Initials |

To configure IIS and ASP on Windows 2000 Server system:

1. Click the **Start** button in the Windows task bar and select **Settings** >**Control Panel**. The **Control Panel** window appears.

2. Click **Add/Remove Programs** in the **Control Panel** window.

3. Click **Add/Remove Windows Components**.

4. Select **Internet Information Services** in the Wizard window.

5. Click **OK.** An Inetpub folder will be created on your hard drive.

6. Open the Inetpub folder and find a folder named **wwwroot**.

7. Create a new folder, such as "MyWeb", under wwwroot.

8. Use a text editor to write some ASP code, save the file as "test1.asp" in the folder you created in step 7. The installation program will add a new icon with the IIS symbol on your task bar.

9. Click the icon and press the **Start** button in the window that appears.

10. Open your browser and type "http://localhost/MyWeb/test1.asp", to view your first ASP page.

ON WINDOWS 2003 SERVER PLATFORM

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Manage Your Server wizard should now show the Application Server role installed.<br><br>A folder "Inetpub" is created in the drive containing the OS.<br><br>ASP pages should run in web browser. | ___ Initials |

To configure IIS and ASP on Windows Server 2003 system:

1. Open **Administrative Tools** and select **Manage Your Server**. The **Manage Your Server** wizard appears.

   *NOTE: By default, the Manage Your Server wizard appears by default when the system starts.*

2. Click **Add or Remove a Role**. The **Configure your wizard** dialog box appears.

3. Click **Next**.

4. Select **Application Server** role and click **Next**.

5. Select **Enable ASP.NET** and click **Next**. If the wizard requests the Server 2003 CD, insert the CD and let it run until it finishes.

6. Click the **Finish** button. The **Manage Your Server** wizard should now show the Application Server role installed.

7. Add the application server.

   a. Click **Start** > **Settings** > **Control Panel**. The **Control Panel** window appears. Select to show the Control Panel items, if prompted.

   b. Double-click **Add/Remove Programs**.

   c. Click the **Add/Remove Windows Components** button and select (double-click to open/navigate) **Application Server >Internet Information Services (IIS)>Internet Information Services Manager** under the entry. Make sure the check mark is in a white box, indicating this component is (or will be) installed.

   d. Click **OK** for the components and in the main display then click **Next**.

   e. Click the **Finish** button when the components are configured and close any open windows from this section of the install.

8. Expand **Internet Information Services (IIS) Manager** in the directory structure displayed on the left pane. Your computer name will be displayed under **Internet Information Services (IIS) Manager**.

9. Expand your computer name to display the **Web Sites** folder.

10. Expand the **Web Sites** folder to display the **Default Web Site** icon.

11. Ensure that IIS is running. To verify this, right-click on the **Default Web Site** icon to display a pop-up menu. The Start menu item should be disabled in the pop-up menu. If not, click **Start** to run IIS.

12. Click the **Web Service Extensions** folder in the **Internet Information Services (IIS) Manager**. Here you may see that Active Server Pages are prohibited.

13. Highlight **Active Server Pages** and click the **Allow** button, if ASP is not already allowed. ASP is now active.

14. Enable parent paths for ASP application virtual folders.

   a. Go to **Start** >**Programs >Administrative Tools >Internet Information Services (IIS) Manager**. IIS window appears.

   b. Expand the node with the name of your computer. The **Web Sites** folder is displayed.

   c. Expand the **Web Sites** folder. The **Default Web Site** icon is displayed.

   d. Expand the **Default Web Site** icon.

   e. Right-click a virtual directory and select **Properties**. The **Properties** dialog of the virtual directory is opened.

   f. Select the **Virtual Directory** tab.

   g. Click the **Configuration** button. An **Application Configuration** dialog box is displayed.

   *NOTE: If the Configuration button is not enabled, click the Create button to enable the Configuration button.*

h. Select the **Options** tab.

i. Select the **Enable Parents** folder or **Enable parent paths** checkbox.

j. Click **OK** to save and close the **Application Configuration** dialog box.

k. Ensure that the **Write** check box is selected in the **Home Directory** tab of **Sample Properties** dialog box.

l. Click **OK** to close the **Properties** dialog box.

**Installing Chem & Bio Draw Ultra**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:   Y:   N: | Chem & Bio Draw Ultra 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install the Chem & Bio Draw Ultra 10:

1. Double-click the **install.exe** file in the installation folder. The welcome screen of ChemDraw Ultra 10.0 Installation Wizard appears.

*NOTE:  You may also be prompted to Activate ChemDraw 10.0 during the installation. At this point you can choose to activate the product then or after installation. You will need your registration code to register.*

2. Click **Next**. The page for selecting the applications to be installed appears.

3. Disable the **E-Notebook Std 10.0** check box so that it is not installed.

4. Click **Next**. The **Ready to Install** page appears.

5. Click **Begin**. The **Welcome to CambridgeSoft® ChemDraw Ultra 10.0** page appears.

6. Click **Next**. The **License Agreement** page appears.

7. Read the license agreement. If you agree with the terms and conditions, accept the agreement and click **Next**. The **Setup type** page appears.

8. Ensure that **Complete** option is selected and click **Next**. The **Ready to Install the Program** page appears.

9. Click **Install**. The installation starts.

10. Click **Finish** when the installation is complete. The **Installation Complete** page appears.

11. Click **Finish**. A message box appears and prompts you to reboot the system.

12. Reboot the system.

NOTE: *Be sure to activate Chem & Bio Draw Ultra 10 after installation is complete, if you had not done so already.*

**Installing Chem & Bio Office Enterprise Core**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Chem & Bio Office Enterprise Core 10 is installed and appears in Control Panel >Add or Remove Programs. Menu items, such as Database Creation Scripts and Server Configuration Tool, appear on clicking Start >Programs > ChemOffice Enterprise 2008. | ___ Initials |

NOTE: *If Reports.EXE RPTSERVICE is running, stop it now. You may restart it after the Core application and database updates are completed.*

To install Chem & Bio Office Enterprise Core 10:

1. Locate the **Setup.exe** file for Chem & Bio Office Enterprise Core 10 and double-click the file. The welcome page of **CambridgeSoft ChemOffice Enterprise Core 10** wizard appears.

2. Click the **Next** button in the welcome page. The page for license agreement is displayed.

3. Read the license agreement and if you wish to continue, accept the agreement and click the **Next** button. The next page for customer related information is displayed.

4. Specify the user name and organization. Specify who will use the application in the **Install this application for** section.

5. Click **Next**. The next page showing the installation path appears.

6. Specify the install path (the default is recommended) and Oracle service name. Then, click the **Next** button. The **Select or Create A User** page appears.
7. Specify the username and password for the user to be created or use an existing user. Click **Next** to display the page for beginning the installation.

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*NOTE: When a validation success message appears, click OK.*

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8. Click the **Install** button. The **Installing** dialog box is shown, and a progress bar tracks the installation.
9. Click the **Finish** button when the installation is completed. The wizard is closed.

---

*NOTE: After Chem & Bio Office Enterprise Core 10 is installed, you can access the Server Configuration tool by clicking Start > Programs > ChemOffice Enterprise 2008 > Server Configuration Tool. This tool allows you to configure the ini file settings. For example, you can specify the Oracle service name and date format in this tool.*

---

TESTING THE INSTALLATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | When you type the URL for the localhost in your web browser, the home page of ChemOffice Enterprise appears and displays the "Sample" link. | ___ Initials |

To test whether Chem & Bio Office Enterprise Core 10 was successfully installed:

1. Open Internet Explorer and type the URL for the localhost. (Example. http://servername/)
2. Click **Sample** database in the **ChemOffice Enterprise Databases** section.
3. Run a structure find query. If the product is activated, the query will run properly and results will be displayed.

**Configuring LDAP**

Lightweight Directory Access Protocol (LDAP) is a protocol for querying and modifying a set of objects with similar attributes. For example, LDAP can be used for querying the database of users and authenticate them. LDAP is installed by default when you install Chem & Bio Office Enterprise Core 10. However, you need to configure LDAP before using it.

To configure LDAP:

1. Open the COEFrameworkConfig.xml located at: C:\Documents and Settings\All Users\Application Data\ChemOffice Enterprise11.
2. Ensure that in the *sso* configuration section, the default provider is set to *coeldap*.

*NOTE: In order to use COELDAP or SingleSignOn (sso), you will need to have ODP.net 2.0 installed.*

3. Review the list of exempt users and add users to the list, if desired.
4. Enter the Oracle service name in the *datasource* field. This field appears in the *validate user connection* section.

*NOTE: At present, LDAP is setup for the camsoft domain. This will need to be changed to match the local domain of the customer.*

5. Enter user information. This is configured for an Exchange server and will need to be updated if you are using a different type of server for LDAP.
6. Open the chemoffice.ini file and change the authentication mode from *cs_security* to *COELDAP*.

**Setting up cs_security**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | A log file opens after the installation is over. The log file shows no connection errors. The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To set up cs_security:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the link *click here* corresponding to the bullet item for creating CS Security schema. A command prompt window appears.

   OR

   Browse to <webroot>\ChemOffice\ cs_security\config\Oracle_Install_Scripts\ create_blank_cs_security_DB. The directory with security files appear. Double-click the file **Create_cs_security.cmd**. A command prompt window appears.

2. Press any key to continue and enter your Oracle service name and press Enter.

3. Answer the rest of the questions; press enter to accept the defaults (shown in parentheses). After answering the final question the upgrade of the cs_security database in Oracle will begin. When the script execution is complete, a log file opens in Notepad. Check the log file for connection errors. If there are no connection errors, close the log file (this closes the command prompt as well).

*NOTE: CambridgeSoft® recommends saving this log file for future reference in an accessible location.*

*NOTE: For information about your Oracle Service Name, see your Oracle DBA or consultant.*

*NOTE: The password for Oracle is hidden from the users. This is applicable for all applications.*

4. Browse to <webroot>/ChemOffice/ cs_security/config/.The directory appears.

5. Double-click the **cs_security.udl** file to open the **Data Link Properties** dialog box.

6. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator. The data source name is visible after data entry.

7. Enter oracle as the password and click **Test Connection**. A success message appears.

8. Click **OK** on the success message box to close it.

9. Click **OK** on the **Data Link Properties** dialog box to close it.

10. Open the file <webroot>/ChemOffice/config/chemoffice.ini and ensure that the following setting exists:

CS_SECURITY =1 in [GLOBALS] section.

11. Save the **chemoffice.ini** file and restart your computer.

TESTING THE INSTALLATION OF GLOBAL SECURITY

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | When you type the URL of the localhost in your web browser, the global login page of ChemOffice Enterprise appears. You are able to login with *cssadmin* as your username and password. | ___ Initials |

To test the installation of global security:

1. Open Internet Explorer and enter http://IIS_SERVER_NAME. The global Login page appears.
2. Log in using the username cssadmin and the password cssadmin. The global security page opens and you are successfully logged in.

REPORT CONFIGURATION

Chem & Bio Office Enterprise 10 products use Reports.exe to write reports (such as for Inventory Enterprise and BioSAR Enterprise). If you do not plan to install and use this feature or if Reports is already set up, you can skip this step. However, if you want, you can perform this step as a test only.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Reports feature is configured and you can print reports using the ChemOffice Enterprise applications. | ___ Initials |

*NOTE: If the RPT Service is stopped, start the service now.*

To configure reports, do the following:

1. Log into the Web server computer as the administrator.

2. Click the reports.exe file at <webroot>/ChemOffice/ webserver_source/cfserverasp/RPT. The **RPT Software - Report Server** dialog box appears.

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*NOTE: You can also set up the report.exe file to run as a service so that it is automatically started when you log into the Web server.*

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3. Click the **Settings** button. The **RPT Software - Report Server Settings** dialog box appears.
4. Set a default PDF printer driver.

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*NOTE: If required, install Win2PDF (a PDF printer driver whose installer is found in the Installation folder of both Inventory Enterprise and BioSAR Browser.). Installing Win2PDF will give your users the ability to create reports in PDF format.*

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5. Click **OK**.

## Installing ChemACX

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | ChemACX 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install ChemACX 10:

1. Click the setup.exe file in the installation CD/folder. The ChemACX 10 installer launches and a welcome screen appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement. If you wish to continue, accept the agreement and click **Next**. The page for specifying customer information appears.
4. Complete the form and click **Next**. The page for specifying installation path appears.
5. Click **Next**. The page for beginning the installation appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete. The installation wizard closes.

CONFIGURING CHEMACX

Before configuring ChemACX, you need to choose the database it will use. ChemACX uses Access by default upon installation; so, if you want to use Access, you can skip this section and proceed to "Configuration" below. However, if you want, you can switch to an Oracle database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | The database to be used with ChemACX is selected. | ___ Initials |

**MOVING FROM ACCESS TO ORACLE**

To switch to Oracle database:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Click the **Oracle** radio button in the **Application Settings** section.
3. Click the **Save Configuration** button and close the window.

**MOVING FROM ORACLE TO ACCESS**

To switch to Access database:

1. Open the **ChemOffice Enterprise 10 Configuration Tool** window.
2. Click the **MS Access** radio button in the **Application Settings** section.
3. Click the **Save Configuration** button and close the window.

**REQUIRED CONFIGURATION**

The following configuration allows users to have more integrated cs_security. For example, if they select Export to ChemInv under ChemACX, they will not have to log in again.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?: <br><br> Y: <br><br> N: | The applications to which ChemACX will export data are selected and are integrated with ChemACX. | ___ Initials |

To set export formats:

1. Open the acxconfig.ini located at: <webroot>\ChemOffice\ChemACX\config\.
2. Set the following values to "True":
   - EXPORT_TO_EXCEL
   - EXPORT_TO_WORD
   - EXPORT_TO_CHEMINV
3. Save and close the acxconfig.ini file.

*NOTE: To enable the Export to Excel feature on Windows Server 2003 platform, perform the following tasks:*
*- In the dcomcnfg.exe file, provide "custom access permissions" as well as "custom launch permissions" to a local administrator, such as camsoft_admin.*
*- Use the local administrator user for anonymous access to the "ChemACX" virtual folder in IIS manager.*

To integrate ChemACX with Global Security (cs_security):

1. Open the cfserver.ini configuration file located at:
<webroot>\ChemOffice\ChemACX\config\.
2. Set the following value to "1" (true): USE_CS_SECURITY_APP
3. Save and close the cfserver.ini file.

**Installing and Upgrading ChemACX Database**
You can install or upgrade to either an Oracle or Access database. Choose one of the following options and proceed to the section in this document as indicated for further set of instructions:

- Install/Update Version 9.5 for Oracle. Go to "Installing ChemACX Database 9.5 for Oracle" on page 23.

- Install/Update Version 9.7 for Access. Go to "Installing/Upgrading ChemACX Database to ChemACX 9.7 for Access" on page 25.

---

*NOTE:  You may switch between databases and their different versions. To switch between Oracle and Access databases, refer to "Configuring ChemACX" on page 20.*
*The procedure for installing a different version of Oracle or Access database will be similar to the procedure mentioned in the following sections.*

---

INSTALLING CHEMACX DATABASE 9.5 FOR ORACLE

The installation of ChemACX database for Oracle is in two parts: data import and indexing.

The import process can take between two and six hours depending on the Oracle environment. The installation script will require you to approve the import process and provide additional information as noted in the section below (this will take about 30 minutes). Responding to the prompts when they appear will ensure the install/update proceeds as quickly as possible.

After the import completes, Oracle Cartridge will automatically start creating the indexes, which may take up to two hours.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Oracle Cartridge automatically starts creating indexes. | ___ Initials |

*NOTE: If you are updating the database, you may wish to make a backup of the pre-existing database as the update process will remove the current database.*

*NOTE: Ensure that you have selected the appropriate Oracle ChemACX options under the section "Configuring ChemACX" on page 20 (the settings can be modified after this section has been completed if required).*

*NOTE: You may need to confirm the Registration and Inventory user grants privileges on the ChemACX database as they are typically granted in an installation step that follows this one. If you encounter any issues, report them to the appropriate CambridgeSoft® resource.*

To install ChemACX database 9.5 for Oracle:

1. Navigate to the following folder in the ChemACX 9.5 Database for Oracle CD (or installation files:

<Install File Folder>\ChemACXOra95\Oracle_Install_Scripts\

2. Run the script as specified below:

   • For a new installation, run Import_ChemACXData.cmd

   *NOTE: You can also run the script through ChemOffice Enterprise 10 Database Creation Guide. The link to the script is provided corresponding to the bullet item on creating ChemACX schema.*

- To update, run UpdateTo_95.cmd

---

*NOTE: If desired, create a backup of the previous version as the script will overwrite the existing database.*

---

3. Press any key to continue, enter the target Oracle service name and press Enter/Return. The installation begins its initial setup of the ChemACX 9.5 database. Within 30 minutes, you will be asked for the folder path location of the chemacxdb95.dmp file that contains the ChemACX data.
4. Enter the full path and filename with extension for this file, which will reside in a <Install File Folder> (or on the Installation CD) and press Enter. The install process continues to completion.

---

*NOTE: The process can take a number of hours.*

---

To confirm that there were no errors in the install, view the command prompt screen and the log file for the install/update located in the following folder:

 <Install File Folder>\ChemACXOra95\Oracle_Install_Scripts\SQL\

The log file will have recent Date Modified and a filename such as log_update_chemacxdb.txt

INSTALLING/UPGRADING CHEMACX DATABASE TO CHEMACX 9.7 FOR ACCESS

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |
| Successfully Executed?: <br><br> Y: <br><br> N: | The ChemACX database for Access is upgraded to version 9.7. | ___ Initials |

---

*NOTE: The highest version of ChemACX for Oracle is 9.5.*

---

Insert the ChemACX 9.7 Database CD and run the ChemACX Database installer file: setup.exe. The installer will launch and open an HTML Web page to direct the installation that has the header ChemACX 9.7 Database Installation Instructions.

*NOTE: If desired, create a backup of the previous version as this will overwrite the existing database.*

Do one of the following:

- To perform an upgrade from a previous installation of ChemACX, follow the steps mentioned in the ChemACX 9.7 Database Installation Instructions, which for this case are also noted in "Upgrade to ChemACX 9.7 for Microsoft® Access".
- To perform a new install of ChemACX, follow the steps mentioned in the topic "New installation of ChemACX 9.7 Database".

**UPGRADING TO CHEMACX 9.7 FOR MICROSOFT® ACCESS**

Update is only required if a pre-existing version of the ChemACX database exists already.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | The ChemACX database for Access is upgraded to version 9.7. | ___ Initials |

To update to ChemACX 9.7:

1. Determine the location of the database files. The default location for the files is c:\ChemOffice_data\ChemACX.
2. Backup the existing files in the default directory.
3. Click **chemacx.exe** in the ChemACX 9.7 Database Installation Instructions HTML Web page to extract the files into your directory (choose to Run or Save and accept any warnings or navigation prompts). By default, the files will be extracted to "c:\ChemOffice_data\ChemACX", but you may change this path as desired.
4. Choose to overwrite the files and perform an IIS reset at the end of the installation. Close the unzip/setup window manually if it remains open.
5. Open ChemACX for Chem & Bio Office Enterprise application. The record count should read 437,930.

**NEW INSTALLATION OF CHEMACX 9.7 DATABASE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | ChemACX 9.7 database is installed. | ___ Initials |

To install a new ChemACX 9.7 database:

1. Open the ChemACX 9.7 Database Installation Instructions HTML page.
2. Click **chemacx.exe** to extract the files into your directory. By default, the files will be extracted to "c:\ChemOffice_data\ChemACX", but you may change this path as desired. The C:\ChemOffice_data\chemacx\ folder is created with the ChemACX 9.7 data.
3. Choose to perform an IIS reset at the end of the installation.
4. Open the ChemACX application. The application will launch with no problems and the record count will read 437,930.
5. Make sure that the database files in the install location are not read-only. To do this:
   a. Right-click on the files (.mdb, .msi, .mst) and select Properties.
   b. Make sure that the Read-only checkbox is not selected.
6. Ensure a Local Administrator user, such as camsoft_admin, has access to the custom access permissions, and the custom launch permissions.
7. Make sure that the same Local Admin user, such as camsoft_admin, is used for Anonymous access to the ChemACX virtual folder in the IIS manager. To do this:
   a. Launch IIS manager
   b. Browse to **Server** > **Web Sites** > **Default Website** > **ChemACX**. Right-click and select Properties.
   c. Select the **Directory Security** tab.
   d. Select **Edit** under **Authentication and Access control**.
   e. Browse or enter the local administrator user name and password for the authentication methods. To enter the username and password, ensure that **Enable anonymous access** is checked. (Example: camsoft_admin and oracle)
8. Browse to: <webroot>\ChemOffice\ChemACX\config\.
9. Double-click the ChemACX.udl file.

10. Make sure that the UDL is pointing to the ChemACX database you just moved (by default, it is at: C:\ChemOffice_data\ChemACX\ChemACX.mdb).

*NOTE: You may wish to use the same Local Administrator account name and password from the previous step to test the connection.*

11. Click **Browse** and browse to the location of ChemACX.mdb file if the default location is incorrect.

If the system did not automatically perform an IISRESET during one of the previous steps in this section, perform the IIRESET now.

TESTING THE INSTALLATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to search the ChemACX database and export the results to Excel. | ___ Initials |

To test the ChemACX 9.7 database installation:

1. Click the ChemACX link on the Chem & Bio Office Enterprise homepage.
2. Search for a compound in the ChemACX database. A list of compounds appears.

*NOTE: For help in searching, see the ChemACX User Guide.*

3. Click the **Details** button for one of the structures displayed. Tabs for vendor information will be included in the resulting display.
4. Click a vendor name.

*NOTE: The vendor you select must sell the item you selected.*

5. Add the compound to your Shopping Cart. For details, see ChemACX User Guide > Viewing a Record and Using the Shopping Cart in the User Guide.

6. Click one of the View Shopping Cart or Shopping Cart link/icons. The shopping Cart is displayed and contains the item(s) you added to the Shopping Cart

7. Export your shopping cart to Excel. Shopping cart is exported into Excel (To learn how to export, see the ChemACX User Guide).

8. Follow the details to access and save or open the Excel file.

---

*NOTE: If you are able to open the Excel file, it means that the installation is successful.*

---

**CORRECTING A 500 ERROR**

When trying to export to Excel, Word, or Access you may receive a *500* error in the browser. To rectify the error, ensure that you are using the identical local administrator user for the *Anonymous* access to the *ChemACX* virtual folder in IIS manager. By default, the local administrator user is *camsoft_admin*.

## Installing Registration Enterprise

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|  |  |  |
| Successfully Executed?:  Y:  N: | Registration Enterprise 10 is installed and appears in Control Panel> Add or Remove Programs. | ___ Initials |

To install Registration Enterprise 10:

1. Locate the **Setup.exe** file for Registration Enterprise 10 and double-click the file. The Welcome page of the installation wizard appears.

2. Click the **Next** button in the Welcome page. The license agreement page appears.

3. Read the license agreement and if you wish to continue, accept the agreement and click the **Next** button. The page for specifying customer related information appears.

4. Specify the user name and organization.

5. Specify the user who will use the application.

6. Then click the **Next** button. The page for specifying the installation information appears.

7. Enter the Oracle service name and click the **Next** button. The page for beginning the installation appears.

8. Click the **Install** button. A command prompt window will open to perform an iisreset.

9. Click the **Finish** button on the Installation wizard.

CREATING REGISTRATION ENTERPRISE DATABASE (SCHEMA)

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file appears and displays that the Registration Enterprise database tables have been created. | ___ Initials |

To create the Registration Enterprise database schema:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the link *click here* corresponding to the bullet item for creating Registration System schema. A command prompt window appears.

   OR

   Navigate to <webroot>\ChemOffice\chem_reg\config\oracle_install_scripts\ and execute the file Create_New_ChemReg_DB.cmd. A command prompt window is opened that notes it will update the Registration database to the latest version.

2. Press any key to continue.

3. Enter the information for the items below. After completing each item, press Enter/ Return to continue.

---

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value, the default is used.*

---

   a. Enter the target Oracle service name.

   b. Enter the Oracle major version number; either 9 or 10.

   c. Enter the name of an Oracle account with system privileges (system).

   d. Enter the Oracle account password (manager2). A text log file opens automatically when the update script has completed.

4. Close the log file and the command prompt window if it does not close.

CONFIGURING REGISTRATION ENTERPRISE
**CONFIGURING REGISTRATION ENTERPRISE UDL**

Configuring Registration Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The reg.udl file successfully connects to the Oracle database. | ___ Initials |

To define the data source in the Registration Enterprise UDL file:

1. Browse to: <webroot>\ChemOffice\chem_reg\config\
2. Double-click the reg.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

**SPECIFYING THE DATA SOURCE IN THE CS_SECURITY.UDL FILE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cs_security.udl file successfully connects to the Oracle database | ___ Initials |

To specify the Data Source in the cs_security.udl file:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.

3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

**SETTING UP THE CFSERVER.INI. FILE**

*NOTE: If you are planning to install more ChemOffice applications and thereafter test the installations then you can perform the following steps after installing all the required applications.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini. file:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Enter the Oracle service name.
3. Click the **Save Configuration** button to save the changes.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to login to Registration Enterprise with username: T5_85 and password: T5_85. You are also able to add compounds to the Registration Enterprise database and search for the compounds later on. | ___ Initials |

To test the installation of Registration Enterprise:

1. Log into the Chem & Bio Office Enterprise using the following username and password:

   - username: T5_85
   - password: T5_85

2. Add a compound to the temporary table. To add a compound:

   a. Click the **Main Menu** link under the **Registration Enterprise** section.

   b. Click the **Add Compound** link under the **Add to Temporary** section. The **New Compound Submission** form appears.

   c. Right-click in the structure draw area and select the **Structure** >**Convert Name To Structure** option. The **Insert Structure** dialog box appears.

   d. Type the name of a compound and use the tool to insert the chemical structure drawing into the structure draw area. (Example: fluorescein)

   *NOTE: Disable the Paste name below Structure checkbox.*

   e. Complete other items in the form. If required, click **Add Record** button. A success message appears.

   f. Click **OK** on the success message box to close it.

3. Register the compound.

   a. Return to the home/main page for the Registration Enterprise section (Example: Click the Main Menu button in the open form).

   b. Click the **Review/Register** link under the **Registration** section.

c. Click the **Mark Record** button for the record you added. Then toggle to Unmark the record (repeat as needed). Check that this impacts the count shown at the top of the page in the Marked Hits link.

d. Click the **Review/Register** button for the record you added.

---

*NOTE: This toggles the display from the list view to the details view.*

---

e. Review the information to ensure it is correct. Then click the **Register** button.

f. Ensure that a confirmation message appears and displays that the compound was successfully registered.

4. Search for the compound in the Registration Database.

a. Return to the home/main page of Registration Enterprise (Example: Click the Main Menu button in the open form).

b. Click the **Search** link under the **Query and Reporting** section.

c. Search for the compound you registered earlier, or a sub-structure of that compound. Enter the structure and click the Search button. (Ex. Search for a Benzene ring, or one with an OH group on it). If your search criteria match the compound you entered it will be returned in the results.

ROLES AND USERS

A set of roles and users were already created by default during the installation when you created the Registration Enterprise schema. The following table shows the list of roles and users:

| Username | Password | Role |
| --- | --- | --- |
| T1_84 | T1_84 | BROSWSER |
| T1_85 | T1_85 | BROSWSER |
| T2_84 | T2_84 | SUBMITTER |
| T2_85 | T2_85 | SUBMITTER |
| T3_84 | T3_84 | SUPERVISING_SCIENTIST |
| T3_85 | T3_85 | SUPERVISING_SCIENTIST |
| T4_84 | T4_84 | CHEMICAL_ADMINISTRATOR |

| Username | Password | Role |
| --- | --- | --- |
| T4_85 | T4_85 | CHEMICAL_ADMINISTRATOR |
| T5_85 | T5_85 | SUPERVISING_CHEMICAL_ADMI N |
| T5_84 | T5_84 | SUPERVISING_CHEMICAL_ADMI N |
| T6_85 | T6_85 | PERFUME_CHEMIST |
| T6_84 | T6_84 | PERFUME_CHEMIST |

ROW LEVEL SECURITY

The Row Level Security feature in Registration Enterprise comprises three parts: The Project_People table, duplicate checking, and a predicate function.

**THE PROJECT_PEOPLE TABLE**

This table allows users to be associated with projects. The table is managed via the registry tables/ projects interface; however, it is available only for users with roles that have the privi¬lege "Manage_People_Project" associated with them. After installation the role, "supervising_chemical_admin" has this privilege.

*NOTE:  It is advised that this privilege NOT be given to any other role as it contains the power to allow users to view registry and the point of the feature is to tightly control this.*

**DUPLICATE CHECKING**

Registration Enterprise performs duplicate checking on a compound and project basis. Compounds that are duplicates within the system but not duplicates within a project will be added to a duplicates table. However the registrar will not see a duplicate window since the compound is not a duplicate within the project. Administrators ("supervising_chemical_admin"- e.g. T5_85 user) with the privilege "Manage_System_Duplicates" will see a button on the Main page "view duplicates", which allows them to view all the duplicates across projects that exist in the system.

**PREDICATE FUNCTION**

The predicate function filters any select statement run against it so that only records where the projects to which the current user has access will be returned. Once the function is installed you can view it in dba studio when logged in with DBA privileges under FUNCTIONS/REGDB/ PEOPLE_PROJECT_RLS_FUNCTION.

There is a policy to tables, referenced in the function, to enforce this action.

---

*NOTE:  The policies are in force no matter how you try to access the data because the policies are applied to the Oracle schema rather than Registration Enterprise.*

---

*NOTE:  The REGDB and SYSTEM users have been specifically excluded from the policy. Therefore, the REGDB and SYSTEM users can allow qualified users to view all information in the registry. The REGDB user must have all privileges to the data as the REGDB user in this RLS mode is the user that actually commits the data to the registry and to the temporary tables.*

---

*NOTE:  Every user, including admin roles in chem_reg ("supervising_chemical_admin") must be EXPLICITY assigned to a project, or they will not see that projects data. Not doing so can lead to the wrong conclusions - e.g. data is missing.*

---

*NOTE:  Upon installation, the test users t5_85 is assigned to the unspecified project plus since any record entered into the system where an appropriate project cannot be found is assigned to unspecified. Whatever you do DO NOT remove the unspecified project.*

---

**INSTALLING ROW LEVEL SECURITY**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Row level security is installed and you are able to associate users with projects, perform duplicate checking and filter the results of select statements. | ___ Initials |

To install row level security:

1. Execute the file Enable_ROW_LEVEL_SECURITY.cmd file located at: <webroot>/ChemOffice/chem._reg/config/oracle_install_scripts folder

2. Open cfserver.ini file located at <webroot>/ChemOffice/chem._reg/config/ and update the following settings as shown:
   - PRIMARY_STRWHERE = COMPOUND_PROJECT
   - PROJECT_LEVEL_ROW_SECURITY=1
   - USE_SESSION_RECORD_COUNTS=1
3. Save the cfserver.ini file and close it.
4. Perform iisreset.

**UNINSTALLING ROW LEVEL SECURITY (DISABLING POLICIES, WHEN REQUIRED)**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | Row level security is uninstalled. | ___ Initials |

To uninstall row level security:

1. Execute the file Disable_ROW_LEVEL_SECURITY.cmd
2. Open CFserver.ini and update the following settings as shown:
   - PRIMARY_STRWHERE = COMPOUND_ONLY
   - PROJECT_LEVEL_ROW_SECURITY=0
3. Restart the Registration Enterprise application, if it was already running or perform iisreset

**Installing Inventory Enterprise**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | Inventory Enterprise 10 is installed and appears in Control Panel > Add Remove Programs. | ___ Initials |

To install Inventory Enterprise 10:

1. Launch the **Setup.exe** file for the Inventory installation. The welcome page of the installation wizard appears.
2. Click **Next** in the welcome page. The license agreement page appears.
3. Read the agreement and accept if you wish to continue, accept the agreement and click the **Next** button. The page for customer information appears.
4. Enter the appropriate information and click **Next**. The page for specifying installation path and Oracle service name appears.
5. Specify the Oracle service name and click **Next**. The page for beginning the installation appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete.

CREATING INVENTORY ENTERPRISE DATABASE

For this step, keep in mind that the menubar.ini file is not backed-up by the installer. Therefore, if you have not made an archive of your entire <webroot> or associated install folder, you may wish to make a backup at this time.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | A log file appears and notifies that Inventory Enterprise database tables have been created. | ___ Initials |

To create Inventory Enterprise database:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the *test database* link corresponding to the bullet item for creating Inventory Manager schema. A command prompt window appears.

   OR

   Locate the folder: "<webroot>\ChemOffice\ChemInv\config\oracle_install_scripts\Create_test_ChemInv_DB\" and double-click the file: Create_test_ChemInvDB.cmd. A command prompt window opens and notifies that it will create the Chemical Inventory database.
2. Press any key to continue.

3. Enter the information at the prompt for the items below; after completing each item press Enter/Return to continue:

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used.*

- Enter the target Oracle service name.
- Enter the name of an Oracle account with system privileges (system).
- Enter the above Oracle account password (manager2). A text log file is opens automatically when the update script has completed.

4. Close any open log file or command prompt windows.

If you have made any changes to the Inventory INI files, manually (or using a 3rd party software tool) merge previous changes to the modified files into the new version of the files. The installation will have created a backup of your original files.

*NOTE: When comparing files, a file comparison tool may show a line as new/changed since that line appears in a different location in the file. Check whether lines being merged into the new file from the old file are placed in the correction section of the file and they appear only once in that section.*

The upgrade install assumes that the install drive is the C drive, thus if you are not installing on the C drive you will need to check any folder paths and restore them to the drive you are using.

The newly written files are:

- cheminv.ini
- cfserver.ini
- invacx.ini (not backed-up automatically at this time)
- invconfig.ini
- invreg.ini
- menubar.ini (not backed-up automatically at this time)

The backups of these files are:

- cheminv.001
- cfserver.001
- invconfig.001
- invreg.001

The files are located in the <webroot> folder in a path for Inventory such as:

C:\Inetpub\wwwroot\ChemOffice\ChemInv\config\

**DEFINE THE DATA SOURCE IN THE CS_SECURITY.UDL FILE**

You need to define the data source in the cs_security.udl file so that you can log into the Inventory Enterprise application.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To define the Data Source in the cs_security.udl file:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

7. Browse to: <webroot>\ChemOffice\chemInv\config\
8. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
9. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
10. Enter *oracle* as the password and click **Test Connection**. A success message appears.
11. Click **OK** on the success message box to close it.
12. Click **OK** on the **Data Link Properties** dialog box to close it.

**CONFIGURE INVENTORY ENTERPRISE UDLS**

Configuring Inventory Enterprise UDLs involves defining the data source in the UDL files and testing the connection to the database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cheminv.udl file successfully connects to the Oracle database. | ___ Initials |

To define the data source in the Inventory Enterprise UDL files:

1. Browse to: <webroot>\ChemOffice\chemInv\config\
2. Double-click the cheminv.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the data source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

**SETTING UP THE CFSERVER.INI. FILE**

*NOTE: If you are planning to install more ChemOffice applications and thereafter test the installations then you can perform the following steps after installing all the required applications.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini. file:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Enter the Oracle service name.
3. Click the **Save Configuration** button to save the changes.

**CREATE A SYSTEM DSN**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A DSN for Inventory Enterprise is created and appears in the System DSN tab of the ODBC Data Source Administrator dialog box. | ___ Initials |

You need to create a system DSN for the report writer using ODBC Control Panel. To create a system DSN:

1. Click Start >Programs >Administrative Tools >Data Sources (ODBC). The **ODBC Data Source Administrator** dialog box appears.
2. Click **System DSN** tab.
3. Click **Add**.
4. Highlight **Oracle ODBC Driver**.

*NOTE: In Oracle 10g, this may be called OraDb10g_home# (Example: OraDb10g_home1)*

5. Click **Finish**. The **Oracle ODBC Driver Configuration** dialog box appears.
6. Fill in the following information in the **Oracle ODBC Driver Configuration** dialog box:
   - Data Source Name: Chem_Inv
   - Description: Chem_Inv
   - Service Name: <Oracle Service Name> for your target database. For information about your Oracle Service Name, see your Oracle database administrator.
   - User ID: cheminvdb2
7. Test the connection (using *cheminvdb2* user, and the default password *oracle*) to ensure it is successful.

8. Click **OK** in the **Oracle ODBC Driver Configuration** dialog box, and confirm that the System Data Source with the Name Chem_Inv now exists with the selected Driver.
9. Click **OK** to close the **ODBC Data Source Administrator** dialog box. The DSN is created and the connection test is successful.

**VERIFY THAT THE SERVER AND PATHS ARE ACCURATE**

To verify that the server and paths are accurate:

1. Browse to and open the following file with a text editor:

<webroot>\ChemOffice\chemInv\config\invconfig.ini

2. Ensure or set the INV_SERVER_NAME to point to the server hosting the Inventory Enterprise database.

---

*NOTE: INV_SERVER_NAME refers to the fully qualified domain name of the server, not the Oracle Service Name. For example, right-click My Computer and select Properties. Select the Computer Name tab and choose the full computer name or simple name if supported.*

---

3. Verify that the RPT_PATH entry agrees with the Chem & Bio Office Enterprise installation path. For example, the default is:

<webroot>\webserver_source\cfserverasp\RPT\

The files located here includes the Reports.exe application for the reports service.

4. Verify that the REPORT_DB_PATH entry agrees with the database path chosen in the installer (The default is: C:\ChemOffice_data\ChemInv\Cheminv_reports.mdb).

**SETUP BARCODE SUPPORT (OPTIONAL)**

Container barcodes facilitate recording of information about the containers. If barcodes have been assigned to containers in your enterprise, you can uniquely identify the containers with their barcodes and store information about them.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Tbarcode is installed and you can assign barcodes to the Inventory containers. | ___ Initials |

To enable barcode support, you will need to install TBarcode. To install TBarcode:

1. Browse to: <webroot>\ChemOffice\ChemInv\Installation\Tbarcode.
2. Double-click to launch the Tbarcode35_OCX.exe installer.
3. Click **Yes** to install. The license agreement appears.
4. Read the license agreement. If you wish to continue, click **Yes**.
5. Browse to destination folder and Click **Next**.
6. Click **OK** to finish the installation.

**SETUP ROW LEVEL SECURITY FOR INVENTORY (OPTIONAL)**

*NOTE:  Row Level security is also known as Location Based Security.*

Row Level security allows you to secure locations by excluding them from specific roles so that users with the specific roles are not able to access the excluded locations.

To set up Row Level security for Inventory Enterprise:

1. Execute the following command file:

C:\Inetpub\wwwroot\ChemOffice\ChemInv\config\
oracle_install_scripts\Create_blank_ChemInv_DB\AddRLS.cmd

2. Press any key to continue.
3. Enter the information at the prompt for the items below; after completing each item press Enter/ Return to continue:

   • Enter the target Oracle service name.
   • Enter the name of an Oracle account that can login as sysdba (sys)
   • Enter the above Oracle account password (manager2).

*NOTE:  Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used.*

4. Perform an IISRESET.

**TEST ROW LEVEL SECURITY**

IQ Summary

| Description | Expected Result | Actual Result |
| --- | --- | --- |
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | You are able to exclude locations from a role. | ___ Initials |

To test the installation of Row Level Security (RLS) in Inventory:

1. Open the Enterprise application and log in (example user: invadmin; example password: invadmin).
2. Click the following links:
   • Under Inventory Enterprise, click **Tasks**.
   • Under Security Management click **Manage Role Locations**. The **Select a Role** page appears.
   • Select a role and click **Next**. A list of locations that can be excluded appears.
   • Exclude any role as you wish and click **OK**.
   • Log off from Chem & Bio Office Enterprise.

*NOTE: If you wish to continue you will see any locations you have setup in a tree structure and will be able to choose locations to exclude the selected role from accessing.*

INTEGRATING WITH OTHER APPLICATIONS

Inventory Enterprise can be integrated with Registration Enterprise, ChemACX, and/or DocManager Enterprise. To integrate Registration Enterprise, DocManager Enterprise, and ChemACX with Inventory Enterprise, you need to update the invconfig.ini file and perform other application specific tasks that are mentioned in the following sections.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The inconfig.ini file lists the server names where Registration Enterprise, DocManager Enterprise and ChemACX is installed. | ___ Initials |

To update the invconfig.ini file:

1. Specify the name of the respective servers in the INV_SERVER_NAME key in the invconfig.ini file.

   *NOTE: The INV_SERVER_NAME for INV is also set in this file. The invconfig.ini file is located at <webroot>ChemOffice\ChemInv\config\.*

   *NOTE: The server names in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server names, select the check boxes corresponding to Inventory Integration under the Application Settings section in Server Configuration Tool and save the configuration changes.*

2. Ensure that the following settings are there in the invconfig.ini file:
 [CHEMACX]
SHOW_ACX_LOOKUP_LINK=1
SHOW_MSDX_LOOKUP_LINK=1
[DOCMANAGER]
SHOW_DOCMANAGER_LINK=1
3. Check other sections, such as CUSTOM_FIELDS and REPORTS for configuration changes.
4. Save the file and close it.

*NOTE: If you are not planning to integrate any of the following items set their x_SERVER_NAME to NULL in the invconfig.ini file: Registration Enterprise, DocManager Enterprise, ChemACX. Also, skip the following steps.*

The steps indicated in this section are specific to the application, which is to be integrated with Inventory Enterprise.

**INTEGRATE WITH REGISTRATION ENTERPRISE**

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | The ChemReg.udl file successfully connects to the Oracle database. You are able to add a compound to the temporary table of Registration Enterprise. | ___ Initials |

To integrate with Registration Enterprise:

1. Update ChemReg.udl.
   a. Browse to: <webroot>\ChemOffice\ChemInv\config\
   b. Double-click the **ChemReg.udl** file to open it. The **Data Link Properties** dialog box appears.
   c. Change the data source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
   d. Enter *oracle* as the password and click **Test Connection**. A success message appears.
   e. Click **OK** on the success message box to close it.
   f. Click **OK** on the **Data Link Properties** dialog box to close it.

2. Update invconfig.ini.
   a. Browse to and open with a text editor: <webroot>\ChemOffice\ChemInv\config\invconfig.ini.
   b. Change the REG_SERVER_NAME entry to point to the server hosting Registration System. This refers to the fully qualified domain name of the server, not the Oracle service name.
   c. Save and close the file. The file is updated.

   *NOTE: The server name in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server name, select the Registration check box corresponding to Inventory Integration under the Application Settings section in Server Configuration Tool and save the configuration changes.*

3. Update cfserver.ini
   a. Browse to and open with a Text Editor: <webroot>\ChemOffice\Chem_Reg\config\cfserver.ini
   b. Change POST_MARKED_SEND_TO_PAGE=NULL to POST_MARKED_SEND_TO_PAGE= http://IIS_SERVER_NAME/cheminv/gui/Import-From-ChemReg.asp. Where IIS_SERVER_NAME is the name of the IIS server that is hosting Inventory Enterprise.
   c. Save and close the file. The file is updated.

4. Create Registration integration views in the Inventory Enterprise schema.

a. Open to the folder: <webroot>\ChemOffice\ChemInv\con-fig\oracle_install_scripts\Create_blank_ChemInv_DB\sql\Update_Scripts\

b. Click the file: RegistrationIntegration.cmd.

c. Press any key to continue the execution of the Inventory – Registration database/view integra-tion update script.

d. Enter the target Oracle service name.

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used. Consult your DBA if you do not know the required information.*

e. Close the log file that appears when the file execution is complete.

To verify the integration, add a compound to the Registration Enterprise Temp table. If you see an error (and the compound is not added), drop the following two tables:

• csdohitlist
• csdohitlistid

After dropping the tables, restart the application (this will automatically recreate the tables); you should no longer see an error.

**INTEGRATE WITH CHEMACX**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The chemacx.udl file successfully connects to the Oracle database. | ___ Initials |

To integrate with ChemACX:

1. Update chemacx.udl.
    a. Browse to: <webroot>\ChemOffice\ChemInv\config\
    b. Double-click the **chemacx.udl** file to open it. The **Data Link Properties** dialog box appears.
    c. Do one of the following:
    • If you are using Microsoft® Access database, verify that the location of the ChemACX database (ChemACX.mdb) is correct by clicking **Test Connection**. A success message appears. Click **OK**.
    • If you are using Oracle database, change the data source to the name of your Oracle service.
    d. Click **OK** on the **Data Link Properties** dialog box to close it.

2. Update cfserver.ini.

    *NOTE: If you had used the Server Configuration Tool to integrate ChemACX then you need not perform this step.*

    *NOTE: You need to update the cfserver.ini file only if ChemACX is using Access database.*

    a. Browse to and open with a text editor: <webroot>\ChemOffice\chemacx\config\cfserver.ini.
    b. Set the USE_CS_SECURITY_APP parameter to 1 in the CS_SECURITY section.
    c. Save and close the cfserver.ini file.

3. Update invconfig.ini.

    *NOTE: You can also use the Server Configuration Tool to update the server name for ChemACX.*

    a. Browse to and open with a text editor: <webroot>\ChemOffice\ChemInv\config\invconfig.ini.
    b. Change the ACX_SERVER_NAME entry to point to the server hosting ChemACX. This refers to the fully qualified domain name of the server, not the Oracle service name.
    c. Adjust look-up link settings to the following (so you will see the ChemACX lookup link in Inventory):

- SHOW_ACX_LOOKUP_LINK= 1
- SHOW_MSDX_LOOKUP_LINK= 0
- MSDX_LOOK_AHEAD= 0

    d.  Save and close the file. The file is updated.

4. Update acxconfig.ini.

> *NOTE: If you had used the Server Configuration Tool to integrate ChemACX then you need not perform this step.*

    a.  Browse to: &lt;webroot&gt;\ChemOffice\chemacx\config\ and open the file acxconfig.ini in a text editor.

    b.  Set EXPORT_TO_CHEMINV="True"

    c.  Save the file and close it. The file is updated.

**UPDATE INVENTORY DATABASE FOR USE WITH CHEMACX 9.5 OR 9.7**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Inventory Enterprise database is updated for use with ChemACX 9.5 or 9.7. | ___ Initials |

You need to update the database for Inventory Enterprise with the vendors and units of measure that have not yet been deployed to the Inventory system, but reside in the latest release of ChemACX.

To update the database to ChemACX 9.5, execute the following script:

Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd

To update the database to ChemACX 9.7, execute the following script:

Update_ChemInvDB_9.0_for_ChemACX_9.7.cmd

If you receive an error in the log after executing the script, execute the scripts one at a time and use a modified version of the Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd script.

The workflow of the script executions would be as follows:

1. Update_ChemInvDB_9.0_for_ChemACX_9.1.cmd
2. Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd (modified; obtain from CambridgeSoft®)
3. Update_ChemInvDB_9.0_for_ChemACX_9.7.cmd To update the Inventory database for use with ChemACX 9.5 or 9.7:

To update the Inventory database:

1. Browse to the folder and files needed to update Inventory Enterprise 10 to use ChemACX 9.7 (you will need to have the ChemACX9.7 database folder in your install folder, or obtain it now.)

&lt;Informatics Install Folder&gt;\ChemACX96\ChemInv\con-
fig\oracle_install_scripts\Create_blank_ChemInv_DB\

2. Copy the following file "update_cheminvdb_9.0_for_chemacx_9.7.cmd" and the folder "sql".

---

*NOTE: You may also copy the entire Create_blank_ChemInv_DB folder and choose to only over-
write the files that appear in both the source and destination folders.*

---

3. Paste the file and folder copied in the previous step, into the target server in the following folder:

&lt;webroot&gt;\ChemOffice\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB\

This will overwrite any files from the update in the folder they are being copied into, leave the remaining files unchanged.

4. Double-click the following file just pasted into the folder mentioned in step 3:

update_cheminvdb_9.0_for_chemacx_9.7.cmd. If prompted with a warning, click **OK** to proceed.

5. Press any key to continue.

6. Complete the information indicated below when prompted; press Enter after each entry:

   • Enter the target Oracle service name.
   • Enter the name of an Oracle account with system privileges (default: system).
   • Enter the above Oracle account password (default: manager2).

The script is completed, and a log file is opened, the log file is:

LOG_Update_ChemInvDB_9.0_for_ChemACX_9.7.txt.

The log file should not contain errors.

---

*NOTE: If an error appears, contact CambridgeSoft® to determine whether all the ChemACX 9.5/9.7
data have been committed or obtain the modified SQL file described in the comments at the start of
this section and execute the scripts one at a time as specified.*

---

7. Close any open command prompt or log file.

**INTEGRATE WITH DOCMANAGER ENTERPRISE**

This section describes how to integrate Inventory Enterprise with DocManager Enterprise. You should test the integration after installing or upgrading DocManager. Instructions for installing Doc-Manager are provided later in this installation guide under "Installing DocManager Enterprise" on page 72. The test of DocManager will not pass until the product is installed and/or upgrade to the correct version (this steps only deals with DocManager integration from Inventory).

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The invconfig.ini file is updated to integrate DocManager Enterprise and display a link to DocManager Enterprise. | ___ Initials |

To integrate with DocManager Enterprise**:**

1. Browse to <webroot>\ChemOffice\Cheminv\config\
2. Open the invconfig.ini file with a text editor.
3. Change the DOCMANAGER_SERVER_NAME to point to the server hosting DocManager Enterprise.

   *NOTE:  This refers to the fully qualified domain name of the server, not the Oracle Service Name. If set to NULL Document Manager integration with Inventory Enterprise will be disabled.*

   *NOTE:  You can also use the Server Configuration Tool to update the server name for DocManager Enterprise.*

4. Set SHOW_DOCMANAGER_LINK to 1 to give any user who requires use of this integration the INV_MANAGE_LINKS privilege.
5. Save the file and close it. The file is updated.

**ENABLE PDF SUPPORT**

This section provides instructions on how to enable users with the ability to create PDF-formatted files. Enabling PDF support is optional and is not required for the installation.

The RPT report writer installed with the Inventory Enterprise can produce reports in four different formats: SNP (MS Access Report Viewer), RTF (Rich Text Format), XLS (Excel Workbook), and PDF.

Support for the PDF format requires a PDF printer driver to be installed on the server.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | You are able to create PDF-formatted files. | ___ Initials |

To enable users to create PDF-formatted files:

1. Browse to <webroot>\ChemOffice\ChemInv\Installation\win2pdf\.
2. Double-click w2pdfsetup.exe; follow the instructions in the installer.
3. Confirm the wind2pdf driver installation as follows:
   a. Open Control Panel and click **Printers and Faxes**.
   b. Right-click on Win2PDF printer.
   c. Select **Set As Default Printer**.
   d. Purchase a license and registration code from: http://www.daneprairie.com/
   e. Right-click the **win2pdf** printer and select **Properties**.
   f. Enter the license/registration code you purchased.
   g. Open Control Panel and click **Administrative Tools** >**Services**.
   h. Click the Reports Service and select to stop the Reports Service (RPTService)
   i. Browse to \ChemOffice_data\Cheminv folder and open the file ChemInv_Reports.mdb.
   j. Open the ReportFormats table and select the Available checkbox for the PDF format.
   k. Close Microsoft® Access, save as needed. The file is updated.
   l. Open the Control Panel and click **Administrative Tools** >**Services**.
   m. Click the Reports Service and select to restart the Reports Service (RPTService)

**INSTALL INVLOADER**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | InvLoader is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install InvLoader:

1. Click the setup.exe file. The welcome page of the installer wizard appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The Customer Information page appears.
4. Click **Next**. The **Destination Folder** page appears.
5. Choose the directory where you would like the application files installed. The default is: C:\ProgramFiles\CambridgeSoft®\InvLoader\
6. Click **Next**. The **Ready to Install the Program** page appears.
7. Click **Install**. The installation begins.
8. Click **Finish** when the installation is complete.

TESTING THE INSTALLATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to add compounds to an Inventory container from multiple applications, such as ChemACX and Registration Enterprise. | ___ Initials |

To ensure Inventory Enterprise was successfully installed:

1. Login in to the Chem & Bio Office WebServer using the following username and password:
   • Username: invadmin
   • Password: invadmin
2. Add a substance.

   *NOTE: For instructions on how to add substances, see "Creating a New Substance" in the Inventory Enterprise User Guide.*

3. Add a container.

   *NOTE: For instructions on how to add a container, see "Creating a New Container" in the Inventory Enterprise User Guide.*

4. Add a compound from ChemACX to a container.

> *NOTE: For instructions on how to add compounds, see "Creating a New Container" in the Inventory Enterprise User Guide.*

5. Add a compound from Registration System to a container.

> *NOTE: For instructions on how to create a barcode, see "Substance Tab" in the Inventory Enterprise User Guide.*

6. Create a Barcode Report.

> *NOTE: For instructions on how to add compounds, see "Print Label/Report" in the Inventory Enterprise User Guide.*

A set of roles and users were already created by default during the installation. Here is a table showing the list of roles and users:

| Username | Password | Role |
|---|---|---|
| invbrowser | invbrowser | BROWSER |
| invchemist | invchemist | CHEMIST |
| invreceiving | invreceiving | RECEIVING |
| invfinance | invfinance | FINANCE |
| invregistrar | invregistrar | REGISTRAR |
| invadmin | invadmin | ADMIN |

**Installing BioAssay Enterprise**

Before installing BioAssay Enterprise on your system, ensure that the following software are already installed:

- CambridgeSoft ChemOffice Enterprise Core 10.
- Correct version of Oracle client and OLEDB. For details, see "Verifying Oracle Database version" on page 6.
- SQLNet access to Oracle 9i or 10g database server.
- Inventory Enterprise 10.

*NOTE: Refer to the README file for BioAssay installation pre-requisites and BioAssay documentation for additional details on configuration settings.*

To install and use BioAssay Enterprise 10, you need to install both its server and client versions.

INSTALLING THE BIOASSAY SERVER

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file appears and notifies that the BioAssay database tables have been created. | ___ Initials |

To install the BioAssay server:

1. Execute the file Create_BioAssay_Database.cmd located at: <Installation folder>\Database Install\Full_Install
2. Press any key to continue.
3. Complete the information indicated below when prompted; press Enter after each entry:
   - Enter the target Oracle service name.
   - Enter Oracle major version.
   - Enter the name of an Oracle account with system privileges (system).
   - Enter the above Oracle account password (manager2).

*NOTE: The text in parenthesis for the prompts above refers to default values. Press Return/Enter without entering a value in order to accept the default.*

4. Close the log file that appears after the file Create_BioAssay_Database.cmd is executed.

INSTALLING BIOASSAY WEB SERVICE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | BioAssay Web service is installed. | ___ Initials |

To install BioAssay Web service:

1. Run the setup.exe file located at: <Installation folder>/WebServiceInstaller. The welcome page of BioAssayDAL WebServiceSetup wizard appears.
2. Click **Next**. The **Select Installation Address** page appears.
3. Click **Next**. The **Confirm Installation** page appears.
4. Click **Next**. The installation starts.
5. Click **Close** when the **Installation Complete** page appears.

CONFIGURING BIOASSAY ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | ASP.NET 2.0 is running. CSWDA virtual directory is created. The bioassayhts.udl file is successfully connected to the Oracle database. | ___ Initials |

To configure BioAssay Enterprise:

1. Ensure that ASP.NET 2.0 is running.
   a. Click **Start**>**Programs**>**Administrative Tools**>**Internet Information Services(IIS) Manager**. The **Internet Information Services(IIS) Manager** console appears.

b. Expand computer name of the local computer that is displayed in the left pane. The **Web Sites** folder is displayed.

c. Expand the **Web Sites** folder. The **Default Web Site** icon is displayed.

d. Right-click the **Default Web Site** icon and select **Properties**. The **Default Web Site Properties** dialog box appears.

e. Click the **ASP.NET** tab.

f. Select **2.0.x** in the **ASP.NET version** drop down list.

g. Click **OK** on the **Default Web Site Properties** dialog box to close it.

*NOTE: If you are using COE SingleSignOn then configure the Web.Config file for your BioAssay .NET Web service. The Web.Config file is located on the server computer at the following location: "C:\Inetpub\wwwroot\BioAssayDALWebService".*
*To configure the Web.Config file, edit the following entry appropriately: <add key="singleSignOnURL" value=""/>. For example, <add key="singleSignOnURL" value="http://localhost/COESingleSignOn/ SingleSignOn.asmx"/> ('Value' refers to the SingleSignOn web service).*

*NOTE: The Web.Config file is automatically installed on the server computer after you run "\WebServiceInstaller\setup.exe".*

2. Create virtual directory.

a. Copy the **CSWDA** folder located in the installation folder and paste it at: /inetpub/wwwroot

b. Open the IIS console.

c. Navigate to the **CSWDA** folder within **Default Web Site**.

d. Right-click the **CSWDA** folder and select **New**>**Virtual Directory** to display the welcome page of **Virtual Directory Creation Wizard**.

e. Click **Next**. The **Virtual Directory Alias** page appears.

f. Enter **CSWDA** in the **Alias** text box and click **Next**. The **Web Site Content Directory** page appears.

g. Browse to the **CSWDA** folder in \inetpub\wwwroot and click **Next**. The **Virtual Directory Access Permissions** page appears.

h. Enable the **Write** check box and click **Next**.

i. Click **Finish**.

3. Configure the CSWDA virtual directory.

a. Right-click the **CSWDA** virtual directory in the left pane of the IIS console and select Properties. The **CSWDA Properties** dialog box appears.

b. Click the **Create** button if **CSWDA** is not displayed in the **Application name** text box.

c. Click the **Configuration** button. The **Application Configuration** dialog box appears.

d. Click the **Options** tab.

e. Change the ASP script timeout value to 600 seconds or higher.

f. Click **OK** on the **Application Configuration** dialog box to close it.

g. Click **OK** on the **CSWDA Properties** dialog box to close it.

4. Configure the bioassayhts.udl file.

   a. Open the **bioassayhts.udl** file located at: \InetPub\wwwroot\cswda\config. The **Data Link Properties** dialog box appears.

   b. Click the **Provider** tab and select **Oracle Provider for OLEDB**.

   c. Click the **Connections** tab.

   d. Enter the Oracle service name in the **Data Source** text box.

   e. Enter *oracle* as password and click **Test Connection**. A success message appears.

   f. Click **OK** on the success message box to close it.

   g. Click **OK** on the **Data Link Properties** dialog box to close it.

5. Configure cswda.ini file.

   a. Open the cswda.ini file located at: \InetPub\wwwroot\cswda\config.

   b. Ensure that the path name of **bioassayhts.udl** file is correct.

   c. Ensure that the user names and passwords of Oracle schemas are correct.

   d. Save and close the file.

6. Configure cfserver.ini file.

   a. Open the cfserver.ini file located at: \InetPub\wwwroot\chemoffice\cs_security\config\

   b. Add ,BIOASSAY_PRIVILEGES (with the comma) to the end of the line which starts with PRIVILEGE_TABLE_LIST.

   *NOTE: If the privilege already exists, do not add it.*

   c. Add ,HTS_LOGIN (with the comma) to the end of the line that starts with MINIMUM_REQUIRED_PRIVILEGE.

   *NOTE: If the privilege already exists, do not add it.*

   d. Save and close the file.

7. Perform iisreset.

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | BioAssay client is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install BioAssay client:

1. Uninstall any previous versions of BioAssay Enterprise that may be present on your system, using the Windows Add/Remove Programs Control Panel.
2. Click the **setup.exe** file locate at: <installation folder>/Client_Installer. The welcome page of the installation wizard appears.
3. Click **Next**. The **License Agreement** page appears.
4. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The **Setup Type** page appears.
5. Ensure that the **Complete** option is selected and click **Next**. The **Ready to Install the Program** page appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete.

*NOTE: BioAssay Desktop and BioAssay Enterprise cannot work simultaneously on the same computer, unless you are prepared to manually register the BioAssayModules.ocx for the application you are interested in using (if it isn't already registered) and un-register the BioAssayModules.ocx of the other BioAssay. BioAssayModules.ocx exists in the BioAssay install directory. For example, if you want BioAssay Desktop to run on a computer that has BioAssay Enterprise installed, you have to reg-*

*ister the BioAssayModules.ocx in the BioAssay Desktop install directory and un-register the BioAssayModules.ocx in the BioAssay Enterprise install directory. The other alternative is to completely un-install the other BioAssay.*

*NOTE: After installing the new client, you must log in as a user with HTS_SUPERVISING_ADMIN privileges. Thereafter, open Application Settings from the start page and click Refresh All Protocol Views. The application will update all the protocol views to take into account the added Version field.*

CONNECTING WITH WEB SERVICES

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The BioAssay.exe file is updated to connect with Web services. | ___ Initials |

To run BioAssay in WebService connection mode, on your client computer, you need to edit the file BioAssay.exe.config:

1. Open the BioAssay.exe.config file located at: <OS drive>:\Program Files\CambridgeSoft®\Bio-Assay Enterprise 10\.

2. Change the line:

<add key="CambridgeSoft.BioAssay.DBConnMethod" value="1" />

To

<add key="CambridgeSoft.BioAssay.DBConnMethod" value="3" />

3. Find the following line in the "WebService for the DAL" section

<add key="CambridgeSoft.BioAssay.DAL.BADataDAL.BADataService1" value="http://localhost/BioAssayDALWebService/BADataService1.asmx"/>

and replace "localhost" with the name of the server computer which will be running Web services.

4. Find the following line in the "WebService for the DAL" section:

<add key="CambridgeSoft.BioAssay.Legacy.WebServer" value="localhost"/>

and replace "localhost" with the name of the server computer that will be running Web services.

5. Save and close the file.

If you want to update user permissions at this time, (this configuration step may not need to be executed immediately):

The HTS_DATA_USER and HTS_ADMIN roles now have minimal privileges. All users other than 'htssupervisingadmin' will now require the following:

- Granted explicit permissions on each feature they need access to (using the Security > Manage Users main menu item)
- Granted permissions on each assay they need access to.

All users should now be granted the Oracle HTS_ADMIN role by executing the following statement from a Oracle DBA account (Replace <USERNAME> with the name of the user you want to update). For example change

GRANT HTS_ADMIN TO <USERNAME>;

to

GRANT HTS_ADMIN TO htssupervisingadmin;.

NOTE: There may be a script now noted above to correct this, checking on this (InventoryRegrant10x), I think not as that is for INV and this seems to be BA specific roles. {delete this if there is no script. Rewrite this if there is}

5. If you want to make all the protocol templates visible, including the inventory-linked protocols, execute the following SQL on the SERVER: --- THIS IS ON THE CLIENT MOVE THIS TO SERVER SECTION---{Verify whether the text here should be moved.}

UPDATE HTS_PRTCL_TEMPLATE_T
SET PTL_TMPL_VISIBLE=1
WHERE NOT PTL_TMPL_VISIBLE=1;
COMMIT;

*NOTE:  This script is also attached as AllProtocolTemplatesVisible.SQL*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: Y: N: | BioAssay Data Service file opens successfully. You are able to login to the BioAssay application as *htssupervisingadmin* | ___ Initials |

1. To test the WebServer installation:

Ensure that you have correctly configured ASP.NET on your computer. For more information see "Configuring IIS and ASP on Web Server" on page 11.

Open the BioAssay Data Service file in a browser. For example, open the following URL:

http://localhost/BioAssayDALWebService/BADataService1.asmx

*NOTE: If you cannot locate the file or receive an error that you may not have configured the ASP.NET environment and folders correctly (Example: Insufficient rights to read or write to the folder structure). To configure ASP.NET correctly, see "Configuring IIS and ASP on Web Server" on page 11.*

2. To test the client installation, log into the BioAssay 10.1 client on the Oracle Service that was setup. Enter the following information when prompted:

• Username (use the default *htssupervisingadmin*. This user has all of the BioAssay HTS rights,)

• Password (use the default *htssupervisingadmin*.)

• Data Source (your Oracle data source. For example, oradb)

• Initial Catalog (you may leave the default: BIOASSAYHTS)

---

*NOTE:  You can perform additional tests for different connections and access templates.*

---

*NOTE:  If you receive an error, review the ASP.NET configuration and attempt to directly view the BADataService1.asmx file as mentioned in step 1(You will not be able to do so via the client).*

---

3. To make the previous Protocols correctly visible after logging into the client:
   a. Click the **Application Settings** link on the Start Page (right side). A window appears.
   b. Click the **Refresh All Protocol Views** button.
   c. Specify the server names in the servers section for Registration Enterprise, Inventory Enterprise and BioSAR Enterprise, if they are already installed.
4. To create a new protocol:
   a. Expand the **Protocol** folder, right-click on the (**Unclassified)** Folder and select **New Project**.
   b. Enter a name for the new project. Click **OK**.
   c. Select the name for the new project that is now in the left panel.
   d. Right-click on the new project and select **New Protocol**.
   e. Enter the required information for the new protocol:
   • Protocol Name
   • Select a template for the protocol
5. Open the newly created protocol. In the right panel for the protocol, select a link, such as **Manage tables, fields, and file import templates**.

---

*NOTE:  For additional integration steps, view the readme.txt file (located in the Installation folder) for this installation.*

---

**Installing BioSAR Enterprise**

Installing BioSAR 10

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | BioSAR Enterprise 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install BioSAR Enterprise 10:

1. Execute the Setup.exe file located in the installation CD or folder containing BioSAR installation files. The welcome page of BioSAR Enterprise 10 installer appears.
2. Click the **Next** button. The license agreement page appears.
3. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The page for specifying customer information appears.
4. Enter your name and organization. Click **Next**. The page for specifying the installation path and Oracle service name appears.
5. Enter your Oracle service name and click **Next**. The page for specifying the location of ChemOffice_data folder appears.
6. Locate the ChemOffice_data folder, if the default path is incorrect and click **Next**. The page for beginning the installation appears.
7. Click **Install**. The installation starts.
8. Click **Finish** when the installation is complete.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file opens and notifies that the database tables for BioSAR Enterprise have been created. | ___ Initials |

To create the BioSAR Enterprise database:

1. Perform one of the following tasks to create BioSAR Enterprise schema:

   • Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts** to open the **ChemOffice Enterprise 10 Database Creation Guide** window. Click the *click here* link corresponding to the bullet item on creating BioSARDB schema. A command prompt window appears.

   *NOTE: If required, you can also import the Inventory Enterprise and Registration Enterprise data.*

   • Navigate to and run the following file: <webroot>\ChemOffice\biosar_browser\config\oracle_install_scripts\Create_BioSAR_DB.cmd. A command prompt window appears.

2. Press any key in the command prompt window to continue and create the BioSAR schema.
3. Specify the configuration information requested:

   • Target Oracle Service Name
   • Name of an Oracle account with system privileges
   • Oracle account Password (for the account with system privileges)

*NOTE: Press Enter after each item; after the last item, the schema creation will continue.*

*NOTE: A log file opens when the schema is created. If you install BioSAR before BioAssay, you may see some errors in this log file. If you install BioAssay and then re-install the BioSAR database schema, these errors should not re-appear.*

4. Close all open BioSAR installation and log file windows.

REQUIRED CONFIGURATION

Follow the steps below to finish configuring BioSAR Enterprise, or to review your configuration after an update.

**SPECIFY THE DATA SOURCE IN THE CS_SECURITY.UDL FILE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To specify the data source in the cs_security.udl file:

1. Browse to:

<webroot>\ChemOffice\cs_security\config\

2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

**CONFIGURE BIOSAR ENTERPRISE UDL**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The biosar_browser.udl file successfully connects to the Oracle database. | ___ Initials |

Configuring BioSAR Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database. To define the data source in the BioSAR Enterprise UDL:

1. Browse to:

<webroot>\ChemOffice\biosar_browser\config\

2. Double-click the biosar_browser.udl file to open it. The **Data Link Properties** dialog box appears.

3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.

4. Enter *oracle* as the password and click **Test Connection**. A success message appears.

5. Click **OK** on the success message box to close it.

6. Click **OK** on the **Data Link Properties** dialog box to close it.

7. Double-click the biosar_browser_msDataShape.udl file to open it. The **Data Link Properties** dialog box appears.

8. Change the data source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.

9. Enter *oracle* as the password and click **Test Connection**. A success message appears.

10. Click **OK** on the success message box to close it.

11. Click **OK** on the **Data Link Properties** dialog box to close it.

**SET UP THE CFSERVER.INI. FILE**

---

*NOTE: If you can also specify the Oracle service name using Server Configuration Tool. Also, if you already specified the Oracle service name earlier in Server Configuration Tool for any other application then you need not set up cfserver.ini file for BioSAR Enterprise.*

---

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | The cfserver.ini file is updated and lists the correct Oracle service name, username of DBA and the corresponding password. | ___ Initials |

To set up the cfserver.ini. file:

1. Browse to and open the following file with a text editor:

<webroot>\ChemOffice\biosar_browser\config\cfserver.ini

2. Find the ORA_SERVICENAME key and enter the name of the Oracle service hosting BioSAR Enterprise. See your Oracle Database Administrator to verify the Oracle service name.

3. Ensure that the DBA_USERNAME and DBA_PWD parameters specify the correct values.

4. Save and close the cfserver.ini file.

**CREATE A SYSTEM DSN**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A DSN for BioSAR Enterprise is created under the System DSN tab of the ODBC Data Source Administrator dialog box. | ___ Initials |

You need to create a system DSN for the report writer using the ODBC Control Panel. To create a system DSN:

1. Click **Start** >**Programs** >**Administrative Tools** >**Data Sources (ODBC)**. The **ODBC Data Source Administrator** dialog box appears.

2. Click **System DSN** tab.

3. Click **Add**.

4. Highlight **Oracle ODBC Driver**.

---

*NOTE:  In Oracle 10g, this may be called OraDb10g_home# (Example: OraDb10g_home1)*

---

5. Click **Finish**. The **Oracle ODBC Driver Configuration** dialog box appears.

6. Fill in the following information in the **Oracle ODBC Driver Configuration** dialog box:

   • Data Source Name: biosar_browser_reports_ora
   • Description: biosar_browser_reports_ora
   • Service Name: <Oracle Service Name> for your target database. For information about your Oracle Service Name, see your Oracle database administrator.
   • User ID: biosardb

7. Test the connection (using *biosardb user* and the default password *oracle*) to ensure it is successful.

8. Click **OK** in the **Oracle ODBC Driver Configuration** dialog box to close it.

9. Click **OK** to close the **ODBC Data Source Administrator** dialog box to close it. The DSN is created and the connection test is successful.

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to login to the Biosar Enterprise application, create forms, and perform searches. | ___ Initials |

To test the installation:

1. Log into the Chem & Bio Office WebServer using the following username and password:
   - Username: biosar_admin
   - Password: biosar_admin
2. Click **Manage Your Forms** in the **BioSAR Enterprise** section. A drop-down list appears with list of forms and management options.
3. Create a new form using the Registration Enterprise tables. For information on creating forms, see "Creating a New Form" in the BioSAR Enterprise User Guide.
4. Click **Main Menu**.
5. Perform a search using the form you just created. For information on performing searches, see "Searching" in the BioSAR Enterprise User Guide.
6. Return to the form you created. click **Edit** and choose **Select Child Tables**.
7. Expand the arrow for **Child Tables**. A list of child tables appears.

A default set of roles and users were created during the BioSAR installation. Here is a table showing the list of roles and users:

| Username | Password | Role |
|---|---|---|
| BIOSAR_ADMIN | BIOSAR_ADMIN | BIOSAR_BROWSER_ADMIN |
| BIOSAR_USER | BIOSAR_USER | BIOSAR_BROWSER_USER |
| BIOSAR_USER_ADMIN | BIOSAR_USER_ADMIN | BIOSAR_BROWSER_USER_ADMIN |

| Username | Password | Role |
|---|---|---|
| BIOSAR_USER_BROWSER | BIOSAR_USER_BROWSER | BIOSAR_BROWSER_USER_BROWSER |

## Installing DocManager Enterprise

Before installing DocManager Enterprise, you should configure Excel, Word, and PowerPoint so that you can use for managing documents through DocManager Enterprise. Also, if your computer on which you will install DocManager Enterprise had been renamed then you will have to append the new computer name to the IUSR and IWAM accounts.

APPENDING SERVER NAMES

To append the new computer name to IUSR and IWAM accounts:

1. Open a command prompt window.
2. Type the following at the prompt: cd into Inetpub\AdminScripts.
3. Type following at the commands prompt to get and set the account names:
   cscript adsutil.vbs GET w3svc/AnonymousUserName
   cscript adsutil.vbs SET w3svc/AnonymousUserName IUSR_NEWNAME
   cscript adsutil.vbs GET w3svc/WAMUserName
   cscript adsutil.vbs SET w3svc/WAMUserName IWAM_NEWNAME

*NOTE: 'NEWNAME' is the current name of the computer on which you will install DocManager Enterprise.*

4. Type the following at the command prompt: cscript Synciwam.vbs -v.
5. Close the command prompt window.

CONFIGURING EXCEL

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | Excel is configured to be used with DocManager Enterprise. | ___ Initials |

**ON WINDOWS SERVER 2003**

To configure Excel for DocManager on Windows Server 2003:

1. Click **Start** > **Run** to display the Run dialog box and type dcomcnfg. The **Component Services** window appears.

2. Navigate to the following location in the left pane in the **Component Services** window: **Console Root** > **Component Services** > **Computers** > **My Computer** > **DCOM Config**. The following tree view appears:



*NOTE:  If warning messages appear upon clicking the DCOM Config folder, click Yes.*

3. Scroll through the list until you see the first entry that looks like a Globally Unique Identifier (GUID), similar to the one marked in the above picture (000C101C-0000).

   *NOTE:  If this is the correct GUID it should display the path for Microsoft® Excel.*

   *NOTE:  If Office 2000 is installed instead of Office 2003, you will see an entry for Microsoft® Excel application instead of the corresponding GUID.*

4. Right-click the entry and select **Properties**. The **Properties** dialog box appears.

5. Click the **Identity** tab and choose **This user**.

6. Specify camsoft_admin as the user.

7. Specify CambridgeSoft® as the password.

8. Click the **Security** tab and check **Customize** instead of **Use Default** in the following three areas:
   - For users who can access the application
   - For users who can launch the application
   - For users who can change configuration of the application.
9. Click the **Edit** button corresponding to the area of users who can access the application. The **Launch Permissions** dialog box appears.
10. Ensure that **INTERACTIVE** user has **Allow Access** as access permission.
11. Click the **Add** button to display the **Select Users or Groups** dialog box.
12. Ensure that the computer name of your **DocManager Enterprise** server is displayed in the **From this location** text box. If not, locate and select it using the **Locations** button.
13. Click the **Advanced** button. The **Common Queries** and **Search results** section is displayed.
14. Click the **Find Now** button. A list of users and groups is displayed in the **Search results** section.
15. Scroll down and select the username starting with IUSR_.
16. Press the Ctrl button and select the username starting with IWAM_ '.
17. Click **OK** to add the users.
18. Click **OK** to close the **Select Users or Groups** dialog box.
19. Enable all the check boxes in the **Allow** list for both the newly added users: IUSR_ and IWAM_.
20. Click **OK** on **Launch Permissions** dialog box to close it.
21. Repeat steps 9 to 20 for the remaining two areas mentioned above in step 8.

   *NOTE: For the remaining two areas, you will have to add the INTERACTIVE user as well in the same way as you add the IUSR_ and IWAM_ user.*

22. Click **OK** on the **Properties** dialog box to close it.

**ON WINDOWS SERVER 2000**

To configure Excel for DocManager on Windows 2000 Server:

1. Click **Start** >**Run** to open the **Run** dialog box and type dcomcnfg. The **Distributed COM Configuration Properties** dialog box appears.
2. Scroll down to identify and select the entry Microsoft® Excel Application.
3. Click the **Properties** button. The **Microsoft® Excel Application Properties** dialog box appears.
4. Click the **Identity** tab and choose **This user**.
5. Specify camsoft_admin as the user.
6. Specify CambridgeSoft® as the password.
7. Click the **Security** tab and check **Customize** instead of Use Default in the three areas:
   - For users who can access the application
   - For users who can launch the application
   - For users who can change configuration of the application.

8.  Click the **Edit** button corresponding to the area of users who can access the application. The **Registry Value Permissions** dialog box appears.

9.  Ensure that INTERACTIVE user is displayed and has Allow Access as access permission. If not, click the **Add** button, select the user from the list shown, and click the **Add** button again to add the INTERACTIVE user.

10. Click the **Add** button to display the **Add Users and Groups** dialog box.

*NOTE: If a warning message regarding domain rights appears, click OK to close the message box.*

11. Select the computer name of the server from the **List Names From** drop down list. The users of the server are displayed in the **Names** list.

12. Click the **Show Users** button. More names are added to the **Names** list.

13. Select the username starting with IUSR_ and click the **Add** button.

14. Select the username starting with IWAM_and click the **Add** button.

15. Click **OK** to close the **Add Users and Groups** dialog box.

16. Click **OK** to close the **Registry Value Permissions** dialog box.

17. Repeat steps 8 to 16 for the remaining two areas mentioned above in step 7.

18. Click **OK** on the **Microsoft® Excel Application Properties** dialog box to close it.

CONFIGURING WORD

The steps for configuring Word for DocManager Enterprise on Windows 2000 Server are similar to that of Excel. You just have to set the properties of Microsoft® Word application in the Distributed COM Configuration Properties dialog box.

The steps for configuring Word for DocManager on Windows Server 2003 are similar to that of Excel. You just have to set the properties of the GUID next to the Excel GUID in Distributed COM Configuration properties.

CONFIGURING POWERPOINT

The steps for configuring PowerPoint for DocManager Enterprise on Windows 2000 Server are similar to that of Excel. You just have to set the properties of Microsoft® PowerPoint application in the Distributed COM Configuration Properties dialog box.

The steps for configuring PowerPoint for DocManager Enterprise on Windows Server 2003 are similar to that of Excel. You just have to set the properties of the GUID next to the Excel GUID in Distributed COM Configuration properties.

INSTALLING DOCMANAGER ENTERPRISE 10

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | DocManager Enterprise 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install DocManager Enterprise 10:

1. Launch setup.exe on the installation CD. The DocManager 10 installer launches and the welcome screen appears.
2. Click **Next** to display the license terms and conditions page. If you accept the agreement, indicate accordingly and click **Next**. The page for specifying customer information appears.
3. Enter user name and organization of customer and click **Next** to display the next page.
4. Perform the following tasks to enter required information:
   a. Select the installation path for the application.
   b. Specify the Oracle service name.
   c. Select username (camsoft_admin)
   d. Enter the password for the selected user.
   e. Specify if the selected user is a domain user.

*NOTE: It is recommended that you keep the default paths when possible.*

5. Click **Next**. A validation succeeded message appears.
6. Click **OK**. The page for beginning the installation appears.
7. Click **Install**. The installation starts.
8. Click **Finish** when the installation is complete.
9. Restart your system.

REPAIRING YOUR DOCMANAGER ENTERPRISE INSTALLATION

If your server was previously renamed and you executed the DocManager Enterprise installer without appending the correct server names to IUSR and IWAM accounts then you need to repair the installation.

To repair the DocManager Enterprise installation:

1. Browse to Program Files\CambridgeSoft\Informatics2008\Common\DLLs\
2. Right-click DCOMCNFG.cmd and select **Edit**.
3. Replace the following entries with the appropriate values:

- <machine_name> with the machine name.
- <AdminAccountUserName> with the account which installs core and will be installing docmanager.
- <AdminAccountPassword> with the password of such account.
- <Informatics2008CommonDllPath> with the absolute path to Program Files\Cambridge-Soft\Informatics2008\Common\DLLs\.

4. Save the DCOMCNFG.cmd file.
5. Open a command prompt window.
6. Type the following at the prompt: cd <DRIVE>Program Files\Cambridge-Soft\Informatics2008\Common\DLLs Run DCOMCNFG.cmd
   where <DRIVE> is the appropriate drive.
7. Close the command prompt window.

CREATING THE DOCMANAGER DATABASE

*NOTE: The database steps detailed below will erase any pre-existing data and establish a new database. To perform an update and retain your data, contact CambridgeSoft® support.*

IQ Summary

| Description | Expected Result | Actual Result |
| --- | --- | --- |
| | | |
| Successfully Executed?:  Y:  N: | A log file opens and notifies that the database tables for DocManager Enterprise have been created. | ___ Initials |

To create the DocManager database:

1. Do one of the following:
   - Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts** to open the **ChemOffice Enterprise 10 Database Creation Guide** window. Click the *click here* link corresponding to the bullet item on creating Document Manager schema. A command prompt window appears.
   - Navigate to the directory: <webroot>\ChemOffice\DocManager\config\oracle_install_scripts\ and click the file: Create_New_DocManager_DB.cmd. A command prompt appears and notes that the update will install a new DocManager (DOCMGR) schema, and that any existing DocManager schema will be destroyed and all data lost.

2. Press any key in the command prompt window to continue and update the DocManager schema.
3. Specify the configuration information requested:
   • Target Oracle Service Name
   • Oracle Version Number (9, or 10)
   • Name of an Oracle account with system privileges
   • Oracle account Password (for the account with system privileges)
   • CTXSYS Account password

---

*NOTE: Press Enter after each item; after the last item the schema creation will continue.*

---

*NOTE: After the last item is entered you may need to press enter one additional time for the installation to proceed.*

---

After the installation is completed, a text editor log window opens and shows the installation log file.
4. Close all open DocManager installation and log file windows.

REQUIRED CONFIGURATION
**DEFINE THE DATA SOURCE IN THE CS_SECURITY UDL**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To define the Data Source in the cs_security UDL:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.

6. Click **OK** on the **Data Link Properties** dialog box to close it.

**CONFIGURE DOCMANAGER ENTERPRISE UDL**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The docmanager.udl file successfully connects to the Oracle database. | ___ Initials |

Configuring DocManager Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database. To define the data source in the DocManager Enterprise UDL file:

1. Browse to:

<webroot>\ChemOffice\docmanager\config\

2. Double-click the docmanager.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

**SET UP CFSERVER.INI. FILE**

*NOTE: If you can also specify the Oracle service name using Server Configuration Tool. Also, if you already specified the Oracle service name earlier in Server Configuration Tool for any other application then you need not set up cfserver.ini file for DocManager Enterprise.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini. file:

1. Browse to and open the following file with a text editor:

<webroot>\ChemOffice\docmanager\config\cfserver.ini

2. Find the ORA_SERVICENAME key and enter the name of the Oracle service hosting DocManager Enterprise. See your Oracle Database administrator to verify the Oracle service name.

3. Save and close the cfserver.ini file.

INTEGRATING WITH INVENTORY ENTERPRISE DATABASE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The invconfig.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Inventory Enterprise database:

1. Browse to <webroot>\ChemOffice\cheminv\config\ and open in a text editor: invconfig.ini.

2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

*NOTE: If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

*NOTE: The server name in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server name, select the DocManager check box corresponding to Inventory Integration under the Application Settings section in Server Configuration Tool and save the configuration changes.*

3. Set SHOW DOCMANAGER_LINK to 1.

4. Save and close the file.

5. Perform iisreset.

## INTEGRATING WITH REGISTRATION ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Registration Enterprise:

1. Browse to <webroot>\ChemOffice\chem_reg\config\ and open in a text editor: cfserver.ini.

2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

   *NOTE: If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

3. Set SHOW DOCMANAGER_LINK to 1.

4. Save and close the file.

5. Perform iisreset.

## INTEGRATING WITH DRUG DEGRADATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Drug Degradation:

1. Browse to <webroot>\ChemOffice\DrugDeg\config\ and open in a text editor: cfserver.ini.
2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

   *NOTE:  If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

3. Set SHOW DOCMANAGER_LINK to 1.
4. Save and close the file.
5. Perform iisreset.

UPLOADING LARGE DOCUMENTS

When uploading a >200K document in Document Manager on Windows 2003 server you get the following error message:

Request Object Error 'ASP 0104 : 80004005'

Operation Not Allowed

/docmanager/docmanager/src/upload.asp, line 72

This is a result of an MS upper limit for uploading. Increase the file upload limit by following these steps:

1. Confirm that the big files (>200k) is unable to load.
2. Type the following commands in the cmd window:
   cd c:\inetpub\adminscripts
   cscript adsutil.vbs set w3svc/ASPMaxRequestEntityAllowed 1073741824
3. Perform iisreset. This will set the max size to 1G and it is the MS upper limit for uploading. You can confirm that files >200K are able to upload by typing: cscript adsutil.vbs get w3svc/ASP-MaxRequestEntityAllowed

TESTING THE INSTALLATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to log into the DocManager Enterprise application and add a new document. | ___ Initials |

To test the installation:

1. Type *http://localhost* in your browser address bar to open the Chem & Bio Office Webserver login security page.
2. Login as:
   - doc_admin: user
   - doc_admin: password
3. Add a new document. The document is added to the record count and can be searched.

The following table lists the users who can access DocManager:

| Username | Password | Privileges |
| --- | --- | --- |
| doc_browser | doc_browser | search |
| doc_submitter | doc_submitter | search, submit, delete docs submitted by this user |
| doc_admin | doc_admin | search, submit, delete all docs, manage batch submission, manage users |

*NOTE: Do not launch Microsoft® Word, PowerPoint, or Excel after running the DocManager Enterprise application.*

## Installing Drug Degradation

IQ Summary

| Description | Expected Result | Actual Result |
| --- | --- | --- |
| | | |
| Successfully Executed?: <br><br> Y: <br><br> N: | Drug Degradation is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install Drug Degradation:

1. Launch setup.exe on the installation CD for Drug Degradation application. The welcome screen of the installation wizard appears.
2. Click **Next**. The **User Information** page appears.
3. Click **Next**. The **Installation Settings** page appears.
4. Click **Next**. The **Ready to Install** page appears.
5. Click **Install**. The installation starts.
6. Click **Finish** when the installation is complete.

CREATING THE DRUG DEGRADATION DATABASE

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file opens and notifies that the database for Drug Degradation has been created. | ___ Initials |

To create Drug Degradation Database:

1. Do one of the following:
   - Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the *click here* link corresponding to the bullet item for creating Drug Degradation schema. A command prompt window appears.
   - Navigate to C:\Inetpub\wwwroot\ChemOffice\DrugDeg\config\Oracle Scripts and run the file create_DrugDeg_ora.cmd. A command prompt window appears.
2. Press any key in the command prompt window to continue and update the Drug Degradation schema.
3. Specify the configuration information requested:
   - Target Oracle service name.
   - Oracle version number (9 or 10).
   - Name of an Oracle account with system privileges.

- Oracle account password (for the account with system privileges).

*NOTE: Press Enter after each item. After the last item the schema creation will continue.*

*NOTE: After the last item is entered, you may need to press Enter one more time for the installation to proceed.*

4. Close any open log file windows.

CONFIGURING THE APPLICATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: <br><br> Y: <br><br> N: | The DrugDeg.udl file successfully connects to the Oracle database. | ___ Initials |

To configure the application:

1. Browse to: <webroot>\ChemOffice\DrugDeg\config\ and launch the file. Open DrugDeg.udl to display the **Data Link Properties** dialog box.
2. Change the service name to your service name, if required. For information about your Oracle service name, see your Oracle database administrator.
3. Enter *oracle* as the password and click **Test Connection**. A success message appears.
4. Click **OK** on the success message to close it.
5. Click **OK** on the **Data Link Properties** dialog box to close it.
6. Open the file cfserver.ini.

   *NOTE: If you have specified the Oracle service name in Server Configuration Tool, earlier, for any other application, then you need not update the cfserver.ini file for Drug Degradation.*

7. Set the value of ORA_SERVICENAME to your Oracle service name in the [DRUG_MANAGEMENT] section.
8. Set the values of DOCMANAGER_SERVER_NAME and DRUGDEG_SERVER_NAME in the [GLOBALS] section.

9. Save the changes and close the file.

10. Perform an IISRESET.

The following table lists the user names with which you can log onto Drug Degradation and test the installation:

| Username | Password | Privileges |
|---|---|---|
| drugdegbrowser | drugdegbrowser | Search D3 and DrugDeg |
| drugdegsubmitter | drugdegsubmitter | Search D3 and DrugDeg, submit & delete DrugDeg records |
| drugdegadmin | drugdegadmin | Search D3 and DrugDeg, submit & delete DrugDeg records, manage users |
| D3browser | D3browser | Search D3 |

## Installing Drug Degradation Database (D3)

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | Drug Degradation Database 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install Drug Degradation Database (D3):

1. Launch setup.exe on the installation CD for Drug Degradation Database (D3). The welcome screen of the installation wizard appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement and accept it, if you wish.
4. Click **Next**. The user information page appears.
5. Specify the username and organization name.
6. Click **Next**. The page displaying the installation path and Oracle service name appears.

7. Specify the Oracle service name.
8. Click **Next**. The page to begin the installation appears.
9. Click **Install**. The installation starts.
10. Click **Finish** when the installation is complete.

CREATING THE DRUG DEGRADATION DATABASE (D3)

IQ Summary

| Description | Expected Result | Actual Result |
| --- | --- | --- |
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file opens and notifies that the database for Drug Degradation Database (D3) has been created. | ___ Initials |

To create Drug Degradation Database (D3):

1. Do one of the following:
   - Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the *click here* link corresponding to the bullet item for creating blank D3 schema. A command prompt window appears.
   - Navigate to *C:\Inetpub\wwwroot\ChemOffice\D3\config\Oracle Scripts\Create_blank_d3data_first_time_install* and run the file *create_d3data_ora.cmd*. A command prompt window appears.
2. Press any key in the command prompt window to continue and update the D3data schema.
3. Specify the configuration information requested:
   - Target Oracle service name.
   - Oracle version number (9 or 10).
   - Name of an Oracle account with system privileges.

- Oracle account password (for the account with system privileges).

*NOTE: Press Enter after each item. After the last item the schema creation will continue.*

*NOTE: After the last item is entered, you may need to press Enter one more time for the installation to proceed.*

4. Close any open log file windows.

IMPORTING D3 DATA

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file opens and notifies that D3 data has been imported. | ___ Initials |

To import D3 data:

1. Do one of the following:

   - Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Creation Scripts**. The **ChemOffice Enterprise 10 Database Creation Guide** window appears. Click the *click here* link corresponding to the bullet item for importing D3 data. A command prompt window appears.
   - Navigate to *C:\Inetpub\wwwroot\ChemOffice\D3\config\Oracle Scripts\Import_d3data* and run the file *import_d3data_ora.cmd* using *d3data.dmp* file. A command prompt window appears.

2. Press any key in the command prompt window to continue and update the D3data schema.

3. Specify the configuration information requested:

   - Target Oracle service name.
   - Oracle version number (9 or 10).
   - Name of an Oracle account with system privileges.

- Oracle account password (for the account with system privileges).

*NOTE: Press Enter after each item. After the last item the schema creation will continue.*

*NOTE: After the last item is entered, you may need to press Enter one more time for the installation to proceed.*

4. Close any open log file windows.

CONFIGURING THE APPLICATION

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The D3.udl file successfully connects to the Oracle database. | ___ Initials |

To configure the application:

1. Browse to: <webroot>\ChemOffice\D3\config\ and launch the file. Open D3.udl to display the **Data Link Properties** dialog box.
2. Change the service name to your service name, if required. For information about your Oracle service name, see your Oracle database administrator.
3. Enter *oracle* as the password and click **Test Connection**. A success message appears.
4. Click **OK** on the success message to close it.
5. Click **OK** on the **Data Link Properties** dialog box to close it.
6. Open the file cfserver.ini.

*NOTE: If you have specified the Oracle service name in Server Configuration Tool, earlier, for any other application, then you need not update the cfserver.ini file for Drug Degradation Database (D3).*

7. Set the value of ORA_SERVICENAME to your Oracle service name in the [DRUG_MANAGEMENT] section.
8. Perform an IISRESET.

**Chem & Bio Office Web Services (COWS) Web-Server (Chem & Bio Office Enterprise-ENB Integration)**

The COWS Web-Server has its own installation and reference guide located in the same folder as its installation kits/goods. Please refer to that document if you wish to upgrade and configure the COWS Web-Server & services. The document describes several integration items, such as Reagent selector, ChemREG push-pull, and ChemINV push-pull.

## Upgrading to Chem & Bio Office Enterprise 10

Before you upgrade your system from Chem & Bio Office Enterprise 9.0 SR3 to Chem & Bio Office Enterprise 10, back up your existing files to ensure that none of your files or settings are lost/over-written during the update installations.

It is recommended that you take a backup of the following folders:

- <webroot>ChemOffice (Example:C:\Inetpub\wwwroot\ChemOffice\)
- <OS drive>ChemOffice_data (Example:C:\ChemOffice_data\)

---

*NOTE:  In case you had installed BioAssay Enterprise, you will have to explicitly delete the cswda folder through IIS console.*

---

Upgradation from Chem & Bio Office Enterprise 9.0 SR3 to Chem & Bio Office Enterprise 10 involves the following tasks:

1. Uninstalling the existing Chem & Bio Office Enterprise applications.
2. Installing Chem & Bio Office Enterprise 10 applications.
3. Running the upgrade database scripts.
4. Comparing the old (SR3) configuration files with the ones (Enterprise 10) and updating the new configuration files.

---

*NOTE:  In this guide, you will be updating the database and configuration files of the applications while installing the respective applications.*

---

**Uninstalling Chem & Bio Office Enterprise Applications**

You must uninstall the applications in the following order:

1. Chem & Bio Office Enterprise 9.0 SR3 applications
2. Chem & Bio Office Enterprise 9.0 SR2 applications, if installed
3. Chem & Bio Office Enterprise 9.0 applications

UNINSTALLING CHEM & BIO OFFICE ENTERPRISE 9.0 SR3 APPLICATIONS

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Chem & Bio Office Enterprise 9.0 SR3 applications are removed from Control Panel > Add or Remove Programs. | ___ Initials |

To uninstall Chem & Bio Office Enterprise 9.0 SR3 applications:

1. Open **Control Panel** window.
2. Click the **Add/Remove Programs** icon. The **Add/Remove Programs** dialog box appears.
3. Select an application name that ends with 'SR3'.

   *NOTE:  Please ensure that the selected application is not CambridgeSoft ChemOffice Enterprise Core Patch(SR3). You should remove CambridgeSoft ChemOffice Enterprise Core Patch(SR3) only after removing all other SR3 applications because it is the base of other SR3 applications.*

4. Click the **Remove** button. A dialog box appears and confirms the removal operation.
5. Click **Yes** to remove the application.
6. Repeat steps 3 to 5 for all applications ending with SR3.
7. Close the **Add/Remove Programs** dialog box after uninstalling all SR3 applications.

UNINSTALLING CHEM & BIO OFFICE ENTERPRISE 9.0 SR2 APPLICATIONS

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Chem & Bio Office Enterprise 9.0 SR2 applications are removed from Control Panel > Add or Remove Programs. | ___ Initials |

To uninstall Chem & Bio Office Enterprise 9.0 SR2 applications:

1. Open **Control Panel** window.

2. Click the **Add/Remove Programs** icon. The **Add/Remove Programs** dialog box appears.
3. Select an application name that ends with 'SR2'.

> *NOTE: Please ensure that the selected application is not CambridgeSoft ChemOffice Enterprise Core Patch(SR2). You should remove CambridgeSoft ChemOffice Enterprise Core Patch(SR2) only after removing all other SR2 applications because it is the base of other SR2 applications.*

4. Click the **Remove** button. A dialog box appears and confirms the removal operation.
5. Click **Yes** to remove the application.
6. Repeat steps 3 to 5 for all applications ending with SR2.
7. Close the **Add/Remove Programs** dialog box after uninstalling all SR2 applications.

UNINSTALLING CHEM & BIO OFFICE ENTERPRISE 9.0 APPLICATIONS

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Chem & Bio Office Enterprise 9.0 applications are removed from Control Panel > Add or Remove Programs. | ___ Initials |

To uninstall Chem & Bio Office Enterprise 9.0 applications:

1. Open **Control Panel** window.
2. Click the **Add/Remove Programs** icon. The **Add/Remove Programs** dialog box appears.
3. Select a Chem & Bio Office Enterprise application that ends with 9.0 or 9.0.0.
4. Click the **Remove** or **Change/Remove** button. A dialog box appears and confirms the removal operation.
5. Click **Yes** to remove the application.
6. Repeat steps 3 to 5 for all applications ending with 9.0 or 9.0.0.
7. Select and remove the following applications:
   - BioSAR Enterprise
   - CambridgeSoft Registration Enterprise
8. Select the CambridgeSoft Inventory Enterprise application.
9. Click **Change**. The welcome page of Inventory Enterprise installation wizard appears.
10. Click **Next**. The **Program Maintenance** page appears.
11. Select **Remove** and click the **Next** button. The **Remove the Program** page appears.

12. Click **Remove** to remove the application.

13. Click **Finish** when the removal process is completed.

> *NOTE: The application may appear in the Add/Remove Programs dialog box even after it had been removed. However, it will disappear if you re-open the Add/Remove Programs dialog box.*

14. Perform steps 8 to 13 for CambridgeSoft ChemACX application.

15. Select and remove the ChemDraw Ultra 9.0 application.

16. Select and remove the CambridgeSoft ChemOffice Enterprise Core application.

17. Close the **Add/Remove Programs** dialog box.

*NOTE: In case you had installed BioAssay Web Services, remove it.*

### Installing Chem & Bio Office Enterprise 10 Applications

The procedure of installing Chem & Bio Office Enterprise 10 applications while upgrading from SR3 to Enterprise 10 is different from that of a fresh installation of Chem & Bio Office Enterprise 10. For a fresh installation of Chem & Bio Office Enterprise 10, you need to create database after installing each application whereas for upgrading to Enterprise 10, you need to upgrade the database after installing each application.

VERIFYING ORACLE DATABASE VERSION

Chem & Bio Office Enterprise 10 supports both Oracle 10g and Oracle 9i. If you are using Oracle 10g, follow the steps mentioned in "For support of Oracle 10g". If you are using Oracle 9i, follow the steps mentioned in "For support of Oracle 9i".

**FOR SUPPORT OF ORACLE 10G**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The sql command prompt should show that the Oracle version is 10.2.0.3. The version of sqora32.dll file should be 10.2.0.3.0. The version of oraoledb.dll file should be 10.2.0.2.20. | ___ Initials |

1. Verify that you are using Oracle 10.2.0.3 before performing any installation. If you are not, update your database to Oracle 10.2.0.3.
2. Verify that you are using the latest Oracle ODBC and OLEDB drivers
   - ODBC patch 10.2.0.3.0 (currently- 5699495): To verify this, check the version of sqora32.dll file located at: C:\oracle\product\10.2.0\db_1\BIN.
   - OLEDB patch 10.2.0.2.20 (currently): To verify this, check the version of OraOLEDB10.dll file located at C:\oracle\product\10.2.0\db_1\BIN.

---

*NOTE:  If you are not running the appropriate driver, update the driver as needed.*

---

**FOR SUPPORT OF ORACLE 9I**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The sql command prompt should show that the Oracle version is 9.2.0.8. The version of ODAC should be 9.2.0.7. The version of ODBC patch should be 9.2.0.6.5d. The version of OLEDB patch should be 9.2.0.7.00. | ___ Initials |

1. Verify that you are using Oracle 9.2.0.8 before performing any installation. If you are not, update your database to Oracle 9.2.0.8.
2. Verify that you are using ODAC 9.2.0.7.
3. Verify that you are using the latest Oracle ODBC and OLEDB drivers:
   - ODBC patch 9.2.0.6.5d: To verify this, check the version of sqora32.dll file located at: C:\oracle\ora92\bin.

- OLEDB patch 9.2.0.7.00: To verify this, check the version of oraoledb.dll file located at C:\oracle\ora92\bin.

---

*NOTE: In case you are having an earlier version of ODAC, OLEDB, or ODBC driver, contact your DBA to update the driver.*

---

VERIFYING MSXML 4.0 INSTALLATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The System32 folder of the Operating System should contain the files: msxml4.dll and msxml4r.dll. | ___ Initials |

MSXML 4.0 may already be installed. To check, search for the following files in the System32 folder:

- msxml4.dll
- msxml4r.dll

---

*NOTE: The System32 folder is located at: C:\winnt\system32 or C:\WINDOWS\system32*

---

The search confirms the presence or absence of MSXML 4.0. If these files are present, then MSXML 4.0 is already installed; skip the remainder of this section and go to the next topic "Verifying Oracle Cartridge Installation" to continue the Chem & Bio Office Enterprise 10 installation. If the files are not present, you need to install MSXML 4.0.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?: <br><br> Y: <br><br> N: | The System32 folder of the Operating System should contain the files: msxml4.dll and msxml4r.dll. | ___ Initials |

To install MSXML 4.0:

1. Open the **Installers** folder on the Installation CD. Double-click the **msxml.msi** file. The **Welcome to MSXML 4.0 SP2 Parser and SDK Setup Wizard** dialog box appears.
2. Click **Next**. The license agreement page appears.
3. Read the license statement. If you agree to it, accept the agreement and click **Next**. The customer information page appears.
4. Enter a name and company if not already specified then click **Next**. The **Choose Setup Type** page appears.
5. Click **Install Now**. After a few moments, the installation is complete.
6. Click **Finish**. The wizard closes.

VERIFYING CARTRIDGE INSTALLATION

Chem & Bio Office Enterprise 10 supports the CambridgeSoft® Oracle Cartridge 9.0.8 or higher. You can check the version of the Oracle Cartridge using the GLOBALS table (under Version) in the CSCartridge Oracle schema.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | The Cartridge version should be 9.0.8 or higher. The version information is contained in the GLOBALS table. | ___ Initials |

To verify the cartridge version:

1. Click **Start**>**Run**. The **Run** dialog box appears.
2. Type **sqlplus** in the **Run** dialog box and click **OK**. The sqlplus command window appears.
3. Type the following:

cscartridge/cscartridge@<your_service_name>. The SQL prompt appears.

4. Type the following:

   select * from GLOBALS;

   The Cartridge version information appears along with other information about the GLOBALS table.

5. Close the command window.

If you verify that the correct version of Oracle Cartridge is not installed, install it.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | Oracle Cartridge is installed. The GLOBALS table displays the version of the Oracle Cartridge installed. The version should be 11.0.0. | ___ Initials |

To install Oracle cartridge:

1. Open the **Installers** folder on the Installation CD.
2. Double-click **SetupCartridge.exe** file within the **CS_Oracle_Cartridge_11.0.0** folder. The **Cs Cartridge Version "11.0.1.207" installation** dialog box appears.
3. Enter service name and password for 'sys' user in the **Oracle Service** section.
4. Select the **Recreate existing indexes** check box.
5. Click the **OK** button. The **Select Oracle home directory** dialog box appears.
6. Click the **OK** button. The **Recreate Index** dialog box appears.
7. Click the **OK** button. the **SetupCartridge** dialog box appears.
8. Click **Yes** to run the SetupCartridge script.
   a. Enter Oracle as password when prompted by the script.
   b. Press Enter to accept the default values of other parameters. After a few seconds, a success message appears.
9. Click the **OK** button. The Oracle Cartridge User Guide and a text file appears.
10. Close the user guide. Also close the text file that opens along with the user guide.

INSTALLING CHEM & BIO DRAW ULTRA

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Chem & Bio Draw Ultra 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install the Chem & Bio Draw Ultra 10:

1. Double-click the **install.exe** file in the installation folder. The welcome screen of ChemDraw Ultra 10.0 Installation Wizard appears.

*NOTE: You may also be prompted to Activate ChemDraw 10.0 during the installation. At this point you can choose to activate the product then or after installation. You will need your registration code to register.*

2. Click **Next**. The page for selecting the applications to be installed appears.
3. Disable the **E-Notebook Std 10.0** check box so that it is not installed.
4. Click **Next**. The **Ready to Install** page appears.
5. Click **Begin**. The **Welcome to CambridgeSoft® ChemDraw Ultra 10.0** page appears.
6. Click **Next**. The **License Agreement** page appears.
7. Read the license agreement. If you agree with the terms and conditions, accept the agreement and click **Next**. The **Setup type** page appears.
8. Ensure that **Complete** option is selected and click **Next**. The **Ready to Install the Program** page appears.
9. Click **Install**. The installation starts.
10. Click **Finish** when the installation is complete. The **Installation Complete** page appears.
11. Click **Finish**. A message box appears and prompts you to reboot the system.
12. Reboot the system.

*NOTE: Be sure to activate Chem & Bio Draw Ultra 10 after installation is complete, if you had not done so already.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | Chem & Bio Office Enterprise Core 10 is installed and appears in Control Panel >Add or Remove Programs. Menu items, such as Database Creation Scripts and Server Configuration Tool, appear on clicking Start >Programs > ChemOffice Enterprise 2008. | ___ Initials |

To install Chem & Bio Office Enterprise Core 10:

1. Locate the **Setup.exe** file for Chem & Bio Office Enterprise Core 10 and double-click the file. The welcome page of **CambridgeSoft ChemOffice Enterprise Core 10** wizard appears.
2. Click the **Next** button in the welcome page. The page for license agreement is displayed.
3. Read the license agreement and if you wish to continue, accept the agreement and click the **Next** button. The next page for customer related information is displayed.
4. Specify the user name and organization. Specify who will use the application in the **Install this application for** section.
5. Click **Next**. The next page showing the installation path appears.
6. Specify the install path (the default is recommended) and Oracle service name. Then, click the **Next** button. The **Select or Create A User** page appears.
7. Specify the username and password for the user to be created or use an existing user. Click **Next** to display the page for beginning the installation.

*NOTE: When a validation success message appears, click OK.*

8. Click the **Install** button. The **Installing** dialog box is shown, and a progress bar tracks the installation.

9. Click the **Finish** button when the installation is completed. The wizard is closed.

---

*NOTE: After Chem & Bio Office Enterprise Core 10 is installed, you can access the Server Configuration tool by clicking Start > Programs > ChemOffice Enterprise 2008 > Server Configuration Tool. This tool allows you to configure the ini file settings. For example, you can specify the Oracle service name and date format in this tool.*

---

**TESTING THE INSTALLATION**

IQ Summary

| Description | Expected Result | Actual Result |
| --- | --- | --- |
|  |  |  |
| Successfully Executed?:  Y:  N: | When you type the URL for the localhost in your web browser, the home page of ChemOffice Enterprise appears and displays the "Sample" link. | ___ Initials |

To test whether Chem & Bio Office Enterprise Core 10 was successfully installed:

1. Log into the Chem & Bio Office Enterprise application as *cssadmin*.
2. Click **Sample** database in the **ChemOffice Enterprise Databases** section.
3. Run a structure find query. If the product is activated, the query will run properly and results will be displayed.

CONFIGURING LDAP

Lightweight Directory Access Protocol (LDAP) is a protocol for querying and modifying a set of objects with similar attributes. For example, LDAP can be used for querying the database of users and authenticate them. LDAP is installed by default when you install Chem & Bio Office Enterprise Core 10. However, you need to configure LDAP before using it.

To configure LDAP:

1. Open the COEFrameworkConfig.xml located at: C:\Documents and Settings\All Users\Application Data\ChemOffice Enterprise11.

2. Ensure that in the *sso config* section, the default provider is set to *coeldap*.

---

*NOTE:  In order to use COELDAP or SingleSignOn (sso), you will need to have ODP.net 2.0 installed.*

---

3. Review the list of exempt users and add users to the list, if desired.
4. Enter the Oracle service name in the *datasource* field. This field appears in the *validate user connection* section.

---

*NOTE:  At present, LDAP is setup for the camsoft domain. This will need to be changed to match the local domain of the customer.*

---

5. Enter user information. This is configured for an Exchange server and will need to be updated if you are using a different type of server for LDAP.
6. Open the chemoffice.ini file and change the authentication mode from *cs_security* to *COELDAP*.

SETTING UP CS_SECURITY.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | A log file opens after the installation is over. The log file shows no connection errors. The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To set up cs_security:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Upgrade Scripts**. The **ChemOffice Enterprise 10 Database Upgrade Guide** window appears. Click the link *click here* corresponding to the bullet item for upgrading CS Security schema. A command prompt window appears.
2. Press any key to continue and enter your Oracle service name and press Enter.
3. Answer the rest of the questions; press enter to accept the defaults (shown in parentheses). After answering the final question the upgrade of the cs_security database in Oracle will begin. When the script execution is complete, a log file opens in Notepad. Check the log file for connection

errors. If there are no connection errors, close the log file (this closes the command prompt as well).

---

*NOTE: CambridgeSoft® recommends saving this log file for future reference in an accessible location.*

---

---

*NOTE: For information about your Oracle Service Name, see your Oracle DBA or consultant.*

---

---

*NOTE: The password for Oracle is hidden from the users. This is applicable for all applications.*

---

4. Browse to <webroot>/ChemOffice/cs_security/config/. The directory appears.
5. Double-click the **cs_security.udl** file to open the **Data Link Properties** dialog box.
6. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator. The data source name is visible after data entry.
7. Enter *oracle* as the password and click **Test Connection**. A success message appears.
8. Click **OK** on the success message box to close it.
9. Click **OK** on the **Data Link Properties** dialog box to close it.
10. Open the file <webroot>/ChemOffice/config/chemoffice.ini and ensure that the following setting exists:

CS_SECURITY =1 in [GLOBALS] section.

11. Save the **chemoffice.ini** file and perform iisreset.

**TESTING THE INSTALLATION OF GLOBAL SECURITY**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | When you type the URL of the localhost in your web browser, the global login page of ChemOffice Enterprise appears. You are able to login with *cssadmin* as your username and password. | ___ Initials |

To test the installation of global security:

1. Open Internet Explorer and enter http://IIS_SERVER_NAME. The Global Login page appears.
2. Log in using the username *cssadmin* and the password *cssadmin*. The global security page opens and you are successfully logged in.

**Report Configuration**

Chem & Bio Office Enterprise 10 products use Reports.exe to write reports (such as for Inventory Enterprise and BioSAR Enterprise). If you do not plan to install and use this feature or if Reports is already set up, you can skip this step. However, if you want, you can perform this step as a test only.

*NOTE: If the RPT Service is stopped, start the service now.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Reports feature is configured and you can print reports using the ChemOffice Enterprise applications. | ___ Initials |

To configure reports, do the following:

1. Log into the Web server computer as the administrator.

2. Click the reports.exe file at <webroot>/ChemOffice/ webserver_source/cfserverasp/RPT. The **RPT Software - Report Server** dialog box appears.

---

*NOTE: You can also set up the report.exe file to run as a service so that it is automatically started when you log into the Web server.*

---

3. Click the **Settings** button. The **RPT Software - Report Server Settings** dialog box appears.
4. Set a default PDF printer driver.

   ---

   *NOTE: If required, install Win2PDF (a PDF printer driver whose installer is found in the Installation folder of both Inventory Enterprise and BioSAR Browser.). Installing Win2PDF will give your users the ability to create reports in PDF format.*

   ---

5. Click **OK**.

INSTALLING CHEMACX

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | ChemACX 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install ChemACX 10:

1. Click the setup.exe file in the installation CD/folder. The ChemACX 10 installer launches and a welcome screen appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement. If you wish to continue, accept the agreement and click **Next**. The page for specifying customer information appears.
4. Complete the form and click **Next**. The page for specifying installation path appears.
5. Click **Next**. The page for beginning the installation appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete. The installation wizard closes.

**CONFIGURING CHEMACX**

Before configuring ChemACX, you need to choose the database it will use. ChemACX uses Access by default upon installation; so, if you want to use Access, you can skip this section and proceed to "Configuration" below. However, if you want, you can switch to an Oracle database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | The database to be used with ChemACX is selected. | ___ Initials |

MOVING FROM ACCESS TO ORACLE

To switch to Oracle database:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Click the **Oracle** radio button in the **Application Settings** section.
3. Click the **Save Configuration** button and close the window.

MOVING FROM ORACLE TO ACCESS

To switch to Access database:

1. Open the **ChemOffice Enterprise 10 Configuration Tool** window.
2. Click the **MS Access** radio button in the **Application Settings** section.
3. Click the **Save Configuration** button and close the window.

**REQUIRED CONFIGURATION**

The following configuration allows users to have more integrated cs_security. For example, if they select Export to ChemInv under ChemACX, they will not have to log in again.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | The applications to which ChemACX will export data are selected and are integrated with ChemACX. | ___ Initials |

To set export formats:

1. Open the acxconfig.ini located at: <webroot>\ChemOffice\ChemACX\config\.
2. Set the following values to "True":
   - EXPORT_TO_EXCEL
   - EXPORT_TO_WORD
   - EXPORT_TO_CHEMINV
3. Save and close the acxconfig.ini file.

*NOTE: To enable the Export to Excel feature on Windows Server 2003 platform, perform the following tasks:*
*- In the dcomcnfg.exe file, provide "custom access permissions" as well as "custom launch permissions" to a local administrator, such as camsoft_admin.*
*- Use the local administrator user for anonymous access to the "ChemACX" virtual folder in IIS manager.*

To integrate ChemACX with Global Security (cs_security):

1. Open the cfserver.ini configuration file located at:
<webroot>\ChemOffice\ChemACX\config\.
2. Set the following value to "1" (true): USE_CS_SECURITY_APP
3. Save and close the cfserver.ini file.

**INSTALLING AND UPGRADING CHEMACX DATABASE**

You can install or upgrade to either an Oracle or Access database. Choose one of the following options and proceed to the section in this document as indicated for further set of instructions:

- Install/Update Version 9.5 for Oracle. Go to "Installing ChemACX Database 9.5 for Oracle" on page 23.

- Install/Update Version 9.7 for Access. Go to "Installing/Upgrading ChemACX Database to ChemACX 9.7 for Access" on page 25.

---

*NOTE: You may switch between databases and their different versions. To switch between Oracle and Access databases, refer to "Configuring ChemACX" on page 20.*
*The procedure for installing a different version of Oracle or Access database will be similar to the procedure mentioned in the following sections.*

---

**Install ChemACX Database 9.5 for Oracle.** The installation of ChemACX database for Oracle is in two parts: data import and indexing.

The import process can take between two and six hours depending on the Oracle environment. The installation script will require you to approve the import process and provide additional information as noted in the section below (this will take about 30 minutes). Responding to the prompts when they appear will ensure the install/update proceeds as quickly as possible.

After the import completes, Oracle Cartridge will automatically start creating the indexes, which may take up to two hours.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | Oracle Cartridge automatically starts creating indexes. | ___ Initials |

*NOTE: If you are updating the database, you may wish to make a backup of the pre-existing database as the update process will remove the current database.*

*NOTE: Ensure that you have selected the appropriate Oracle ChemACX options under the section "Configuring ChemACX" on page 20 (the settings can be modified after this section has been completed if required).*

*NOTE: You may need to confirm the Registration and Inventory user grants privileges on the ChemACX database as they are typically granted in an installation step that follows this one. If you encounter any issues, report them to the appropriate CambridgeSoft® resource.*

To install ChemACX database 9.5 for Oracle:

1. Navigate to the following folder in the ChemACX 9.5 Database for Oracle CD (or installation files:

<Install File Folder>\ChemACXOra95\Oracle_Install_Scripts\

2. Run the script as specified below:

   • For a new installation, run Import_ChemACXData.cmd
   • To update, run UpdateTo_95.cmd

*NOTE: If desired, create a backup of the previous version as the script will overwrite the existing database.*

3. Press any key to continue, enter the target Oracle service name and press Enter/Return. The installation begins its initial setup of the ChemACX 9.5 database. Within 30 minutes, you will be asked for the folder path location of the chemacxdb95.dmp file that contains the ChemACX data.

4. Enter the full path and filename with extension for this file, which will reside in a <Install File Folder> (or on the Installation CD) and press Enter. The install process continues to completion.

*NOTE: The process can take a number of hours.*

To confirm that there were no errors in the install, view the command prompt screen and the log file for the install/update located in the following folder:

<Install File Folder>\ChemACXOra95\Oracle_Install_Scripts\SQL\

The log file will have recent Date Modified and a filename such as log_update_chemacxdb.txt

**Install/Upgrade ChemACX Database to ChemACX 9.7 for Access.** Insert the ChemACX 9.7 Database CD and run the ChemACX Database installer file: setup.exe. The installer will launch and open an HTML Web page to direct the installation that has the header ChemACX 9.7 Database Installation Instructions.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The ChemACX database for Access is upgraded to version 9.7. | ___ Initials |

*NOTE: The highest version of ChemACX for Oracle is 9.5.*

*NOTE: If desired, create a backup of the previous version as this will overwrite the existing database.*

Do one of the following:

• To perform an upgrade from a previous installation of ChemACX, follow the steps mentioned in the ChemACX 9.7 Database Installation Instructions, which for this case are also noted in "Upgrade to ChemACX 9.7 for Microsoft® Access".

- To perform a new install of ChemACX, follow the steps mentioned in the topic "New installation of ChemACX 9.7 Database".

Upgrade to ChemACX 9.7 for Microsoft® Access

Update is only required if a pre-existing version of the ChemACX database exists already.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The ChemACX data-base for Access is upgraded to version 9.7. | ___ Initials |

To update to ChemACX 9.7:

1. Determine the location of the database files. The default location for the files is c:\ChemOffice_data\ChemACX.
2. Backup the existing files in the default directory.
3. Click **chemacx.exe** in the ChemACX 9.7 Database Installation Instructions HTML Web page to extract the files into your directory (choose to Run or Save and accept any warnings or navigation prompts). By default, the files will be extracted to "c:\ChemOffice_data\ChemACX", but you may change this path as desired.
4. Choose to overwrite the files and perform an IIS reset at the end of the installation. Close the unzip/setup window manually if it remains open.
5. Open ChemACX for Chem & Bio Office Enterprise application. The record count should read 437,930.

New Installation of ChemACX 9.7 Database

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | ChemACX 9.7 database is installed. | ___ Initials |

To install a new ChemACX 9.7 database:

1. Open the ChemACX 9.7 Database Installation Instructions HTML page.
2. Click **chemacx.exe** to extract the files into your directory. By default, the files will be extracted to "c:\ChemOffice_data\ChemACX", but you may change this path as desired. The C:\ChemOffice_data\chemacx\ folder is created with the ChemACX 9.7 data.
3. Choose to perform an IIS reset at the end of the installation.
4. Open the ChemACX application. The application will launch with no problems and the record count will read 437,930.
5. Make sure that the database files in the install location are not read-only. To do this:
   a. Right-click on the files (.mdb, .msi, .mst) and select Properties.
   b. Make sure that the Read-only checkbox is not selected.
6. Ensure a Local Administrator user, such as camsoft_admin, has access to the custom access permissions, and the custom launch permissions.
7. Make sure that the same Local Admin user, such as camsoft_admin, is used for Anonymous access to the ChemACX virtual folder in the IIS manager. To do this:
   a. Launch IIS manager
   b. Browse to **Server** > **Web Sites** > **Default Website** > **ChemACX**. Right-click and select Properties.
   c. Select the **Directory Security** tab.
   d. Select **Edit** under **Authentication and Access control**.
   e. Browse or enter the local administrator user name and password for the authentication methods. To enter the username and password, ensure that **Enable anonymous access** is checked. (Example: *camsoft_admin* and *oracle*)
8. Browse to: <webroot>\ChemOffice\ChemACX\config\.
9. Double-click the ChemACX.udl file.

10. Make sure that the UDL is pointing to the ChemACX database you just moved (by default, it is at: C:\ChemOffice_data\ChemACX\ChemACX.mdb).

*NOTE: You may wish to use the same Local Administrator account name and password from the previous step to test the connection.*

11. Click **Browse** and browse to the location of ChemACX.mdb file if the default location is incorrect.

If the system did not automatically perform an IISRESET during one of the previous steps in this section, perform the IIRESET now.

**TESTING THE INSTALLATION**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | You are able to search the ChemACX database and export the results to Excel. | ___ Initials |

To test the ChemACX 9.7 database installation:

1. Click the ChemACX link on the Chem & Bio Office Enterprise homepage.
2. Search for a compound in the ChemACX database. A list of compounds appears.

*NOTE: For help in searching, see the ChemACX User Guide.*

3. Click the **Details** button for one of the structures displayed. Tabs for vendor information will be included in the resulting display.
4. Click a vendor name.

*NOTE: The vendor you select must sell the item you selected.*

5. Add the compound to your Shopping Cart. For details, see ChemACX User Guide > Viewing a Record and Using the Shopping Cart in the User Guide.

6. Click one of the View Shopping Cart or Shopping Cart link/icons. The shopping Cart is displayed and contains the item(s) you added to the Shopping Cart

7. Export your shopping cart to Excel. Shopping cart is exported into Excel (To learn how to export, see the ChemACX User Guide).

8. Follow the details to access and save or open the Excel file.

---

*NOTE: If you are able to open the Excel file, it means that the installation is successful.*

---

CORRECTING A 500 ERROR

When trying to export to Excel, Word, or Access you may receive a *500* error in the browser. To rectify the error, ensure that you are using the identical local administrator user for the *Anonymous* access to the *ChemACX* virtual folder in IIS manager. By default, the local administrator user is *camsoft_admin*.

INSTALLING REGISTRATION ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Registration Enterprise 10 is installed and appears in Control Panel> Add or Remove Programs. | ___ Initials |

To install Registration Enterprise 10:

1. Locate the **Setup.exe** file for Registration Enterprise 10 and double-click the file. The Welcome page of the installation wizard appears.

2. Click the **Next** button in the Welcome page. The license agreement page appears.

3. Read the license agreement and if you wish to continue, accept the agreement and click the **Next** button. The page for specifying customer related information appears.

4. Specify the user name and organization.

5. Specify the user who will use the application.

6. Then click the **Next** button. The page for specifying the installation information appears.

7. Enter the Oracle service name and click the **Next** button. The page for beginning the installation appears.

8. Click the **Install** button. A command prompt window will open to perform an iisreset.

9. Click the **Finish** button on the Installation wizard.

**UPDATING THE REGISTRATION ENTERPRISE DATABASE (SCHEMA)**

*NOTE: While updating the Registration Enterprise database, a "commit to temp failure" message may appear. This message appears because of the csdohitlist and csdohitlist id tables that are out of sync. To fix this issue, drop the tables and clear the cache memory. Thereafter, restart the Registration Enterprise application using the iisreset command.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file appears and displays that the Registration Enterprise database tables have been updated. | ___ Initials |

To update the Registration Enterprise database schema:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Upgrade Scripts**. The **ChemOffice Enterprise 10 Database Upgrade Guide** window appears. Click the link *click here* corresponding to the bullet item for upgrading Registration System schema. A command prompt window appears.

   OR

   Navigate to <webroot>\ChemOffice\chem_reg\config\oracle_install_scripts\ and execute the file Update_ChemReg_DB_From_9.0SR3_to_10.0.cmd. A command prompt window is opened that notes it will update the Registration Enterprise database to the latest version.

2. Press any key to continue.
3. Enter the information for the items below. After completing each item, press Enter/ Return to continue.

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value, the default is used.*

   a. Enter the target Oracle service name.
   b. Enter the Oracle major version number; either 9 or 10.

    c. Enter the name of an Oracle account with system privileges (system).

    d. Enter the Oracle account password (manager2). A text log file opens automatically when the update script has completed.

4. Close the log file and the command prompt window if it does not close.

**CONFIGURING REGISTRATION ENTERPRISE**

CONFIGURING REGISTRATION ENTERPRISE UDL

Configuring Registration Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The reg.udl file successfully connects to the Oracle database. | ___ Initials |

To define the data source in the Registration Enterprise UDL file:

1. Browse to: <webroot>\ChemOffice\chem_reg\config\

2. Double-click the reg.udl file to open it. The **Data Link Properties** dialog box appears.

3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.

4. Enter *oracle* as the password and click **Test Connection**. A success message appears.

5. Click **OK** on the success message box to close it.

6. Click **OK** on the **Data Link Properties** dialog box to close it.

SPECIFY THE DATA SOURCE IN THE CS_SECURITY.UDL FILE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | The cs_security.udl file successfully connects to the Oracle database | ___ Initials |

To specify the Data Source in the cs_security.udl file:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

SET THE SERVICE NAME IN THE CFSERVER.INI. FILE

*NOTE: If you are planning to install more ChemOffice applications and thereafter test the installations then you can perform the following steps after installing all the required applications.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini. file:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Enter the Oracle service name.
3. Click the **Save Configuration** button to save the changes.

**TESTING THE INSTALLATION OF REGISTRATION ENTERPRISE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to login to Registration Enterprise with username: T5_85 and password: T5_85. You are also able to add compounds to the Registration Enterprise database and search for the compounds later on. | ___ Initials |

To test the installation of Registration Enterprise:

1. Log into the Chem & Bio Office Enterprise using the following username and password:
   - username: T5_85
   - password: T5_85
2. Add a compound to the temporary table. To add a compound:
   a. Click the **Main Menu** link under the **Registration Enterprise** section.
   b. Click the **Add Compound** link under the **Add to Temporary** section. The **New Compound Submission** form appears.
   c. Right-click in the structure draw area and select the **Structure** >**Convert Name To Structure** option. The **Insert Structure** dialog box appears.
   d. Type the name of a compound and use the tool to insert the chemical structure drawing into the structure draw area. (Example: fluorescein)

   *NOTE: Disable the Paste name below Structure checkbox.*

   e. Complete other items in the form. If required, click **Add Record** button. A success message appears.
   f. Click **OK** on the success message box to close it.
3. Register the compound.
   a. Return to the home/main page for the Registration Enterprise section (Example: Click the Main Menu button in the open form).
   b. Click the **Review/Register** link under the **Registration** section.

c. Click the **Mark Record** button for the record you added. Then toggle to Unmark the record (repeat as needed). Check that this impacts the count shown at the top of the page in the Marked Hits link.

d. Click the **Review/Register** button for the record you added.

---

*NOTE: This toggles the display from the list view to the details view.*

---

e. Review the information to ensure it is correct. Then click the **Register** button.

f. Ensure that a confirmation message appears and displays that the compound was successfully registered.

4. Search for the compound in the Registration Database.

a. Return to the home/main page of Registration Enterprise (Example: Click the Main Menu button in the open form).

b. Click the **Search** link under the **Query and Reporting** section.

c. Search for the compound you registered earlier, or a sub-structure of that compound. Enter the structure and click the Search button. (Ex. Search for a Benzene ring, or one with an OH group on it). If your search criteria match the compound you entered it will be returned in the results.

**ROLES AND USERS**

A set of roles and users were already created by default during the installation when you created the Registration Enterprise schema. The following table shows the list of roles and users:

| Username | Password | Role |
|----------|----------|------|
| T1_84 | T1_84 | BROSWSER |
| T1_85 | T1_85 | BROSWSER |
| T2_84 | T2_84 | SUBMITTER |
| T2_85 | T2_85 | SUBMITTER |
| T3_84 | T3_84 | SUPERVISING_SCIENTIST |
| T3_85 | T3_85 | SUPERVISING_SCIENTIST |
| T4_84 | T4_84 | CHEMICAL_ADMINISTRATOR |

| Username | Password | Role |
|----------|----------|------|
| T4_85 | T4_85 | CHEMICAL_ADMINISTRATOR |
| T5_85 | T5_85 | SUPERVISING_CHEMICAL_ADMI N |
| T5_84 | T5_84 | SUPERVISING_CHEMICAL_ADMI N |
| T6_85 | T6_85 | PERFUME_CHEMIST |
| T6_84 | T6_84 | PERFUME_CHEMIST |

**ROW LEVEL SECURITY**

The Row Level Security feature in Registration Enterprise comprises three parts: The Project_People table, duplicate checking, and a predicate function.

**The Project_People table .** This table allows users to be associated with projects. The table is managed via the registry tables/projects interface; however, it is available only for users with roles that have the privi¬lege "Manage_People_Project" associated with them. After installation the role, "supervising_chemical_admin" has this privilege.

*NOTE: It is advised that this privilege NOT be given to any other role as it contains the power to allow users to view registry and the point of the feature is to tightly control this.*

**Duplicate checking .** Registration Enterprise performs duplicate checking on a compound and project basis. Compounds that are duplicates within the system but not duplicates within a project will be added to a duplicates table. However the registrar will not see a duplicate window since the compound is not a duplicate within the project. Administrators ("supervising_chemical_admin"- e.g. T5_85 user) with the privilege "Manage_System_Duplicates" will see a button on the Main page "view duplicates", which allows them to view all the duplicates across projects that exist in the system.

**Predicate function .** The predicate function filters any select statement run against it so that only records where the projects to which the current user has access will be returned. Once the function is installed you can view it in dba studio when logged in with DBA privileges under FUNCTIONS/REGDB/PEOPLE_PROJECT_RLS_FUNCTION.

There is a policy to tables, referenced in the function, to enforce this action.

---

*NOTE: The policies are in force no matter how you try to access the data because the policies are applied to the Oracle schema rather than Registration Enterprise.*

---

*NOTE: The REGDB and SYSTEM users have been specifically excluded from the policy. Therefore, the REGDB and SYSTEM users can allow qualified users to view all information in the registry. The REGDB user must have all privileges to the data as the REGDB user in this RLS mode is the user that actually commits the data to the registry and to the temporary tables.*

---

*NOTE: Every user, including admin roles in chem_reg ("supervising_chemical_admin") must be EXPLICITY assigned to a project, or they will not see that projects data. Not doing so can lead to the wrong conclusions - e.g. data is missing.*

---

*NOTE: Upon installation, the test users t5_85 is assigned to the unspecified project plus since any record entered into the system where an appropriate project cannot be found is assigned to unspecified. Whatever you do DO NOT remove the unspecified project.*

---

**INSTALLING ROW LEVEL SECURITY**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Row level security is installed and you are able to associate users with projects, perform duplicate checking and filter the results of select statements. | ___ Initials |

To install row level security:

1. Execute the file Enable_ROW_LEVEL_SECURITY.cmd file located at: <webroot>/ChemOffice/chem._reg/config/oracle_install_scripts folder

2. Open cfserver.ini file located at <webroot>/ChemOffice/chem._reg/config/ and update the following settings as shown:
   - PRIMARY_STRWHERE = COMPOUND_PROJECT
   - PROJECT_LEVEL_ROW_SECURITY=1
   - USE_SESSION_RECORD_COUNTS=1
3. Save the cfserver.ini file and close it.
4. Perform iisreset.

**UNINSTALLING ROW LEVEL SECURITY (DISABLING POLICIES, WHEN REQUIRED)**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | Row level security is uninstalled. | ___ Initials |

To uninstall row level security:

1. Execute the file Disable_ROW_LEVEL_SECURITY.cmd
2. Open CFserver.ini and update the following settings as shown:
   - PRIMARY_STRWHERE = COMPOUND_ONLY
   - PROJECT_LEVEL_ROW_SECURITY=0
3. Restart the Registration Enterprise application, if it was already running or perform iisreset

INSTALLING INVENTORY ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: <br><br> Y: <br><br> N: | Inventory Enterprise 10 is installed and appears in Control Panel > Add Remove Programs. | ___ Initials |

To install Inventory Enterprise 10:

1. Launch the **Setup.exe** file for the Inventory installation. The welcome page of the installation wizard appears.
2. Click **Next** in the welcome page. The license agreement page appears.
3. Read the agreement and accept if you wish to continue, accept the agreement and click the **Next** button. The page for customer information appears.
4. Enter the appropriate information and click **Next**. The page for specifying installation path and Oracle service name appears.
5. Specify the Oracle service name and click **Next**. The page for beginning the installation appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete.

**UPDATING INVENTORY ENTERPRISE DATABASE**

For this step, keep in mind that the menubar.ini file is not backed-up by the installer. Therefore, if you have not made an archive of your entire <webroot> or associated install folder, you may take backup at this time.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | A log file appears and notifies that Inventory Enterprise database tables have been updated. | ___ Initials |

To update Inventory Enterprise database:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Upgrade Scripts**. The **ChemOffice Enterprise 10 Database Upgrade Guide** window appears. Click the *click here* link corresponding to the bullet item for updating Inventory Manager schema. A command prompt window appears.

   OR

   Locate the folder: "<webroot>\ChemOffice\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB\sql\Update_Scripts" and double-click the file: Update_Inventory_9SR3_to_10.cmd. A command prompt window opens and notifies that it will create the Chemical Inventory database.
2. Press any key to continue.

3. Enter the information at the prompt for the items below; after completing each item press Enter/Return to continue:

---

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used.*

---

- Enter the target Oracle service name.
- Enter the name of an Oracle account with system privileges (system).
- Enter the above Oracle account password (manager2). A text log file is opens automatically when the update script has completed.

4. Close any open log file or command prompt windows.

If you have made any changes to the Inventory INI files, manually (or using a 3rd party software tool) merge previous changes to the modified files into the new version of the files. The installation will have created a backup of your original files.

---

*NOTE: When comparing files, a file comparison tool may show a line as new/changed since that line appears in a different location in the file. Check whether lines being merged into the new file from the old file are placed in the correction section of the file and they appear only once in that section.*

---

The upgrade install assumes that the install drive is the C drive, thus if you are not installing on the C drive you will need to check any folder paths and restore them to the drive you are using.

The newly written files are:

- cheminv.ini
- cfserver.ini
- invacx.ini (not backed-up automatically at this time)
- invconfig.ini
- invreg.ini
- menubar.ini (not backed-up automatically at this time)

The backups of these files are:

- cheminv.001
- cfserver.001
- invconfig.001
- invreg.001

The files are located in the <webroot> folder in a path for Inventory such as:

C:\Inetpub\wwwroot\ChemOffice\ChemInv\config\

**REQUIRED CONFIGURATION**

DEFINE THE DATA SOURCE IN THE CS_SECURITY.UDL FILE

You need to define the data source in the cs_security.udl file so that you can log into the Inventory Enterprise application.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: Y: N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To define the data source in the cs_security.udl file:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

7. Browse to: <webroot>\ChemOffice\chemInv\config\
8. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
9. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
10. Enter *oracle* as the password and click **Test Connection**. A success message appears.
11. Click **OK** on the success message box to close it.
12. Click **OK** on the **Data Link Properties** dialog box to close it.

CONFIGURING INVENTORY ENTERPRISE UDLS

Configuring Inventory Enterprise UDLs involves defining the data source in the UDL files and testing the connection to the database.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cheminv.udl file successfully connects to the Oracle database. | ___ Initials |

To define the data source in the Inventory Enterprise UDL files:

1. Browse to: <webroot>\ChemOffice\chemInv\config\
2. Double-click the cheminv.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the data source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

SETTING THE SERVICE NAME IN THE CFSERVER.INI FILE

*NOTE: If you are planning to install more ChemOffice applications and thereafter test the installa-tions then you can perform the following steps after installing all the required applications.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini:

1. Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Server Configuration Tool**. The **ChemOffice Enterprise 10 Configuration Tool** window appears.
2. Enter the Oracle service name.
3. Click the **Save Configuration** button to save the changes.

VERIFY THAT THE SERVER AND PATHS ARE ACCURATE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: <br><br> Y: <br><br> N: | The invconfig.ini file is updated and lists the correct server name where Inventory Enterprise is installed. | ___ Initials |

To verify that the server and paths are accurate:

1. Browse to and open the following file with a text editor:

<webroot>\ChemOffice\chemInv\config\invconfig.ini

2. Ensure or set the INV_SERVER_NAME to point to the server hosting the Inventory Enterprise database.

---

*NOTE: INV_SERVER_NAME refers to the fully qualified domain name of the server, not the Oracle Service Name. For example, right-click My Computer and select Properties. Select the Computer Name tab and choose the full computer name or simple name if supported.*

---

3. Verify that the RPT_PATH entry agrees with the Chem & Bio Office Enterprise installation path. For example, the default is:

<webroot>\webserver_source\cfserverasp\RPT\

The files located here includes the Reports.exe application for the reports service.

4. Verify that the REPORT_DB_PATH entry agrees with the database path chosen in the installer (The default is: C:\ChemOffice_data\ChemInv\Cheminv_reports.mdb).

SETUP BARCODE SUPPORT (OPTIONAL)

Container barcodes facilitate recording of information about the containers. If barcodes have been assigned to containers in your enterprise, you can uniquely identify the containers with their barcodes and store information about them.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Tbarcode is installed and you can assign barcodes to the Inventory containers. | ___ Initials |

To enable barcode support, you will need to install TBarcode. To install TBarcode:

1. Browse to: <webroot>\ChemOffice\ChemInv\Installation\Tbarcode.
2. Double-click to launch the Tbarcode35_OCX.exe installer.
3. Click **Yes** to install. The license agreement appears.
4. Read the license agreement. If you wish to continue, click **Yes**.
5. Browse to destination folder and Click **Next**.
6. Click **OK** to finish the installation.

SETUP ROW LEVEL SECURITY FOR INVENTORY (OPTIONAL)

*NOTE: Row Level security is also known as Location Based Security.*

Row Level security allows you to secure locations by excluding them from specific roles so that users with the specific roles are not able to access the excluded locations. To set up Row Level security for Inventory Enterprise:

1. Execute the following command file:

C:\Inetpub\wwwroot\ChemOffice\ChemInv\config\
oracle_install_scripts\Create_blank_ChemInv_DB\AddRLS.cmd

2. Press any key to continue.
3. Enter the information at the prompt for the items below; after completing each item press Enter/Return to continue:

   • Enter the target Oracle service name.
   • Enter the name of an Oracle account that can login as sysdba (sys)

- Enter the above Oracle account password (manager2).

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used.*

4. Perform an IISRESET.

**TESTING ROW LEVEL SECURITY**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | You are able to exclude locations from a role. | ___ Initials |

To test the installation of Row Level Security (RLS) in Inventory:

1. Open the Enterprise application and log in (example user: invadmin; example password: invadmin).
2. Click the following links:
   - Under Inventory Enterprise, click **Tasks**.
   - Under Security Management click **Manage Role Locations**. The **Select a Role** page appears.
   - Select a role and click **Next**. A list of locations that can be excluded appears.
   - Exclude any role as you wish and click **OK**.
   - Log off from Chem & Bio Office Enterprise.

*NOTE: If you wish to continue you will see any locations you have setup in a tree structure and will be able to choose locations to exclude the selected role from accessing.*

**INTEGRATING WITH OTHER APPLICATIONS**

Inventory Enterprise can be integrated with Registration Enterprise, ChemACX, and/or DocManager Enterprise. To integrate Registration Enterprise, DocManager Enterprise, and ChemACX with Inventory Enterprise, you need to update the invconfig.ini file and perform other application specific tasks that are mentioned in the following sections.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The inconfig.ini file lists the server names where Registration Enterprise, DocManager Enterprise and ChemACX is installed. | ___ Initials |

To update the invconfig.ini file:

1. Specify the name of the respective servers in the INV_SERVER_NAME key in the invconfig.ini file.

   *NOTE: The INV_SERVER_NAME for INV is also set in this file. The invconfig.ini file is located at <webroot>ChemOffice\ChemInv\config\.*

   *NOTE: The server names in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server names, select the check boxes corresponding to Inventory Integration under the Application Settings section in Server Configuration Tool and save the configuration changes.*

2. Ensure that the following settings are there in the invconfig.ini file:
 [CHEMACX]
SHOW_ACX_LOOKUP_LINK=1
SHOW_MSDX_LOOKUP_LINK=1
[DOCMANAGER]
SHOW_DOCMANAGER_LINK=1
3. Check other sections, such as CUSTOM_FIELDS and REPORTS for configuration changes.
4. Save the file and close it.

*NOTE: If you are not planning to integrate any of the following items set their x_SERVER_NAME to NULL in the invconfig.ini file: Registration Enterprise, DocManager Enterprise, ChemACX. Also, skip the following steps.*

The steps indicated in this section are specific to the application, which is to be integrated with Inventory Enterprise.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The ChemReg.udl file successfully connects to the Oracle database. You are able to add a compound to the temporary table of Registration Enterprise. | ___ Initials |

To integrate with Registration Enterprise:

1. Update ChemReg.udl.
    a. Browse to: <webroot>\ChemOffice\ChemInv\config\
    b. Double-click the **ChemReg.udl** file to open it. The **Data Link Properties** dialog box appears.
    c. Change the data source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
    d. Enter *oracle* as the password and click **Test Connection**. A success message appears.
    e. Click **OK** on the success message box to close it.
    f. Click **OK** on the **Data Link Properties** dialog box to close it.

2. Update invconfig.ini.
    a. Browse to and open with a text editor: <webroot>\ChemOffice\ChemInv\config\invconfig.ini.
    b. Change the REG_SERVER_NAME entry to point to the server hosting Registration System. This refers to the fully qualified domain name of the server, not the Oracle service name.
    c. Save and close the file. The file is updated.

    *NOTE: The server name in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server name, select the Registration check box corresponding to Inventory Integration under the Application Settings section in Server Configuration Tool and save the configuration changes.*

3. Update cfserver.ini
    a. Browse to and open with a Text Editor: <webroot>\ChemOffice\Chem_Reg\config\cfserver.ini
    b. Change POST_MARKED_SEND_TO_PAGE=NULL to

POST_MARKED_SEND_TO_PAGE= http://IIS_SERVER_NAME/cheminv/gui/Import-From-ChemReg.asp. Where IIS_SERVER_NAME is the name of the IIS server that is hosting Inventory Enterprise.

   c. Save and close the file. The file is updated.

4. Create Registration integration views in the Inventory Enterprise schema.

   a. Open to the folder: <webroot>\ChemOffice\ChemInv\con-fig\oracle_install_scripts\Create_blank_ChemInv_DB\sql\Update_Scripts\

   b. Click the file: RegistrationIntegration.cmd.

   c. Press any key to continue the execution of the Inventory – Registration database/view integration update script.

   d. Enter the target Oracle service name.

*NOTE: Values in parenthesis in the prompts are default values; if you press Enter/Return without entering a value the default will be used. Consult your DBA if you do not know the required information.*

   e. Close the log file that appears when the file execution is complete.

To verify the integration, add a compound to the Registration Enterprise Temp table. If you see an error (and the compound is not added), drop the following two tables:

- csdohitlist
- csdohitlistid

After dropping the tables, restart the application (this will automatically recreate the tables); you should no longer see an error.

INTEGRATE WITH CHEMACX

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The chemacx.udl file successfully connects to the Oracle database. | ___ Initials |

To integrate with ChemACX:

1. Update chemacx.udl.

   a. Browse to: <webroot>\ChemOffice\ChemInv\config\

   b. Double-click the **chemacx.udl** file to open it. The **Data Link Properties** dialog box appears.

c. Do one of the following:

- If you are using Microsoft® Access database, verify that the location of the ChemACX database (ChemACX.mdb) is correct by clicking **Test Connection**. A success message appears. Click **OK**.
- If you are using Oracle database, change the data source to the name of your Oracle service.

d. Click **OK** on the **Data Link Properties** dialog box to close it.

2. Update invconfig.ini.

a. Browse to and open with a text editor: <webroot>\ChemOffice\ChemInv\config\invconfig.ini.

b. Change the ACX_SERVER_NAME entry to point to the server hosting ChemACX. This refers to the fully qualified domain name of the server, not the Oracle service name.

c. Adjust look-up link settings to the following (so you will see the ChemACX lookup link in Inventory):

- SHOW_ACX_LOOKUP_LINK= 1
- SHOW_MSDX_LOOKUP_LINK= 0
- MSDX_LOOK_AHEAD= 0

d. Save and close the file. The file is updated.

3. Update acxconfig.ini.

a. Browse to: <webroot>\ChemOffice\chemacx\config\ and open the file acxconfig.ini in a text editor.

b. Set EXPORT_TO_CHEMINV="True"

c. Save the file and close it. The file is updated.

UPDATE INVENTORY DATABASE FOR USE WITH CHEMACX 9.5 OR 9.7

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The Inventory Enterprise database is updated for use with ChemACX 9.5 or 9.7. | ___ Initials |

You need to update the database for Inventory Enterprise with the vendors and units of measure that have not yet been deployed to the Inventory system, but reside in the latest release of ChemACX.

To update the database to ChemACX 9.5, execute the following script:

Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd

To update the database to ChemACX 9.7, execute the following script:

Update_ChemInvDB_9.0_for_ChemACX_9.7.cmd

If you receive an error in the log after executing the script, execute the scripts one at a time and use a modified version of the Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd script.

The workflow of the script executions would be as follows:

1. Update_ChemInvDB_9.0_for_ChemACX_9.1.cmd
2. Update_ChemInvDB_9.0_for_ChemACX_9.5.cmd (modified; obtain from CambridgeSoft®)
3. Update_ChemInvDB_9.0_for_ChemACX_9.7.cmd To update the Inventory database for use with ChemACX 9.5 or 9.7:

To update the Inventory database:

1. Browse to the folder and files needed to update Inventory Enterprise 10 to use ChemACX 9.7 (you will need to have the ChemACX9.7 database folder in your install folder, or obtain it now.)

<Informatics Install Folder>\ChemACX96\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB\

2. Copy the following file "update_cheminvdb_9.0_for_chemacx_9.7.cmd" and the folder "sql".

---

*NOTE: You may also copy the entire Create_blank_ChemInv_DB folder and choose to only overwrite the files that appear in both the source and destination folders.*

---

3. Paste the file and folder copied in the previous step, into the target server in the following folder:
<webroot>\ChemOffice\ChemInv\config\oracle_install_scripts\Create_blank_ChemInv_DB\
This will overwrite any files from the update in the folder they are being copied into, leave the remaining files unchanged.

4. Double-click the following file just pasted into the folder mentioned in step 3:
update_cheminvdb_9.0_for_chemacx_9.7.cmd. If prompted with a warning, click **OK** to proceed.

5. Press any key to continue.

6. Complete the information indicated below when prompted; press Enter after each entry:

   • Enter the target Oracle service name.
   • Enter the name of an Oracle account with system privileges (default: system).
   • Enter the above Oracle account password (default: manager2).

The script is completed, and a log file is opened, the log file is:

LOG_Update_ChemInvDB_9.0_for_ChemACX_9.7.txt.

The log file should not contain errors.

---

*NOTE: If an error appears, contact CambridgeSoft® to determine whether all the ChemACX 9.5/9.7 data have been committed or obtain the modified SQL file described in the comments at the start of this section and execute the scripts one at a time as specified.*

---

7. Close any open command prompt or log file.

INTEGRATE WITH DOCMANAGER ENTERPRISE

This section describes how to integrate Inventory Enterprise with DocManager Enterprise. You should test the integration after installing or upgrading DocManager. Instructions for installing Doc-Manager are provided later in this installation guide under "Installing DocManager Enterprise" on page 72. The test of DocManager will not pass until the product is installed and/or upgrade to the correct version (this steps only deals with DocManager integration from Inventory).

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | The invconfig.ini file is updated to integrate DocManager Enterprise and display a link to DocManager Enterprise. | ___ Initials |

To integrate with DocManager Enterprise**:**

1. Browse to <webroot>\ChemOffice\Cheminv\config\.
2. Open the invconfig.ini file with a text editor.
3. Change the DOCMANAGER_SERVER_NAME to point to the server hosting DocManager Enterprise.

---

*NOTE: This refers to the fully qualified domain name of the server, not the Oracle service name. If set to NULL Document Manager integration with Inventory Enterprise will be disabled.*

---

*NOTE: You can also use the Server Configuration Tool to update the server name for DocManager Enterprise.*

---

4. Set SHOW_DOCMANAGER_LINK to 1 to give any user who requires use of this integration the INV_MANAGE_LINKS privilege.
5. Save the file and close it. The file is updated.

This section provides instructions on how to enable users with the ability to create PDF-formatted files. Enabling PDF support is optional and is not required for the installation.

The RPT report writer installed with the Inventory Enterprise can produce reports in four different formats: SNP (MS Access Report Viewer), RTF (Rich Text Format), XLS (Excel Workbook), and PDF.

Support for the PDF format requires a PDF printer driver to be installed on the server.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | You are able to create PDF-formatted files. | ___ Initials |

To enable users to create PDF-formatted files:

1. Browse to <webroot>\ChemOffice\ChemInv\Installation\win2pdf\.
2. Double-click w2pdfsetup.exe; follow the instructions in the installer.
3. Confirm the wind2pdf driver installation as follows:
   a. Open Control Panel and click **Printers and Faxes**.
   b. Right-click on Win2PDF printer.
   c. Select **Set As Default Printer**.
   d. Purchase a license and registration code from: http://www.daneprairie.com/
   e. Right-click the **win2pdf** printer and select **Properties**.
   f. Enter the license/registration code you purchased.
   g. Open Control Panel and click **Administrative Tools** >**Services**.
   h. Click the Reports Service and select to stop the Reports Service (RPTService)
   i. Browse to \ChemOffice_data\Cheminv folder and open the file ChemInv_Reports.mdb.
   j. Open the ReportFormats table and select the Available checkbox for the PDF format.
   k. Close Microsoft® Access, save as needed. The file is updated.
   l. Open the Control Panel and click **Administrative Tools** >**Services**.
   m. Click the Reports Service and select to restart the Reports Service (RPTService)

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | InvLoader is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To Install InvLoader:

1. Click the setup.exe file. The welcome page of the installer wizard appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The Customer Information page appears.
4. Click **Next**. The **Destination Folder** page appears.
5. Choose the directory where you would like the application files installed. The default is: C:\ProgramFiles\CambridgeSoft®\InvLoader\
6. Click **Next**. The **Ready to Install the Program** page appears.
7. Click **Install**. The installation begins.
8. Click **Finish** when the installation is complete.

**TESTING THE INSTALLATION**
IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | You are able to add compounds to an Inventory container from multiple applications, such as ChemACX and Registration Enterprise. | ___ Initials |

To ensure Inventory Enterprise was successfully installed:

1. Login in to the Chem & Bio Office WebServer using the following username and password:

- • Username: invadmin
- • Password: invadmin

2. Add a substance.

*NOTE: For instructions on how to add substances, see "Creating a New Substance" in the Inventory Enterprise User Guide.*

3. Add a container.

*NOTE: For instructions on how to add a container, see "Creating a New Container" in the Inventory Enterprise User Guide.*

4. Add a compound from ChemACX to a container.

*NOTE: For instructions on how to add compounds, see "Creating a New Container" in the Inventory Enterprise User Guide.*

5. Add a compound from Registration System to a container.

*NOTE: For instructions on how to create a barcode, see "Substance Tab" in the Inventory Enterprise User Guide.*

6. Create a Barcode Report.

*NOTE: For instructions on how to add compounds, see "Print Label/Report" in the Inventory Enterprise User Guide.*

A set of roles and users were already created by default during the installation. Here is a table showing the list of roles and users:

| Username | Password | Role |
|----------|----------|------|
| invbrowser | invbrowser | BROWSER |
| invchemist | invchemist | CHEMIST |
| invreceiving | invreceiving | RECEIVING |
| invfinance | invfinance | FINANCE |
| invregistrar | invregistrar | REGISTRAR |
| invadmin | invadmin | ADMIN |

INSTALLING BIOASSAY ENTERPRISE

Before installing BioAssay Enterprise on your system, ensure that the following software are already installed:

- CambridgeSoft ChemOffice Enterprise Core 10.
- Correct version of Oracle client and OLEDB. For details, see "Verifying Oracle Database Version" on page 93.
- SQLNet access to Oracle 9i or 10g database server.
- Inventory Enterprise 10.

---

*NOTE: Refer to the README file for BioAssay installation pre-requisites and BioAssay documentation for additional details on configuration settings.*

---

To install and use BioAssay Enterprise 10, you need to install both its server and client versions.

**INSTALLING THE BIOASSAY SERVER**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file appears and notifies that the BioAssay database tables have been created. | ___ Initials |

To install the BioAssay server:

1. Execute the file update_bioassay_9.0sr3_to_10.cmd located at: <Installation folder>\database sinstall\update9sr3to10.
2. Press any key to continue.
3. Complete the information indicated below when prompted; press Enter after each entry:
   - Enter the target Oracle service name.
   - Enter Oracle major version.
   - Enter the name of an Oracle account with system privileges (system).
   - Enter the above Oracle account password (manager2).

---

*NOTE: The text in parenthesis for the prompts above refers to default values. Press Return/Enter without entering a value in order to accept the default.*

---

4. Close the log file that appears after the file update_bioassay_9.0sr3_to_10.cmd is executed.

**INSTALLING BIOASSAY WEB SERVICE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: Y: N: | BioAssay Web service is installed. | ___ Initials |

To install BioAssay Web service:

1. Run the setup.exe file located at: <Installation folder>/WebServiceInstaller. The welcome page of BioAssayDAL WebServiceSetup wizard appears.
2. Click **Next**. The **Select Installation Address** page appears.
3. Click **Next**. The **Confirm Installation** page appears.
4. Click **Next**. The installation starts.
5. Click **Close** when the **Installation Complete** page appears.

**CONFIGURING BIOASSAY ENTERPRISE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: Y: N: | ASP.NET 2.0 is running. CSWDA virtual directory is created. The bioassayhts.udl file is successfully connected to the Oracle database. | ___ Initials |

To configure BioAssay Enterprise:

1. Ensure that ASP.NET 2.0 is running.
   a. Click **Start**>**Programs**>**Administrative Tools**>**Internet Information Services(IIS) Manager**. The **Internet Information Services(IIS) Manager** console appears.
   b. Expand computer name of the local computer that is displayed in the left pane. The **Web Sites** folder is displayed.

c. Expand the **Web Sites** folder. The **Default Web Site** icon is displayed.

d. Right-click the **Default Web Site** icon and select **Properties**. The **Default Web Site Properties** dialog box appears.

e. Click the **ASP.NET** tab.

f. Select **2.0.x** in the **ASP.NET version** drop down list.

g. Click **OK** on the **Default Web Site Properties** dialog box to close it.

*NOTE: If you are using COE SingleSignOn then configure the Web.Config file for your BioAssay .NET Web service. The Web.Config file is located on the server computer at the following location: "C:\Inetpub\wwwroot\BioAssayDALWebService".*
*To configure the Web.Config file, edit the following entry appropriately: <add key="singleSignOnURL" value=""/>. For example, <add key="singleSignOnURL" value="http://localhost/COESingleSignOn/ SingleSignOn.asmx"/> ('Value' refers to the SingleSignOn web service).*

*NOTE: The Web.Config file is automatically installed on the server computer after you run "\WebServiceInstaller\setup.exe".*

2. Create virtual directory.

   a. Copy the **CSWDA** folder located in the installation folder and paste it at: /inetpub/wwwroot

   b. Open the IIS console.

   c. Navigate to the **CSWDA** folder within **Default Web Site**.

   d. Right-click the **CSWDA** folder and select **New**>**Virtual Directory** to display the welcome page of **Virtual Directory Creation Wizard**.

   e. Click **Next**. The **Virtual Directory Alias** page appears.

   f. Enter **CSWDA** in the **Alias** text box and click **Next**. The **Web Site Content Directory** page appears.

   g. Browse to the **CSWDA** folder in \inetpub\wwwroot and click **Next**. The **Virtual Directory Access Permissions** page appears.

   h. Enable the **Write** check box and click **Next**.

   i. Click **Finish**.

3. Configure the CSWDA virtual directory.

   a. Right-click the **CSWDA** virtual directory in the left pane of the IIS console and select Properties. The **CSWDA Properties** dialog box appears.

   b. Click the **Create** button if **CSWDA** is not displayed in the **Application name** text box.

   c. Click the **Configuration** button. The **Application Configuration** dialog box appears.

   d. Click the **Options** tab.

   e. Change the ASP script timeout value to 600 seconds or higher.

   f. Click **OK** on the **Application Configuration** dialog box to close it.

   g. Click **OK** on the **CSWDA Properties** dialog box to close it.

4. Configure the bioassayhts.udl file.
   a. Open the **bioassayhts.udl** file located at: \InetPub\wwwroot\cswda\config. The **Data Link Properties** dialog box appears.
   b. Click the **Provider** tab and select **Oracle Provider for OLEDB**.
   c. Click the **Connections** tab.
   d. Enter the Oracle service name in the **Data Source** text box.
   e. Enter *oracle* as password and click **Test Connection**. A success message appears.
   f. Click **OK** on the success message box to close it.
   g. Click **OK** on the **Data Link Properties** dialog box to close it.
5. Configure cswda.ini file.
   a. Open the cswda.ini file located at: \InetPub\wwwroot\cswda\config.
   b. Ensure that the path name of **bioassayhts.udl** file is correct.
   c. Ensure that the user names and passwords of Oracle schemas are correct.
   d. Save and close the file.
6. Configure cfserver.ini file.
   a. Open the cfserver.ini file located at: \InetPub\wwwroot\chemoffice\cs_security\config\
   b. Add ,BIOASSAY_PRIVILEGES (with the comma) to the end of the line which starts with PRIVILEGE_TABLE_LIST.

   *NOTE: If the privilege already exists, do not add it.*

   c. Add ,HTS_LOGIN (with the comma) to the end of the line that starts with MINIMUM_REQUIRED_PRIVILEGE.

   *NOTE: If the privilege already exists, do not add it.*

   d. Save and close the file.
7. Perform iisreset.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | BioAssay client is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install BioAssay client:

1. Uninstall any previous versions of BioAssay Enterprise that may be present on your system, using the Windows Add/Remove Programs Control Panel.
2. Click the **setup.exe** file locate at: <installation folder>/Client_Installer. The welcome page of the installation wizard appears.
3. Click **Next**. The **License Agreement** page appears.
4. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The **Setup Type** page appears.
5. Ensure that the **Complete** option is selected and click **Next**. The **Ready to Install the Program** page appears.
6. Click **Install**. The installation starts.
7. Click **Finish** when the installation is complete.

*NOTE:  BioAssay Desktop and BioAssay Enterprise cannot work simultaneously on the same computer, unless you are prepared to manually register the BioAssayModules.ocx for the application you are interested in using (if it isn't already registered) and un-register the BioAssayModules.ocx of the other BioAssay. BioAssayModules.ocx exists in the BioAssay install directory. For example, if you want BioAssay Desktop to run on a computer that has BioAssay Enterprise installed, you have to reg-*

*ister the BioAssayModules.ocx in the BioAssay Desktop install directory and un-register the BioAssayModules.ocx in the BioAssay Enterprise install directory. The other alternative is to completely uninstall the other BioAssay.*

*NOTE: After installing the new client, you must log in as a user with HTS_SUPERVISING_ADMIN privileges. Thereafter, open Application Settings from the start page and click Refresh All Protocol Views. The application will update all the protocol views to take into account the added Version field.*

**CONNECTING WITH WEB SERVICES**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The BioAssay.exe file is updated to connect with Web services. | ___ Initials |

To run BioAssay in WebService connection mode, on your client computer, you need to edit the file BioAssay.exe.config:

1.  Open the BioAssay.exe.config file located at: <OS drive>:\Program Files\CambridgeSoft®\BioAssay Enterprise 10\.

2.  Change the line:

<add key="CambridgeSoft.BioAssay.DBConnMethod" value="1" />

To

<add key="CambridgeSoft.BioAssay.DBConnMethod" value="3" />

3.  Find the following line in the "WebService for the DAL" section

<add key="CambridgeSoft.BioAssay.DAL.BADataDAL.BADataService1" value="http://localhost/BioAssayDALWebService/BADataService1.asmx"/>

and replace "localhost" with the name of the server computer which will be running Web services.

4.  Find the following line in the "WebService for the DAL" section:

<add key="CambridgeSoft.BioAssay.Legacy.WebServer" value="localhost"/>

and replace "localhost" with the name of the server computer that will be running Web services.

5.  Save and close the file.

If you want to update user permissions at this time, (this configuration step may not need to be executed immediately):

The HTS_DATA_USER and HTS_ADMIN roles now have minimal privileges. All users other than 'htssupervisingadmin' will now require the following:

- Granted explicit permissions on each feature they need access to (using the Security > Manage Users main menu item)
- Granted permissions on each assay they need access to.

All users should now be granted the Oracle HTS_ADMIN role by executing the following statement from a Oracle DBA account (Replace <USERNAME> with the name of the user you want to update). For example change

GRANT HTS_ADMIN TO <USERNAME>;

to

GRANT HTS_ADMIN TO htssupervisingadmin;.

NOTE: There may be a script now noted above to correct this, checking on this (InventoryRegrant10x), I think not as that is for INV and this seems to be BA specific roles. {delete this if there is no script. Rewrite this if there is}

If you want to make all the protocol templates visible, including the inventory-linked protocols, execute the following SQL on the SERVER: --- THIS IS ON THE CLIENT MOVE THIS TO SERVER SECTION---{Verify whether the text here should be moved.}

UPDATE HTS_PRTCL_TEMPLATE_T

SET PTL_TMPL_VISIBLE=1

WHERE NOT PTL_TMPL_VISIBLE=1;

COMMIT;

*NOTE: This script is also attached as AllProtocolTemplatesVisible.SQL*

**TESTING BIOASSAY ENTERPRISE 10 INSTALLATION**

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |

| Description | Expected Result | Actual Result |
| --- | --- | --- |
| Successfully Executed?:<br><br>Y:<br><br>N: | BioAssay Data Service file opens successfully.<br><br>You are able to login to the BioAssay application as *htssupervisingadmin* | ___ Initials |

1. To test the WebServer installation:

Ensure that you have correctly configured ASP.NET on your computer. For more information see "Configuring IIS and ASP on Web Server" on page 11.

Open the BioAssay Data Service file in a browser. For example, open the following URL:

http://localhost/BioAssayDALWebService/BADataService1.asmx

*NOTE: If you cannot locate the file or receive an error that you may not have configured the ASP.NET environment and folders correctly (Example: Insufficient rights to read or write to the folder structure). To configure ASP.NET correctly, see "Configuring IIS and ASP on Web Server" on page 11.*

2. To test the client installation, log into the BioAssay 10.1 client on the Oracle Service that was setup. Enter the following information when prompted:

- Username (use the default *htssupervisingadmin*. This user has all of the BioAssay HTS rights,)
- Password (use the default *htssupervisingadmin*.)
- Data Source (your Oracle data source. For example, oradb)
- Initial Catalog (you may leave the default: BIOASSAYHTS)

*NOTE: You can perform additional tests for different connections and access templates.*

*NOTE: If you receive an error, review the ASP.NET configuration and attempt to directly view the BADataService1.asmx file as mentioned in step 1(You will not be able to do so via the client).*

3. To make the previous Protocols correctly visible after logging into the client:
   a. Click the **Application Settings** link on the Start Page (right side). A window appears.

b. Click the **Refresh All Protocol Views** button.

c. Specify the server names in the servers section for Registration Enterprise, Inventory Enterprise and BioSAR Enterprise, if they are already installed.

4. To create a new protocol:

a. Expand the **Protocol** folder, right-click on the **(Unclassified)** Folder and select **New Project**.

b. Enter a name for the new project. Click **OK**.

c. Select the name for the new project that is now in the left panel.

d. Right-click on the new project and select **New Protocol**.

e. Enter the required information for the new protocol:

• Protocol Name
• Select a template for the protocol

5. Open the newly created protocol. In the right panel for the protocol, select a link, such as **Manage tables, fields, and file import templates**.

---

*NOTE: For additional integration steps, view the readme.txt file (located in the Installation folder) for this installation.*

---

INSTALLING BIOSAR ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | BioSAR Enterprise 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install BioSAR Enterprise 10:

1. Execute the Setup.exe file located in the installation CD or folder containing BioSAR installation files. The welcome page of BioSAR Enterprise 10 installer appears.

2. Click the **Next** button. The license agreement page appears.

3. Read the license agreement. If you wish to continue, accept the agreement and click the **Next** button. The page for specifying customer information appears.

4. Enter your name and organization. Click **Next**. The page for specifying the installation path and Oracle service name appears.

5. Enter your Oracle service name and click **Next**. The page for specifying the location of ChemOffice_data folder appears.

6. Locate the ChemOffice_data folder, if the default path is incorrect and click **Next**. The page for beginning the installation appears.

7. Click **Install**. The installation starts.

8. Click **Finish** when the installation is complete.

**UPDATING THE BIOSAR ENTERPRISE DATABASE**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:  Y:  N: | A log file opens and notifies that the database tables for BioSAR Enterprise have been updated. | ___ Initials |

To update the BioSAR Enterprise database:

1. Perform one of the following tasks to update the BioSAR Enterprise schema:

   • Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Upgrade Scripts** to open the **ChemOffice Enterprise 10 Database Upgrade Guide** window. Click the *click here* link corresponding to the bullet item on upgrading BioSARDB schema. A command prompt window appears.
   • Navigate to and run the following file: <webroot>\ChemOffice\biosar_browser\config\oracle_install_scripts\Update_BioSAR_DB_from_9.SR3_to_10.cmd. A command prompt window appears.

2. Press any key in the command prompt window to continue and create the BioSAR schema.

3. Specify the configuration information requested:

   • Target Oracle Service Name
   • Name of an Oracle account with system privileges

• Oracle account Password (for the account with system privileges)

*NOTE:  Press Enter after each item; after the last item, the schema creation will continue.*

*NOTE:  A log file opens when the schema is updated. If you install BioSAR before BioAssay, you may see some errors in this log file. If you install BioAssay and then re-install the BioSAR database schema, these errors should not re-appear.*

4.  Close all open BioSAR installation and log file windows.

**REQUIRED CONFIGURATION**

Follow the steps below to finish configuring BioSAR Enterprise, or to review your configuration after an update.

SPECIFY THE DATA SOURCE IN THE CS_SECURITY.UDL FILE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To specify the data source in the cs_security.udl file:

1.  Browse to: <webroot>\ChemOffice\cs_security\config\.
2.  Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3.  Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4.  Enter *oracle* as the password and click **Test Connection**. A success message appears.
5.  Click **OK** on the success message box to close it.
6.  Click **OK** on the **Data Link Properties** dialog box to close it.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?: Y: N: | The biosar_browser.udl file successfully connects to the Oracle database. | ___ Initials |

Configuring BioSAR Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database.

To define the data source in the BioSAR Enterprise UDL:

1. Browse to: <webroot>\ChemOffice\biosar_browser\config\
2. Double-click the biosar_browser.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.
7. Double-click the biosar_browser_msDataShape.udl file to open it. The **Data Link Properties** dialog box appears.
8. Change the data source to the name of your Oracle service. For information about your Oracle Service Name, see your Oracle database administrator or consultant.
9. Enter *oracle* as the password and click **Test Connection**. A success message appears.
10. Click **OK** on the success message box to close it.
11. Click **OK** on the **Data Link Properties** dialog box to close it.

CONFIGURE THE CFSERVER.INI. FILE

*NOTE: If you can also specify the Oracle service name using Server Configuration Tool. Also, if you already specified the Oracle service name earlier in Server Configuration Tool for any other application then you need not set up cfserver.ini file for BioSAR Enterprise.*

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cfserver.ini file is updated and lists the correct Oracle service name, username of DBA and the corresponding password. | ___ Initials |

To configure the cfserver.ini. file:

1. Browse to and open the following file with a text editor:
   <webroot>\ChemOffice\biosar_browser\config\cfserver.ini
2. Find the ORA_SERVICENAME key and enter the name of the Oracle service hosting BioSAR Enterprise. See your Oracle Database Administrator to verify the Oracle service name.
3. Ensure that the DBA_USERNAME and DBA_PWD parameters specify the correct values.
4. Save and close the cfserver.ini file.

**TESTING THE INSTALLATION**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to login to the Biosar Enterprise application, create forms, and perform searches. | ___ Initials |

To test the installation:

1. Log into the Chem & Bio Office WebServer using the following username and password:
   - Username: biosar_admin
   - Password: biosar_admin
2. Click **Manage Your Forms** in the **BioSAR Enterprise** section. A drop-down list appears with list of forms and management options.

3. Create a new form using the Registration Enterprise tables. For information on creating forms, see "Creating a New Form" in the BioSAR Enterprise User Guide.
4. Click **Main Menu**.
5. Perform a search using the form you just created. For information on performing searches, see "Searching" in the BioSAR Enterprise User Guide.
6. Return to the form you created. click **Edit** and choose **Select Child Tables**.
7. Expand the arrow for **Child Tables**. A list of child tables appears.

A default set of roles and users were created during the BioSAR installation. Here is a table showing the list of roles and users:

| Username | Password | Role |
|---|---|---|
| BIOSAR_ADMIN | BIOSAR_ADMIN | BIOSAR_BROWSER_ADMIN |
| BIOSAR_USER | BIOSAR_USER | BIOSAR_BROWSER_USER |
| BIOSAR_USER_ADMIN | BIOSAR_USER_ADMIN | BIOSAR_BROWSER_USER_ADMIN |
| BIOSAR_USER_BROWSER | BIOSAR_USER_BROWSER | BIOSAR_BROWSER_USER_BROWSER |

INSTALLING DOCMANAGER ENTERPRISE

If your computer on which you will install DocManager Enterprise had been renamed then you will have to append the new computer name to the IUSR and IWAM accounts.

**APPENDING SERVER NAMES**

To append the new computer name to IUSR and IWAM accounts:

1. Open a command prompt window.
2. Type the following at the prompt: cd into Inetpub\AdminScripts.
3. Type following at the commands prompt to get and set the account names:
   cscript adsutil.vbs GET w3svc/AnonymousUserName
   cscript adsutil.vbs SET w3svc/AnonymousUserName IUSR_NEWNAME
   cscript adsutil.vbs GET w3svc/WAMUserName

cscript adsutil.vbs SET w3svc/WAMUserName IWAM_NEWNAME

*NOTE: 'NEWNAME' is the current name of the computer on which you will install DocManager Enterprise.*

4. Type the following at the command prompt: cscript Synciwam.vbs -v.
5. Close the command prompt window.

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | DocManager Enterprise 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install DocManager Enterprise 10:

1. Launch setup.exe on the installation CD. The DocManager 10 installer launches and the welcome screen appears.
2. Click **Next** to display the license terms and conditions page. If you accept the agreement, indicate accordingly and click **Next**. The page for specifying customer information appears.
3. Enter user name and organization of customer and click **Next** to display the next page.
4. Perform the following tasks to enter required information:
   a. Select the installation path for the application.
   b. Specify the Oracle service name.
   c. Select username (camsoft_admin)
   d. Enter the password for the selected user.
   e. Specify if the selected user is a domain user.

*NOTE: It is recommended that you keep the default paths when possible.*

5. Click **Next**. A validation succeeded message appears.
6. Click **OK**. The page for beginning the installation appears.
7. Click **Install**. The installation starts.

8. Click **Finish** when the installation is complete.

9. Restart your system.

**REPAIRING YOUR DOCMANAGER ENTERPRISE INSTALLATION**

If your server was previously renamed and you executed the DocManager Enterprise installer without appending the correct server names to IUSR and IWAM accounts then you need to repair the installation.

To repair the DocManager Enterprise installation:

1. Browse to Program Files\CambridgeSoft\Informatics2008\Common\DLLs\

2. Right-click DCOMCNFG.cmd and select **Edit**.

3. Replace the following entries with the appropriate values:

    • <machine_name> with the machine name.

    • <AdminAccountUserName> with the account which installs core and will be installing docmanager.

    • <AdminAccountPassword> with the password of such account.

    • <Informatics2008CommonDllPath> with the absolute path to Program Files\CambridgeSoft\Informatics2008\Common\DLLs\.

4. Save the DCOMCNFG.cmd file.

5. Open a command prompt window.

6. Type the following at the prompt: cd <DRIVE>Program Files\CambridgeSoft\Informatics2008\Common\DLLs Run DCOMCNFG.cmd

    where <DRIVE> is the appropriate drive.

7. Close the command prompt window.

**UPDATING THE DOCMANAGER DATABASE**

*NOTE: The database steps detailed below will erase any pre-existing data and establish a new database. To perform an update and retain your data, contact CambridgeSoft® support.*

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:<br><br>Y:<br><br>N: | A log file opens and notifies that the database tables for DocManager Enterprise have been created. | ___ Initials |

To update the DocManager database:

1. Do one of the following:

    - Click **Start** > **Programs** > **ChemOffice Enterprise 2008** > **Database Upgrade Scripts** to open the **ChemOffice Enterprise 10 Database Upgrade Guide** window. Click the *click here* link corresponding to the bullet item on upgrading the Document Manager schema. A command prompt window appears.
    - Navigate to the directory: <webroot>\ChemOffice\DocManager\config\oracle_install_scripts\ and click the file: Update_DocManager_9SR3_to_10.cmd. A command prompt appears and notes that the update will install a new DocManager (DOCMGR) schema, and that any existing DocManager schema will be destroyed and all data lost.

2. Press any key in the command prompt window to continue and update the DocManager schema.

3. Specify the configuration information requested:

    - Target Oracle Service Name
    - Oracle Version Number (9, or 10)
    - Name of an Oracle account with system privileges
    - Oracle account Password (for the account with system privileges)
    - CTXSYS Account password

---

*NOTE: Press Enter after each item; after the last item the schema creation will continue.*

---

---

*NOTE: After the last item is entered you may need to press enter one additional time for the installation to proceed.*

---

After the installation is completed, a text editor log window opens and shows the installation log file.

4. Close all open DocManager installation and log file windows.

DEFINE THE DATA SOURCE IN THE CS_SECURITY UDL

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:

Y:

N: | The cs_security.udl file successfully connects to the Oracle database. | ___ Initials |

To define the Data Source in the cs_security UDL:

1. Browse to: <webroot>\ChemOffice\cs_security\config\
2. Double-click the cs_security.udl file to open it. The **Data Link Properties** dialog box appears.
3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle service name, see your Oracle database administrator or consultant.
4. Enter *oracle* as the password and click **Test Connection**. A success message appears.
5. Click **OK** on the success message box to close it.
6. Click **OK** on the **Data Link Properties** dialog box to close it.

CONFIGURING DOCMANAGER ENTERPRISE UDL

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:

Y:

N: | The docmanager.udl file successfully connects to the Oracle database. | ___ Initials |

Configuring DocManager Enterprise UDL involves defining the data source in the UDL file and testing the connection to the database. To define the data source in the DocManager Enterprise UDL file:

1. Browse to:

<webroot>\ChemOffice\docmanager\config\

2. Double-click the docmanager.udl file to open it. The **Data Link Properties** dialog box appears.

3. Change the Data Source to the name of your Oracle service, if required. For information about your Oracle Service Name, see your Oracle database administrator or consultant.

4. Enter *oracle* as the password and click **Test Connection**. A success message appears.

5. Click **OK** on the success message box to close it.

6. Click **OK** on the **Data Link Properties** dialog box to close it.

CONFIGURE THE CFSERVER.INI. FILE

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*NOTE: If you can also specify the Oracle service name using Server Configuration Tool. Also, if you already specified the Oracle service name earlier in Server Configuration Tool for any other application then you need not set up cfserver.ini file for DocManager Enterprise.*

---

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |
| Successfully Executed?:<br><br>Y:<br><br>N: | The cfserver.ini file is updated and lists the correct Oracle service name. | ___ Initials |

To set the service name in the cfserver.ini. file:

1. Browse to and open the following file with a text editor:

<webroot>\ChemOffice\docmanager\config\cfserver.ini

2. Find the ORA_SERVICENAME key and enter the name of the Oracle service hosting DocManager Enterprise. See your Oracle Database administrator to verify the Oracle service name.

3. Save and close the cfserver.ini file.

INTEGRATE WITH INVENTORY ENTERPRISE DATABASE

IQ Summary

| Description | Expected Result | Actual Result |
|-------------|-----------------|---------------|
|             |                 |               |

| Description | Expected Result | Actual Result |
|---|---|---|
| Successfully Executed?:  Y:  N: | The invconfig.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Inventory Enterprise database:

1. Browse to <webroot>\ChemOffice\cheminv\config\ and open in a text editor: invconfig.ini.
2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

   *NOTE: If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

   *NOTE: The server name in the invconfig.ini file can also be updated automatically using the Server Configuration Tool. To update the server name, select the DocManager check box corresponding to Inventory Integration under the Application Settings section in the Server Configuration Tool and save the configuration changes.*

3. Set SHOW DOCMANAGER_LINK to 1.
4. Save and close the file.
5. Perform iisreset.

INTEGRATING WITH REGISTRATION ENTERPRISE

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The cfserver.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Registration Enterprise:

1. Browse to <webroot>\ChemOffice\chem_reg\config\ and open in a text editor: cfserver.ini.

2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

*NOTE: If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

3. Set SHOW DOCMANAGER_LINK to 1.
4. Save and close the file.
5. Perform iisreset.

INTEGRATING WITH DRUG DEGRADATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: Y: N: | The cfserver.ini file is updated to list the server name on which DocManager is installed. | ___ Initials |

To integrate with Drug Degradation:

1. Browse to <webroot>\ChemOffice\DrugDeg\config\ and open in a text editor: cfserver.ini.
2. Change the DOCMANAGER_SERVER_NAME to point to the server hosting Document Manager. This refers to the fully qualified domain name of the server, not the Oracle service name.

*NOTE: If DOCMANAGER_SERVER_NAME is set to NULL, Document Manager integration will be disabled.*

3. Set SHOW DOCMANAGER_LINK to 1.
4. Save and close the file.
5. Perform iisreset.

UPLOADING LARGE DOCUMENTS

When uploading a >200K document in Document Manager on Windows 2003 server you get the following error message:

Request Object Error 'ASP 0104 : 80004005'

Operation Not Allowed

/docmanager/docmanager/src/upload.asp, line 72

This is a result of an MS upper limit for uploading. Increase the file upload limit by following these steps:

1. Confirm that the big files (>200k) is unable to load.
2. Type the following commands in the command window:

   cd c:\inetpub\adminscripts

   cscript adsutil.vbs set w3svc/ASPMaxRequestEntityAllowed 1073741824
3. Perform iisreset. This will set the max size to 1G and it is the MS upper limit for uploading. You can confirm that files >200K are able to upload by typing: cscript adsutil.vbs get w3svc/ASP-MaxRequestEntityAllowed

**TESTING THE INSTALLATION**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:<br><br>Y:<br><br>N: | You are able to log into the DocManager Enterprise application and add a new document. | ___ Initials |

To test the installation:

1. Type *http://localhost* in your browser address bar to open the Chem & Bio Office Webserver login security page.
2. Login as:
   - doc_admin: user
   - doc_admin: password
3. Add a new document. The document is added to the record count and can be searched.

The following table lists the users who can access DocManager:

| Username | Password | Privileges |
|---|---|---|
| doc_browser | doc_browser | search |
| doc_submitter | doc_submitter | search, submit, delete docs submitted by this user |
| doc_admin | doc_admin | search, submit, delete all docs, manage batch submission, manage users |

*NOTE: Do not launch Microsoft® Word, PowerPoint, or Excel after running the DocManager Enterprise application.*

INSTALLING DRUG DEGRADATION

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?:<br><br>Y:<br><br>N: | Drug Degradation is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install Drug Degradation:

1. Launch setup.exe on the installation CD for Drug Degradation application. The welcome screen of the installation wizard appears.
2. Click **Next**. The **User Information** page appears.
3. Click **Next**. The **Installation Settings** page appears.
4. Click **Next**. The **Ready to Install** page appears.
5. Click **Install**. The installation starts.

6. Click **Finish** when the installation is complete.

---

*NOTE: There is no update script available for upgrading the Drug Degradation database form 9SR3 to 10.*

---

**CONFIGURING THE APPLICATION**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: <br><br> Y: <br><br> N: | The DrugDeg.udl file successfully connects to the Oracle database. | ___ Initials |

To configure the application:

1. Browse to: <webroot>\ChemOffice\DrugDeg\config\ and launch the file. Open DrugDeg.udl to display the **Data Link Properties** dialog box.
2. Change the service name to your service name, if required. For information about your Oracle service name, see your Oracle database administrator.
3. Enter *oracle* as the password and click **Test Connection**. A success message appears.
4. Click **OK** on the success message to close it.
5. Click **OK** on the **Data Link Properties** dialog box to close it.
6. Open the file cfserver.ini.

   ---

   *NOTE: If you have specified the Oracle service name in Server Configuration Tool, earlier, for any other application, then you need not update the cfserver.ini file for Drug Degradation.*

   ---

7. Set the value of ORA_SERVICENAME to your Oracle service name in the [DRUG_MANAGEMENT] section.
8. Set the values of DOCMANAGER_SERVER_NAME and DRUGDEG_SERVER_NAME in the [GLOBALS] section.
9. Save the changes and close the file.
10. Perform an IISRESET.

**TESTING THE INSTALLATION**

The following table lists the user names with which you can log onto Drug Degradation and test the installation:

| Username | Password | Privileges |
|---|---|---|
| drugdegbrowser | drugdegbrowser | Search D3 and DrugDeg |
| drugdegsubmitter | drugdegsubmitter | Search D3 and DrugDeg, submit & delete DrugDeg records |
| drugdegadmin | drugdegadmin | Search D3 and DrugDeg, submit & delete DrugDeg records, manage users |
| D3browser | D3browser | Search D3 |

INSTALLING DRUG DEGRADATION DATABASE (D3)

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
| | | |
| Successfully Executed?: <br><br> Y: <br><br> N: | Drug Degradation Database 10 is installed and appears in Control Panel > Add or Remove Programs. | ___ Initials |

To install Drug Degradation Database (D3):

1. Launch setup.exe on the installation CD for Drug Degradation Database. The welcome screen of the installation wizard appears.
2. Click **Next**. The license agreement page appears.
3. Read the license agreement and accept it, if you wish.
4. Click **Next**. The user information page appears.
5. Specify the username and organization name.
6. Click **Next**. The page displaying the installation path and Oracle service name appears.
7. Specify the Oracle service name.
8. Click **Next**. The page to begin the installation appears.

9.  Click **Install**. The installation starts.
10. Click **Finish** when the installation is complete.

---

*NOTE:  There is no update script available for upgrading the Drug Degradation database form 9SR3 to 10.*

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**CONFIGURING THE APPLICATION**

IQ Summary

| Description | Expected Result | Actual Result |
|---|---|---|
|  |  |  |
| Successfully Executed?:  Y:  N: | The D3.udl file success-fully connects to the Oracle database. | ___ Initials |

To configure the application:

1.  Browse to: <webroot>\ChemOffice\D3\config\ and launch the file. Open D3.udl to display the **Data Link Properties** dialog box.
2.  Change the service name to your service name, if required. For information about your Oracle service name, see your Oracle database administrator.
3.  Enter *oracle* as the password and click **Test Connection**. A success message appears.
4.  Click **OK** on the success message to close it.
5.  Click **OK** on the **Data Link Properties** dialog box to close it.
6.  Open the file cfserver.ini.

    *NOTE:  If you have specified the Oracle service name in Server Configuration Tool, earlier, for any other application, then you need not update the cfserver.ini file for Drug Degradation Database (D3).*

7.  Set the value of ORA_SERVICENAME to your Oracle service name in the [DRUG_MANAGEMENT] section.
8.  Perform an IISRESET.

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