

**YuniquePLM™**  
**Installation Guide**  
**V5.1**

**November 2013**

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The information in this document is correct to the date of its release, but is subject to change.

### Updated Information

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This Installation Guide is updated with each release of the product or when necessary.

This table provides a list of changes.

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1. Windows Server 2012 / 2012R2 and SQL 2012 are now supported in addition to Windows Server 2008R2 and SQL Server 2008R2.
  2. Windows Server 2003 and 2008 32/64-bit, and SQL Server 2005 and 2008 are no longer supported.
  3. ImageGlue V6, ABCPDF V4 and .NET Framework V1.1 are no longer required, are no longer available in the Vendor folder, and the option to install via the Setup Utility has been removed.
  4. ImageGlue V7 and ABCPDF V8 are now required in YuniquePLM™V5.1.
  5. Ghostscript is no longer used.
  6. .NET Framework V4.5 must now be installed on Windows Server 2008R2 web servers.  
.NET Framework V4.5 is already included with Windows Server 2012 / 2012R2.
  7. Microsoft ReportViewer 2008 and ReportViewer 2010 are required on YuniquePLM™V5.1 web servers.
  8. A new Initial Database installation program that accommodates local collation for foreign language versions of Windows Server and SQL Server replaces the manual database restore. The Setup Utility no longer has an installation option.
  9. Revised ImageGlue installation section.
  10. Added support for Windows Server 2012R2, revised Server Configuration section.
  11. Revised Hardware and System Requirements.
- 

Version: 1.00	Date: 3/2013	Description: Initial Release
Version: 1.10	Date: 9/2013	Description: V5.1 update
Version: 1.11	Date: 11/2013	Description: Revisions

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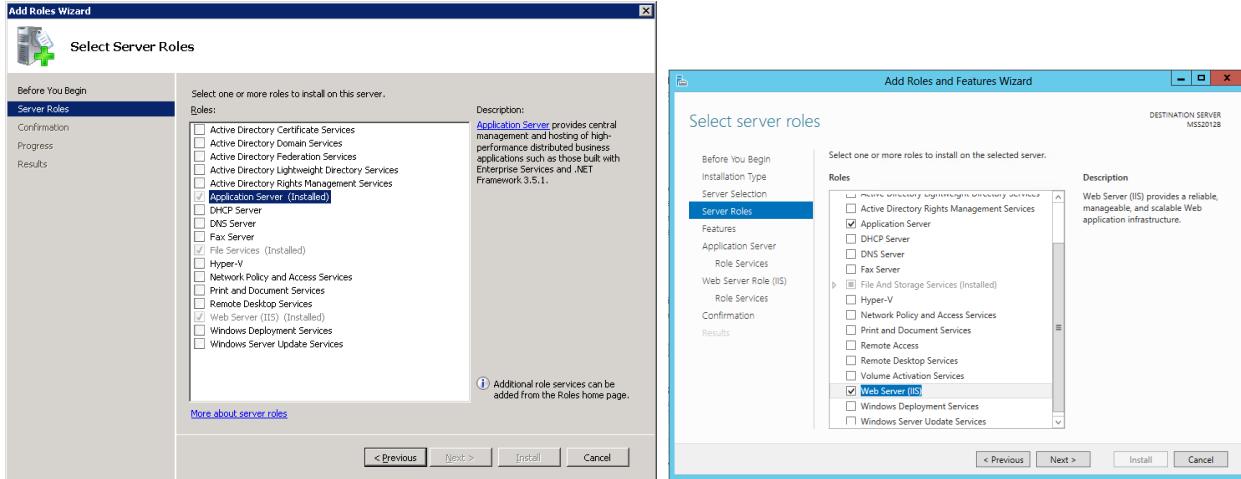
# YuniquePLM™ Installation Guide

## 1. Server Configuration

### 1.1. Windows Server 2008R2 / Windows Server 2012 / 2012R2 configuration

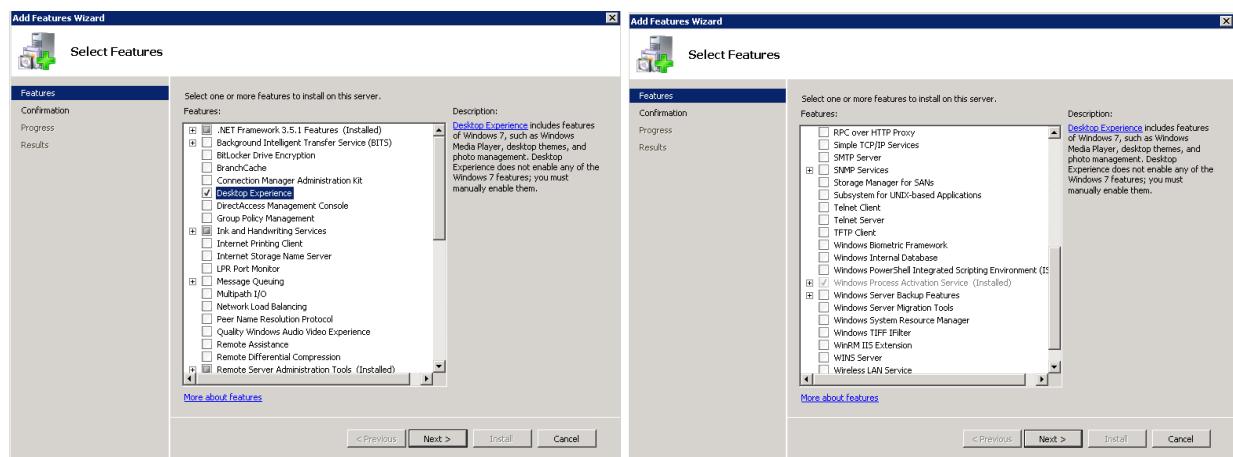
Install all the checked Roles and Features shown in the following screen shots.

#### 1.1.1. Using Windows “Server Manager”, install “Application Server”, “File Services”, and “Web Server” roles.

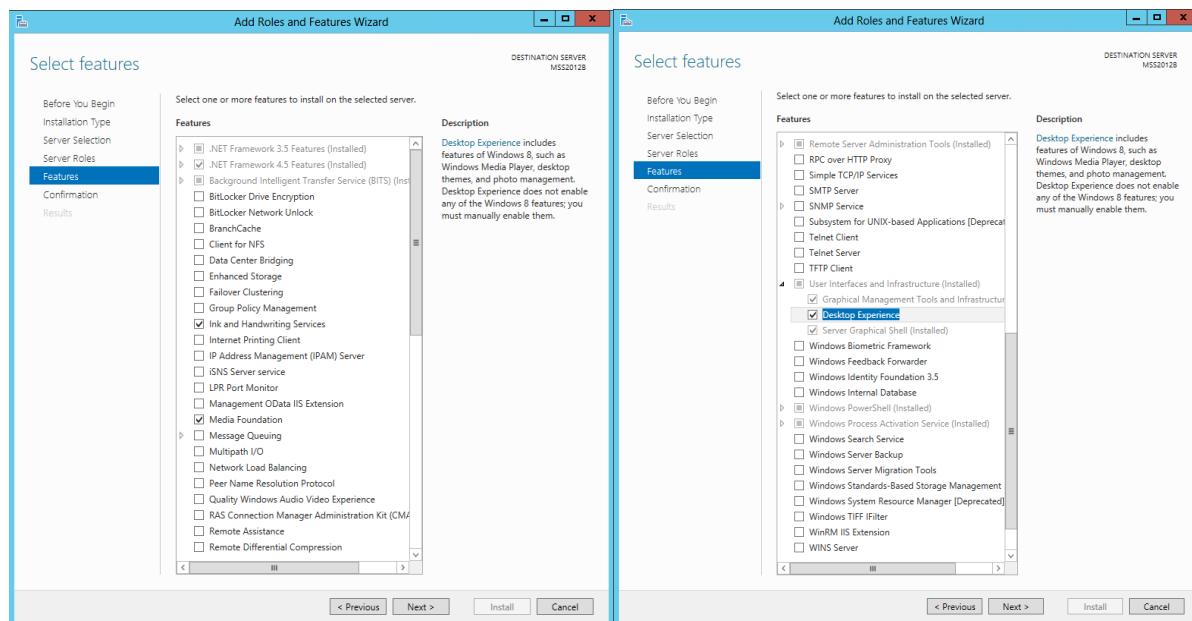


#### 1.1.2. Insure that the following Features are selected.

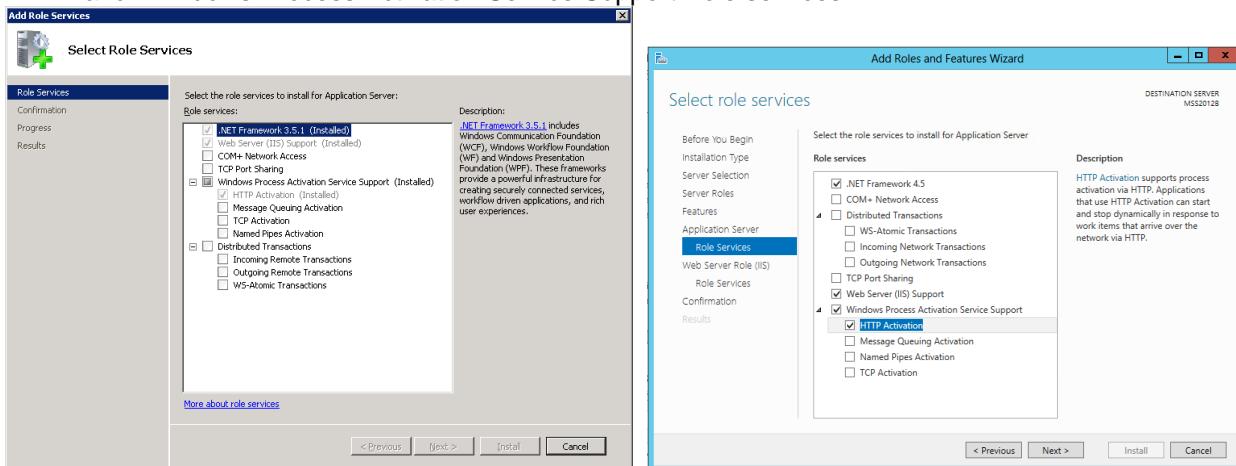
##### Windows Server 2008R2



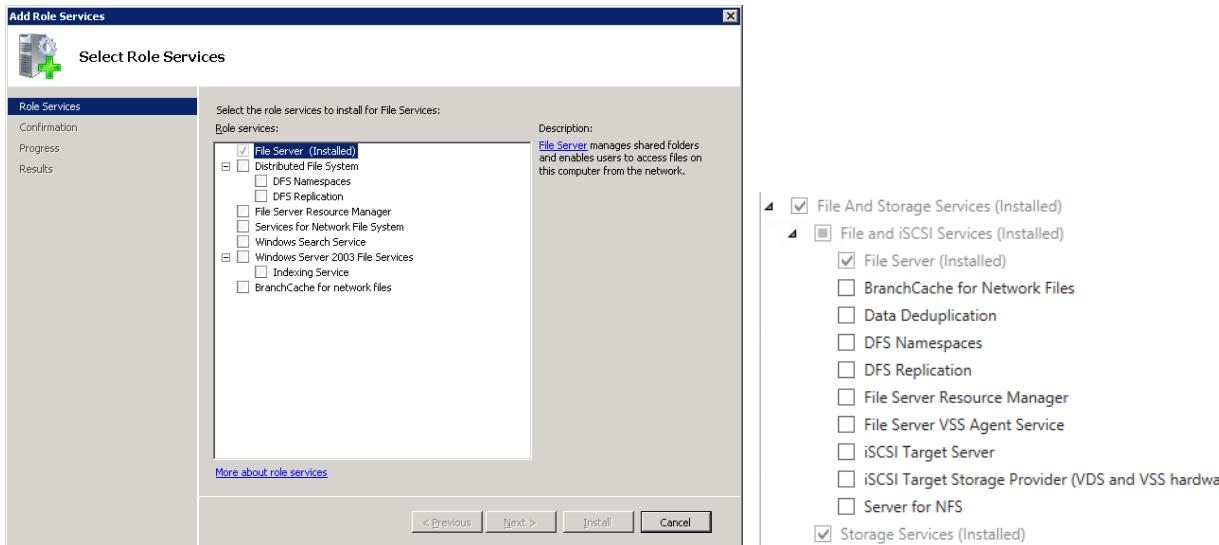
## Windows Server 2012 / 2012R2



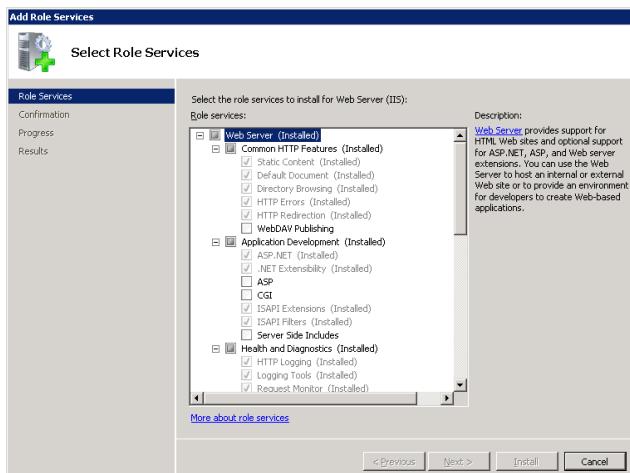
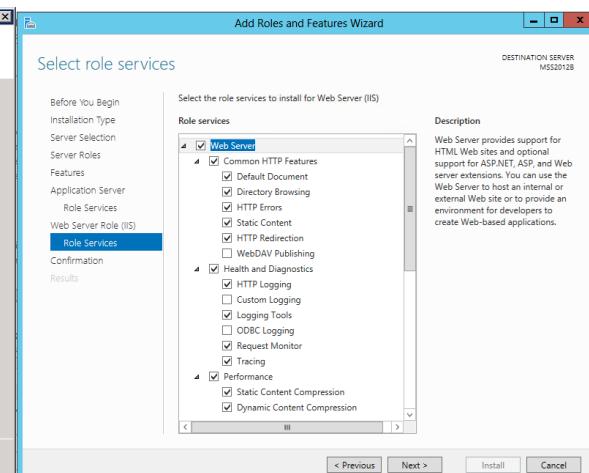
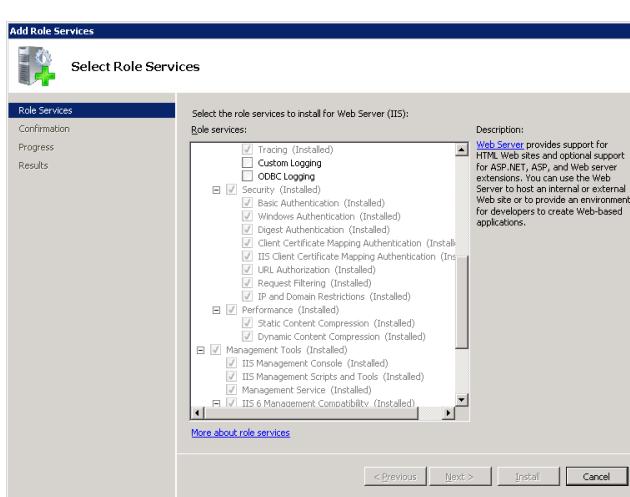
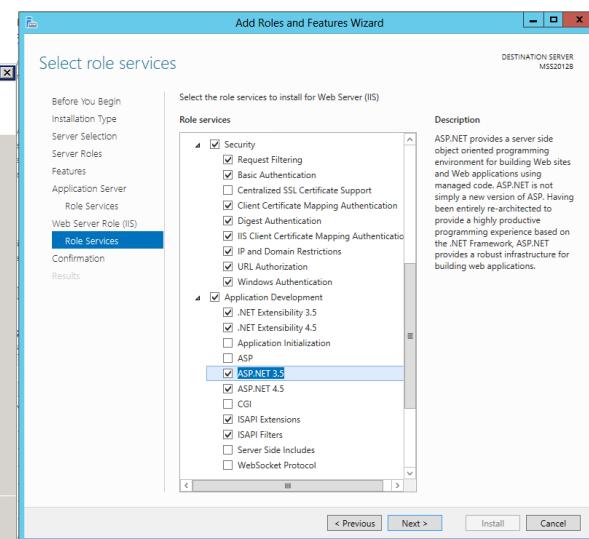
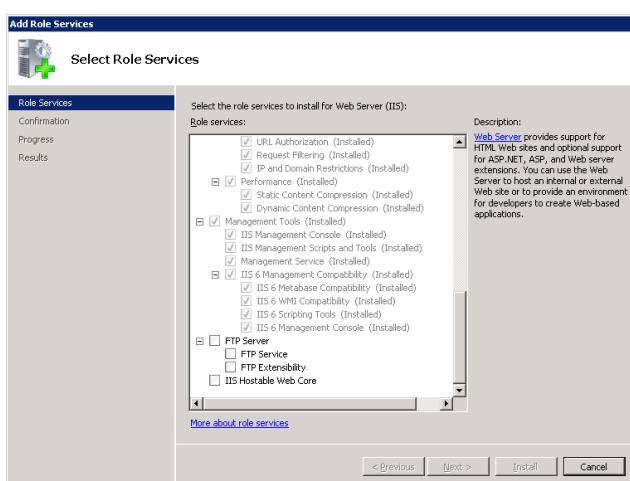
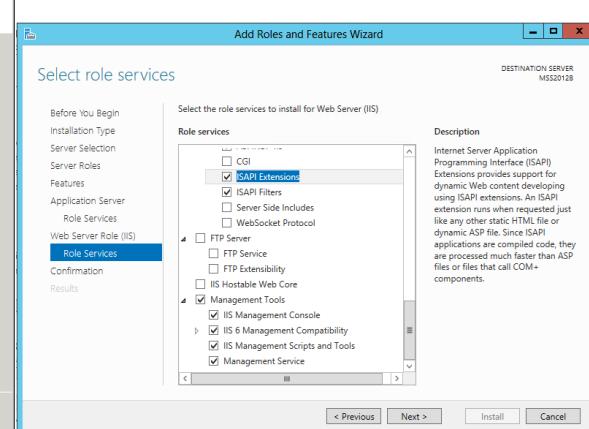
**1.1.3. For the “Application Server” role, install “.NET Framework 3.5.1 or 4.5”, “Web Server Support”, and “Windows Process Activation Service Support” role services.**



**1.1.4. For the “File Server” role, only the “File Server” role service needs to be installed.**



### 1.1.5. For the “Web Server” role, the following role services should be installed:

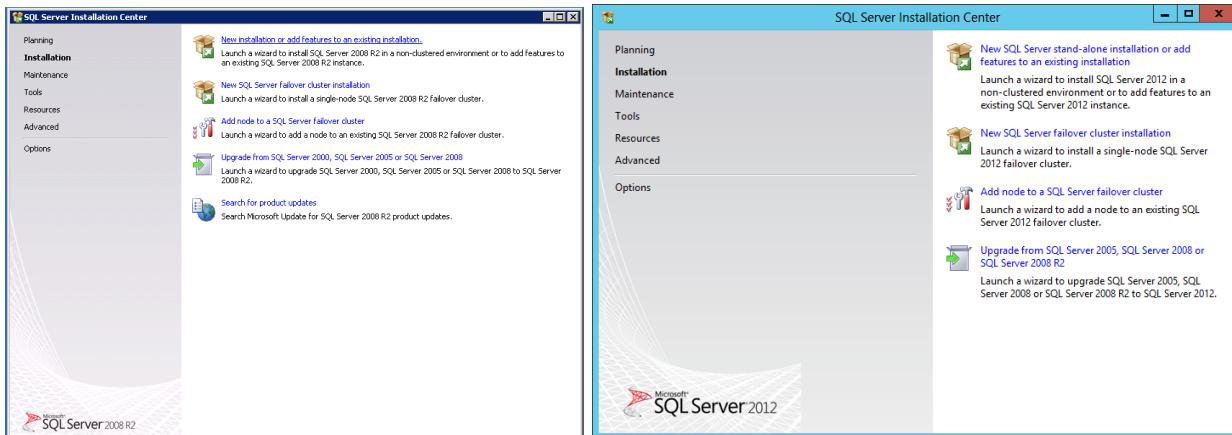







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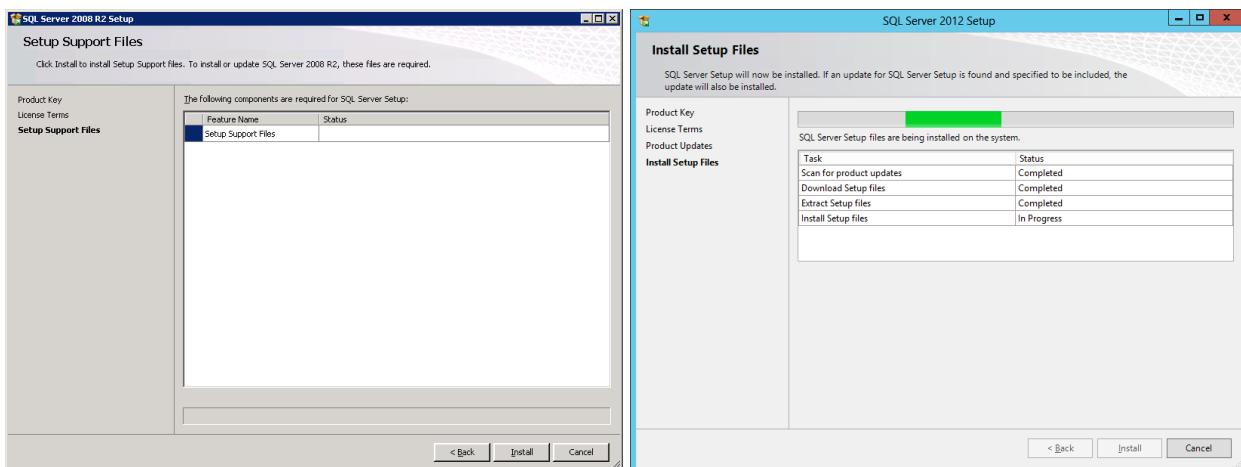
## 1.2. Microsoft SQL Server configuration (2008R2 / 2012)

**1.2.1. Using SQL Server Setup, the following features should be installed: “Database”, “Analysis”, “Reporting”, “Business Intelligence Development Studio” / “SQL Server Data Tools”, “Integration Services”, and “Management Tools – Basic”, “Management Tools – Complete”. Use the standard default configuration settings when installing.**

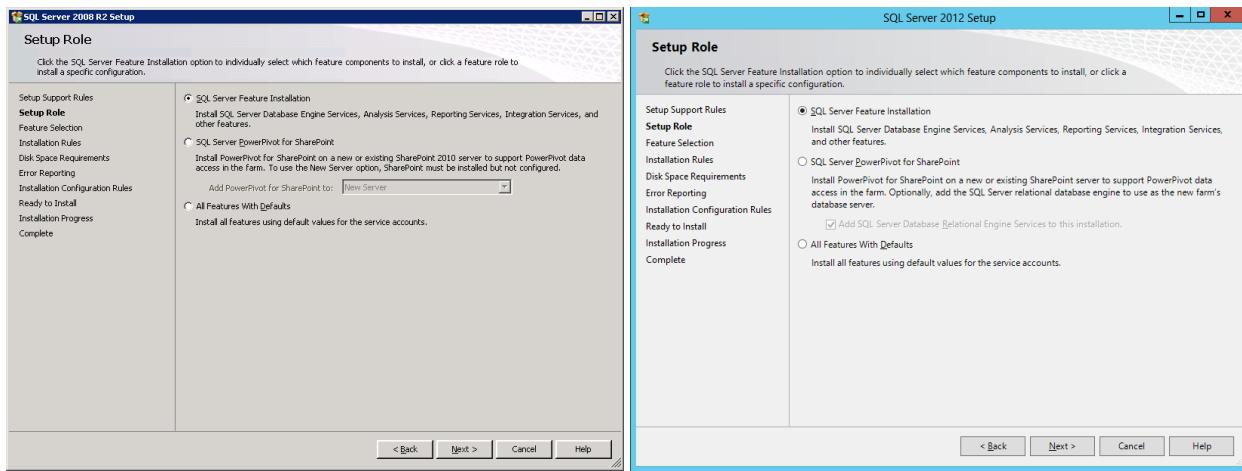
### 1.2.1.1. Select “New Installation...” / “New SQL Server stand-alone...”



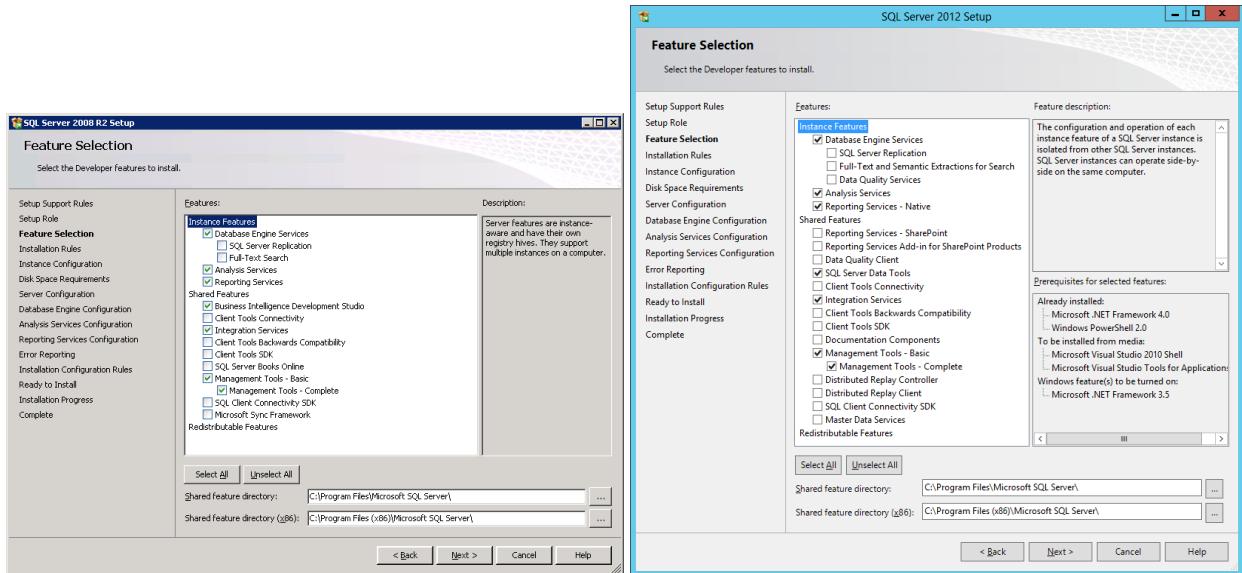
### 1.2.1.2. Press the Install button on the Setup...” screen



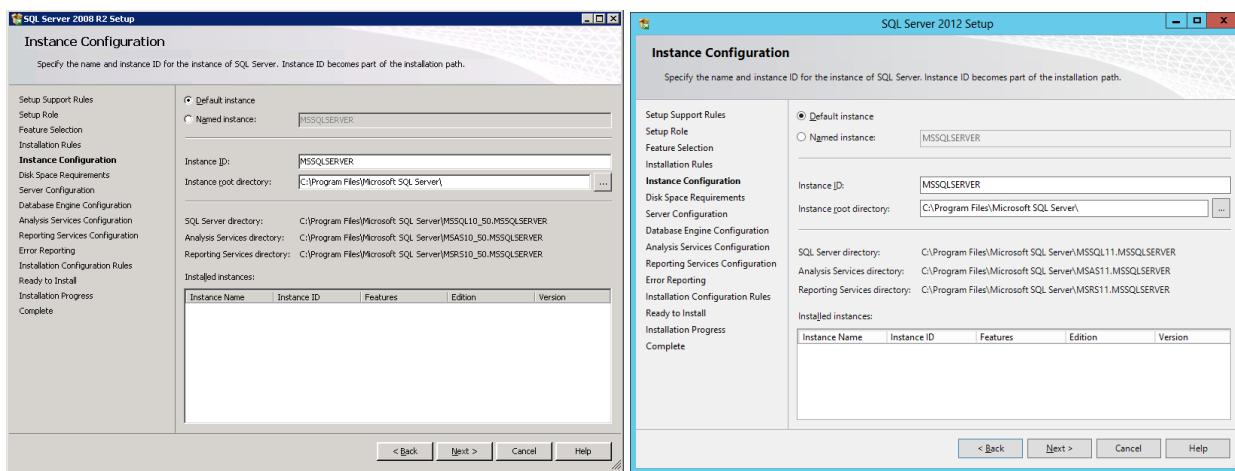
### 1.2.1.3. Select “SQL Server Feature Installation”, press the Next button



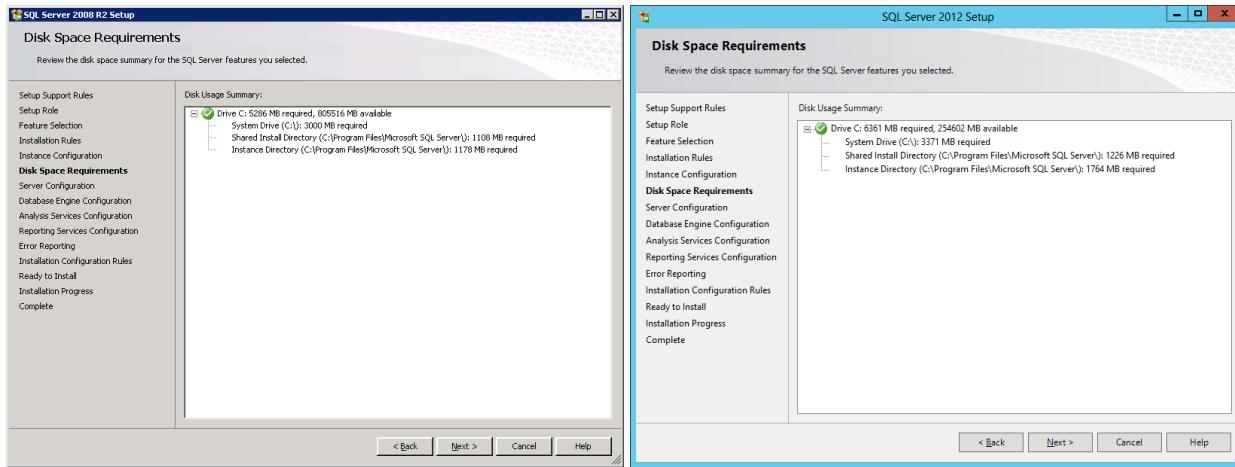
### 1.2.1.4. Select the checked features shown below, press the Next button



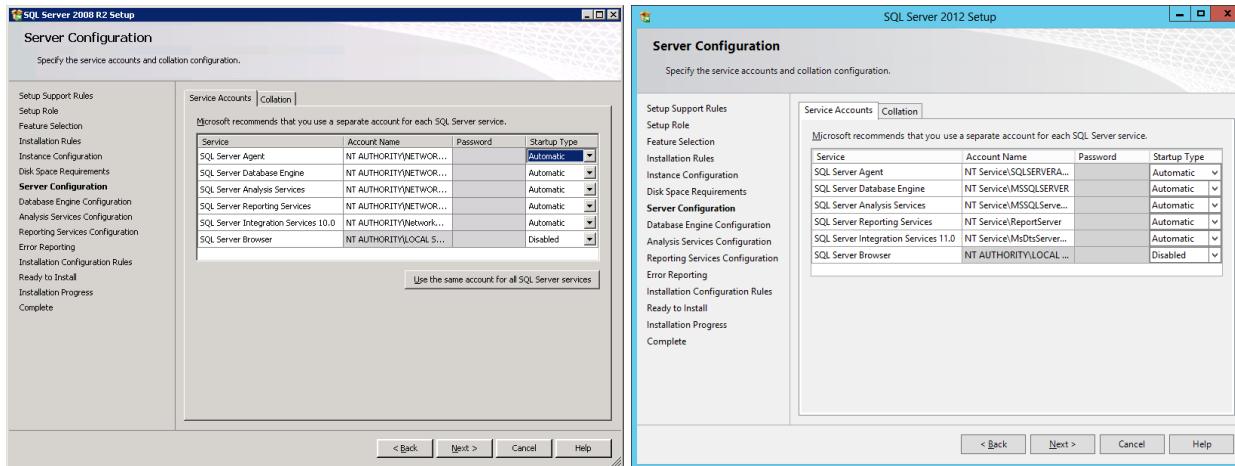
### 1.2.1.5. Select “Default instance”, press the Next button



### 1.2.1.6. Confirm the disk space requirements, press the Next button

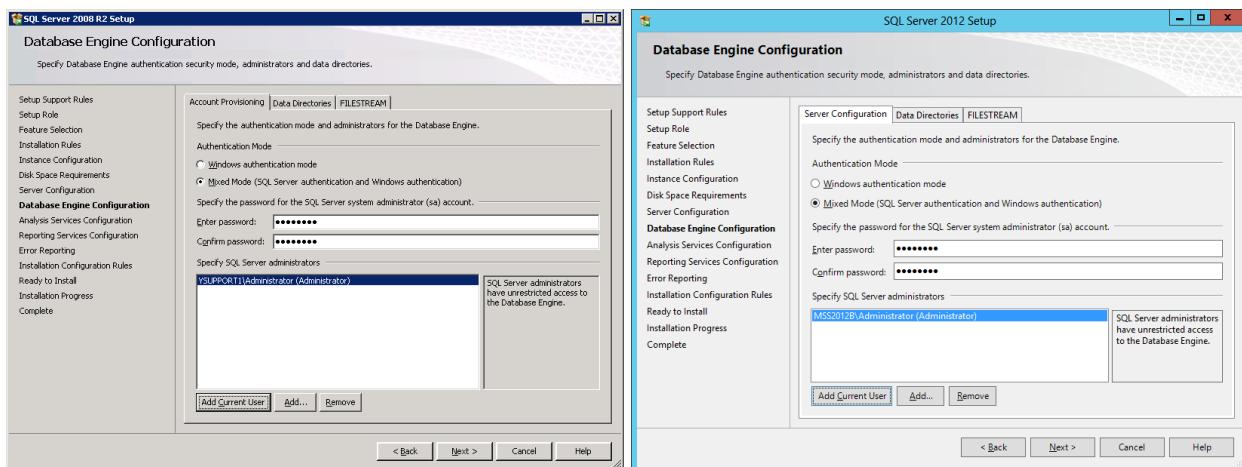


### 1.2.1.7. Select “NT Authority/Network Services” for Account Names (SQL 2012 fills in accounts) and set SQL Server Agent Startup Type to Automatic, press the Next button

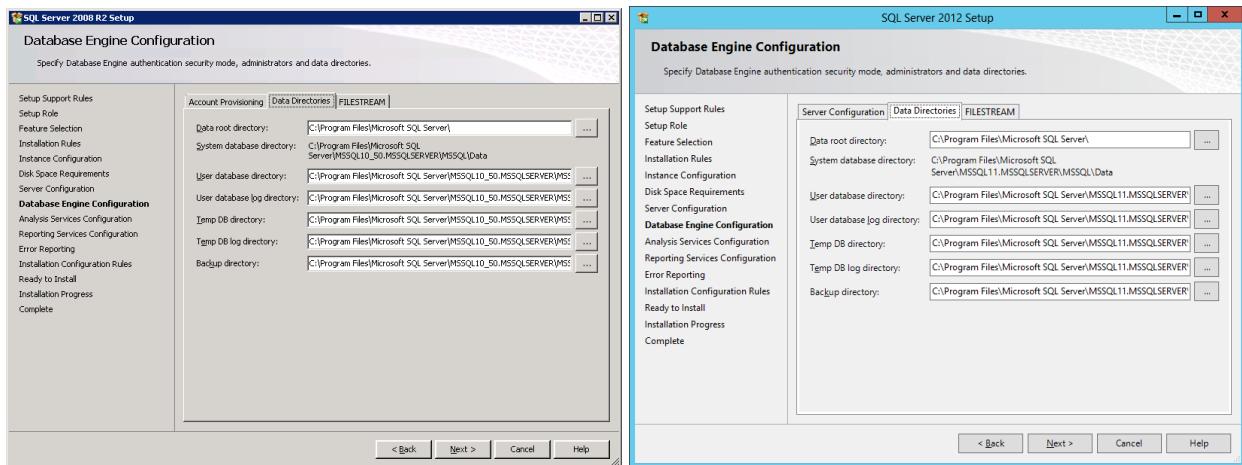


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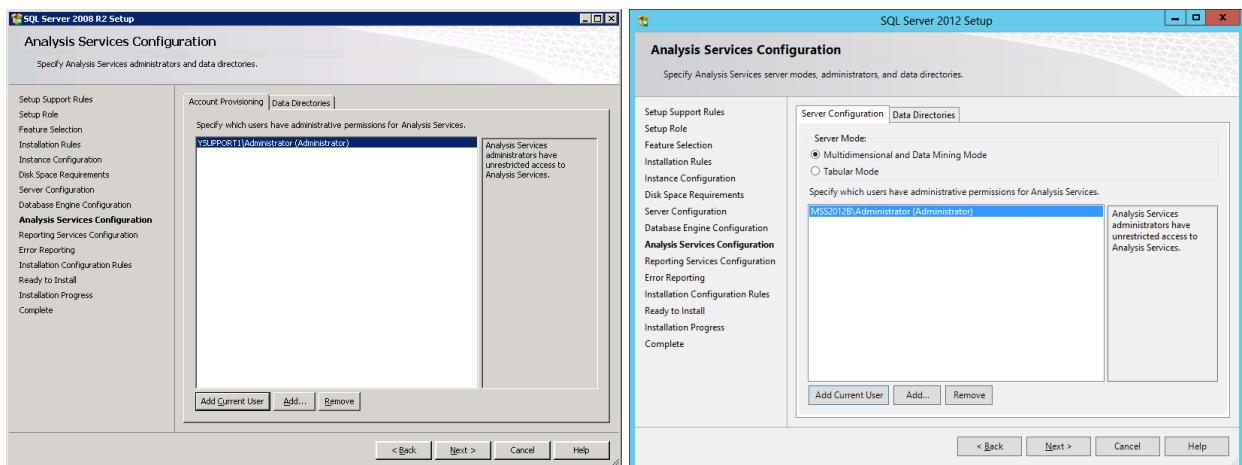
### 1.2.1.8. Set Authentication Mode to “Mixed Mode”, enter the sa password, press “Add Current User” button, press the “Data Directories” tab



### 1.2.1.9. Set the data directory locations or accept the defaults, press the Next button

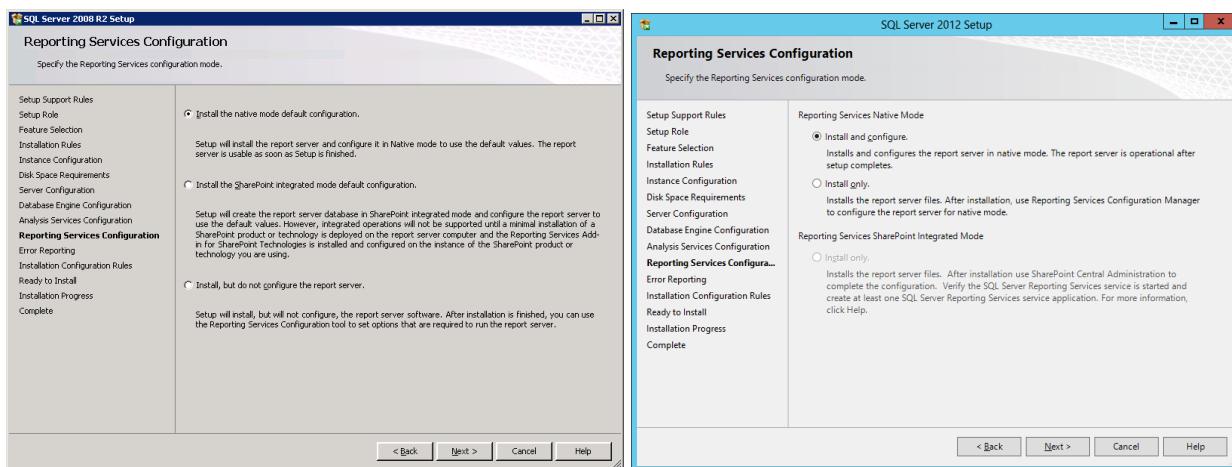


### 1.2.1.10. Press the “Add Current User” button on the “Analysis Services Configuration” screen, press the Next button

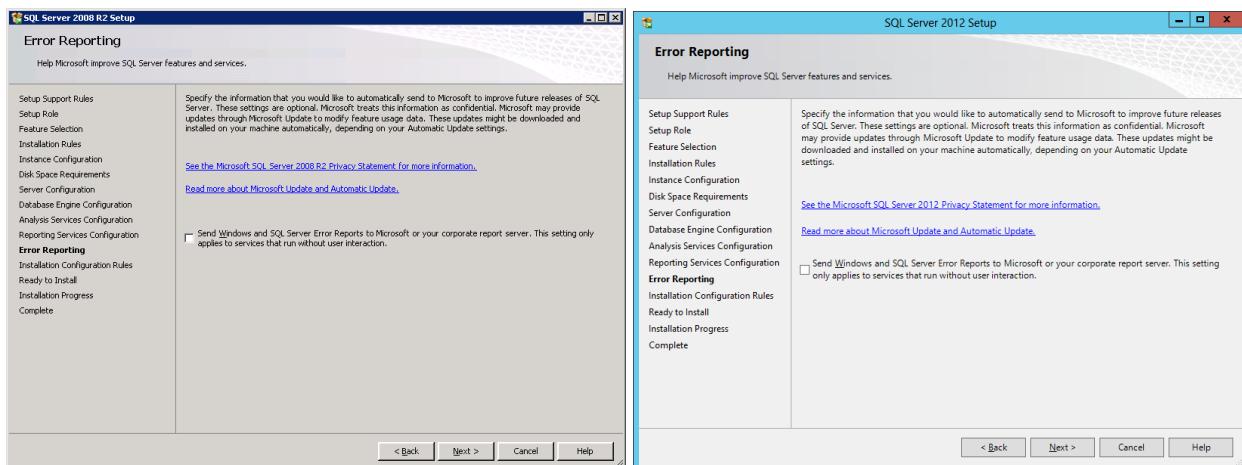


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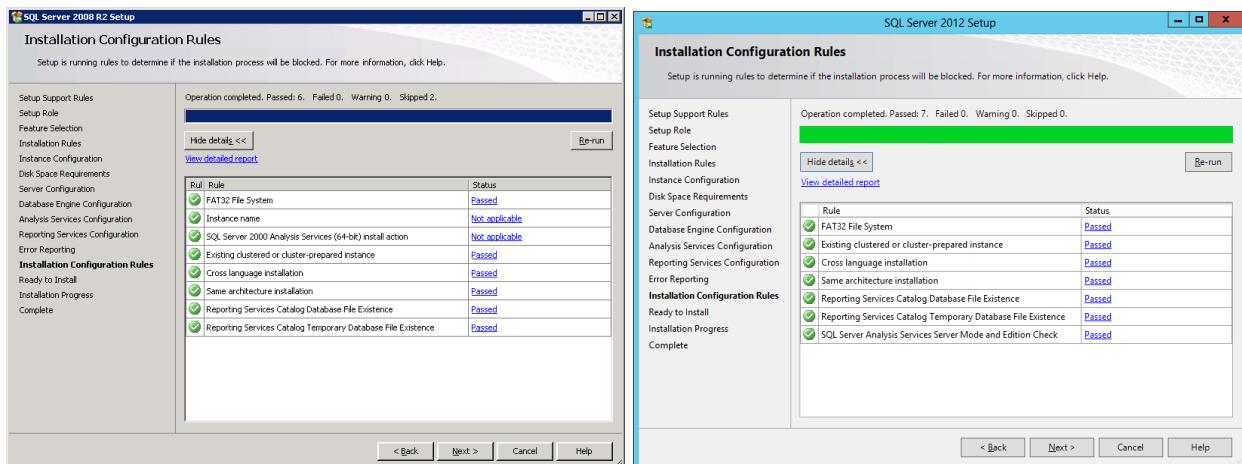
### 1.2.1.11. Select “Install the native mode default configuration” on the Reporting Services Configuration screen, press the Next button



### 1.2.1.12. Press the Next button on the ‘Error Reporting’ screen

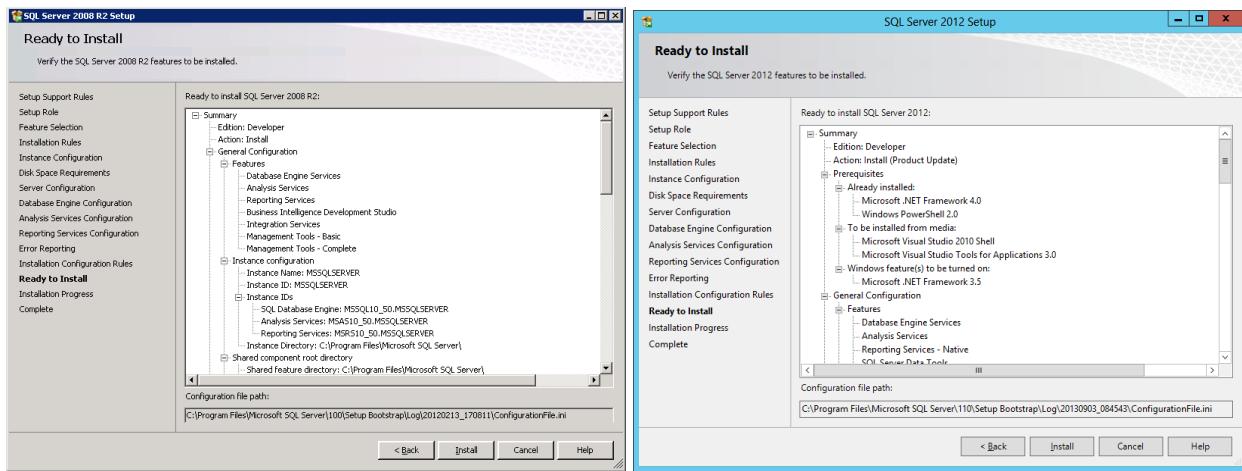


### 1.2.1.13. Press the Next Button on the “Installation Configuration Rules” screen

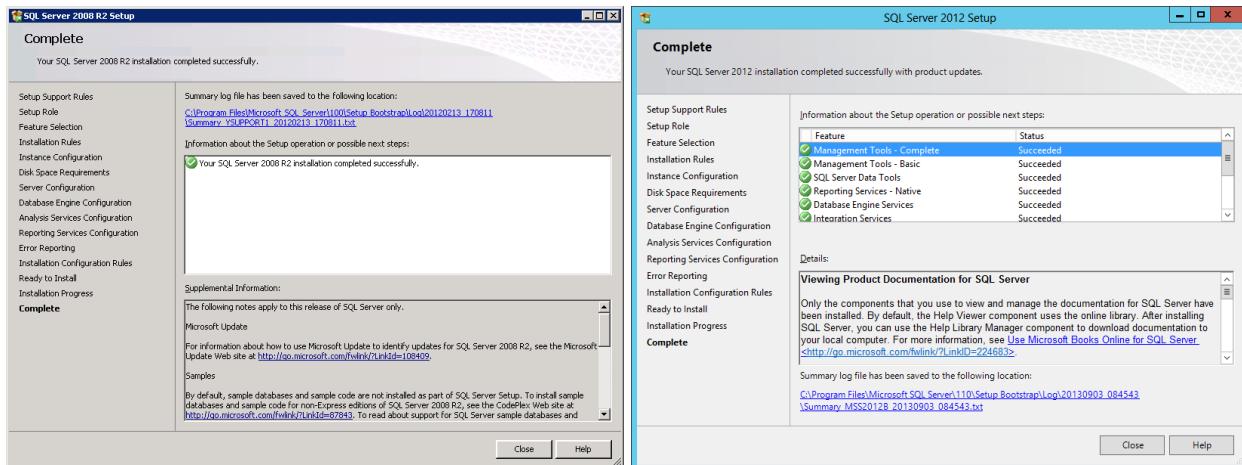


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### 1.2.1.14. Press the Install button on the “Ready to Install” screen

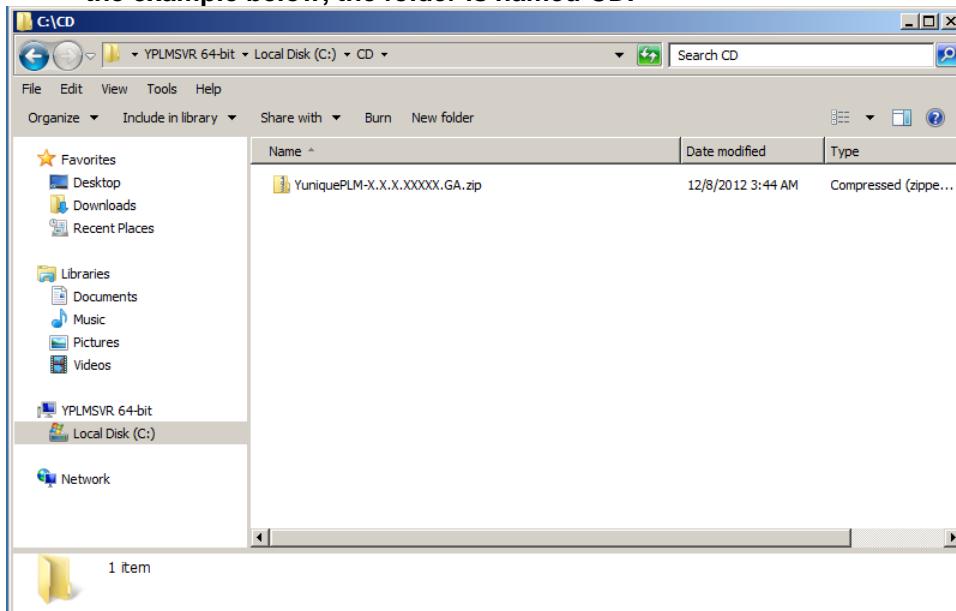


### 1.2.1.15. Press the Close button on the “Complete” screen

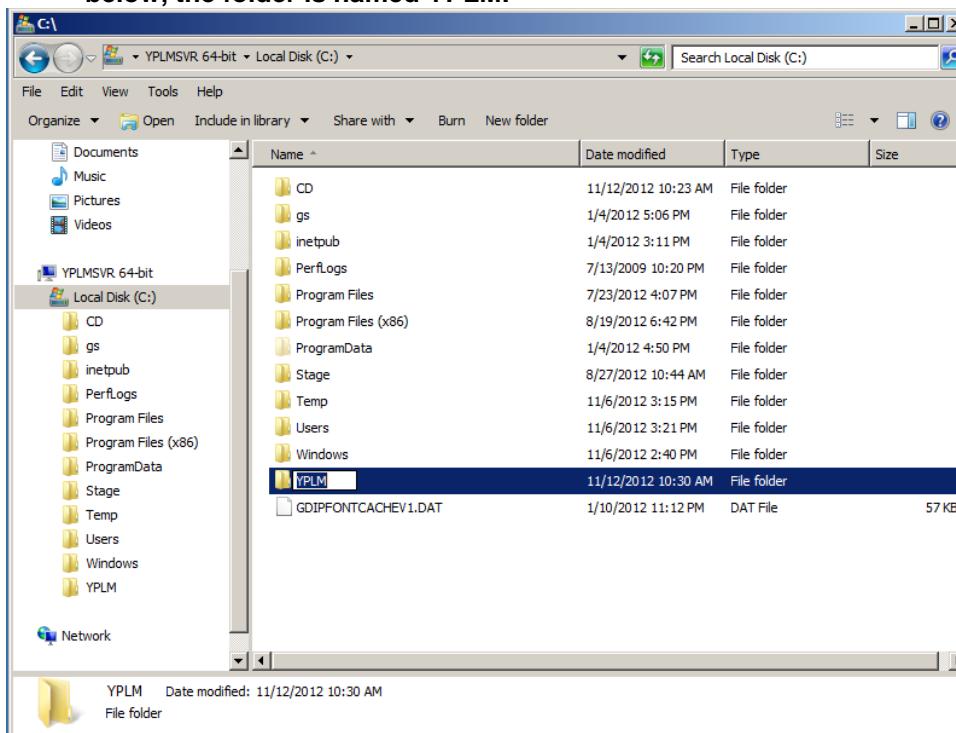


## 1.3. Preparing for YuniquePLM™ software installation

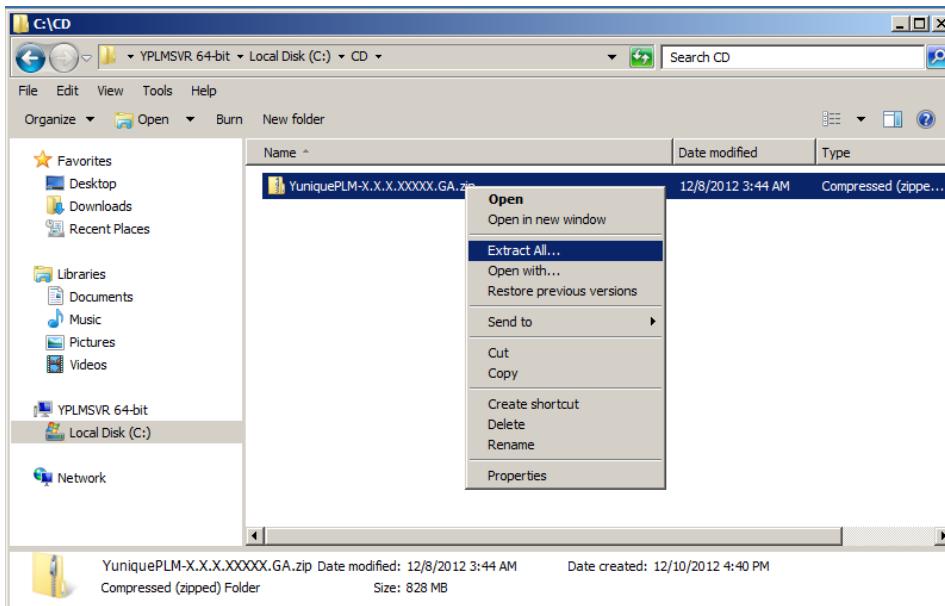
### 1.3.1. Create a folder and copy the YuniquePLM™ distribution software zip file to the server. In the example below, the folder is named CD.



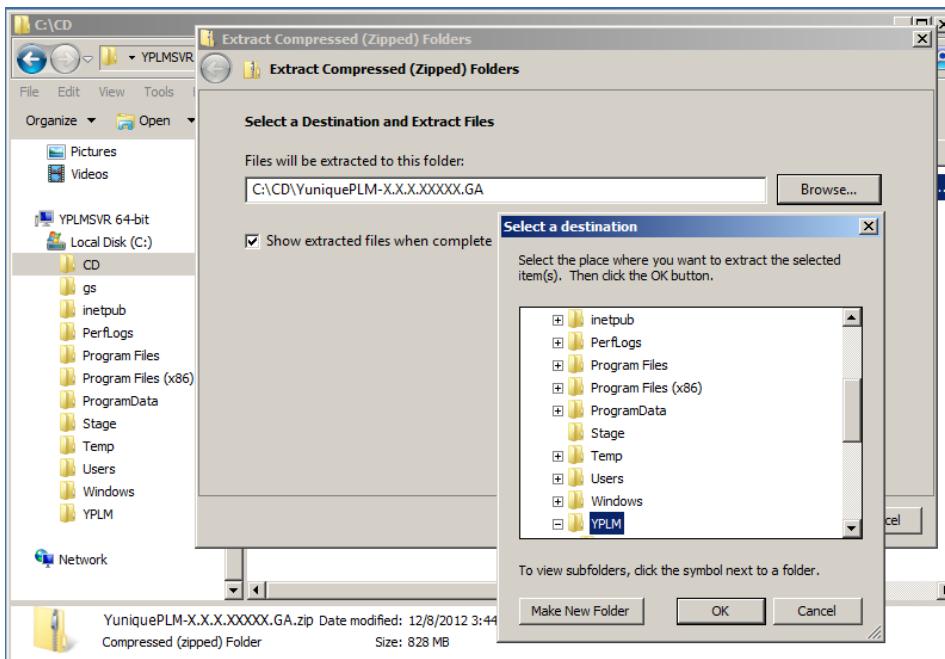
### 1.3.2. Create a folder where the YuniquePLM™ software and data files will reside. In the example below, the folder is named YPLM.



### 1.3.3. Right click on the ZIP file and select “Extract All”

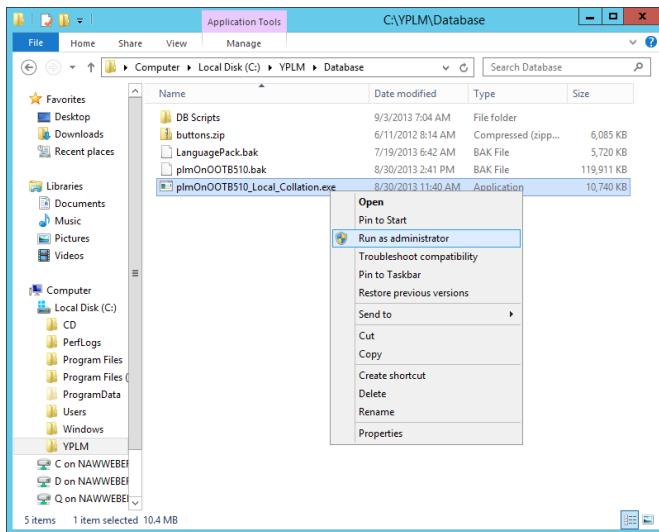


### 1.3.4. Press the Browse button and select the destination folder where all the files and folders and data will be extracted. Press OK and then press the Extract button.

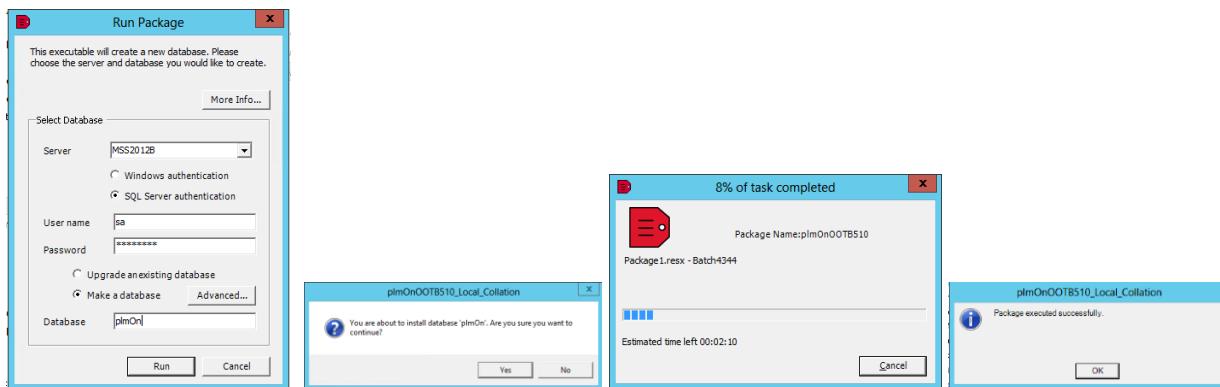


## 1.4. Installing the Initial YuniquePLM™ Database

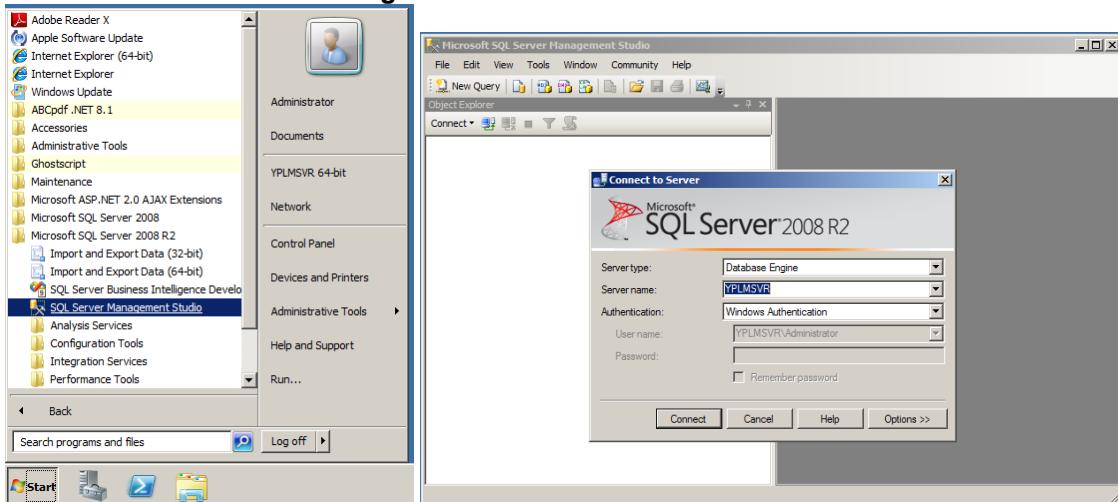
**1.4.1. Go to the YPLM\Database folder and execute the “plmOnOOTB510\_Local\_collation.exe” program. Right click and select “Run as administrator”**



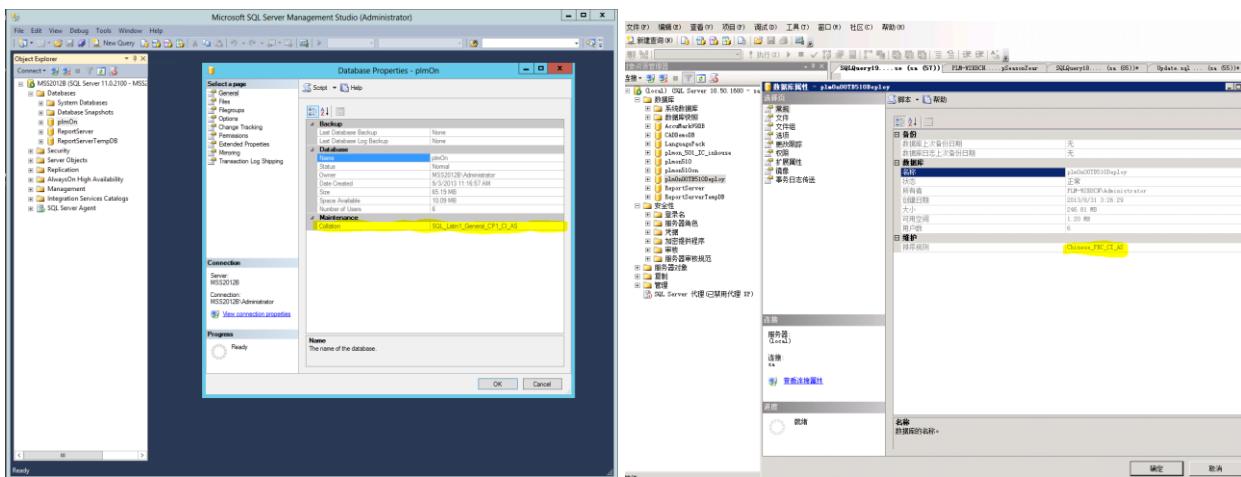
**1.4.2. Select the database server where the database will be restored, select either “Windows authentication” or “SQL Server authentication” will be used to create the database (if “SQL Server authentication” is selected enter the “User Name” and “Password” for the SQL account). Select “Make a database”, and enter the database name to create (Note: If a database with the entered name exists, it will be overwritten). Press “Run” and press “Yes” to confirm. The initial database will be created on the selected server using the database name provided. Press “OK” when complete.**



### 1.4.3. Start SQL Server Management Studio and connect to the Database Server



### 1.4.4. Expand the Databases Object to confirm the database has been restored, select the database, right click and select “Properties”. Verify that the database Collation is correct for the language version of Windows Server and SQL Server installed.



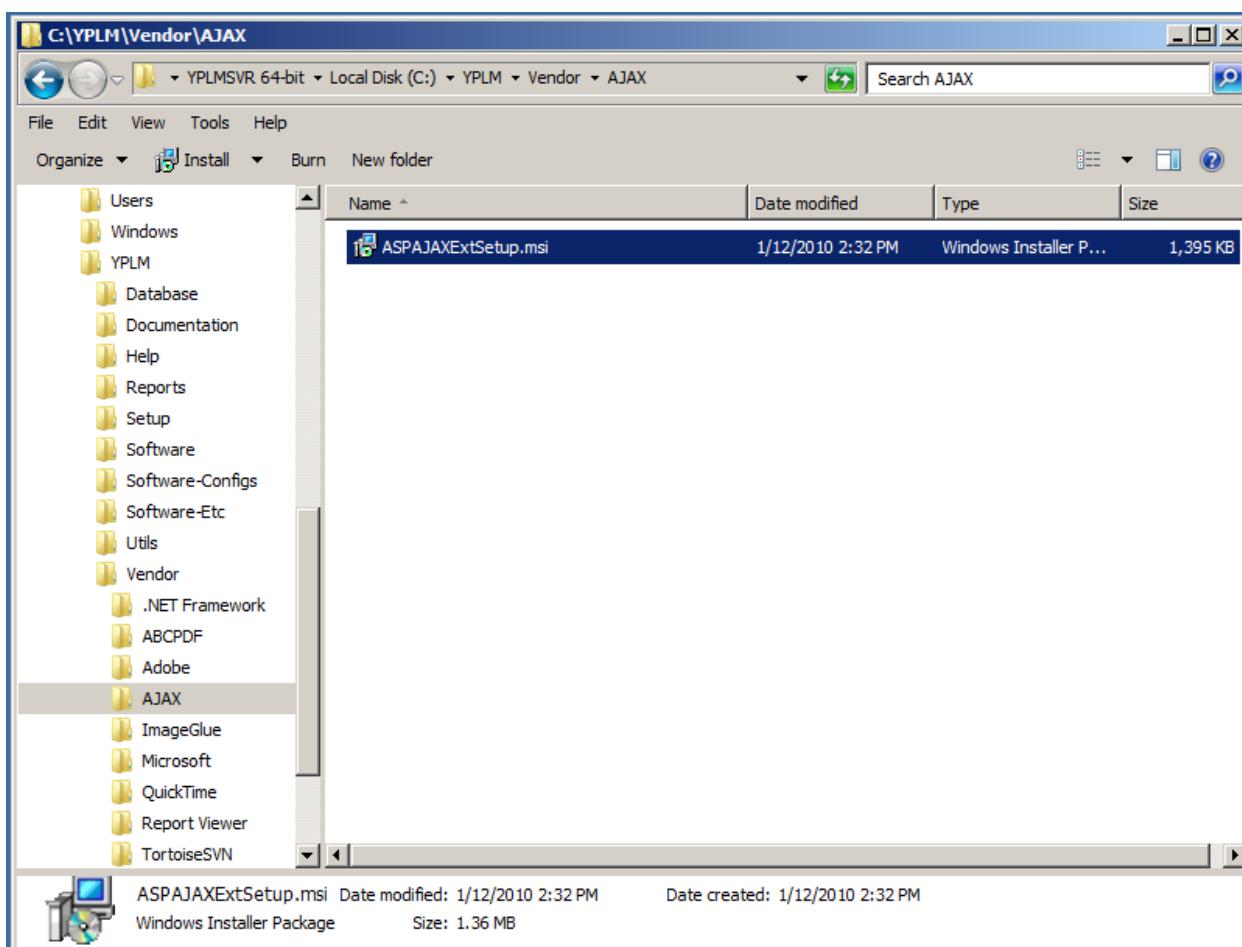
## 1.5. Installing additional support software

### 1.5.1. Adobe Reader and QuickTime.

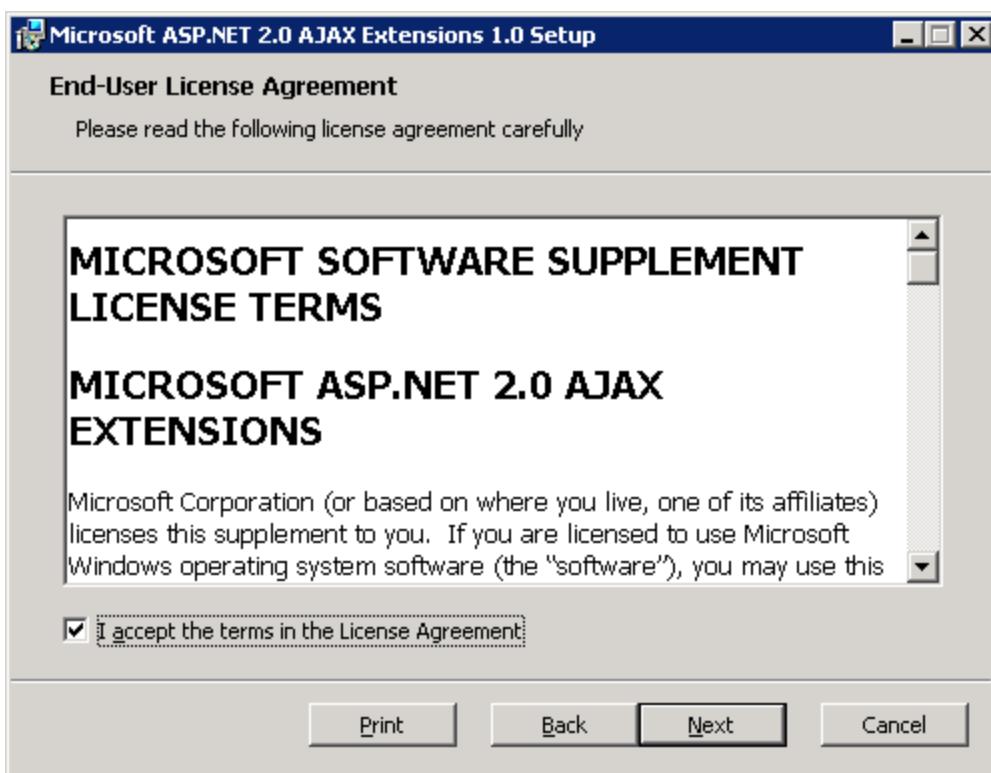
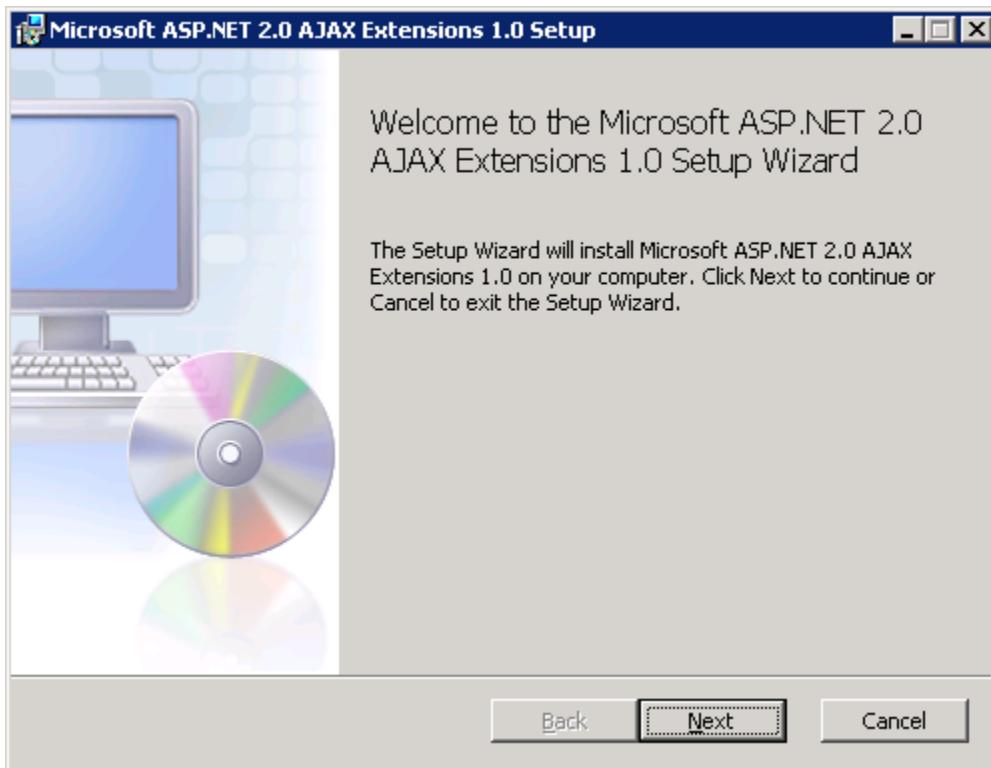
1.5.1.1. Although the YuniquePLM™ distribution ZIP files contain installation files for Adobe Reader and QuickTime, it would be best if these applications were installed from the vendor's website to insure the latest version is installed and compatible with the installed operating system. Adobe Reader can be installed from the <http://adobe.com> website, and QuickTime can be installed from the <http://quicktime.com> website.

### 1.5.2. Microsoft AJAX V1.0 Extensions for Microsoft .NET 2.0.

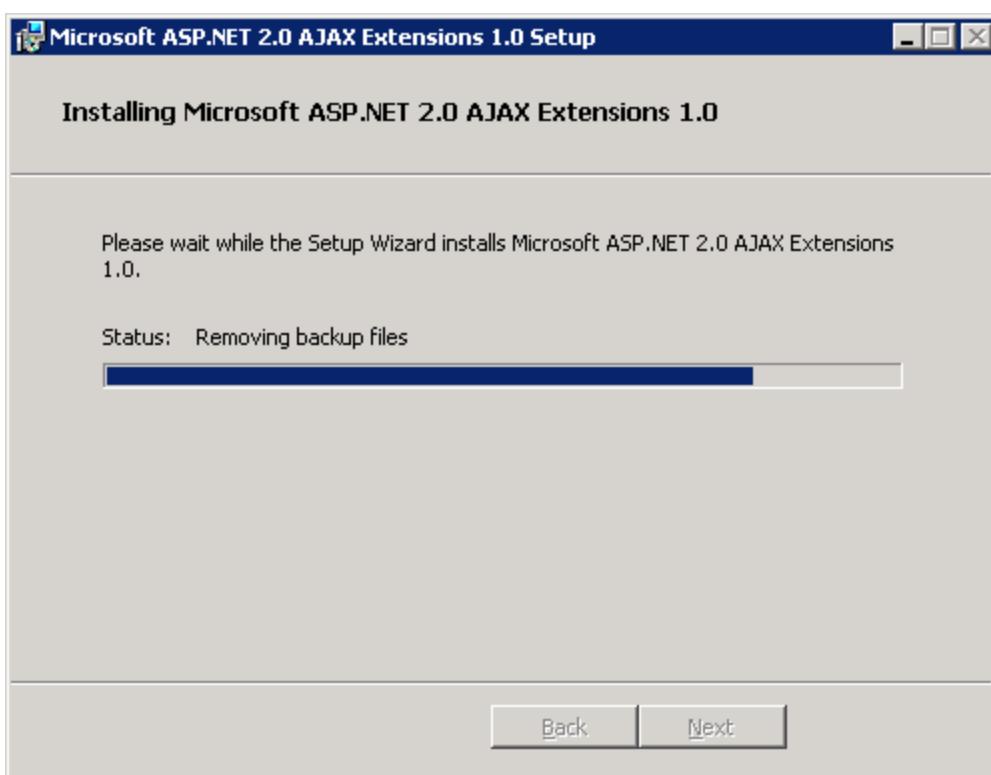
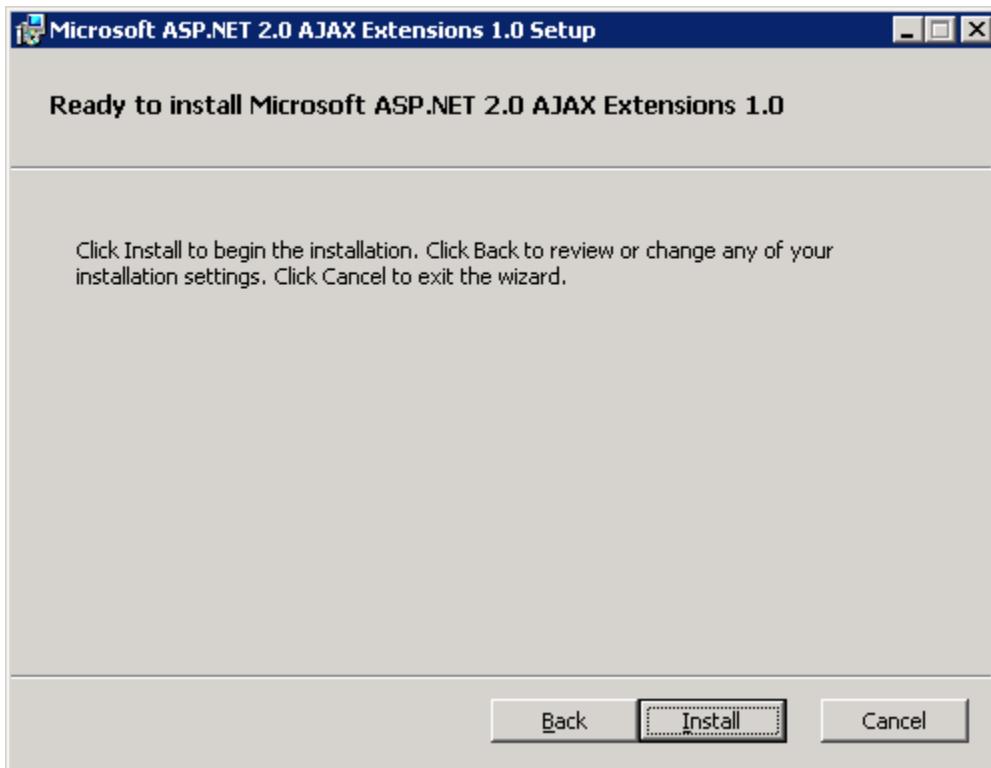
1.5.2.1. Go to the YPLM\Vendor\AJAX folder and execute the “ASPAJAXExtSetup.msi” program.



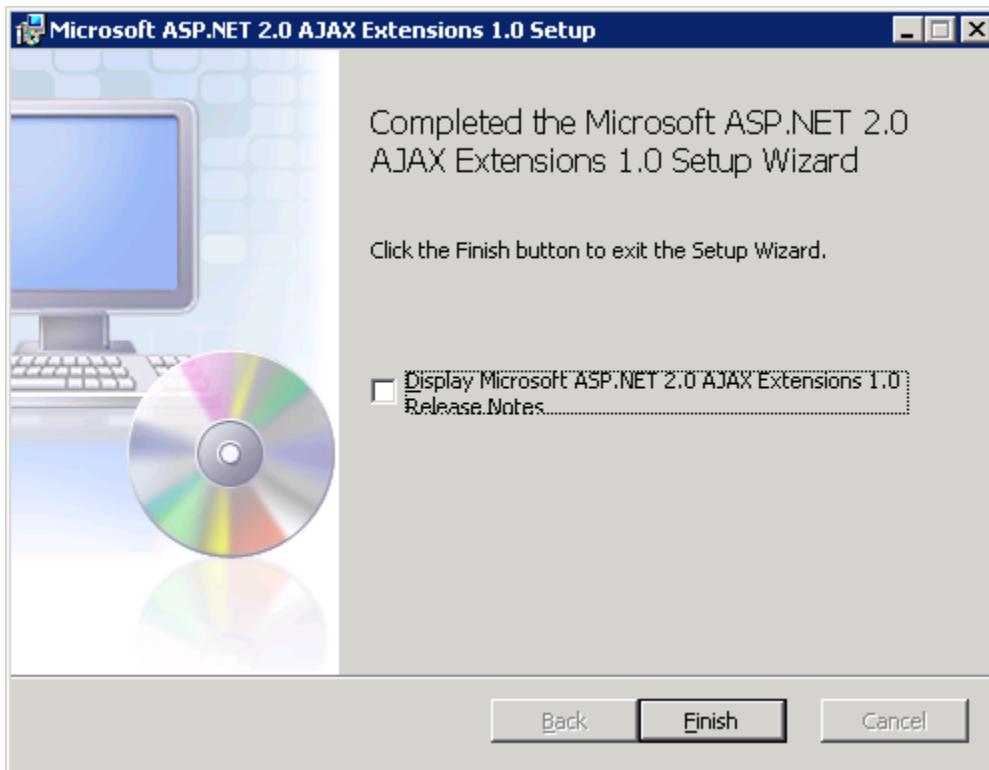
**1.5.2.2. Press the Next button, check Accept, and press the Next button again**



### 1.5.2.3. Press the Install button to begin installation



#### 1.5.2.4. Uncheck the “Display . . .” checkbox and press the Finish button



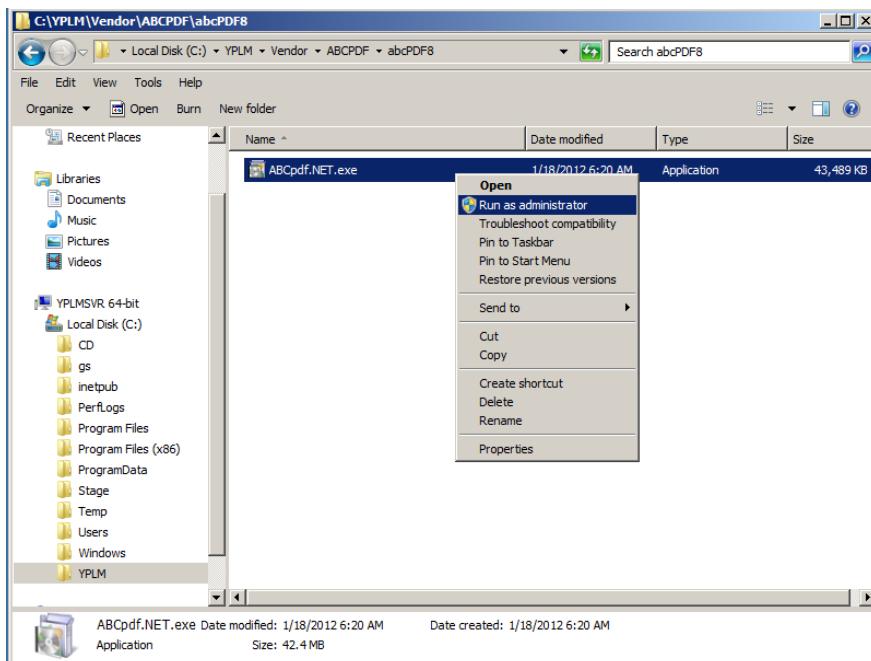
### 1.5.3. Microsoft .NET Framework 4.5.

**1.5.3.1. Microsoft .NET Framework 4.5 is included with Windows Server 2012 / 2012R2, but must be installed on Windows Server 2008R2.**

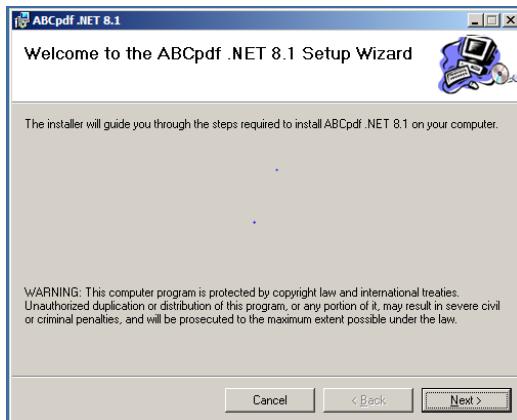
**1.5.3.2. Go to the YPLM\Vendor\.NET Framework folder and execute the “dotNetFx45\_Full\_setup.exe” program. Right click on the file and select “Run as administrator” and follow the installation instructions.**

### 1.5.4. ABCPDF.NET

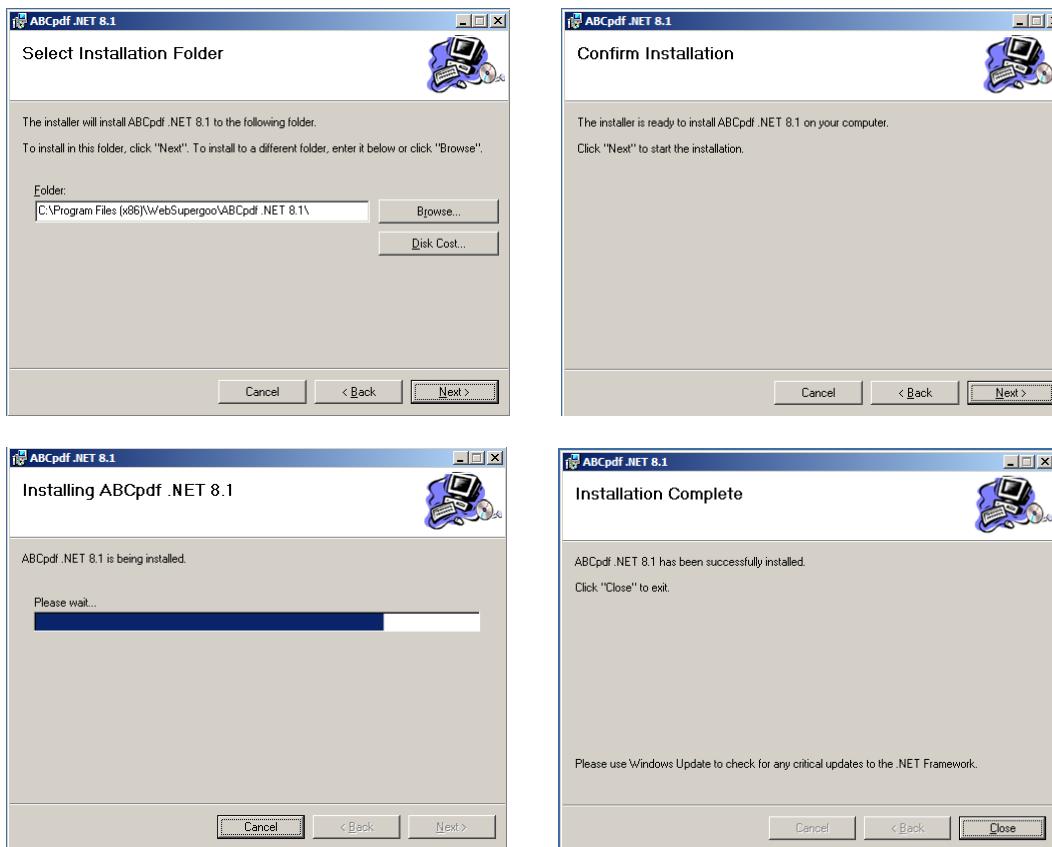
**1.5.4.1. Go to the “YPLM\Vendor\ABCPDF\abcPDF8” folder and execute the “ABCpdf.NET.exe” program. Right click on the file and select “Run as administrator”.**



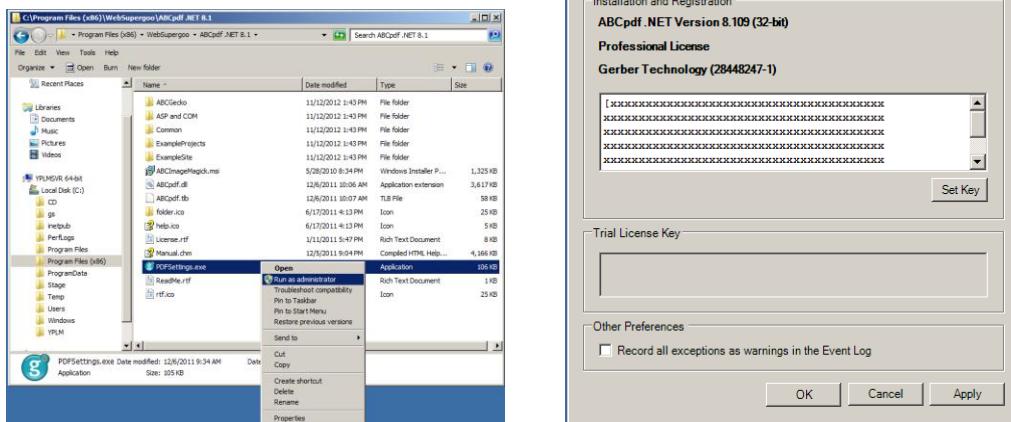
**1.5.4.2. Press the Next button, select “I Agree” and press the Next button.**



**1.5.4.3. Press the Next button to select the default Installation Folder and press the Next button to start the installation. When complete press the Close button.**

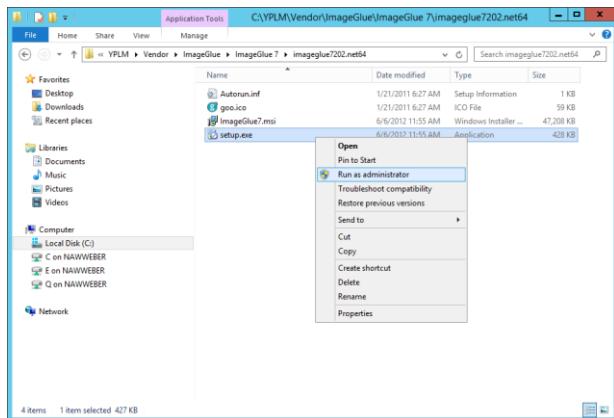


**1.5.4.4. Open the “C:\Program Files (x86)\WebSupergoo\ABCpdf .NET 8.1” folder, find the PDFSettings.exe program, right click and select “Run as administrator”. Enter the License Key (supplied by Gerber); press the “Set Key” button, then press the Apply button. The license type should change from a Trial License to a Professional License.**

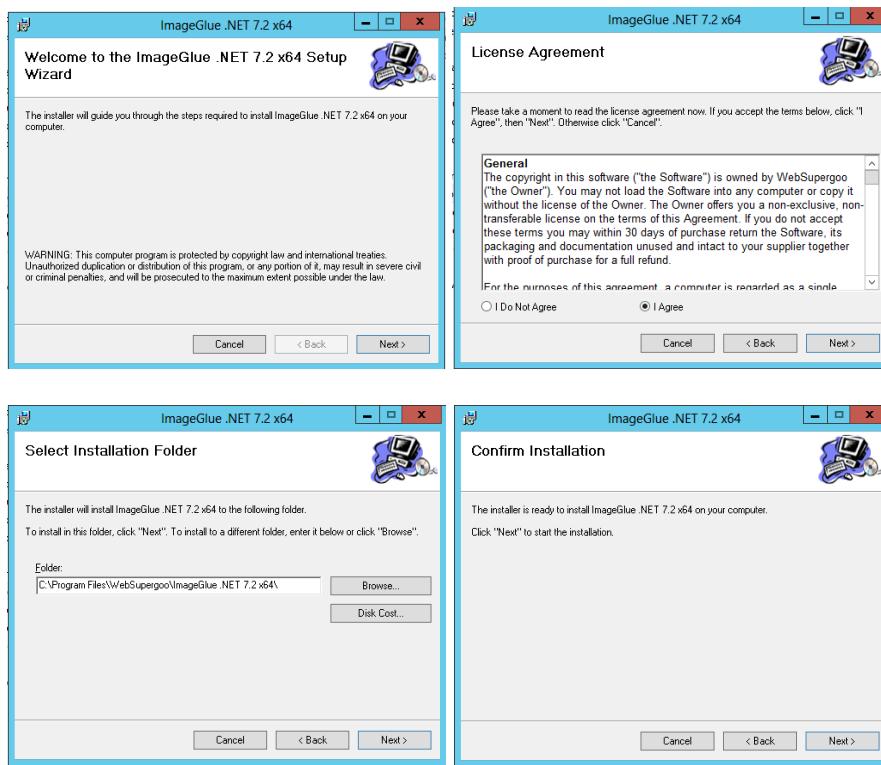


### 1.5.5.ImageGlue

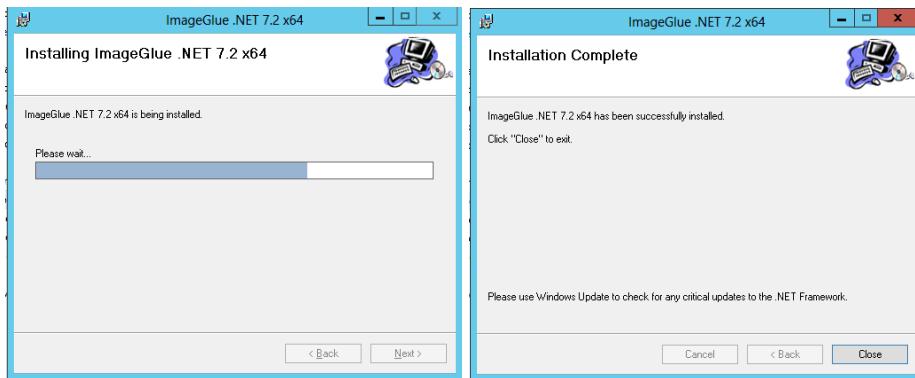
**1.5.5.1. Go to the “YPLM\Vendor\ImageGlue\ImageGlue 7\imageglue7202.net64” folder and locate the “setup.exe” program. Right click on the file and select “Run as administrator”.**



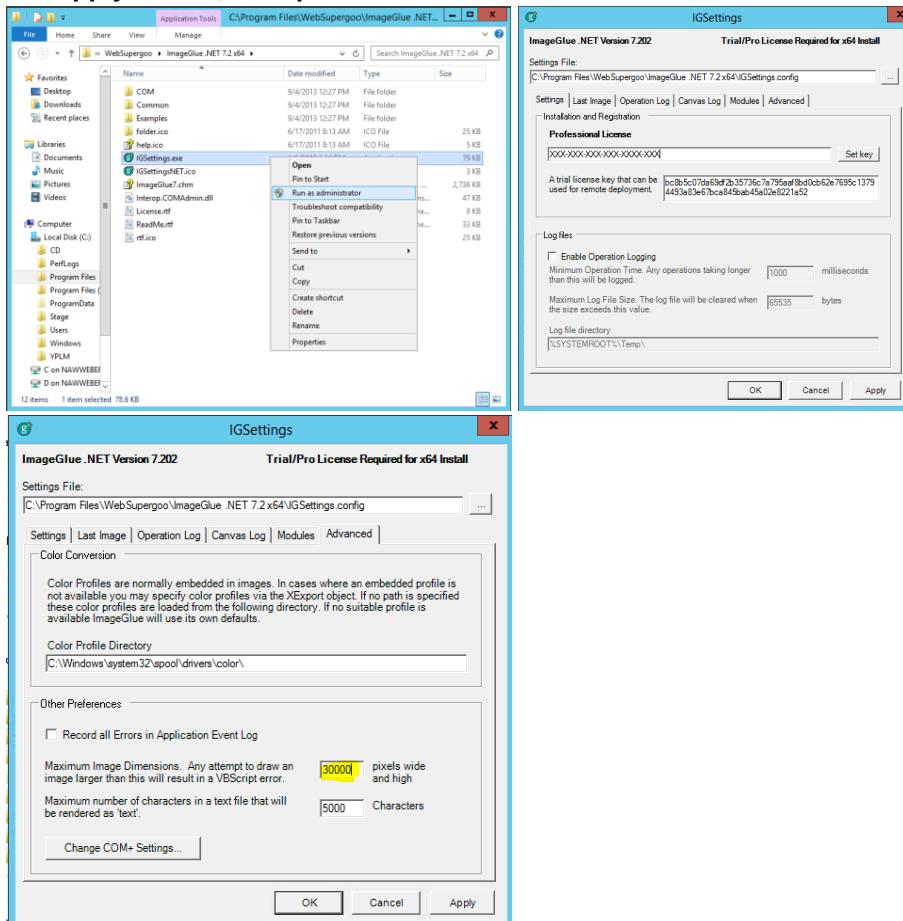
**1.5.5.2. Press the Next button, accept the License Agreement, and press the Next button. Select the default Installation Folder and press the Next button. Press the Next button to start the installation.**



### 1.5.5.3. When installation is complete press the Close button.



### 1.5.5.4. Open the “C:\Program Files\WebSupergoo\ImageGlue .NET 7.2 x64” folder, find the IGSettings.exe program, right click and select “Run as administrator”. Enter the License Key (supplied by Gerber); press the “Set Key” button, then press the Apply button. The license type should change from a Trial License to a Professional License. Select the “Advanced” tab and change the “Maximum Image Dimensions” from 3000 to 30000, press the Apply button, then press the OK button.

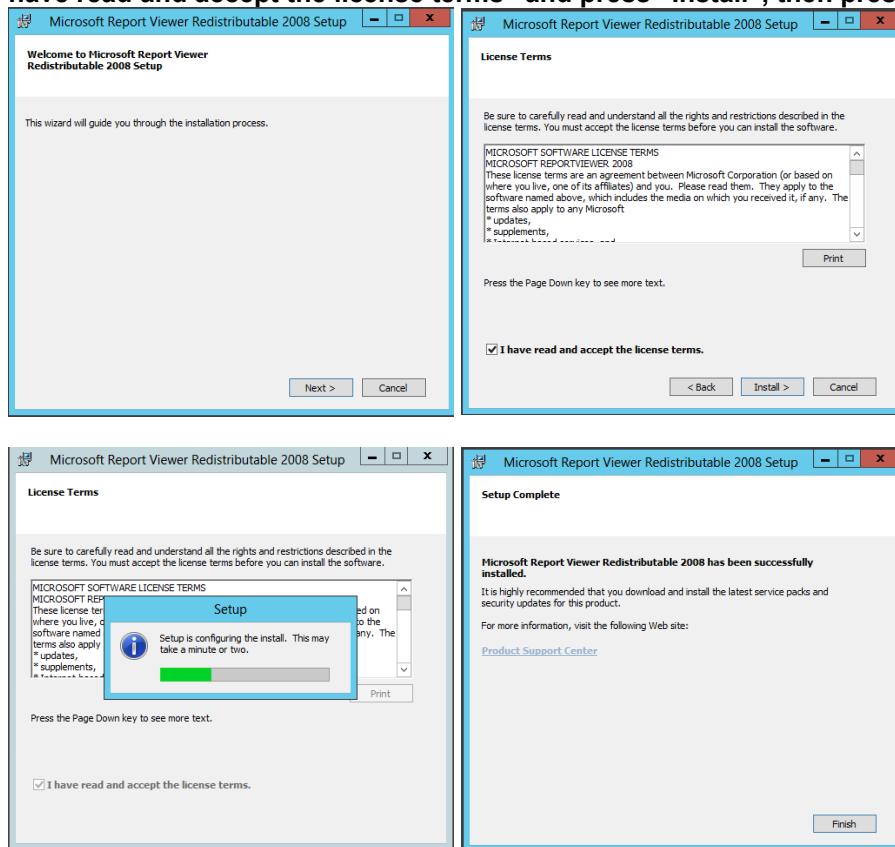


### 1.5.6. Microsoft ReportViewer

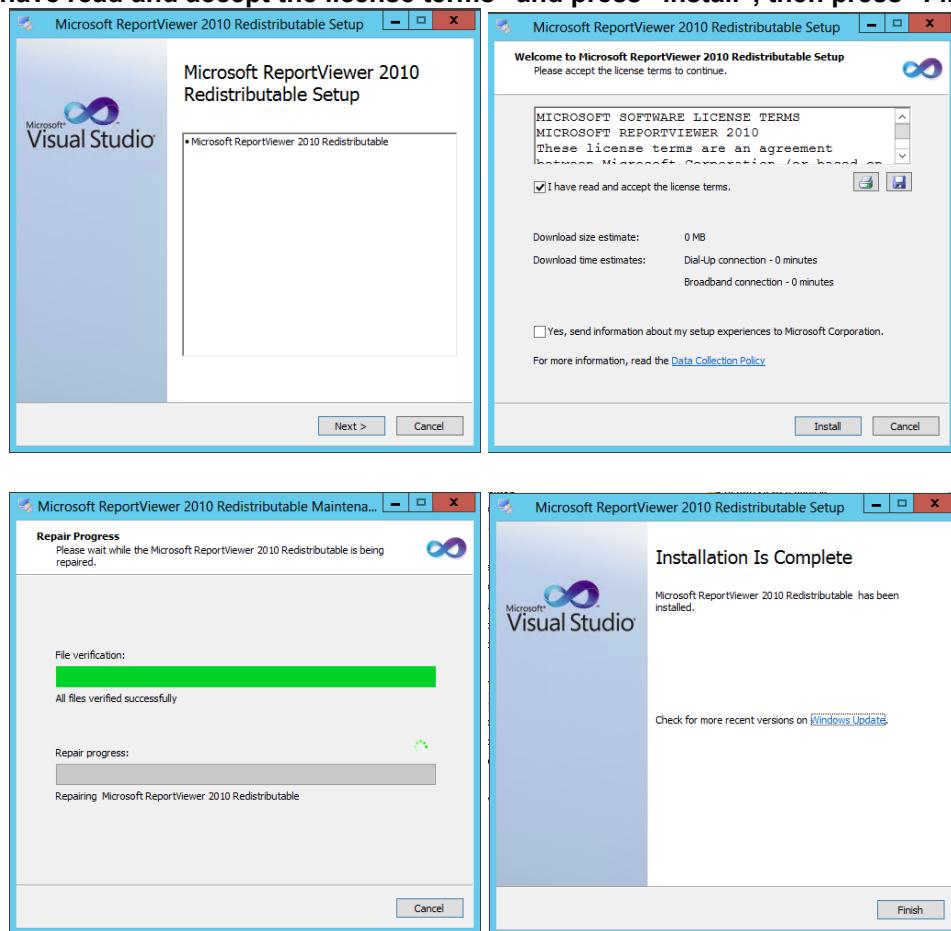
**1.5.6.1. For single server configurations (database, web, and file server) Microsoft ReportViewer is automatically installed with SQL Server (SQL 2008R2 / ReportViewer 2008, SQL 2012 / ReportViewer 2012). The YuniquePLM™V5.1 web server (plmOn / srmOn) uses ReportViewer 2008 and ReportViewer 2010 to display generated YuniqueBI reports. Depending on the server configuration and version of SQL installed, one or both versions of ReportViewer will need to be installed on the YuniquePLM™web server:**

Web Server with SQL 2008R2	Install ReportViewer 2008
Web Server with SQL 2012	Install ReportViewer 2008 and 2010
Web Server with no SQL	Install ReportViewer 2008 and 2010

**1.5.6.2. Go to the “YPLM\Vendor\Report Viewer” folder and execute the “ReportViewer2008.exe” program. Right click on the file and select “Run as administrator”. Select “Next”, check “I have read and accept the license terms” and press “Install”, then press “Finish”**



**1.5.6.3. Go to the “YPLM\Vendor\Report Viewer” folder and execute the “ReportViewer2010.exe” program. Right click on the file and select “Run as administrator”. Select “Next”, check “I have read and accept the license terms” and press “Install”, then press “Finish”**



## 2. Installing YuniquePLM™

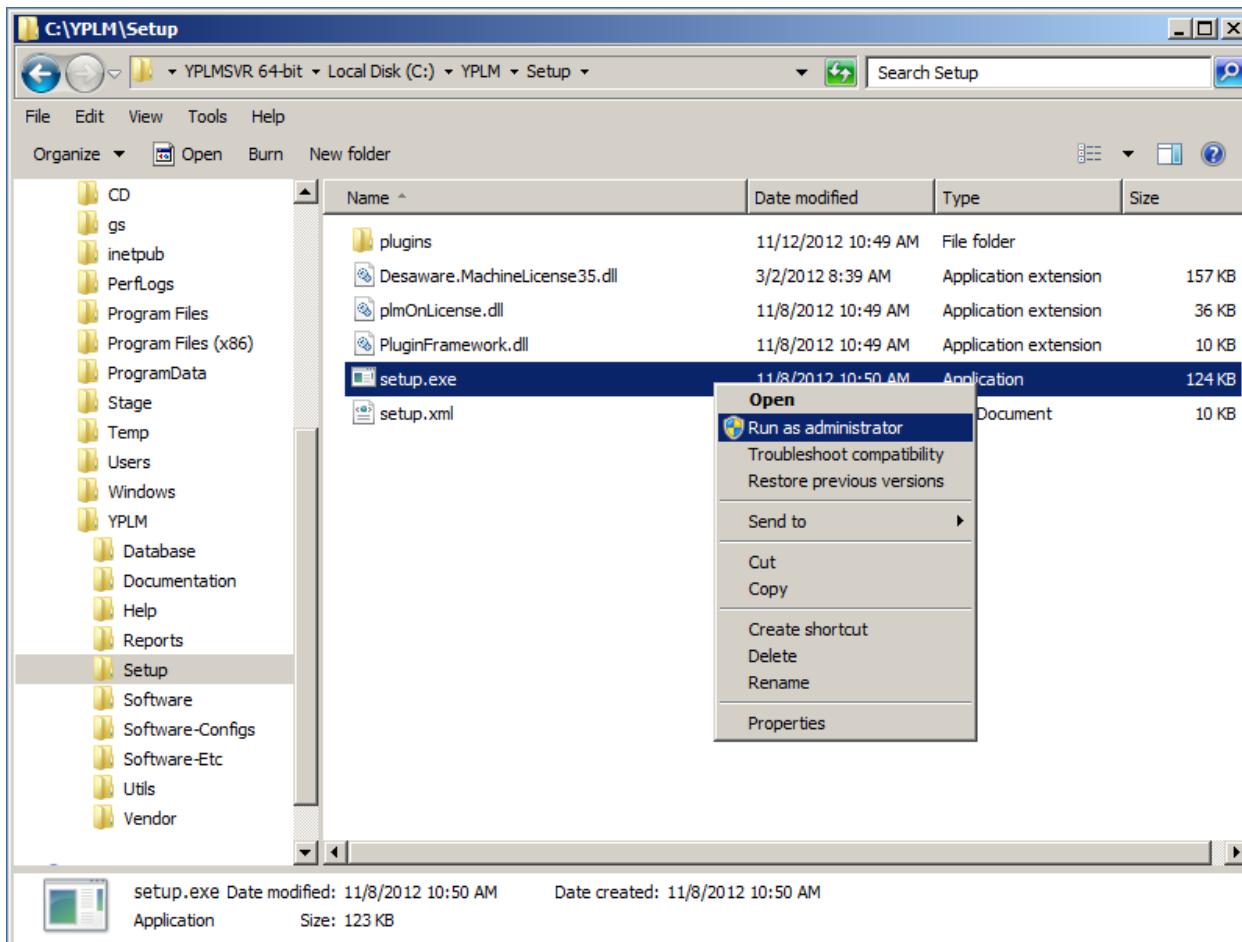
The setup utility included in the YuniquePLM™ distribution zip file is currently designed to install on a single server that is used as the database, file, and web server. For multiple server configurations it is highly recommended that the complete Microsoft SQL Management Studio tools be installed on the YuniquePLM™ web server. This will allow the execution of certain setup utility functions on an external database server, such as installing reports for SQL Reporting Services, and synchronize the system configuration with the database. To install the SQL management tools follow the installation instructions in section 1.2, but only select “Management Tools – Basic” and “Management Tools – Complete” features.

Currently multiple server configurations using a separate file server, SQL Reporting servers, and/or additional web servers require manual installation and configuration. In some cases the unzipped and configured YuniquePLM™ distribution folder can be copied to the various servers so that the setup utility can be used for installation and configuration. For example, the setup utility can be run on a SQL Reporting server to install the initial reports, or run on an additional web server to install the additional support software and web applications.

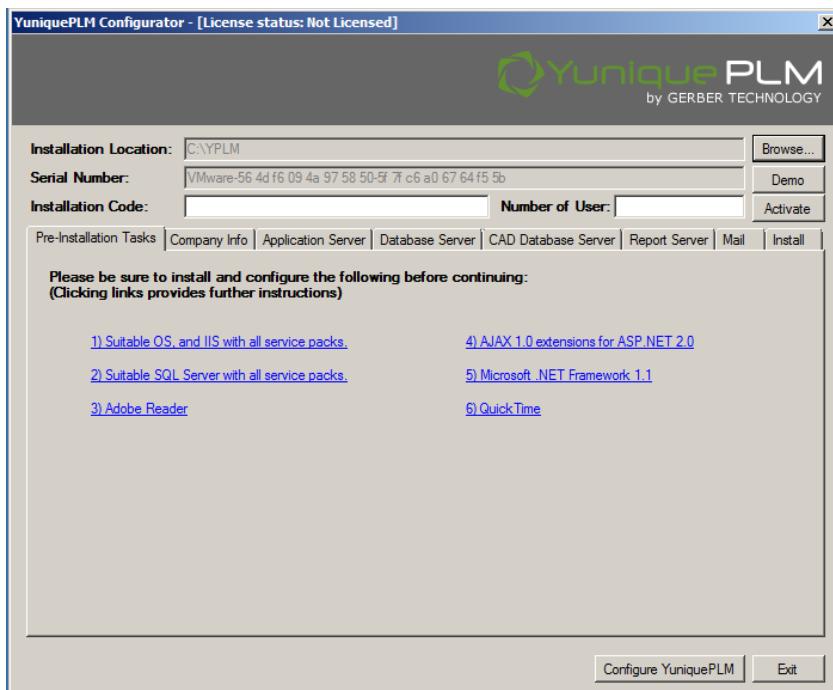
The setup utility does limited error checking during the installation process. Insure that the currently logged in user has appropriate permissions for setup and installation, that all the required information is entered and correct, and that all the prerequisite support programs and utilities have been installed prior to running the setup utility. Also use the “Run as administrator” where documented, even if the currently logged in user is an Administrator. The installation description below in this guide is for a single server configuration. This Installation Guide does not address multiple server manual installation and configuration.

Note that balloon help messages are displayed for many data entry boxes by placing the mouse pointer in the box.

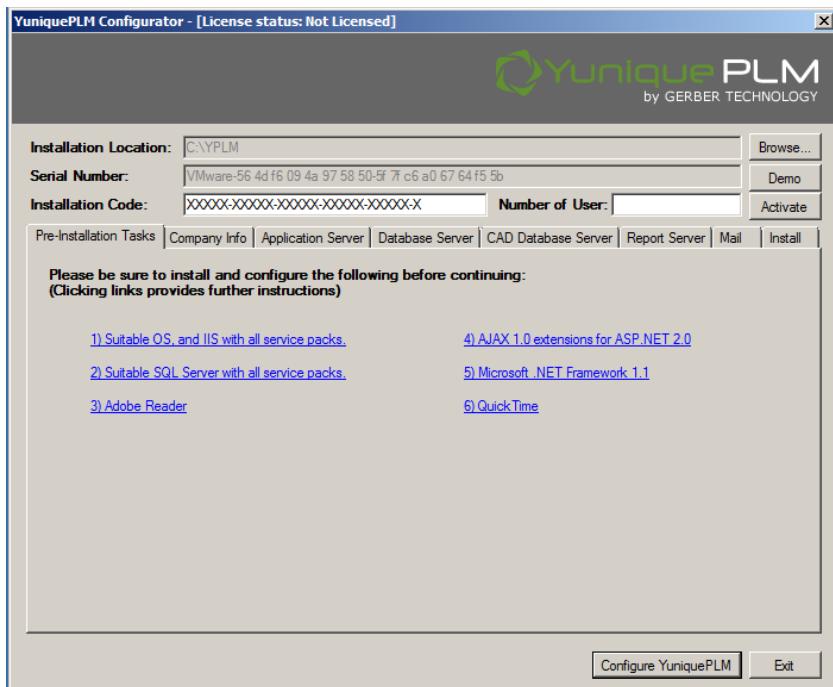
**2.1. Locate the “setup.exe” utility in the YPLM\Setup folder and select “Run as administrator”.**



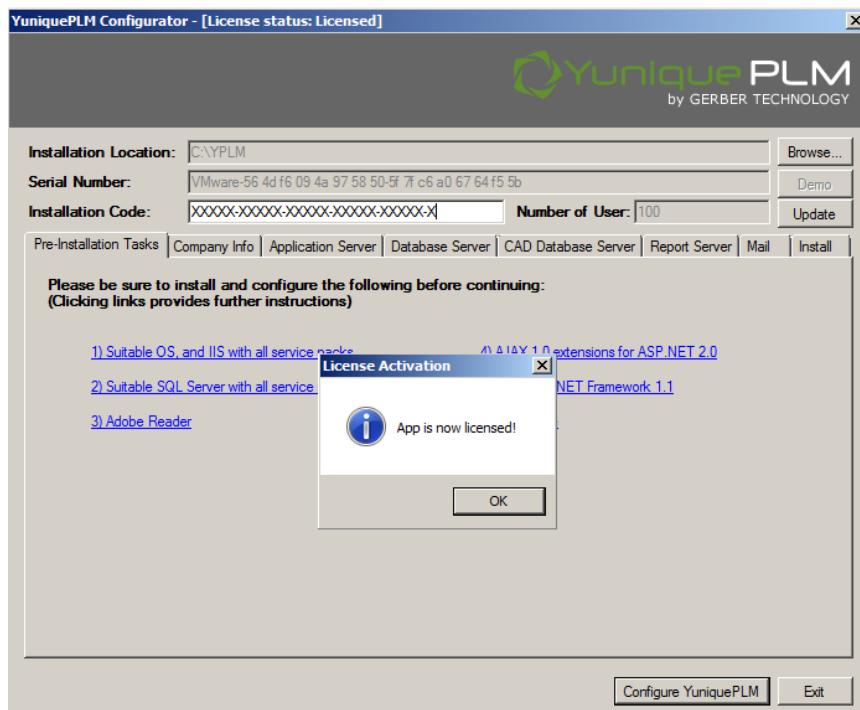
**2.1.1. The Title Bar will show that the YuniquePLM™ license status is "Not Licensed". The "Serial Number" box will display the system serial number.**



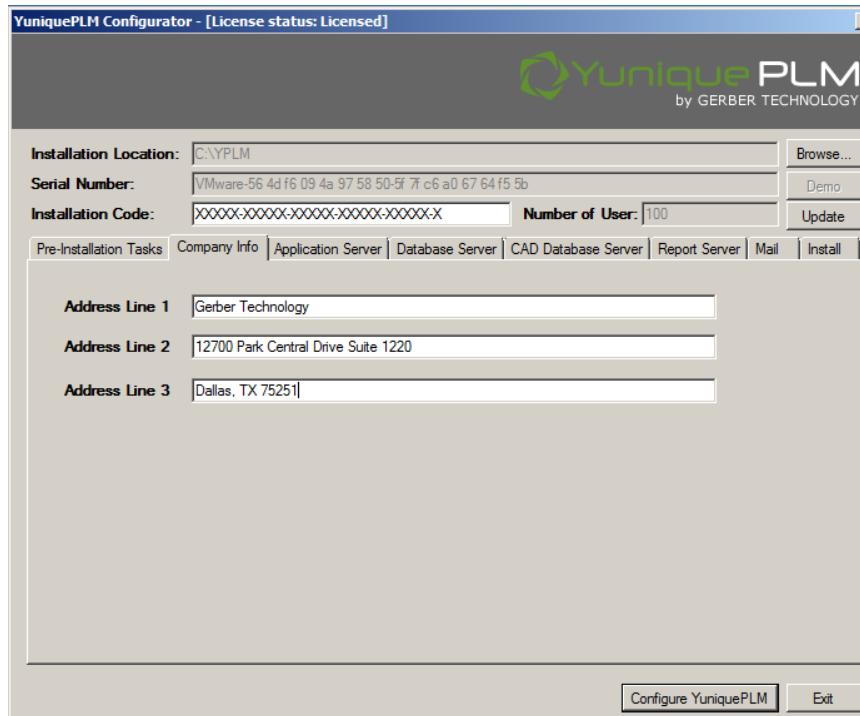
**2.1.2. Enter the Installation Code (supplied by Gerber) and press the "Activate" button to obtain a license from the Gerber License server via the internet. Only web servers need to be licensed.**



A message box will appear indicating a valid license has been obtained. The Title Bar will now show the License status as Licensed, and the “Number of Users” box will show the number of licensed users. The “Activate” button is changed to an “Update” button. To update a license for additional users or additional application options, run the Setup utility and press the Update button when notified by Gerber that the update is available on the License server.



### 2.1.3. Select the “Company Info” tab and enter the company address information.



**2.1.4. Select the “Application Server” tab and enter the web server name and the TCP/IP address of the web server (the TCP/IP address should be a static IP address).**

Enter the name of the local Windows user account and password you want the setup utility to create. This account is the website impersonation account.

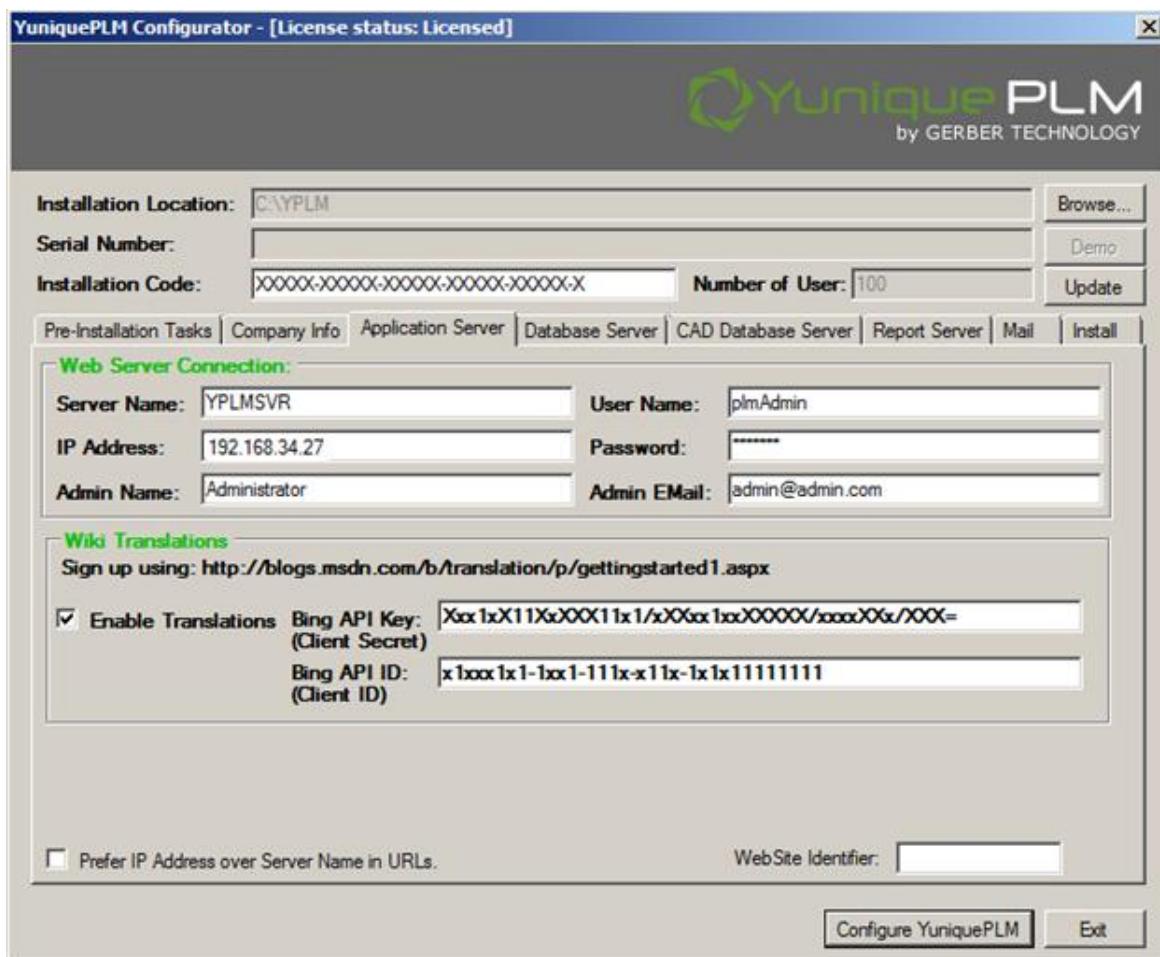
Enter the name of the YuniquePLM™ administrator and the YuniquePLM™ administrator’s email address.

Normally the YuniquePLM™ websites that are created are named plmOn and srmOn. If you wish to add a website identifier to the end of the website names created, enter the identifier in the “Website Identifier” box. For example, entering “Test” in the “Website Identifier” box will direct the setup utility to create websites plmOnTest and srmOnTest.

Microsoft’s translation service can be used to provide language translations of the Wiki Help messages. You will have to sign up for the service and obtain license keys from Microsoft at

<https://datamarket.azure.com/dataset/1899a118-d202-492c-aa16-ba21c33c06cb>

Select the “Enable Translations” checkbox and enter your API Key and API ID license keys



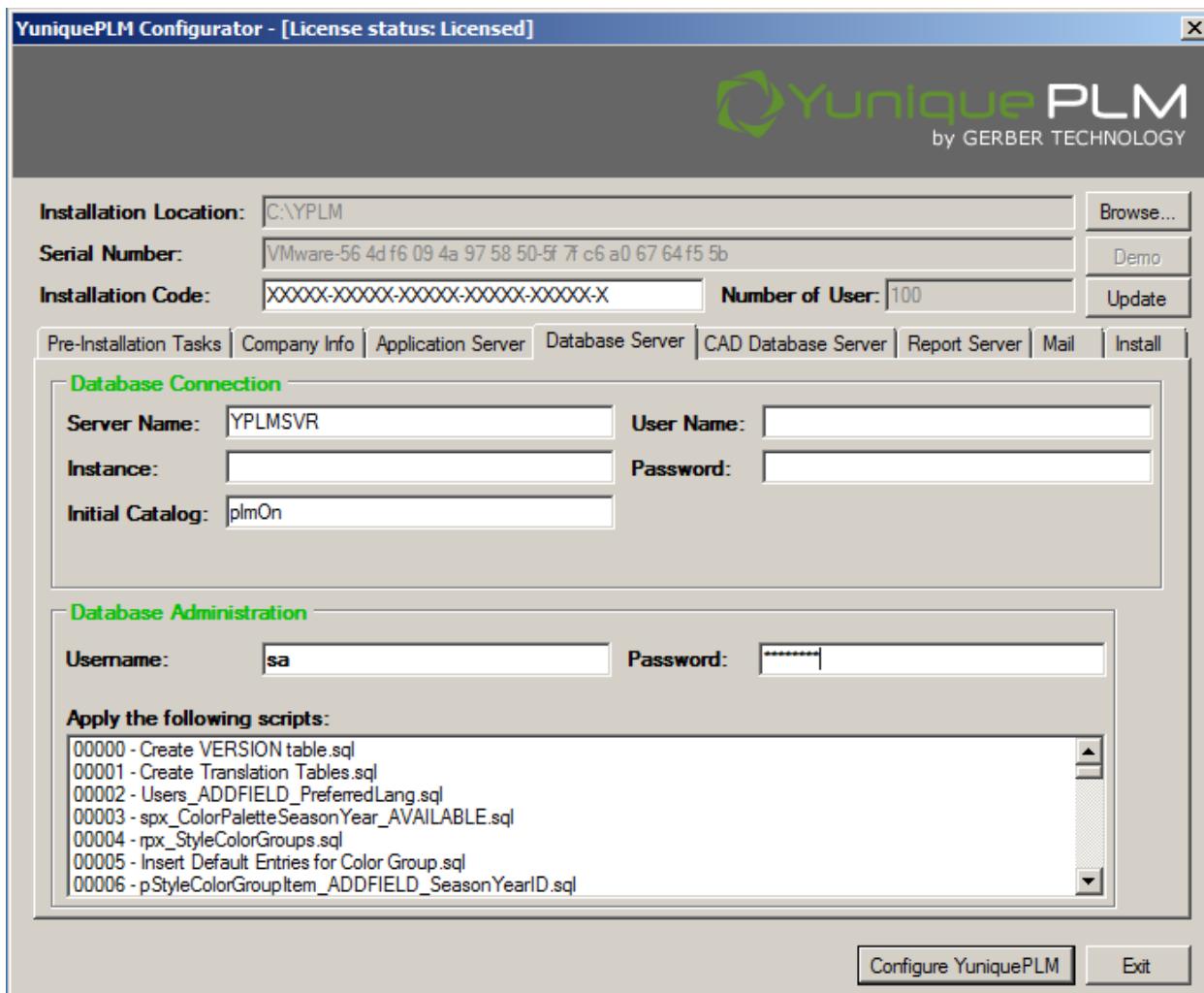
### 2.1.5. Select the “Database Server” tab.

#### In the “Database Connection” section

- Enter the database server name.
- Enter the SQL Server Instance name that will host the YuniquePLM™database (leave this field blank if the default instance will be used).
- Enter the name of the YuniquePLM™database you want the setup utility to create from the initial YuniquePLM™database or the existing YuniquePLM™database name.
- Leave the User Name and Password blank if you want the Windows impersonation account to access the database (Integrated Security), or enter a SQL Server User Name and Password that has dbo permissions to the YuniquePLM™database (SQL authentication).

#### In the “Database Administration” section

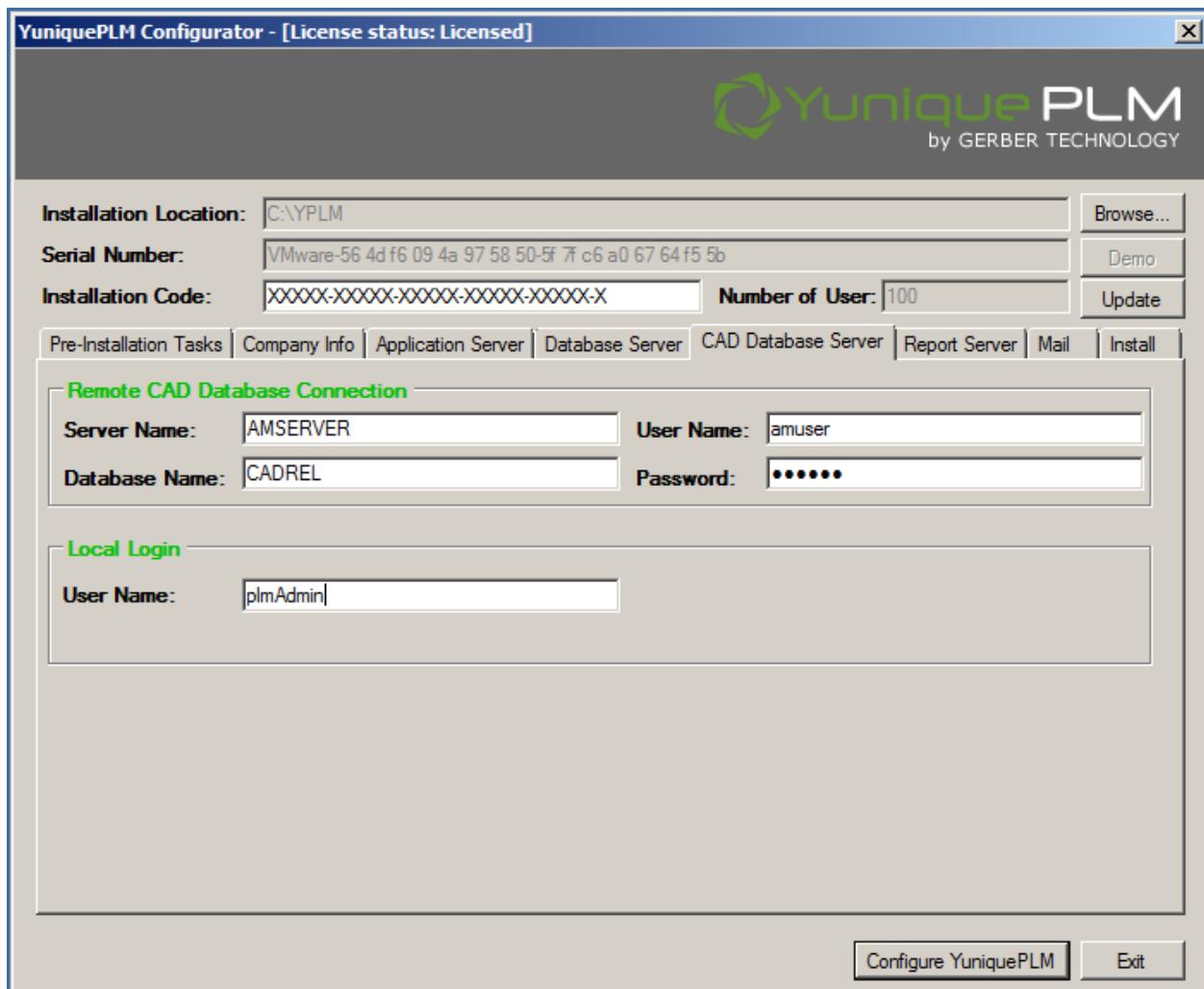
- Enter a SQL Server user account and password with dbo permissions that can update the YuniquePLM™database (usually the sa account).



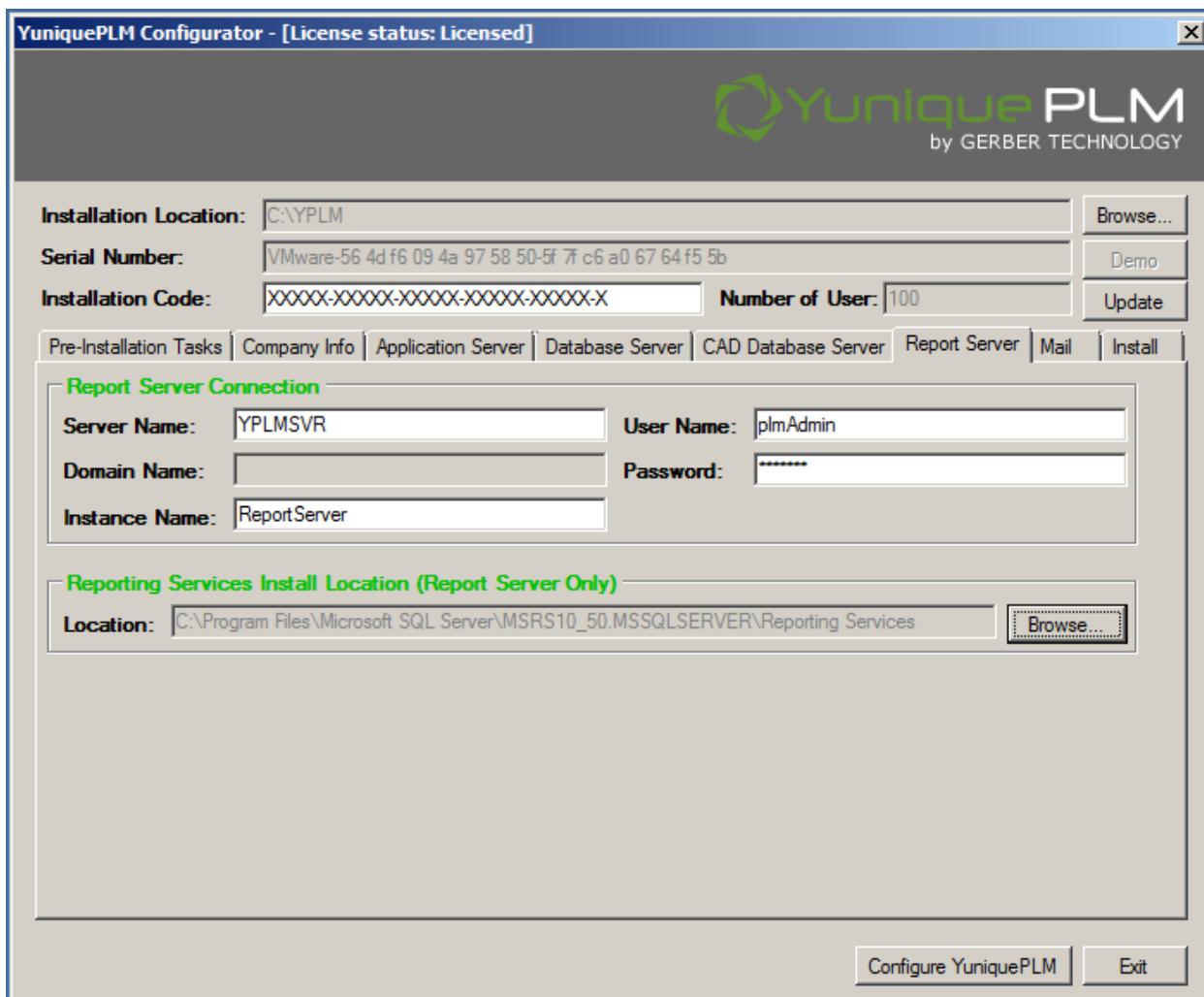
### 2.1.6. Select the “CAD Database Server” tab.

If the YuniquePLM™ system will retrieve CAD information from a Gerber AccuMark SQL database, the connection information is entered on this tab. Otherwise leave everything blank. The YuniquePLM™ system can only connect to one AccuMark CAD Relational database. AccuMark workstations must be configured to use AccuMark SQL storage areas and the AccuMark CAD Relational database (refer to AccuMark documentation). The version of AccuMark must be V8.4.1 or greater.

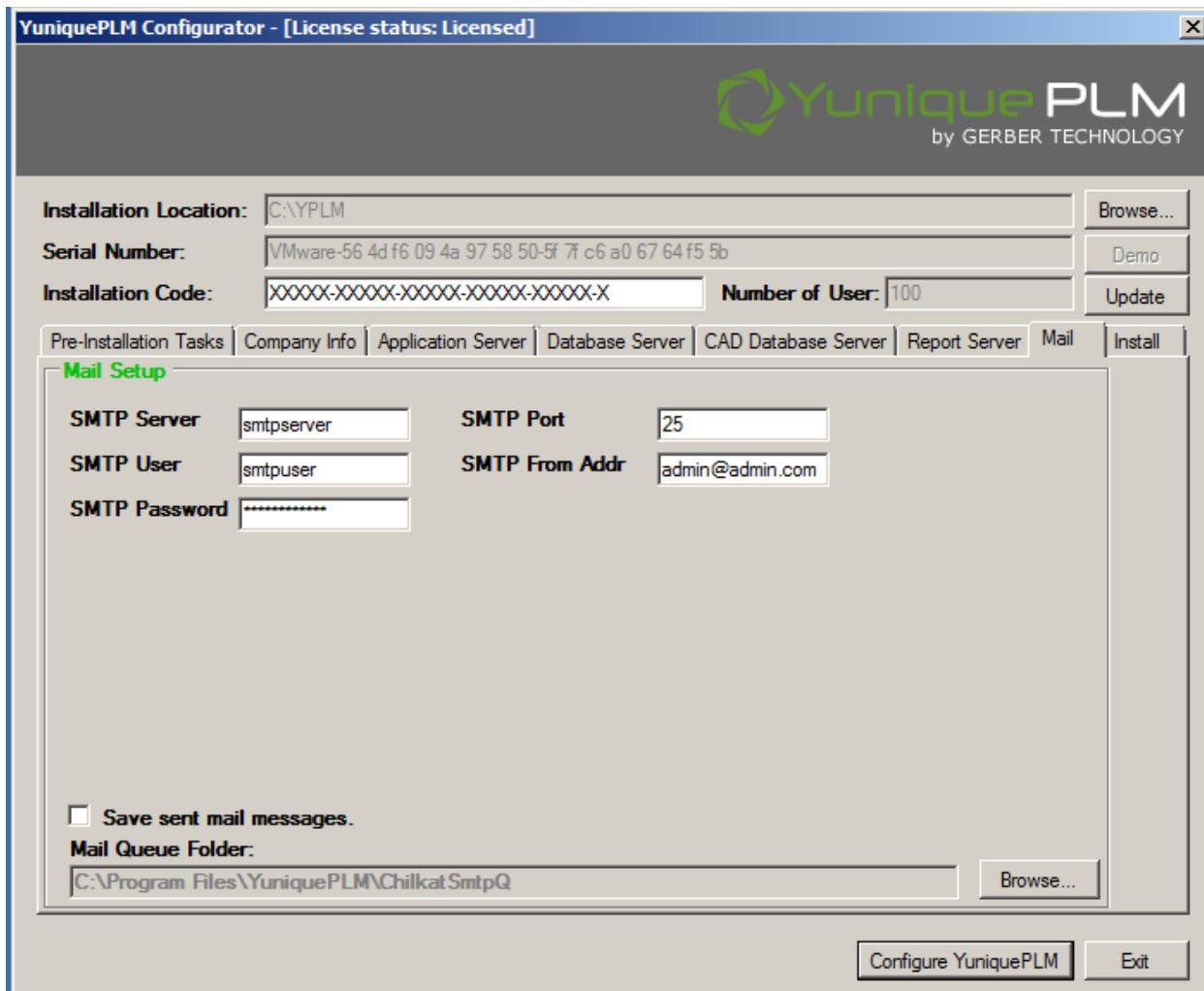
- Enter the AccuMark SQL Server name.
- Enter the AccuMark CAD Relational database name.
- Enter the SQL User account name on the AccuMark SQL Server that will be used to read the CAD Relational database (the account only needs “datareader” permissions to the CAD Relational database).
- Enter the SQL User account password.
- Enter the local Windows user account that was defined on the “Application Server” tab (the website Impersonation account).



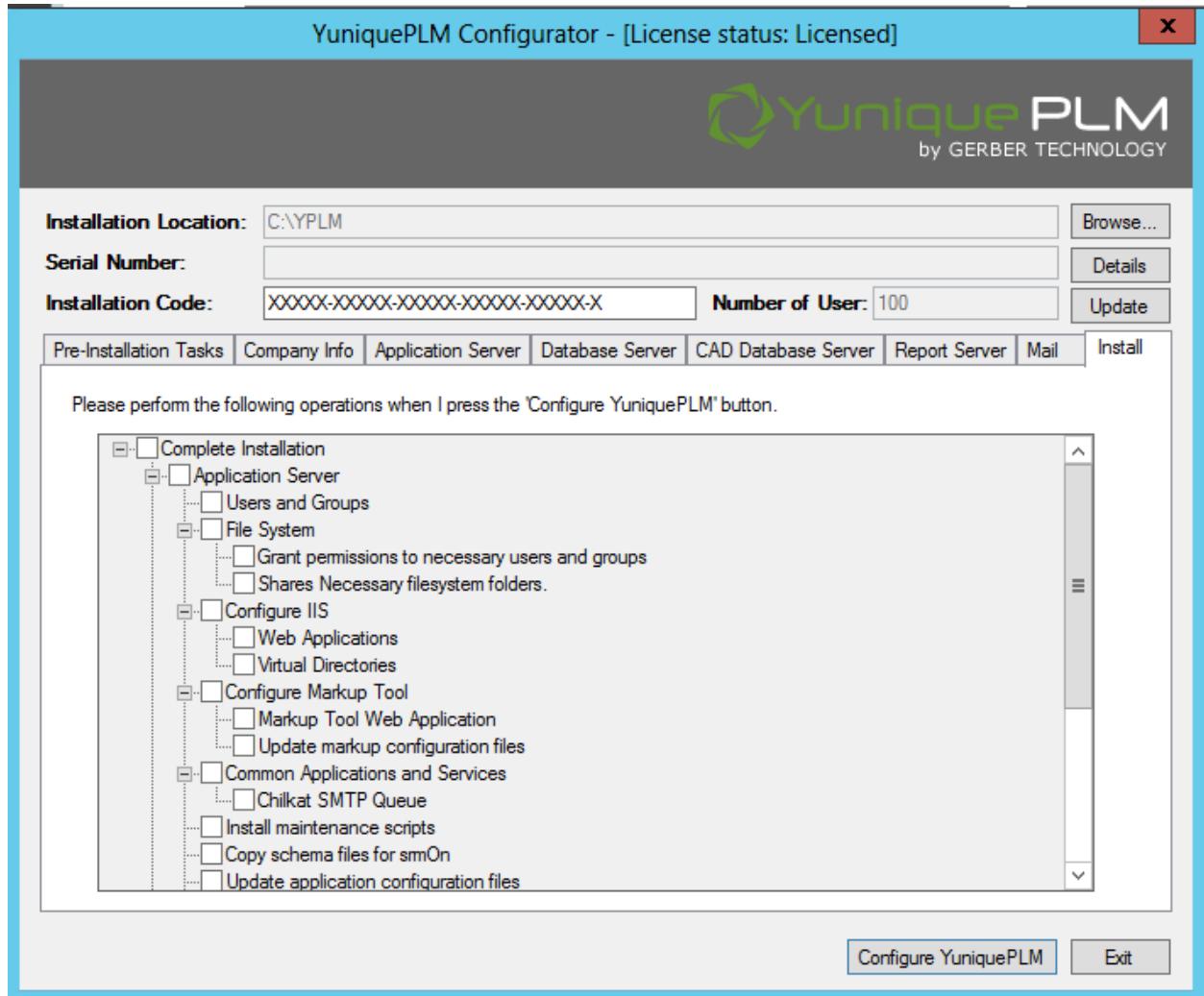
**2.1.7. Select the “Report Server” tab. Enter the name of the Report Server. Enter the Report Server Instance name (the default is ReportServer). Enter a Windows User Name and Password that has permissions to create reports on the Report server (usually the website Impersonation account). Press the “Browse” button and select the location of the Microsoft SQL Reporting Server folder.**



**2.1.8. Select the “Mail” tab. For YuniquePLM™email processing, enter the SMTP Server name and the SMTP User account and password (if required) that will be used for sending emails from YuniquePLM. If no SMTP User account is required, leave the SMTP User and SMTP Password entries blank. Enter the SMTP TCP/IP Port address (normally port 25) and the SMTP “From Address” that will be used when sending emails. If you wish sent messages to be saved after sending, check the “Save sent mail messages” checkbox.**



**2.1.9. Press the “Install” tab.**



The functions of the various check boxes are as follows:

**2.1.9.1. “Complete Installation” – If checked, will execute all operations. This check box is normally not selected.**

**2.1.9.1.1. “Application Server” – If checked, will execute all operations in the Application Server group. This check box is normally not selected. (Web server)**

**2.1.9.1.1.1. “Users and Groups” – A local Windows User Account will be created, as defined in the Application Server tab, with the supplied password. A local Windows Group called plmUsers will be created and the local Windows User Account will be added as a member. The local Windows User Account will also be added to the local IIS\_IUSRS group. (Web server)**

***NOTE: Domain accounts and groups must be manually created and added to the IIS\_IUSRS group.***

2.1.9.1.1.2. "File System" – If checked, will execute all operations in the File System group.

2.1.9.1.1.2.1. "Grant permissions to necessary user groups" – the created plmUsers group will be granted security permissions to the software-Etc folder. (File server)

**NOTE:** *Domain accounts and groups must be manually granted permissions.*

2.1.9.1.1.2.2. "Share necessary file system folders" – the file share plmOnShare will be created for the Software-Etc\Share\Image folder, and the plmUsers group will be granted access. The file share plmOnShareRoot will be created for the Software-Etc\Share folder, and the plmUsers group will be granted access. The file share plmOnStore will be created for the Software-Etc\Store folder, and the plmUsers group will be granted access. (File Server)

2.1.9.1.1.3. "Configure IIS" – If checked, will execute all operations in the Configure IIS group.

2.1.9.1.1.3.1. "Web Applications" – YuniquePLM™ web applications will be created on the local IIS server. (Web server)

2.1.9.1.1.3.2. "Virtual Directories" – YuniquePLM™ web virtual directories will be created on the local IIS server. (File server)

2.1.9.1.2. "Configure Markup Tool" – If checked, will execute all operations in the Configure Markup tool group.

2.1.9.1.2.1. "Markup Tool Web Application" - Installs the YuniquePLM™ Markup Tool web application (Web server)

2.1.9.1.2.2. "Update markup configuration files" – Creates a backup of any existing configuration file, then using the information entered on the various setup utility tabs, creates a new Markup Tool application configuration file. The new configuration file is then copied to the YuniquePLM™ database. (Web server)

2.1.9.1.3. "Common Applications and Services" – If checked, will execute all operations in the Common Applications and Services group. This check box is normally not selected.

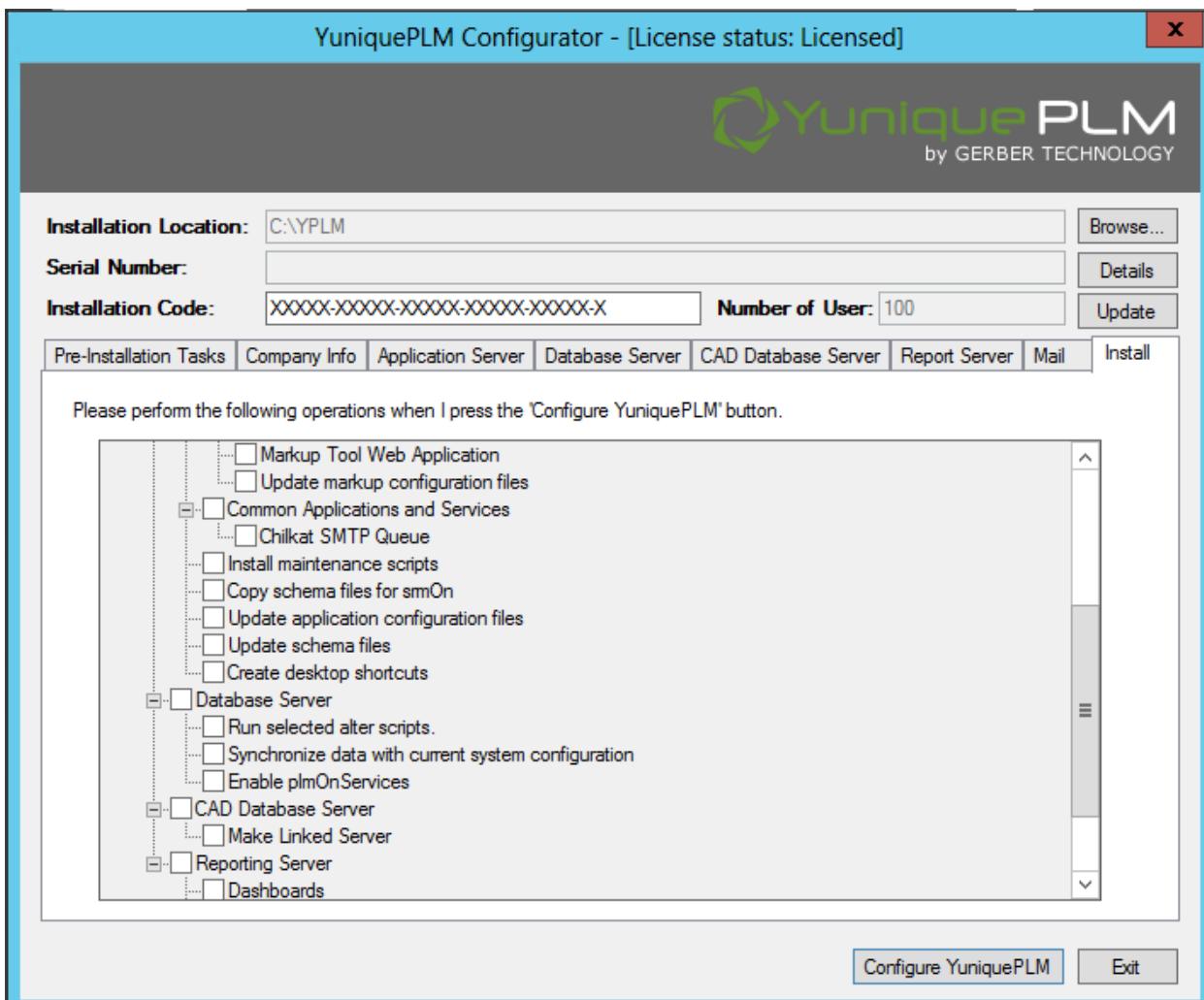
2.1.9.1.3.1.1. "Chilkat SMPT Queue" – Installs the SMTP mail Windows service on the local server. (Web server)

2.1.9.1.3.2. "Install Maintenance Scripts" – Installs a Windows script that will execute at 11PM, Monday through Friday to delete temporary files and folders more than 14 days old in the defined YuniquePLM™ TEMP folder.

2.1.9.1.3.3. "Copy schema files for srmOn" – Copies the plmOn schema files (with no overwrite) to a separate schema folder for the srmOn web application. (Web server)

2.1.9.1.3.4. "Update application configuration files" – Creates backups of any existing configuration files, then using the information entered on the various setup utility tabs, creates new YuniquePLM™ application configuration files. The new configuration files are then copied to the YuniquePLM™ database. (Web servers)

**NOTE: The currently logged in Windows User account will be used to access and update the YuniquePLM™ database. This Windows User account MUST have dbo permissions to the YuniquePLM™ database.**



**2.1.9.1.3.5. “Update scheme files” – The scheme files will be copied to the YuniquePLM™ database (Web server)**

**2.1.9.1.3.6. “Create desktop shortcuts” – Creates desktop shortcuts for plmOn, YuniqueBI, YuniqueToolkit and srmOn. (Web server)**

**2.1.9.1.4. “Database Server” – If checked, will execute all operations in the Database Server group. This check box is normally not selected.**

**2.1.9.1.4.1. “Run selected alter scripts” – will execute the alter scripts selected on the Database Server tab using the Database Server and catalog name and the SQL User Account and Password defined in the Database Administration section. This operation should only be performed when instructed by Yunique Solutions. (Database server)**

**2.1.9.1.4.2. “Synchronize data with current system configuration” – Various YuniquePLM™ database tables will be updated with information entered on the various setup utility tabs. (Database server)**

**2.1.9.1.4.3. “Enable plmOnServices” – installs plmOnServices Windows Service for YuniquePLM™ Line Planning and Batch Queue.**

**2.1.9.1.5. “CAD Database Server” – If checked, will execute all operations in the CAD Database Server group.**

**2.1.9.1.5.1. “Make Linked Server” – Using the information on the CAD Database Server tab, a SQL Linked Server connection to the AccuMark SQL Database server will be created. Only a single connection is possible. (Database server)**

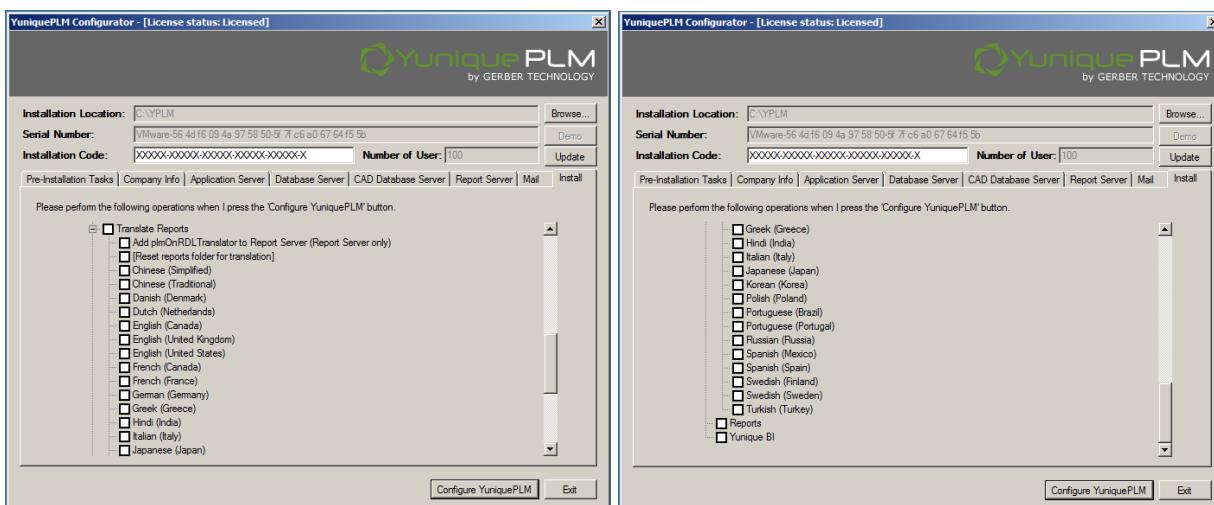
**2.1.9.1.6. “Reporting Server” – If checked, will execute all operations in the Reporting Server group. This check box is normally not selected.**

**2.1.9.1.6.1. “Dashboards” – The YuniquePLM™ Dashboards folder will be created on the defined SQL Report Server and populated with the standard Dashboard reports. (Report server)**

**2.1.9.1.6.2. “Translate Reports” – Selects all check boxes in the Translate Reports group. This check box is normally not selected.**

**2.1.9.1.6.3. Reports – The YuniquePLM™ plmOnReports folder will be created on the defined SQL Report Server and populated with the standard reports for each language selected. (Report server)**

**2.1.9.1.6.4. YuniqueBI – The YuniquePLM™ YuniqueBI folder will be created on the defined SQL Report Server and populated with the standard YuniqueBI reports. (Report server)**



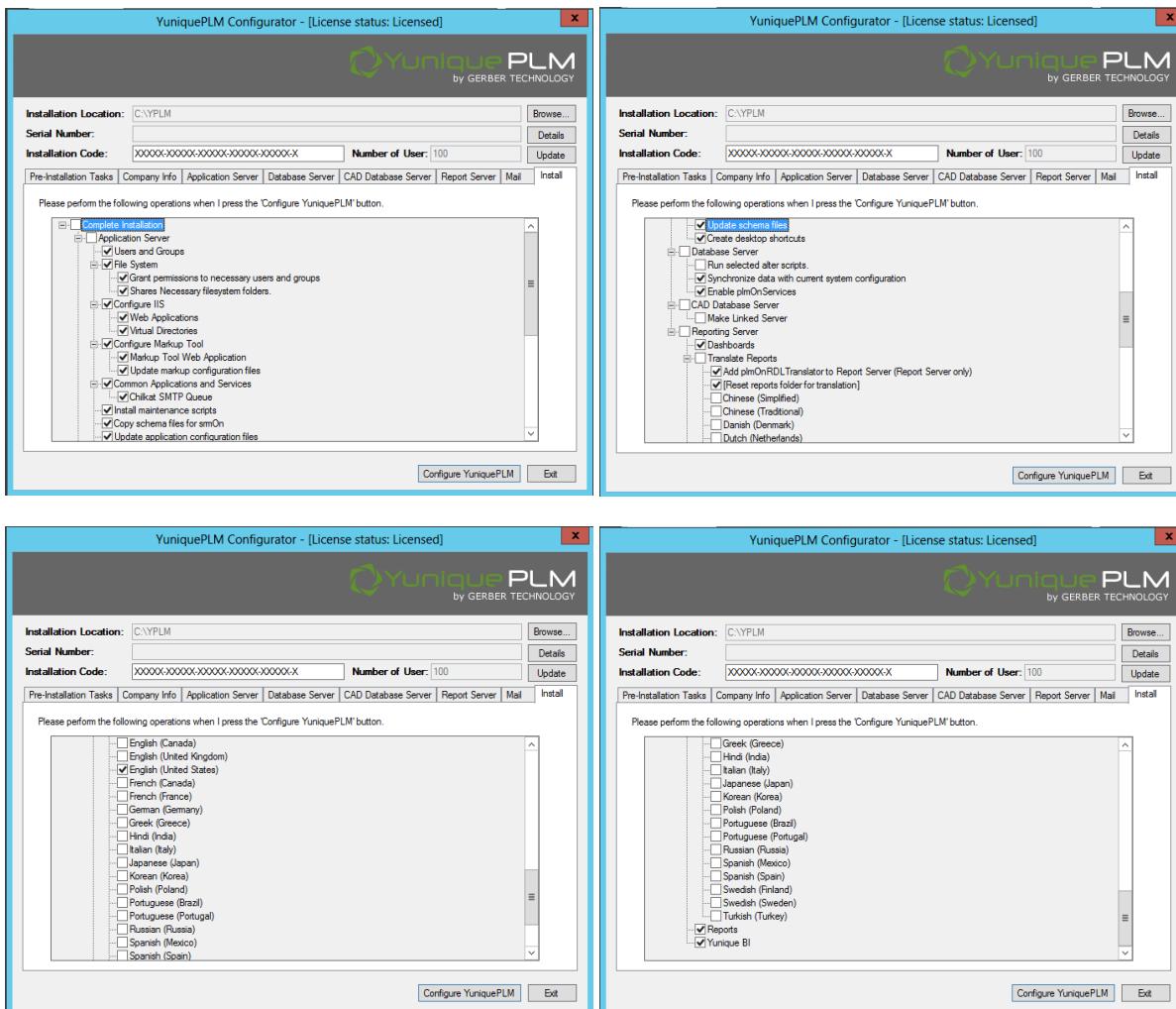
In the “Translate Reports” section:

**2.1.9.1.6.5. “Add plmOnRDL Translator to Report Server (Report Server only)” – adds a program module to the Microsoft Reporting Server folder that is used in conjunction with translated reports. (Report Server)**

**2.1.9.1.6.5.1. “(Reset reports folder for translation)” – resets the reports folder for installing translated reports. (Report Server)**

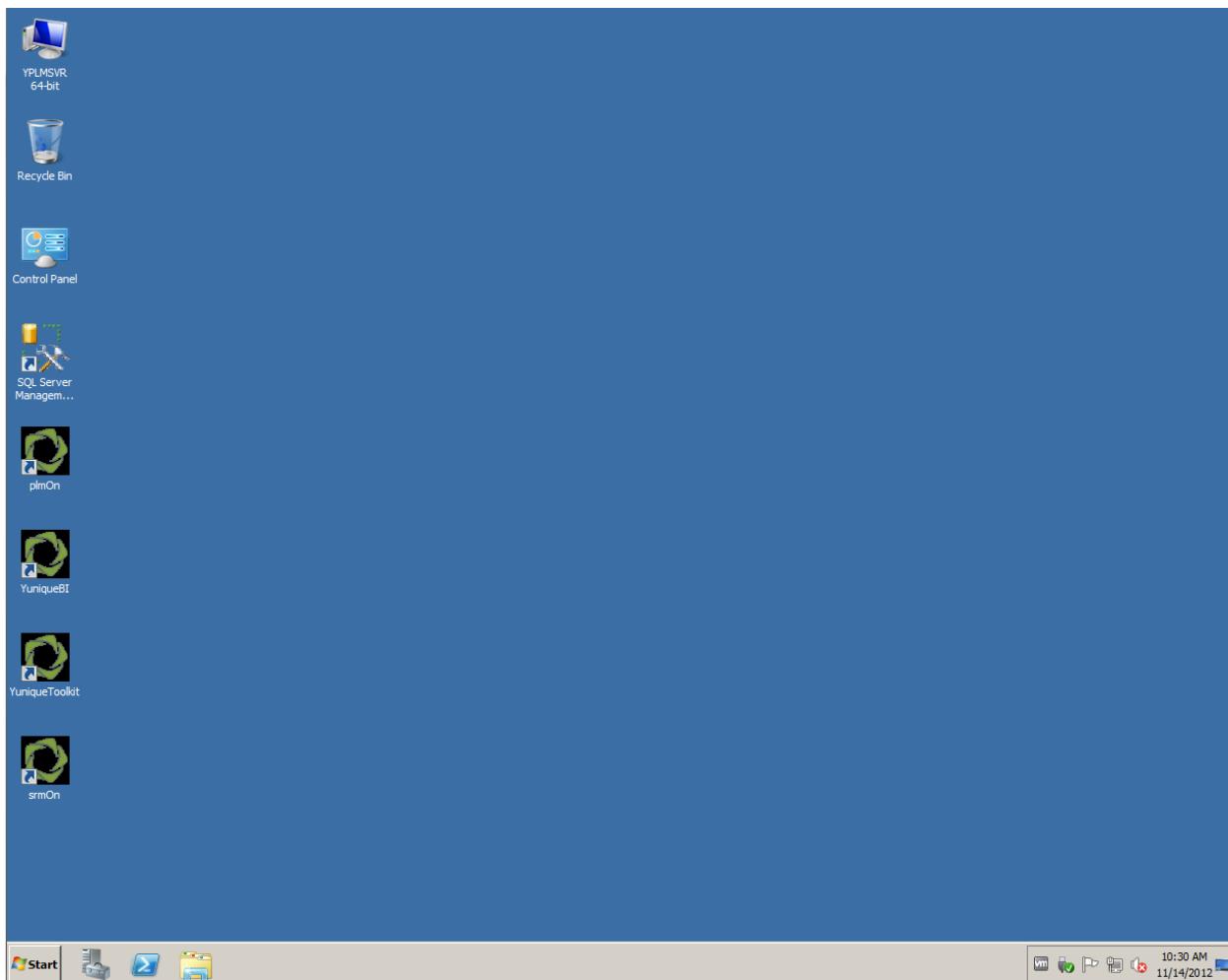
**2.1.9.1.6.5.2. “(Languages) – check the boxes of the desired languages required for the Reports folder. (Report Server)**

**2.1.10. Verify that all information entered on the various setup tabs is correct. To execute a complete install of YuniquePLM™ on a single server, check the following boxes, and then press the “Configure YuniquePLM” button to begin installation. The title bar will display the current installation step being processed and the step text will turn green when complete.**



**2.1.11. When all steps have been processed, a “Complete!” message will be displayed. Press OK. Desktop ICONs for plmOn, YuniqueBI, YuniqueToolkit and srmOn should be displayed on the desktop.**

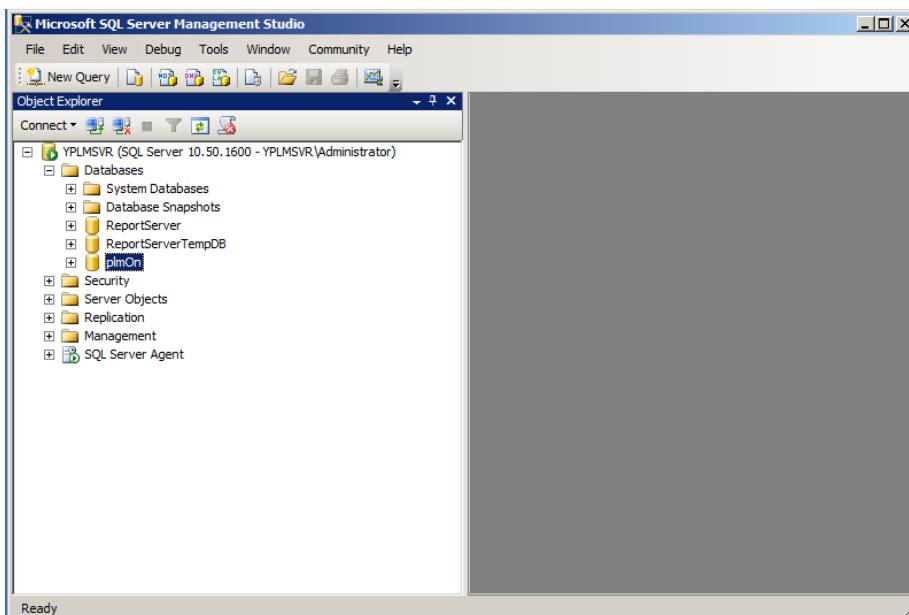




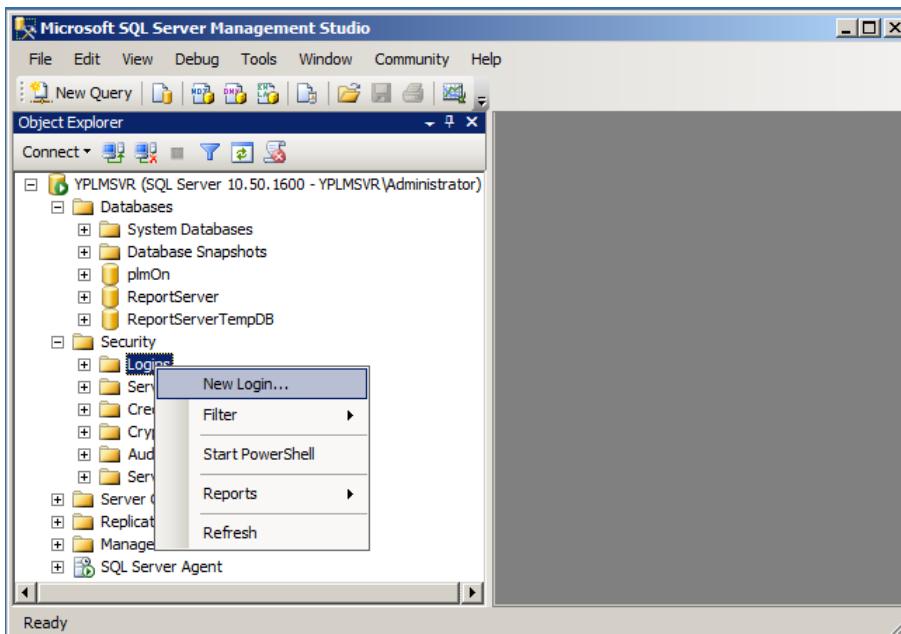
### 3. Verification and Additional Configuration Steps

#### 3.1. SQL Server Configuration Steps

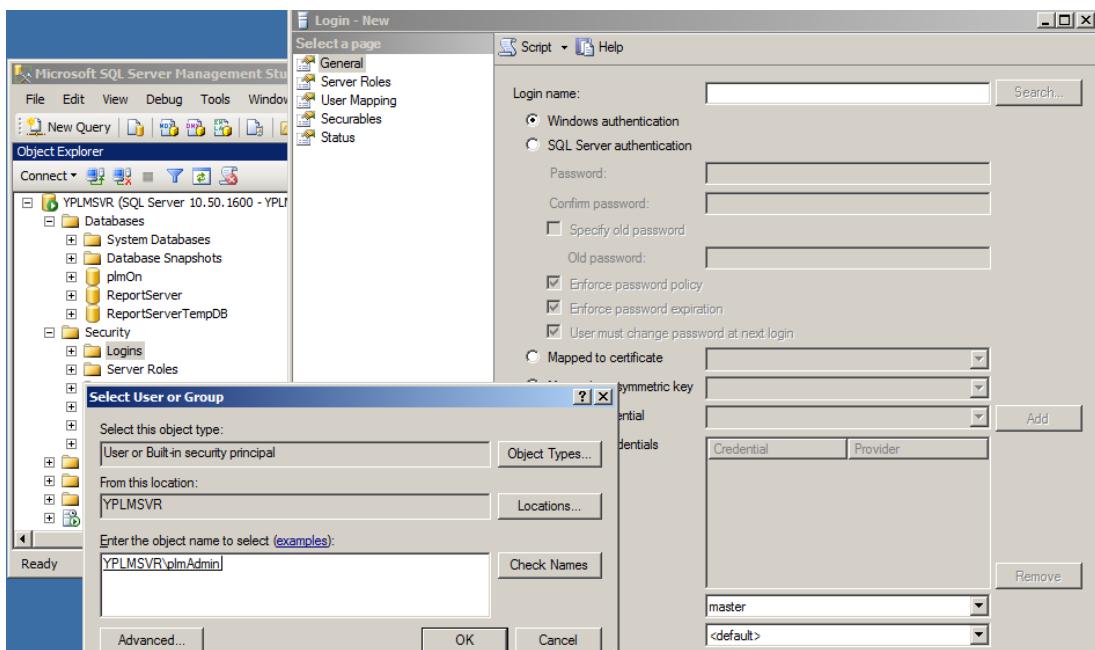
##### 3.1.1. Open SQL Server Management Studio and in the Object Explorer pane expand “Databases”. Verify that the YuniquePLM™ database was created.



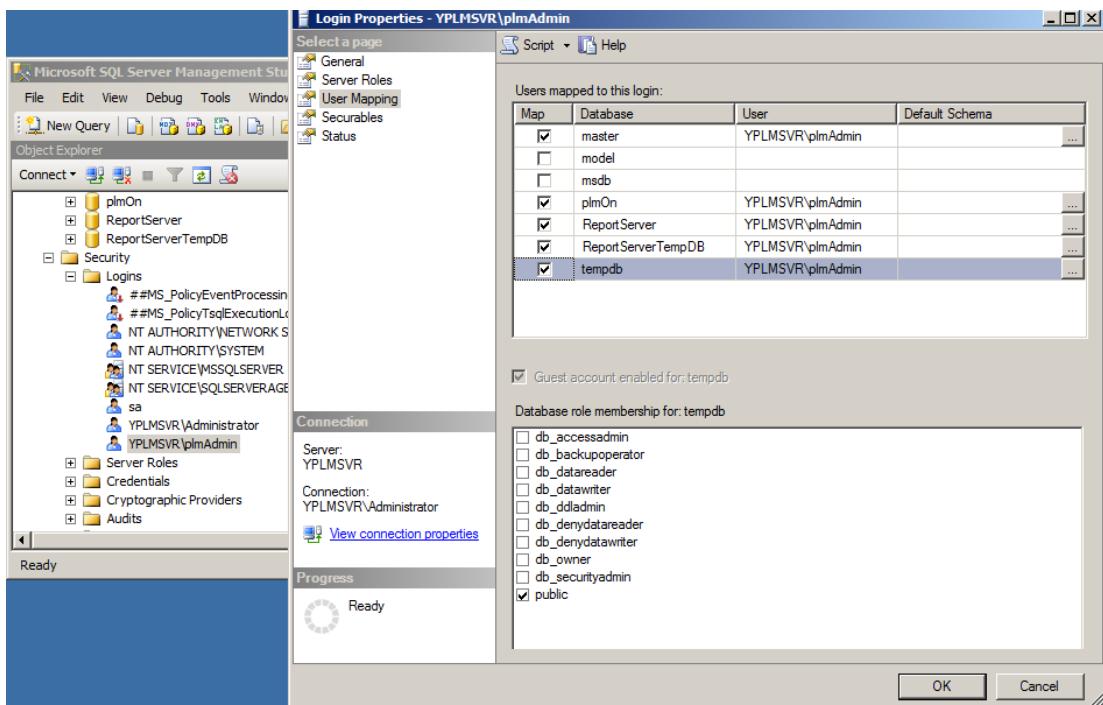
##### 3.1.2. In the Object Explorer pane expand “Security” and “Logins”. Right click on “Logins” and select “New Login...”



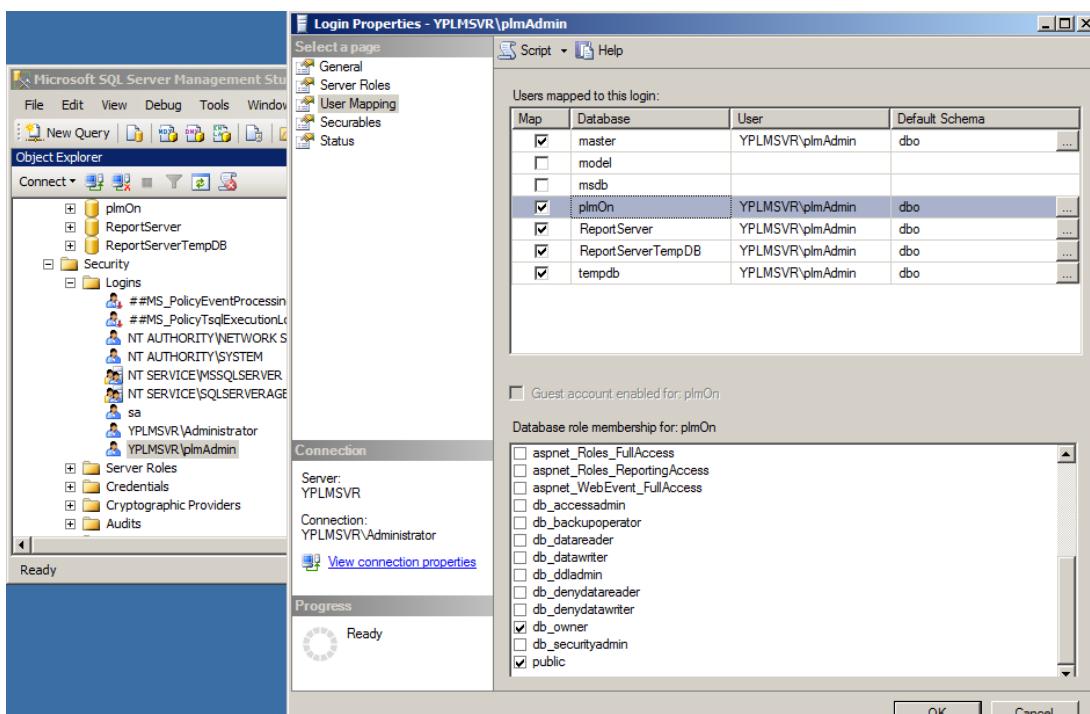
**3.1.3. Press the “Search” button, and in the “Select User or Group” dialog box, enter the user name that was created by the YuniquePLM™setup utility. Press “Check Names” and then press OK.**



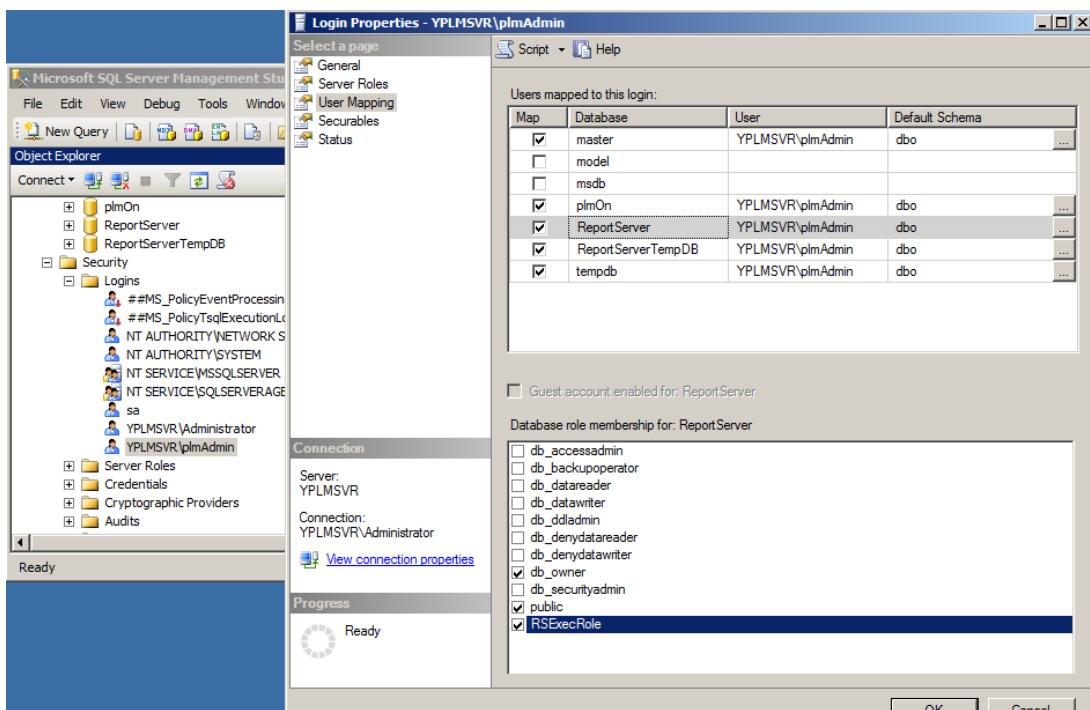
**3.1.4. Double click on the user name in the Object Explorer windows and select “User Mapping” in the Login Properties dialog box. Check Master, the YuniquePLM™database, ReportServer, ReportServerTempDB, and tempdb databases.**



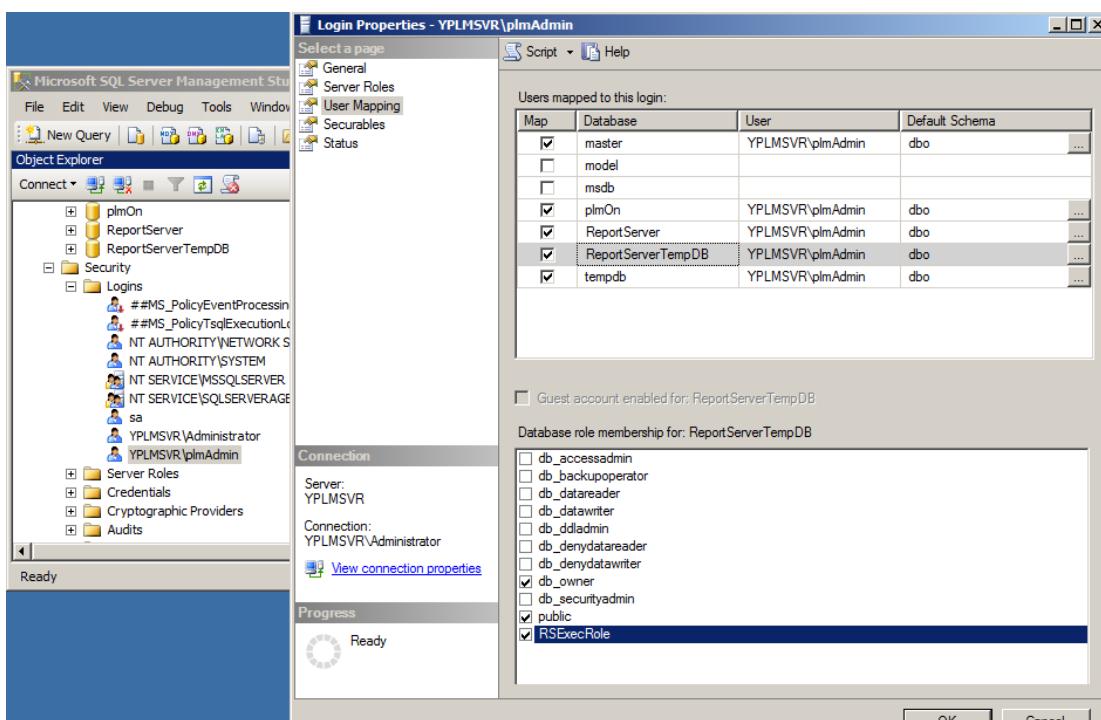
### 3.1.5. Select the YuniquePLM™ database and make sure db\_owner and public are checked.



### 3.1.6. Select the ReportServer database and make sure db\_owner, public, and RSExecRole are checked.

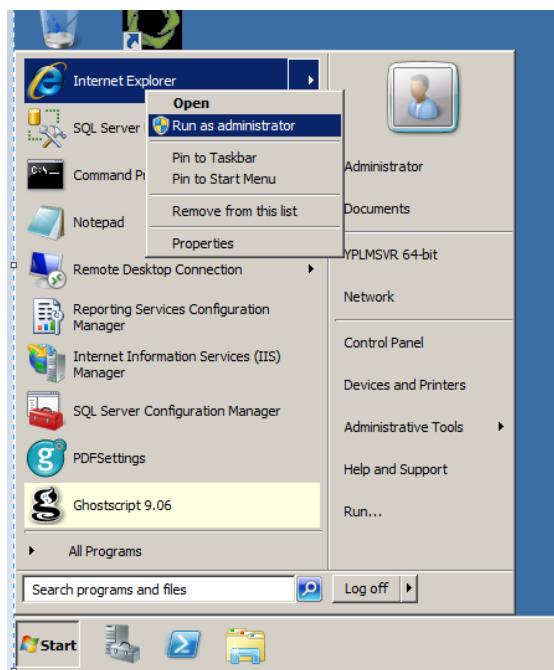


**3.1.7. Select the ReportServerTempDB database and make sure db\_owner, public, and RSEexecRole are checked. Press OK to save the settings.**

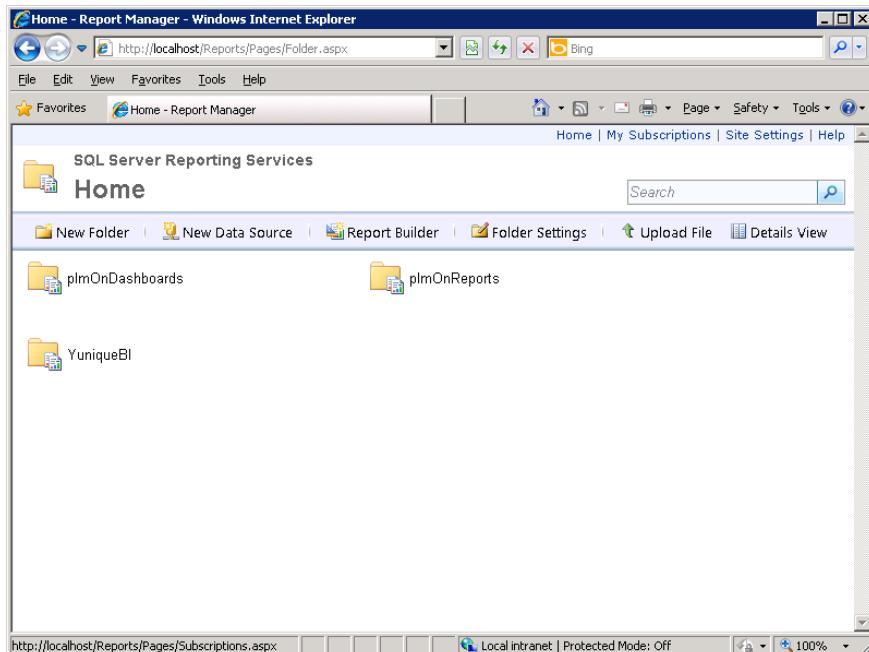


### 3.2. SQL Server Reporting Services Configuration

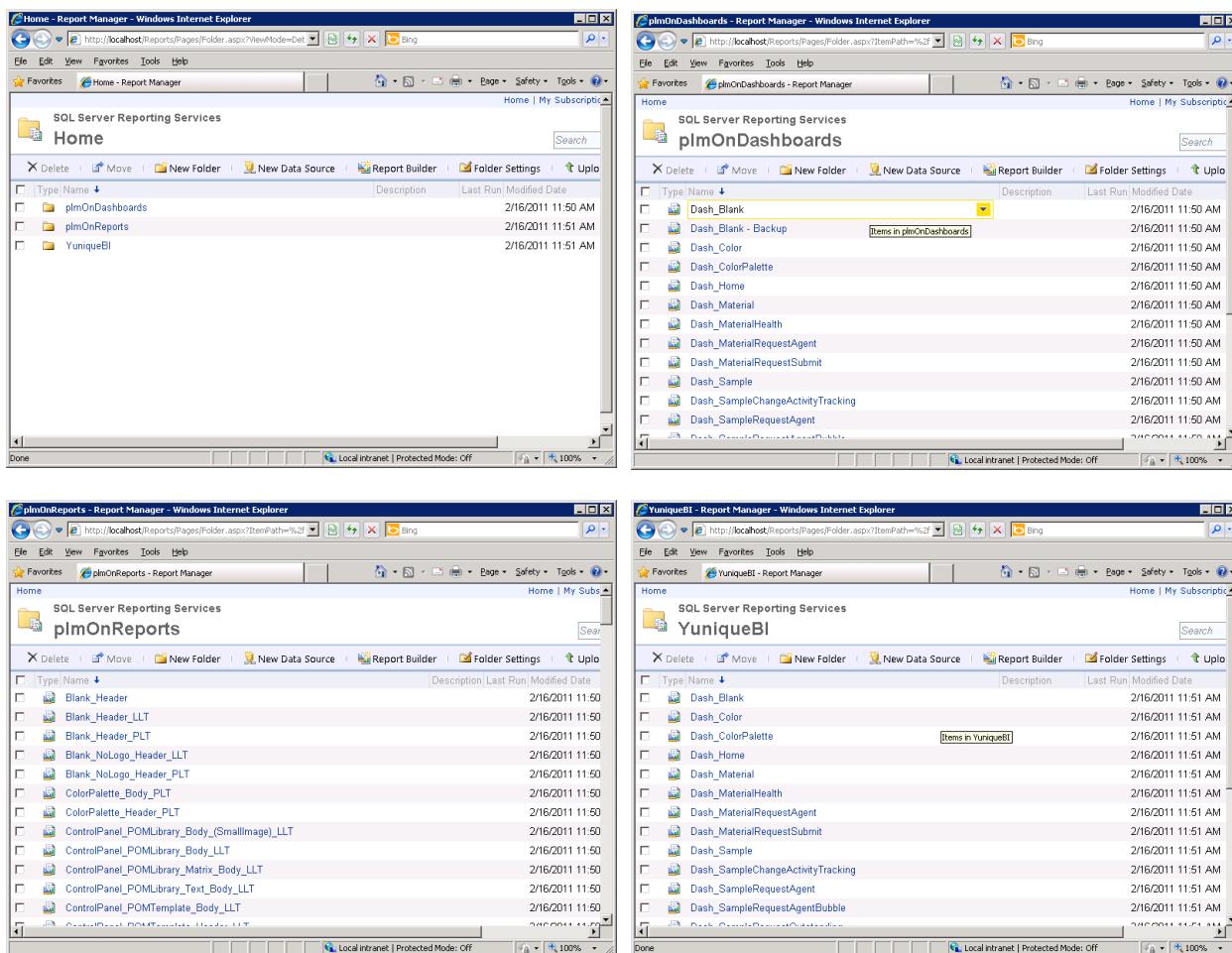
**3.2.1. On the Desktop, press the Start button, right click on Internet Explorer and select “Run as administrator”**



**3.2.2. Type in the url <http://localhost/reports> and verify that report folders plmOnDashboards, plmOnReports, and YuniqueBI have been created.**



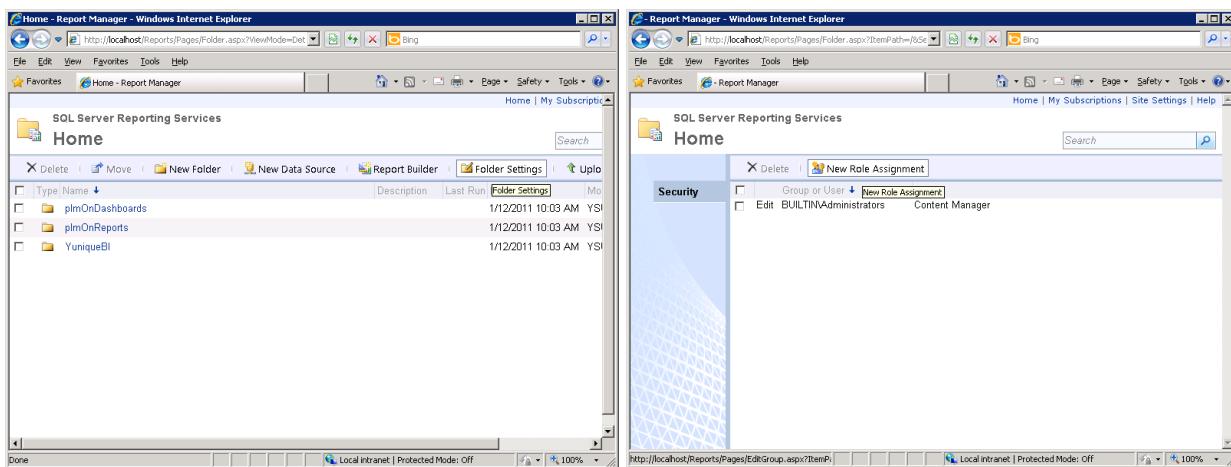
### 3.2.3. Press “Detail View”, and then select each folder to verify reports are installed.



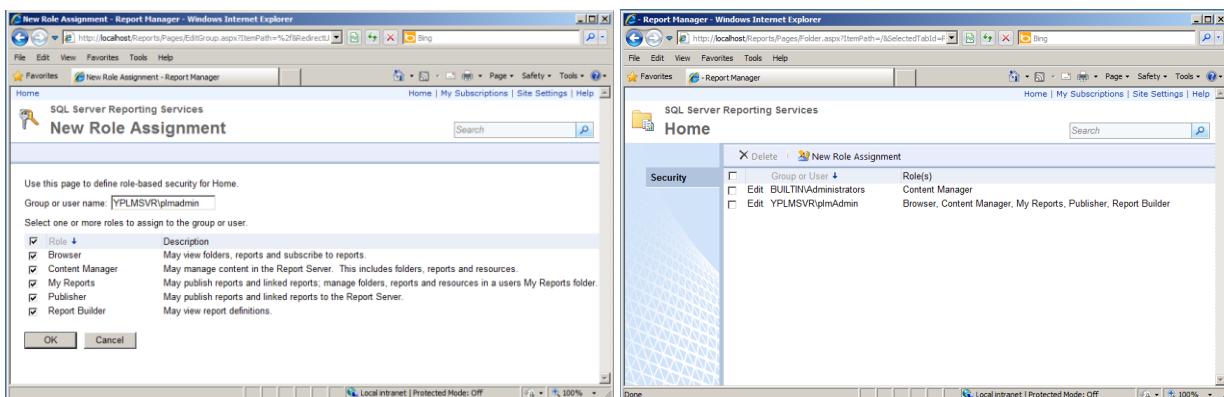
The figure consists of four separate windows of the "Report Manager - Windows Internet Explorer" browser. Each window displays a hierarchical list of reports under a specific folder in the "SQL Server Reporting Services" section.

- Home:** Shows three main folders: "plmOnDashboards", "plmOnReports", and "YuniqueBI".
- plmOnDashboards:** Shows a list of reports including "Dash\_Bank", "Dash\_Bank - Backup", "Dash\_Color", "Dash\_ColorPalette", "Dash\_Home", "Dash\_Material", "Dash\_MaterialHealth", "Dash\_MaterialRequestAgent", "Dash\_MaterialRequestSubmit", "Dash\_Sample", "Dash\_SampleChangeActivityTracking", and "Dash\_SampleRequestAgent". A tooltip "Items in plmOnDashboards" is visible over the "Dash\_Bank" item.
- plmOnReports:** Shows a list of reports including "Blank\_Header", "Blank\_Header\_LLT", "Blank\_Header\_PLT", "Blank\_NoLogo\_Header\_LLT", "Blank\_NoLogo\_Header\_PLT", "ColorPalette\_Body\_PLT", "ControlPanel\_POMLibrary\_Body\_(SmallImage)\_LLT", "ControlPanel\_POMLibrary\_Body\_LLT", "ControlPanel\_POMLibrary\_Matrix\_Body\_LLT", "ControlPanel\_POMTemplate\_Body\_LLT", and "ControlPanel\_POMTemplate\_Body\_LLTT".
- YuniqueBI:** Shows a list of reports identical to the "plmOnDashboards" list, including "Dash\_Bank", "Dash\_Bank - Backup", "Dash\_Color", "Dash\_ColorPalette", "Dash\_Home", "Dash\_Material", "Dash\_MaterialHealth", "Dash\_MaterialRequestAgent", "Dash\_MaterialRequestSubmit", "Dash\_Sample", "Dash\_SampleChangeActivityTracking", and "Dash\_SampleRequestAgent". A tooltip "Items in YuniqueBI" is visible over the "Dash\_Bank" item.

### 3.2.4. Select “Folder Settings”, then select “New Role Assignment”

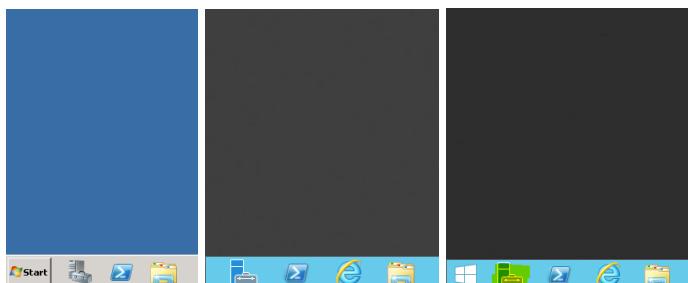


### 3.2.5. In the “Group or user name” box enter the serverusername of the user that was created by the YuniquePLM™ setup utility (website impersonation account). Check all role boxes and press OK.

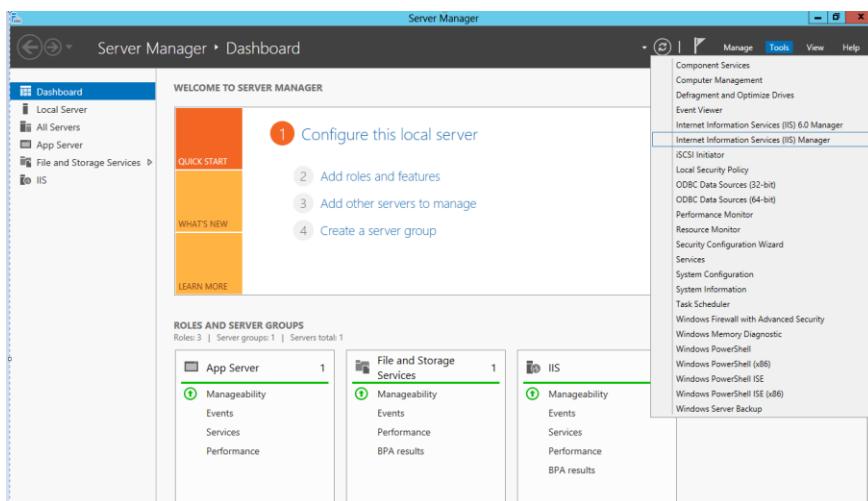
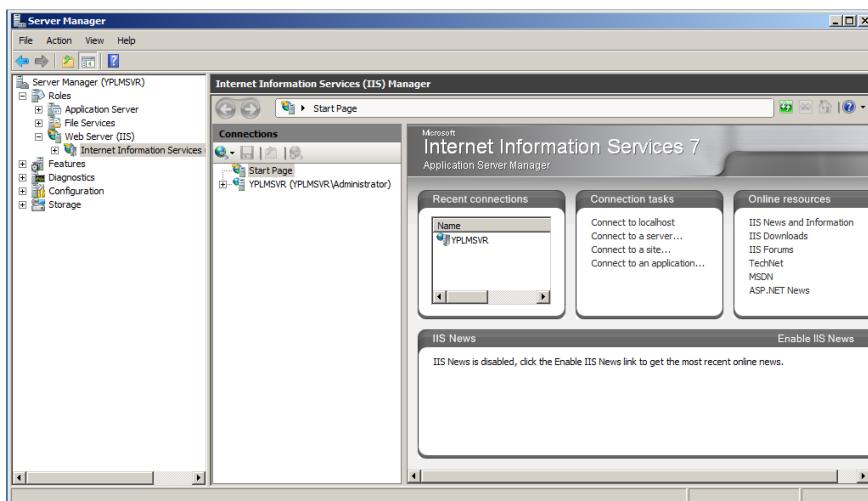


### 3.3. Server Manager Configuration

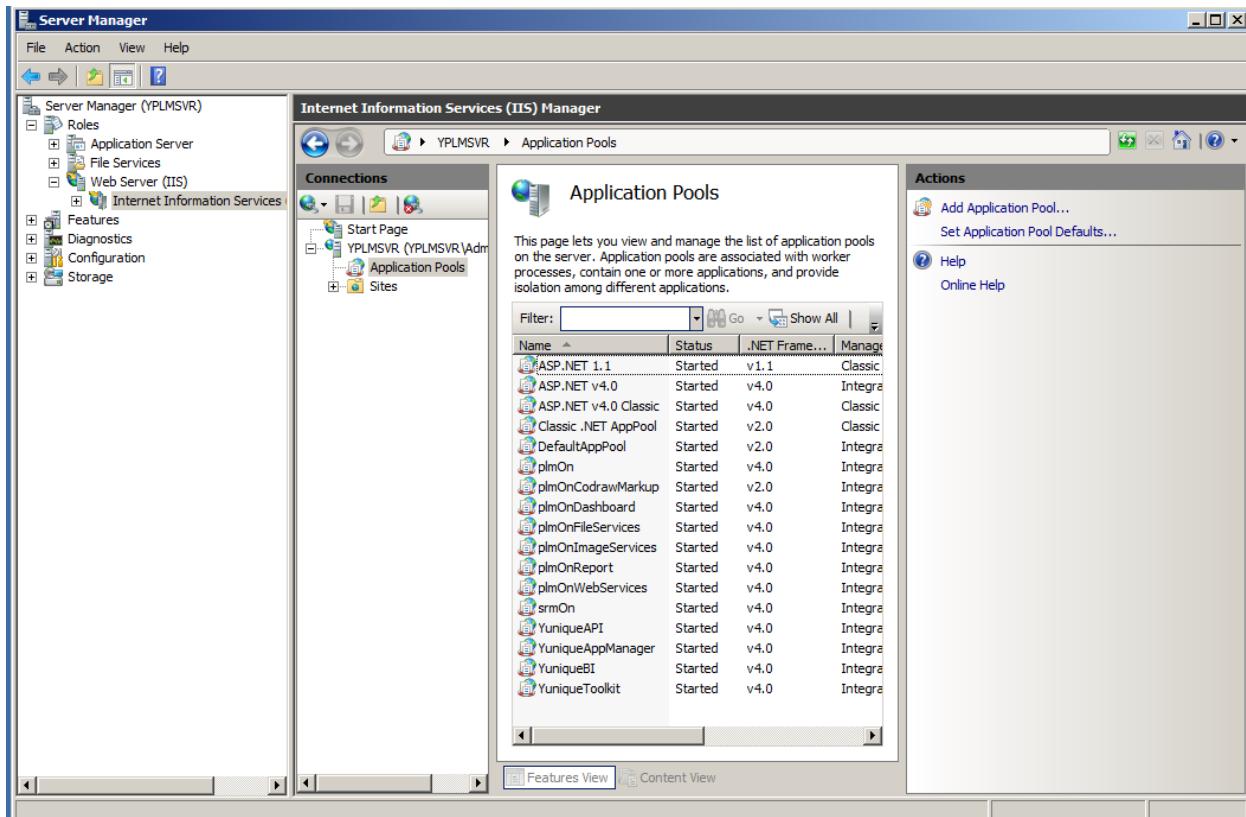
#### 3.3.1. On the desktop, click on the Server manager ICON in the lower left screen.



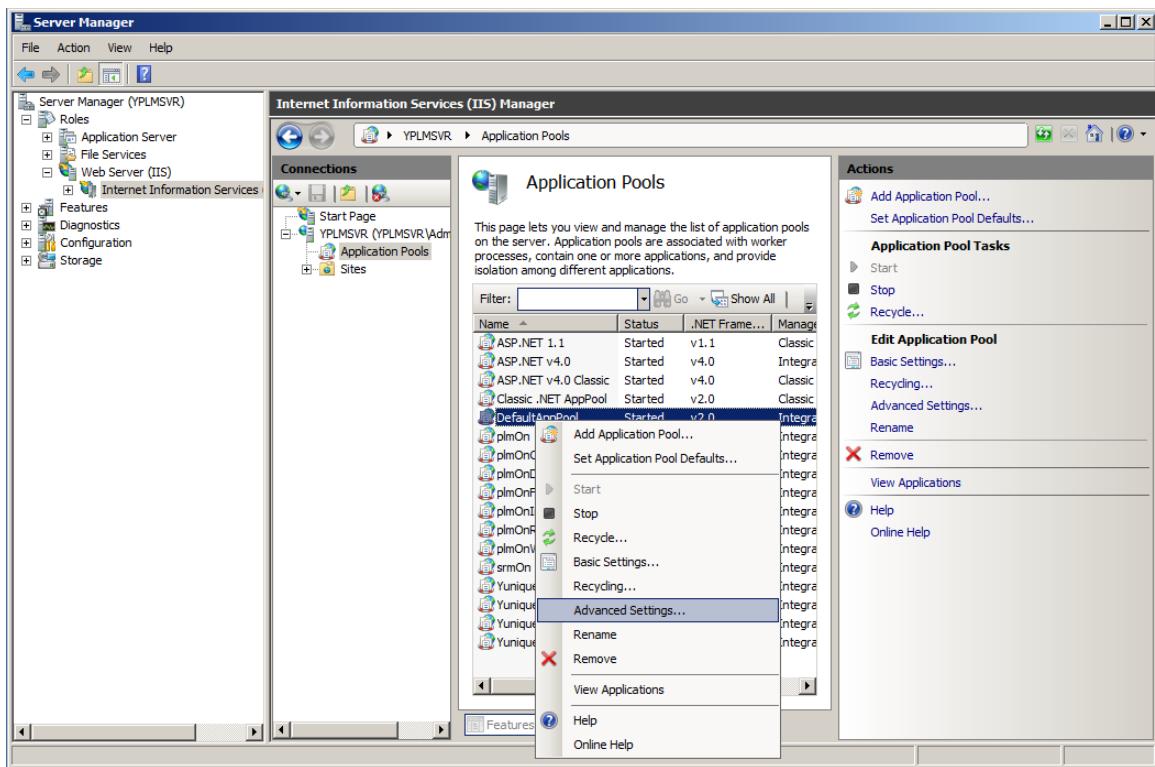
#### 3.3.2. Expand “Roles”, “Web Server”, click on “Internet Information Server” for Server 2008R2. Select “Tools” and “Internet Information Services (IIS) Manager” for Server 2012 / 2012R2



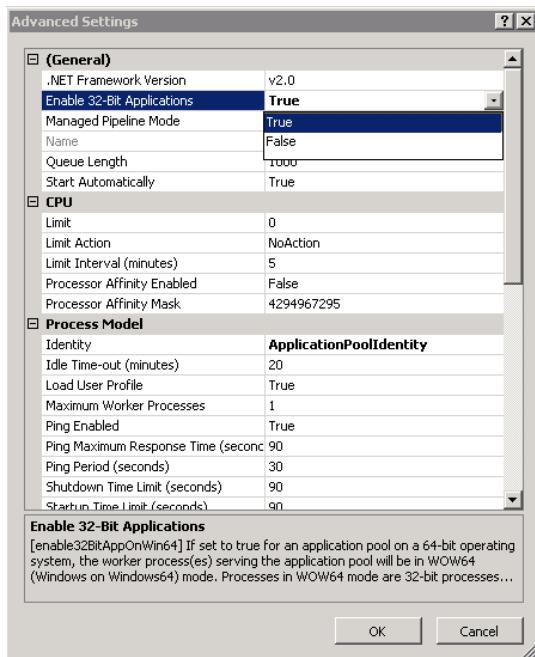
**3.3.3. In the Connections pane, expand the server, and expand “Sites”. Verify the websites have been created. Click on “Application Pools” and verify that the application pools have been created.**



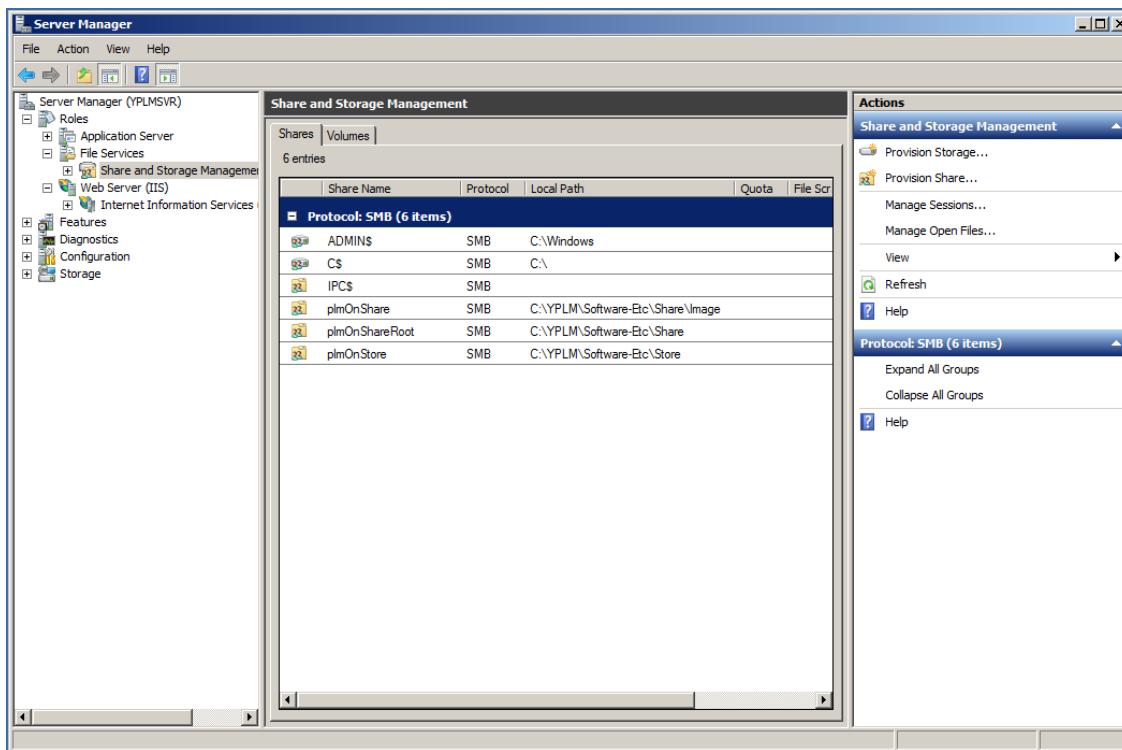
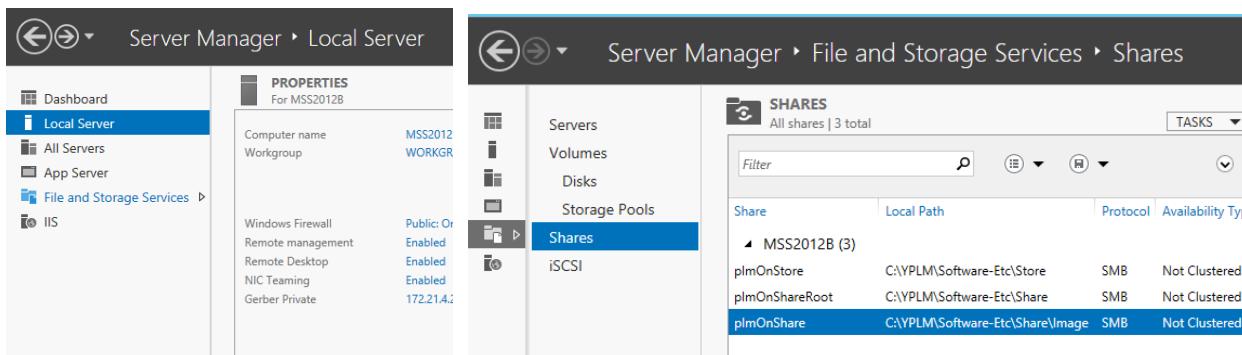
**3.3.4. In the “Application Pools” pane, right click on “DefaultAppPool” and select “Advanced Settings”**



**3.3.5. Select “Enable 32-bit Applications” and verify that “True” is set. Select “Load User Profile” and verify that “True” is set.**

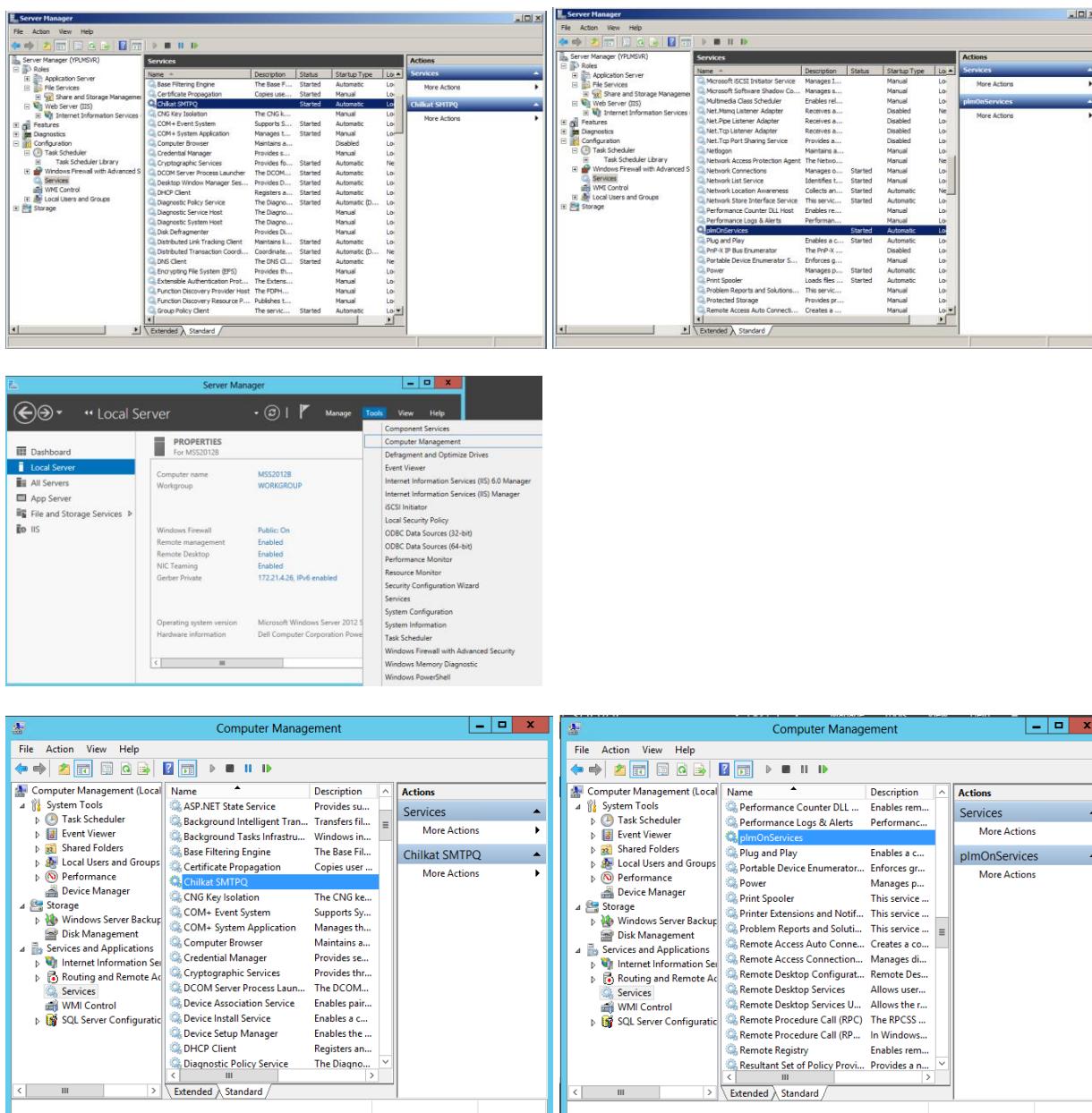


**3.3.6. Expand “File Services” and select “Share and Storage Management” in 2008R2 Server Manager. In Server Manager 2012 / 2012R2 select “File and Storage Services”, the select “Shares. Verify that “plmOnShare” and “plmOnStore” shares have been created.**

Share	Local Path	Protocol	Availability Type
plmOnStore	C:\YPLM\Software-Etc\Store	SMB	Not Clustered
plmOnShareRoot	C:\YPLM\Software-Etc\Share	SMB	Not Clustered
plmOnShare	C:\YPLM\Software-Etc\Share\Image	SMB	Not Clustered

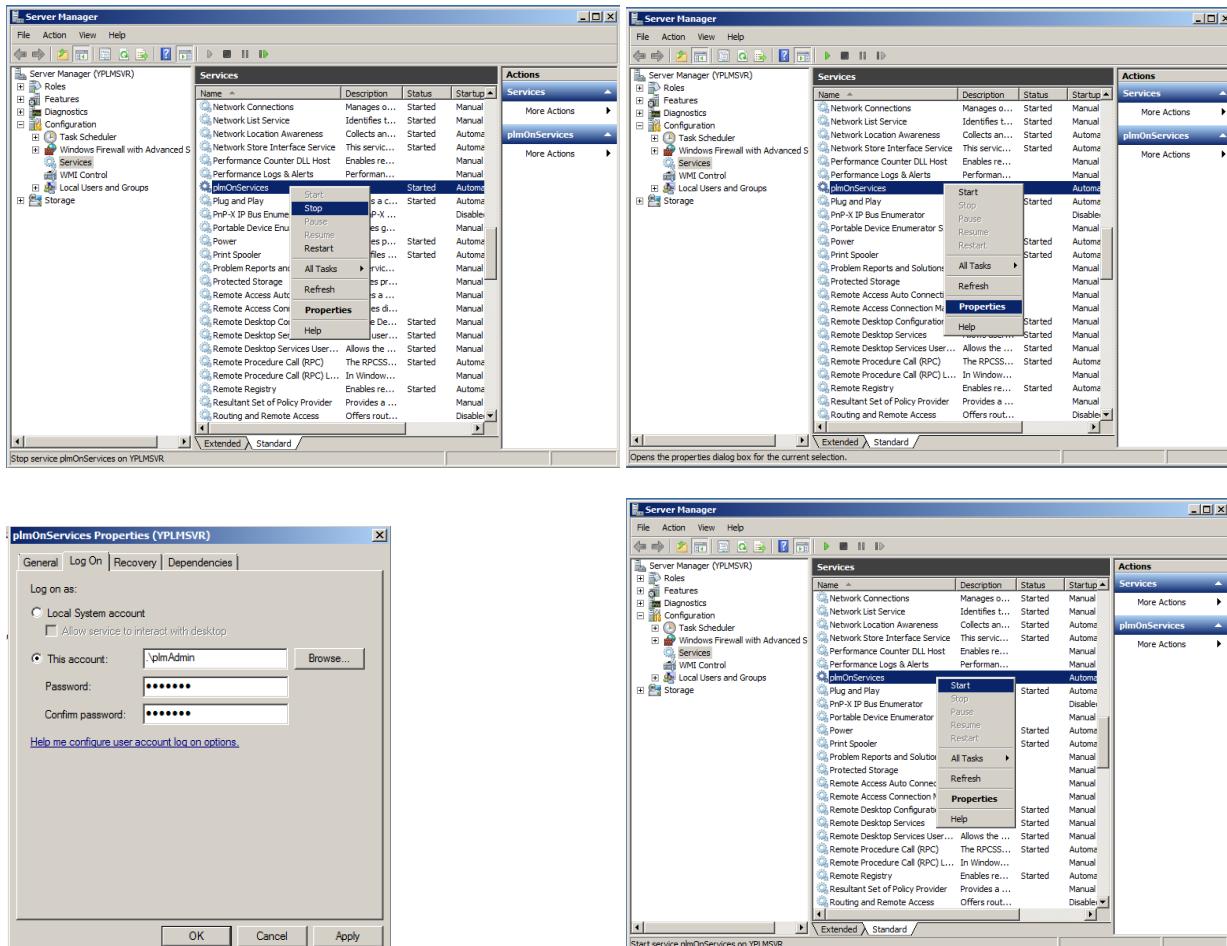
### 3.3.7. In Service Manager 2008R2 click on “Services” and verify that services “Chilkat SMTPQ” and plmOnServices have been created. In Server Manager 2012 select “Tools” and “Computer Management”



The figure consists of four screenshots arranged in a 2x2 grid, illustrating the creation and verification of services in various Microsoft management environments:

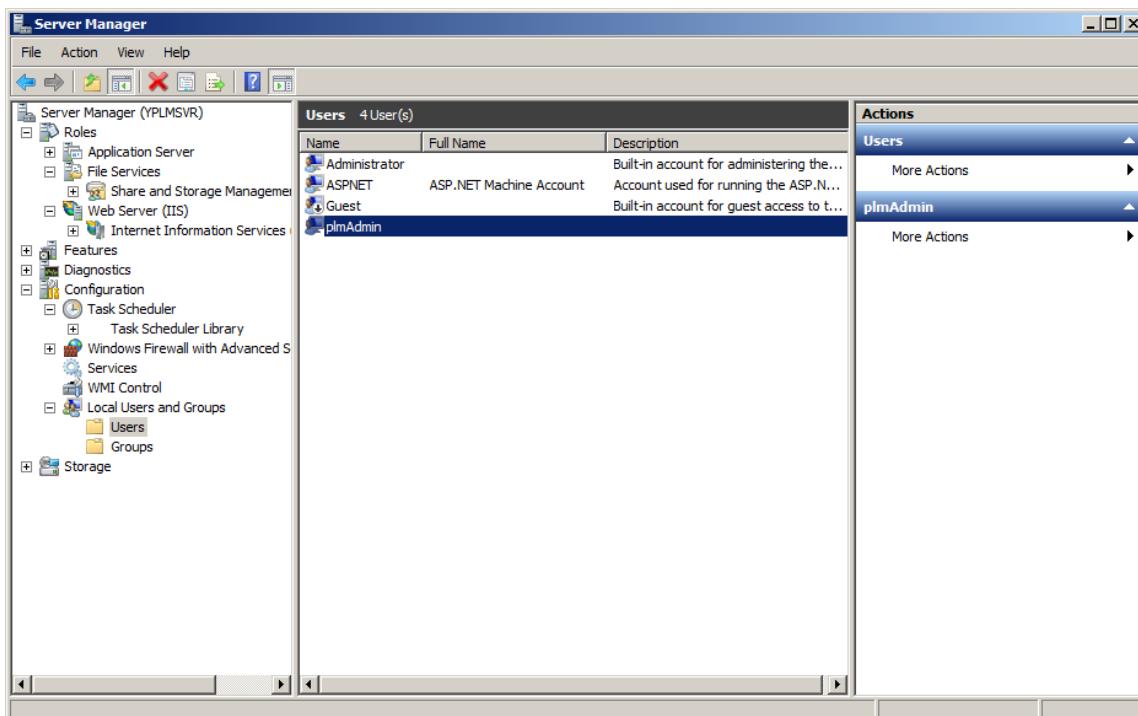
- Top Left (Service Manager 2008R2 Services View):** Shows the "Services" list with two new entries: "Chilkat SMTPQ" and "plmOnServices".
- Top Right (Service Manager 2008R2 Services View):** A second view of the "Services" list, also showing "Chilkat SMTPQ" and "plmOnServices".
- Bottom Left (Server Manager 2012 Tools > Computer Management):** Shows the "Computer Management" interface under "Tools".
- Bottom Right (Computer Management Services View):** Shows the "Services" list with "Chilkat SMTPQ" and "plmOnServices" listed.

**3.3.8. The logon account used by plmOnServices will have to be changed to the YuniquePLM™ impersonation account. Right click on plmOnServices and select “Stop”. Right click on plmOnServices and select “Properties”. Select “This account:”, enter the information for the YuniquePLM™ impersonation account, and press the “OK” button. Right click on plmOnServices and select “Start”.**

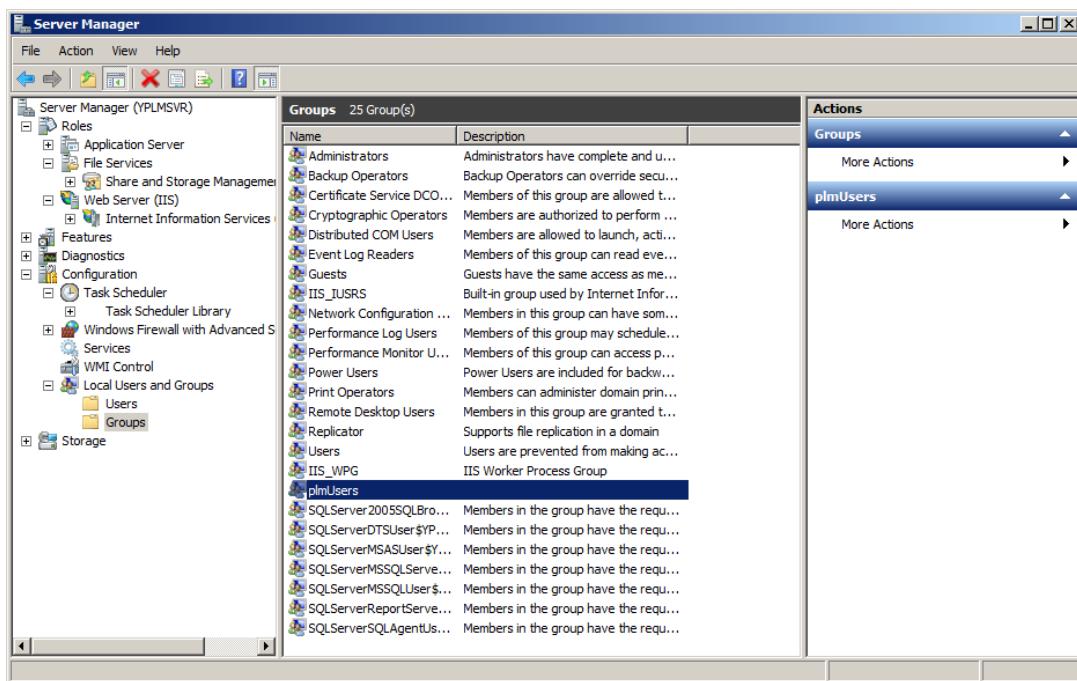


**3.3.9. Click on “Users” and verify that the website impersonation account has been created.**

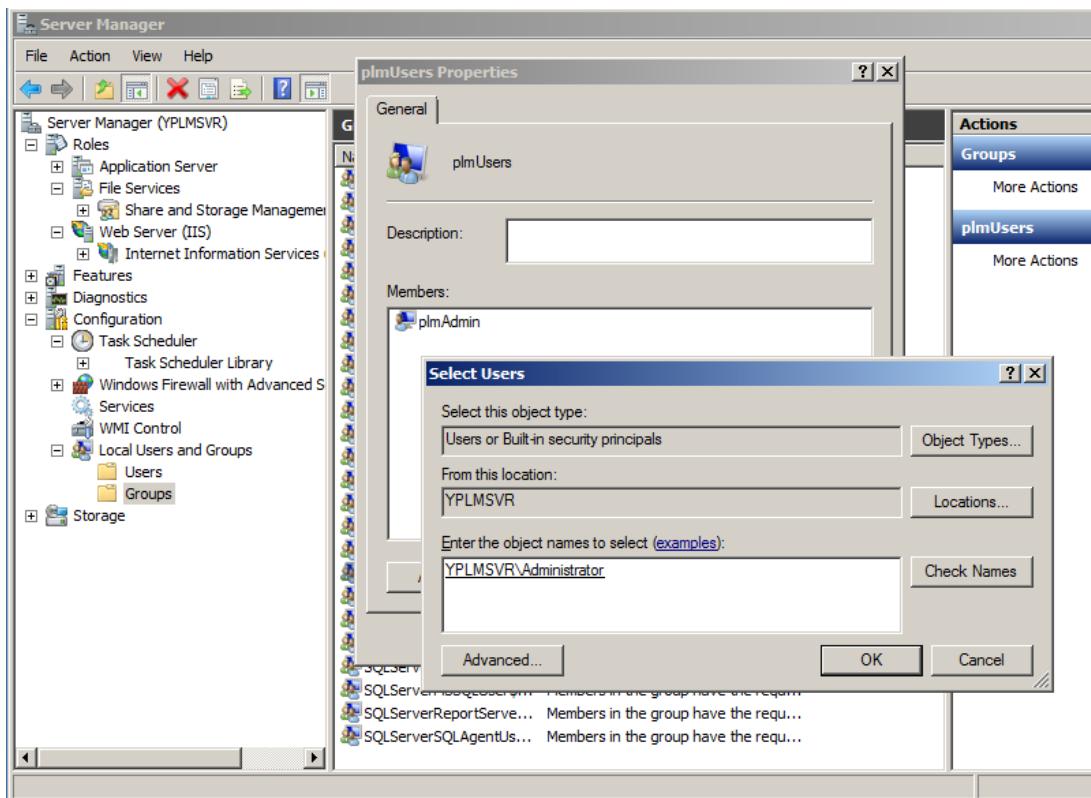
**Double click on the account name, check “Password never expires” and press the OK button.**



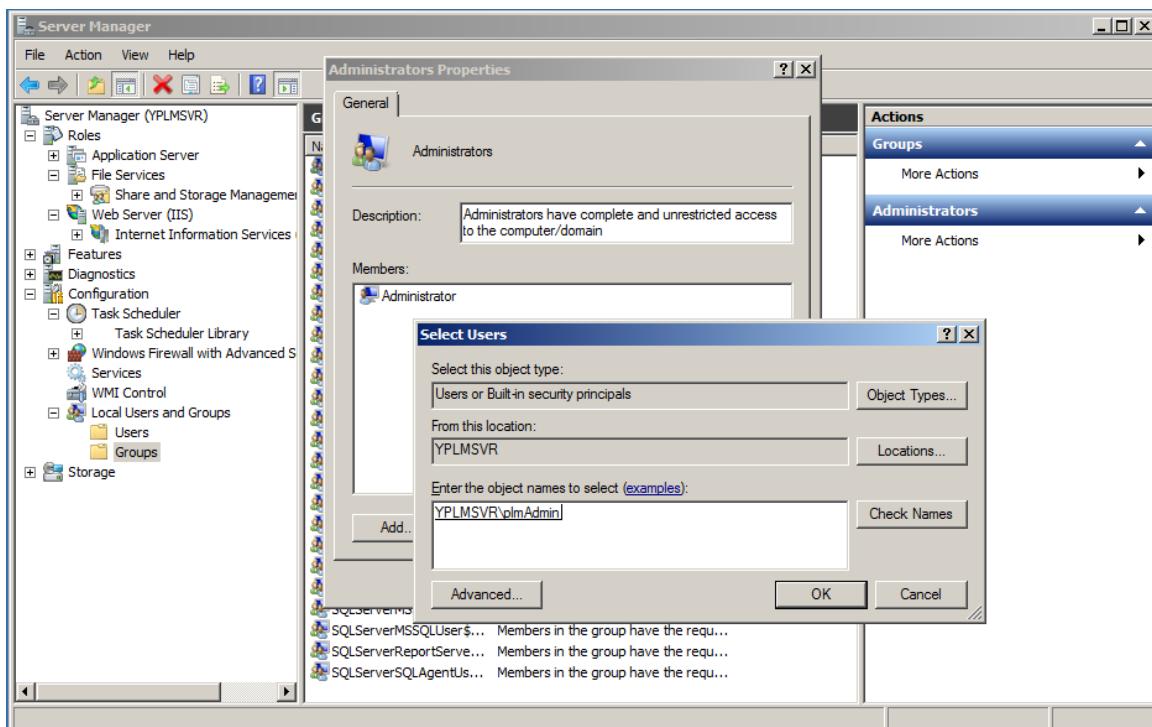
### 3.3.10. Click on “Groups” and verify that the “plmUsers” group has been created.



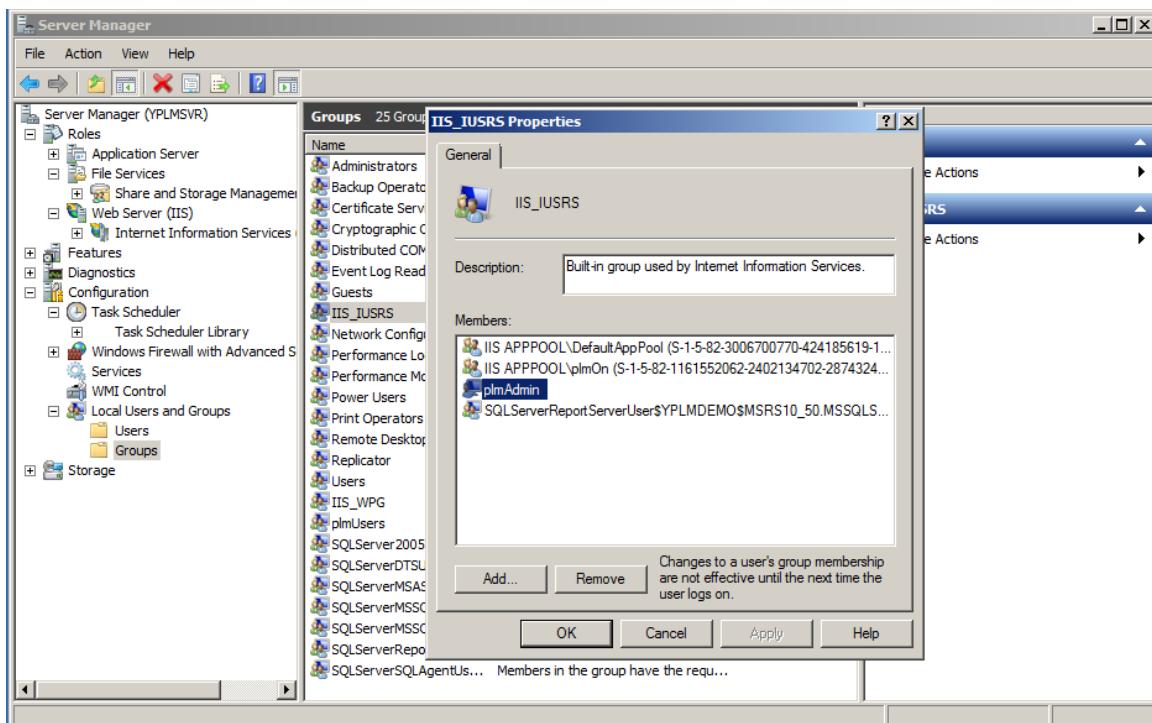
### 3.3.11. Double click on the “plmUsers” group and add the current logged in user in order to test Image Editing functionality. You will have to reboot for this to take effect.



### 3.3.12. Double click on the “Administrators” group and add the website impersonation account.

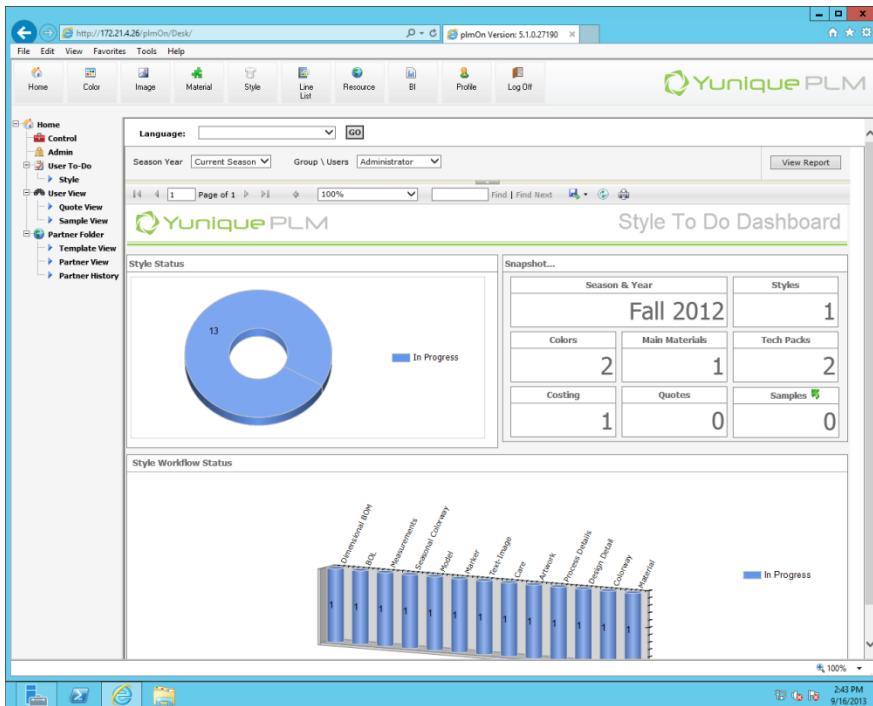
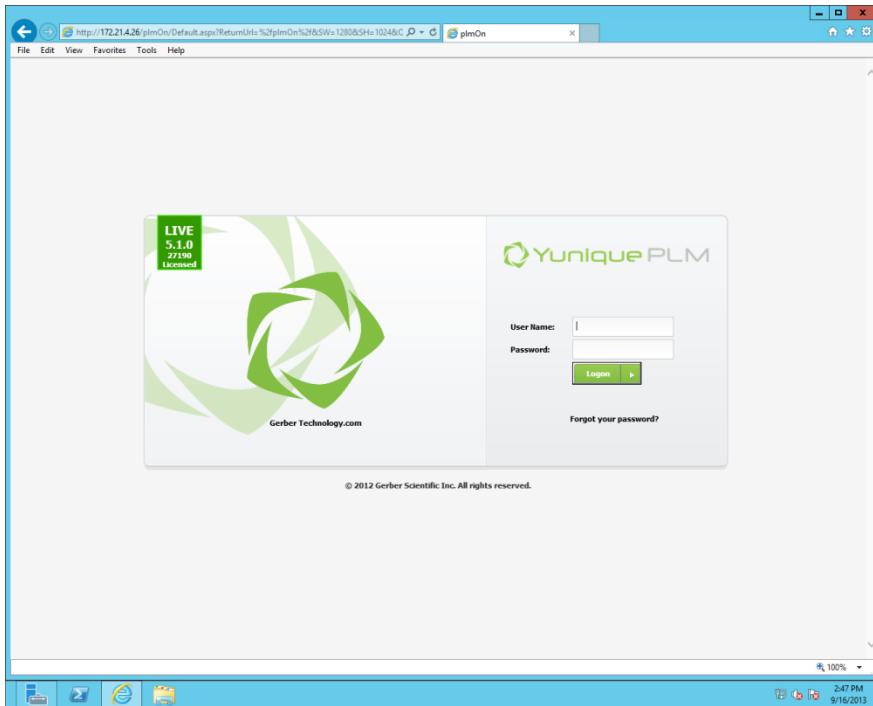


### 3.3.13. Double click on the “IIS\_USRS” group and verify that the website impersonation account is a member.



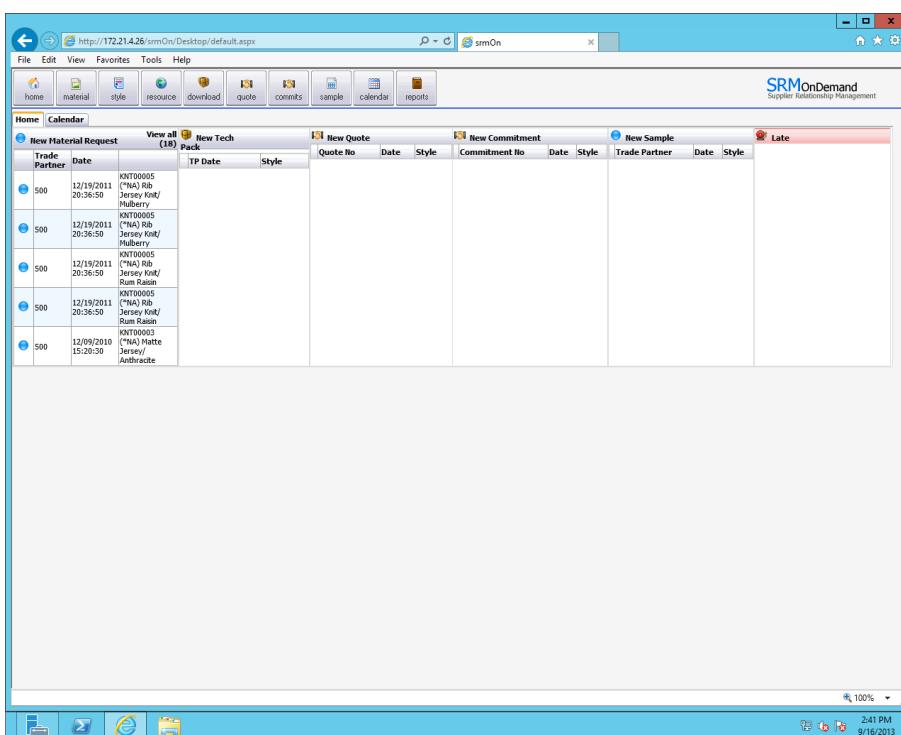
## 4. Application Verification

- 4.1. On the desktop, double click on the plmOn ICON and verify the plmOn login screen displays. Login and verify the application is functioning. The default user ID is “Administrator”, password “plmon1234@”**



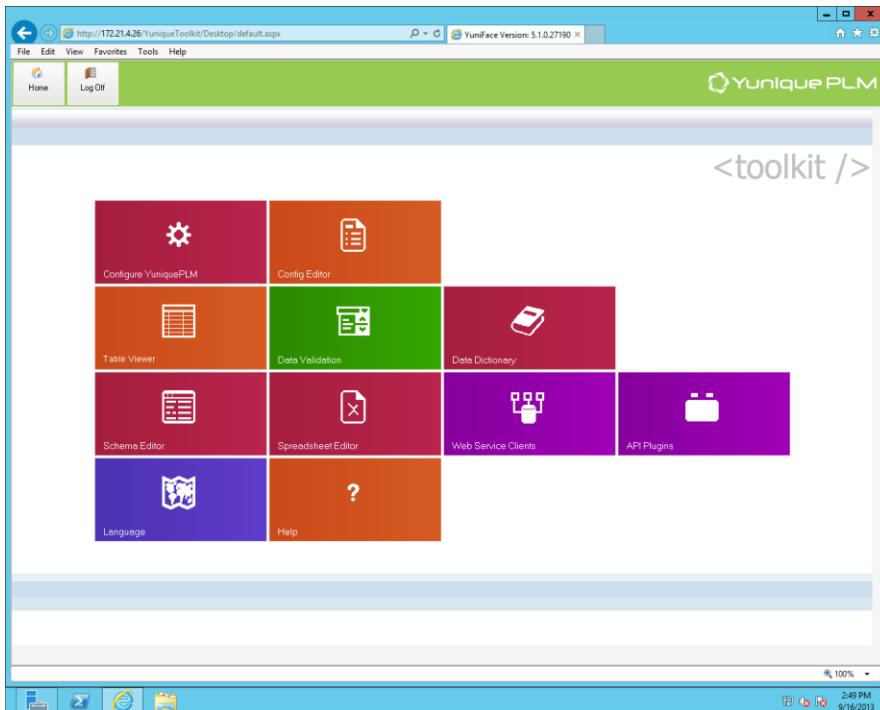
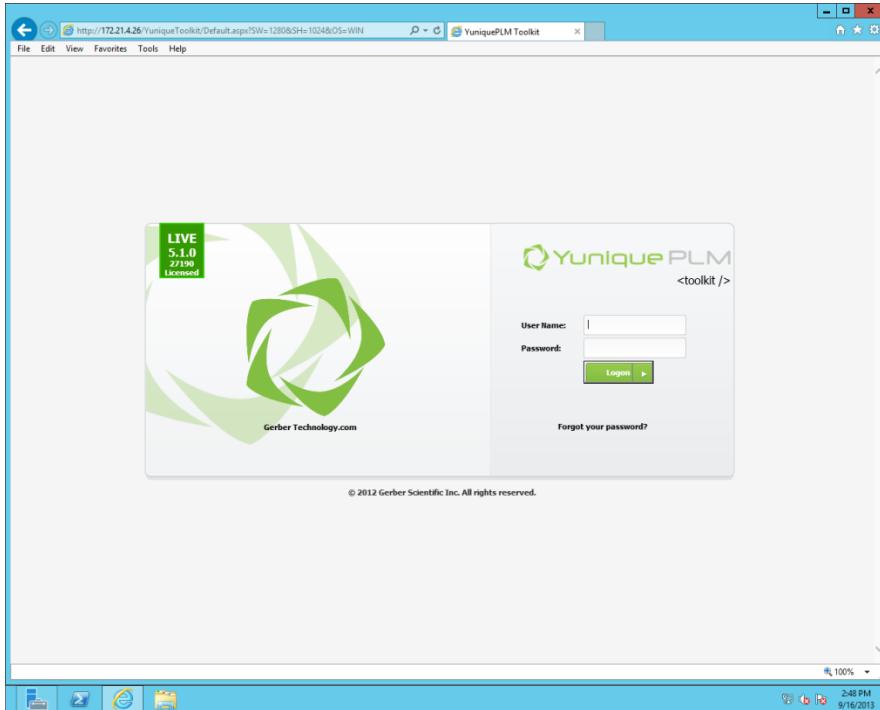
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- 4.2. On the desktop, double click on the srmOn ICON and verify the srmOn login screen displays. Login and verify the application is functioning. The default user ID is “YuniqueAgent”, password “plmon1234@”, email “danpak6@gmail.com”**

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- 4.3. On the desktop, double click on the YuniqueToolkit ICON and verify the YuniqueToolkit login screen displays. The YuniqueToolkit is an option. If licensed, login and verify the application is functioning. The default user ID is “Administrator”, password “plmon1234@”



## Appendix A: Hardware and System Requirements

### ***YuniquePLM™ Deployment Infrastructure***

Many of our customers implementing YuniquePLM™ maintain multiple environments.

Typically there are up to four (4) environments.

**Minimally, the Development and Production environments are required.**

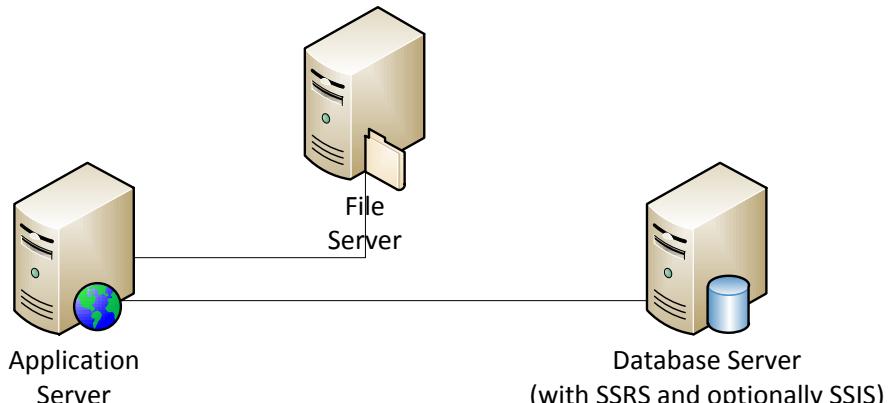
For Best practice we recommend the following environments:

- Integration: An environment for testing the latest release builds. Developers test their deployed changes in this environment.
- Development: An environment for new configurations and development efforts.
- Staging/QA: Typically a close replica of the Production environment where new changes can be tested and approved, prior to production release.
- Production/Live: This is the environment where all of the day-to-day activities take place.

### ***Minimum Eligibility Requirements***

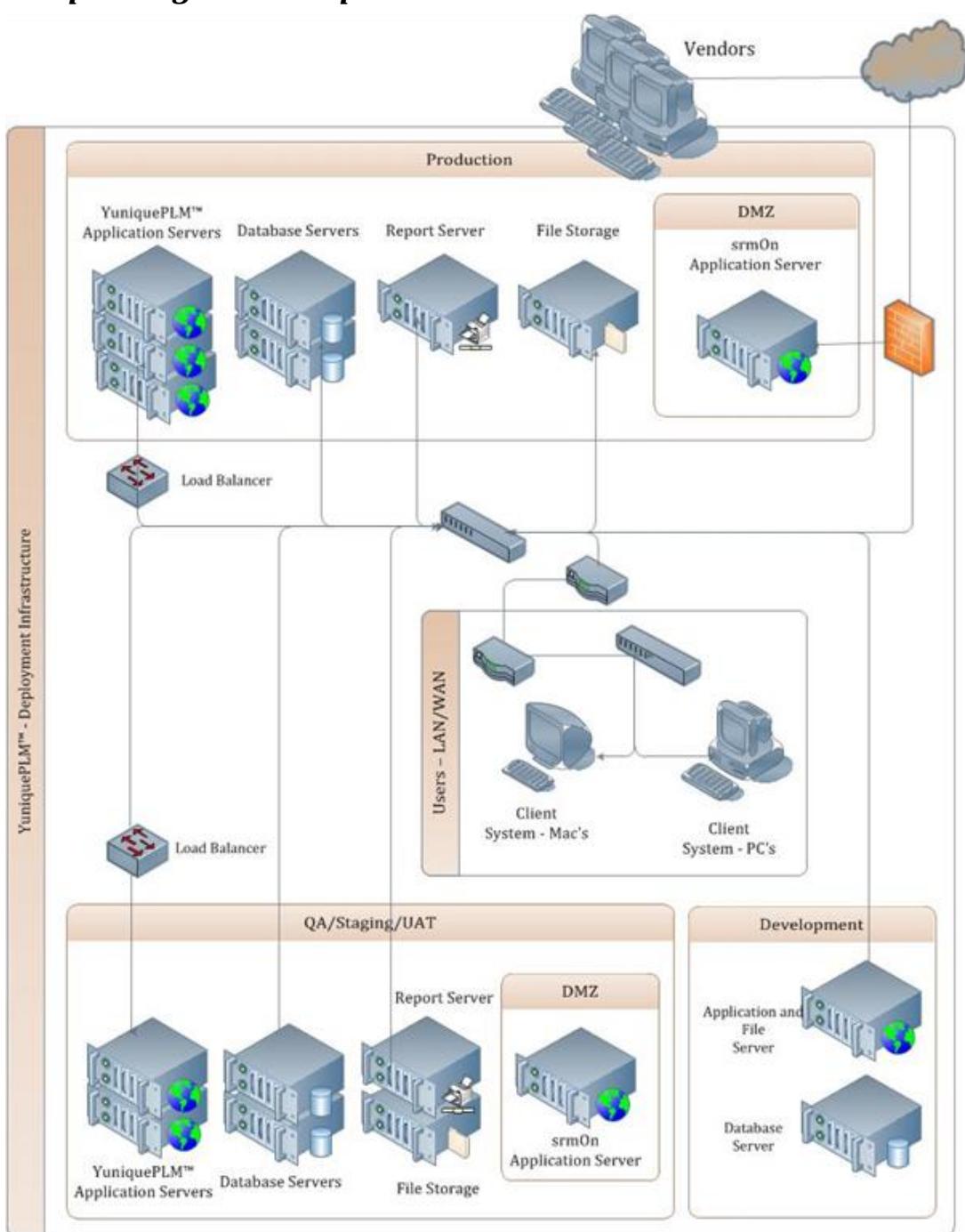
Each environment typically consists of three servers:

### ***YuniquePLM™ Building Blocks***



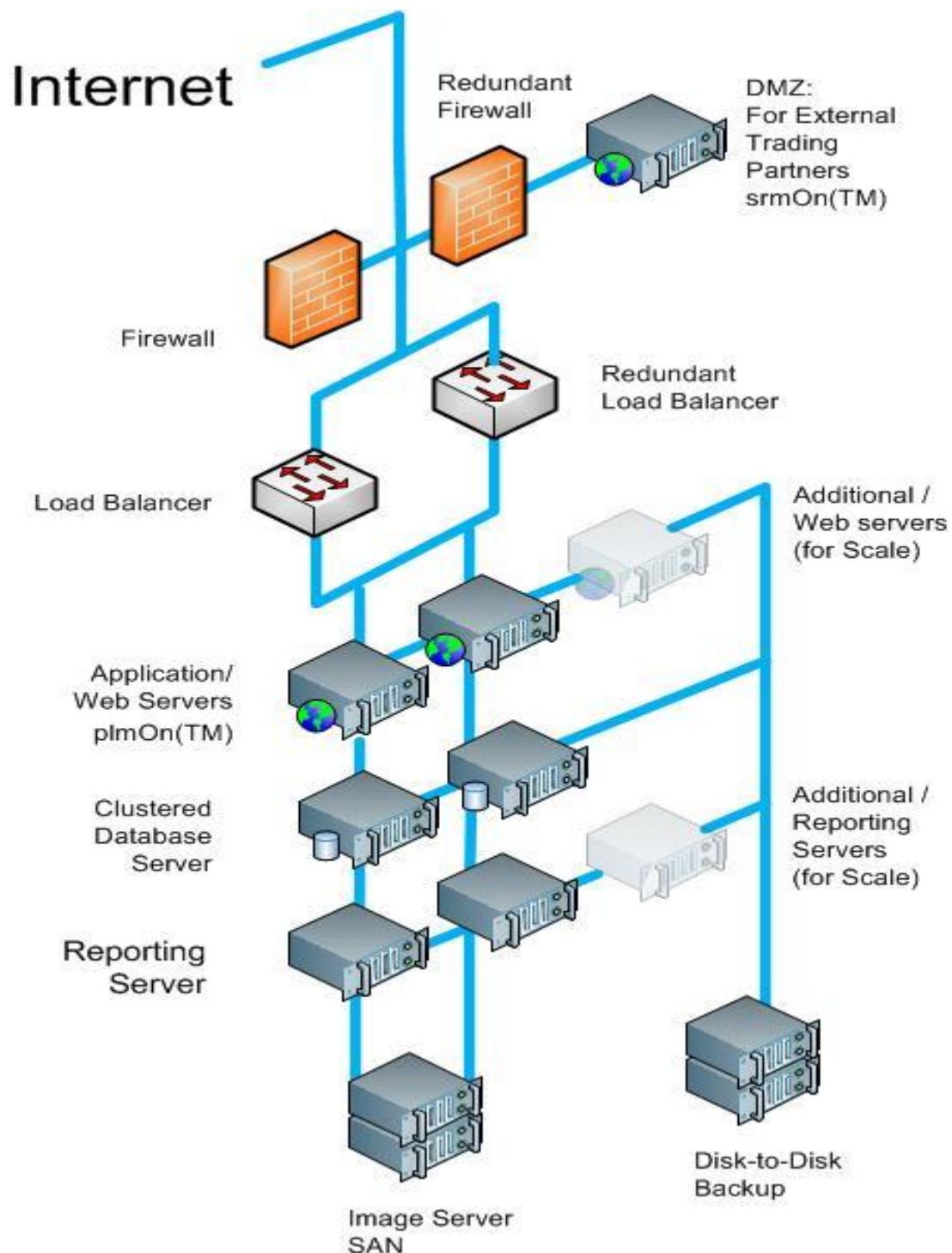
- Application Server: Configured with IIS to host the YuniquePLM™ application
- File Server: Image Repository
- Database Server: A Server hosting the SQL Server Database, SQL Server Reporting Services and SQL Server Integration Services

## Sample Large Scale Implementation

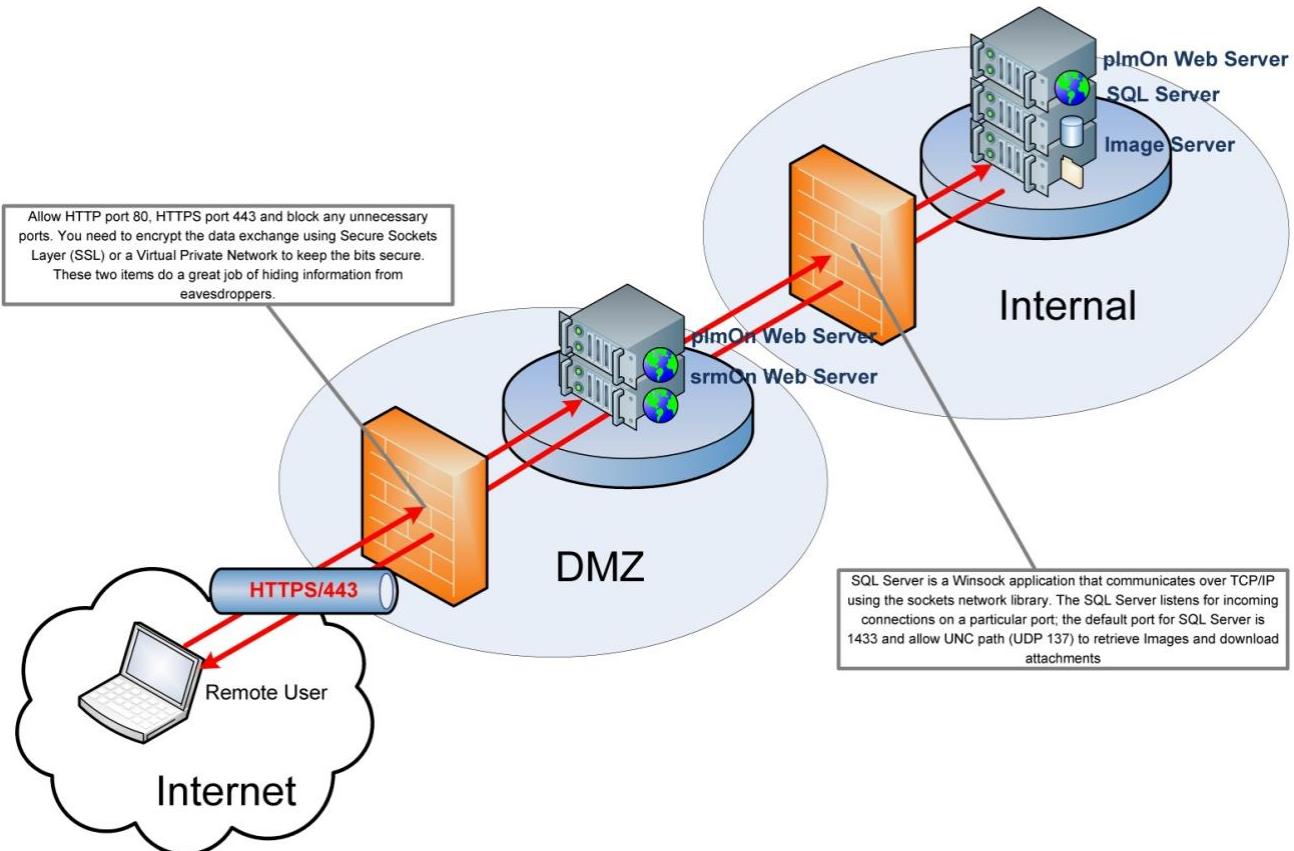


## ***YuniquePLM™Network Architecture***

YuniquePLM™ runs on Microsoft technologies including Windows Server 2008R2, IIS, SQL Server DBMS. These technologies offer high availability and scalability. We recommend database clustering, web farm, network load balancing clusters and installing RAID drives for high availability.



## Possible YuniquePLMTM Configuration Secure Remote Internet Access using a DMZ Internal Private Network Access



## Large System Configuration (100+ Users) - YuniquePLM™

 Database Server Configuration		 Web Server Configuration	
DB Server	Recommended	Web Server	Recommended
CPU	Two processor Intel Xeon – 8 Cores 2.4 GHz	CPU	Intel Xeon – 4 Cores 3.0 GHz
Memory	64 GB	Memory	32 GB
Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) – TBD	Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB
Preferred O/S	Windows Server 2012R2 Std.	Preferred O/S	Windows Server 2012R2 Std.
Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.	Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.
Network Connection	4x1 Gigabit Ethernet - teamed	Network Connection	4x1 Gigabit Ethernet - teamed
Data Engine	64-bit SQL Server 2008R2 Std. or SQL 2012 Std. with Reporting and Integration Services	Data Engine	n/a
Other		Other	IIS 7.5 (2008R2), 8.0 (2012), 8.5 (2012R2), .NET Framework 4.5, AJAX V1.0
Physical	√	Physical	√
Virtual	X	Virtual	√
<ul style="list-style-type: none"> <li>○ For best performance the Database Server should be a dedicated physical server and not host other databases or applications. It must not be hosted on the same server as the Web Server or the File Server.</li> <li>○ The Database Server should not be installed in a virtual server for optimum performance.</li> <li>○ A SQL Server license and SQL Client Licenses are required for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> </ul>		<ul style="list-style-type: none"> <li>○ For best performance the Web Server should be a dedicated physical server and not host other applications. It must not be hosted on the same server as the Database or File Server.</li> <li>○ The Web Server can be installed in a virtual server.</li> <li>○ IIS is part of the Windows Server Operating System.</li> </ul>	

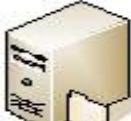
 File Server Configuration		 Report Server Configuration (Recommended for best Performance)	
File Server	Recommended	Report Server	Recommended
CPU	Intel Xeon – 4 Cores 3.0 GHz	CPU	Intel Xeon – 4 Cores 3.0 GHz
Memory	16 GB	Memory	32 GB
Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) - TBD	Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) - TBD
Preferred O/S	Windows Server 2012R2 Std.	Preferred O/S	Windows Server 2012R2 Std.
Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.	Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.
Network Connection	4x1 Gigabit Ethernet - teamed	Network Connection	2x1 Gigabit Ethernet - teamed
Data Engine	n/a	Data Engine	64-bit SQL Server 2008R2 Std. or SQL 2012 Std.
Other	IIS 7.5 (2008R2), 8.0 (2012), 8.5 (2012R2)	Other	SQL Server Reporting Services
Physical	√	Physical	√
Virtual	√	Virtual	√
<ul style="list-style-type: none"> <li>○ For best performance the File Server should be a dedicated physical server and not host other applications. It must not be hosted on the same server as the Database Server or the Web Server.</li> <li>○ The File Server can be installed on a virtual server.</li> <li>○ A Windows Server Client License is needed for each YuniquePLM™User License.</li> <li>○ IIS is part of the Windows Server Operating System.</li> </ul>		<ul style="list-style-type: none"> <li>○ For best performance the SQL Reporting Server should be a dedicated server and not host other databases or applications.</li> <li>○ A SQL Server license and SQL Client Licenses are required for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> </ul>	

Large System Configurations can be scaled to include additional Web Servers, File Servers, Reporting Servers, Load Balancers, Clusters, and remote Servers.

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## Medium System Configuration (21-99 Users) - YuniquePLM™

 Database Server Configuration		 Web & File Server Configuration	
DB Server	Recommended	Web Server	Recommended
CPU	Two processor Intel Xeon – 8 Cores 2.4 GHz	CPU	Intel Xeon – 4 Cores 3.0 GHz
Memory	64 GB	Memory	32 GB
Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) - TBD	Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) - TBD
Preferred O/S	Windows Server 2012R2 Std.	Preferred O/S	Windows Server 2012R2 Std.
Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.	Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.
Network Connection	4x1 Gigabit Ethernet - teamed	Network Connection	4x1 Gigabit Ethernet - teamed
Data Engine	64-bit SQL Server 2008R2 Std. or SQL 2012 Std. with Reporting and Integration Services	Data Engine	n/a
Other		Other	IIS 7.5 (2008R2) , 8.0 (2012), 8.5 (2012R2), .NET Framework 4.5, AJAX V1.0
Physical	√	Physical	√
Virtual	X	Virtual	√
<ul style="list-style-type: none"> <li>○ For best performance the Database Server should be a dedicated physical server and not host other databases or applications. It must not be hosted on the same server as the Web Server or the File Server.</li> <li>○ The Database Server should not be installed in a virtual server for optimum performance.</li> <li>○ A SQL Server license and SQL Client Licenses are required for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> </ul>		<ul style="list-style-type: none"> <li>○ For best performance the Web and File Server should be a dedicated physical server and not host other applications. It must not be hosted on the same server as the Database Server.</li> <li>○ The Web and File Server can be installed in a virtual server.</li> <li>○ A Windows Server Client License is needed for each YuniquePLM™User License.</li> <li>○ IIS is part of the Windows Server Operating System.</li> </ul>	

 Report Server Configuration (Recommended for best Performance)	
Report Server	Recommended
CPU	Intel Xeon – 4 Cores 3.0 GHz
Memory	32 GB
Storage	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI) - TBD
Preferred O/S	Windows Server 2012R2 Std.
Compatible O/S	Windows Server 2008R2, 2012, 2012R2, Std.
Network Connection	2x1 Gigabit Ethernet - teamed
Data Engine	64-bit SQL Server 2008R2 Std. or SQL 2012 Std.
Other	SQL Server Reporting Services
Physical	√
Virtual	√
<ul style="list-style-type: none"> <li>○ For best performance the SQL Reporting Server should be a dedicated server and not host other databases or applications.</li> <li>○ A SQL Server license and SQL Client Licenses are required for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> </ul>	

## Small System Configuration (20 Users or less) - YuniquePLM™



### **Database, Web, File, and Report Server Configuration**

<b>DB Server</b>	<b>Recommended</b>
<b>CPU</b>	Two processor Intel Xeon – 8 Cores 2.4 GHz
<b>RAM</b>	64 GB
<b>Storage</b>	O/S: RAID-1 (15k RPM SCSI) – 100GB Storage: RAID-10 (15k RPM SCSI)
<b>Preferred O/S</b>	Windows Server 2012R2 Std.
<b>Compatible O/S</b>	Windows Server 2008R2, 2012, 2012R2, Std.
<b>Network Connection</b>	4x1 Gigabit Ethernet - teamed
<b>Data Engine</b>	64-bit SQL Server 2008R2 Std. or SQL 2012 Std. with Reporting and Integration Services
<b>Other</b>	IIS 7.5 (2008R2) , 8.0 (2012), 8.5 (2012R2), .NET Framework 4.5, AJAX V1.0
<b>Physical</b>	√
<b>Virtual</b>	√
<ul style="list-style-type: none"> <li>○ For best performance the Database, Web and File Server should be a dedicated physical server and not host other applications.</li> <li>○ The Database, Web and File Server can be installed in a virtual server.</li> <li>○ A SQL Server license and SQL Client Licenses are required for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> <li>○ A Windows Server Client License is needed for each YuniquePLM™User License.</li> <li>○ IIS is part of the Windows Server Operating System</li> </ul>	

## Development System Configuration (Basic) - YuniquePLM™



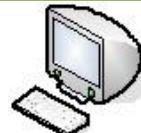
### **Database, Web, File, and Report Server Configuration**

<b>DB Server</b>	<b>Recommended</b>
<b>CPU</b>	Intel Xeon – 4 Cores 3.0 GHz
<b>RAM</b>	16 GB
<b>Storage</b>	500GB +
<b>Preferred O/S</b>	Windows Server 2012R2 Std.
<b>Compatible O/S</b>	Windows Server 2008R2, 2012, 2012R2, Std.
<b>Network Connection</b>	Gigabit Ethernet
<b>Data Engine</b>	64-bit SQL Server 2008R2 Std. or SQL 2012 Std. with Reporting and Integration Services
<b>Other</b>	IIS 7.5 (2008R2) , 8.0 (2012), 8.5 (2012R2), .NET Framework 4.5, AJAX V1.0
<b>Physical</b>	√
<b>Virtual</b>	√
<ul style="list-style-type: none"> <li>○ The Database, Web and File Server can be installed in a virtual server.</li> <li>○ A SQL Client License is needed for each YuniquePLM™User License, or SQL Core Licenses can be used.</li> <li>○ A Windows Server Client License is needed for each YuniquePLM™User License.</li> <li>○ IIS is part of the Windows Server Operating System</li> </ul>	

## User Workstation Requirements - YuniquePLM™



**PC Workstation Configuration**



**MAC Workstation Configuration**

User Workstation	Recommended	User Workstation	Recommended
<b>Processor</b>	2.5 GHz Intel i3 or better	<b>Processor</b>	2.5 GHz Intel i3 or better
<b>Memory</b>	8 GB	<b>Memory</b>	8 GB
<b>Network</b>	Gigabit Ethernet	<b>Network</b>	Gigabit Ethernet
<b>Monitor</b>	17"	<b>Monitor</b>	17"
<b>Monitor Resolution</b>	1280x1024	<b>Monitor Resolution</b>	1280x1024
<b>Operating System</b>	Windows XP Professional w/SP3 Windows 7 Professional w/SP1 Windows 8 or 8.1 Professional	<b>Operating System</b>	Mac OS X 10.4 or Higher
<b>Web Browser</b>	Internet Explorer 8.0 or Higher	<b>Web Browser</b>	Safari (as included with Mac OS X)
<b>Other Software</b>	Adobe Reader XI Adobe Illustrator CS5.5 or CS6 Adobe Photoshop CS5.5 or CS6	<b>Other Software</b>	Adobe Reader XI Adobe Illustrator CS5.5 or CS6 Adobe Photoshop CS5.5 or CS6
<b>Physical</b>	✓	<b>Physical</b>	✓
<b>Virtual</b>	NA	<b>Virtual</b>	NA

### NOTES

- Windows, MAC, Photoshop, and Illustrator are registered trademarks of Microsoft, Apple, and Adobe, respectively. No endorsement is implied by their appearance in this document.
- Supported Virtual Server hosts include VMware and HyperV.
- Unless otherwise noted, newer Service Pack releases to those mentioned are supported and required.
- The Windows Desktop Experience feature in Windows Server 2008R2 and Windows Server 2012 / 2012R2 must be installed on the Web server.
- It is recommended that Windows Server and Microsoft SQL be installed in English for remote installation and support purposes.
- Disk space requirements for the database and file server data will vary. The recommended minimum space for the database should be at least 100GB, and the minimum space for the file server data should be at least 500GB.
- For User Workstation configurations without Adobe Illustrator or Photoshop, the memory requirement can be reduced to 4GB
- Hardware configurations listed in this document are based on vendor offerings at the time of publication.

## Appendix B: Manually Creating a CAD Relational Database Link Server

YuniquePLM™ connects to an AccuMark CAD Relational data using a Microsoft SQL Linked Server connection. The YuniquePLM™ setup utility can be used to create the Linked server connection for a YuniquePLM™ single server configuration (the “CAD Database Server” tab and the “Make Linked Server” checkbox on the “Install” tab). The Linked Server connection can be created manually using Microsoft SQL Management Studio and SQL script commands. YuniquePLM™ can only connect to a single AccuMark CAD Relational database. AccuMark workstations must be configured to use AccuMark SQL storage areas and the AccuMark CAD Relational database (refer to AccuMark documentation). The AccuMark version must be V8.4.1 or greater.

The following information is needed:

- The server name or IP address of the AccuMark SQL Server
- The name of the CAD Relational database on the AccuMark SQL Server
- A SQL user account and password on the AccuMark SQL Server that has “datareader” permissions to the CAD Relational database
- The YuniquePLM™ Impersonation Windows account and password
- The Windows account and password of the logged in user running SQL Management Studio (for verification of the Linked Server connection).

The YuniqueToolkit will also have to be run to set the AccuMark CAD Relational database name for YuniquePLM.

Below is a SQL script that would be used to create the Linked Server:

---

```

sp_dropserver 'CADDATABASE', 'droplogins';

sp_addlinkedserver @server = 'CADDATABASE',
    @srvproduct = N'SQL_Server',
    @provider = N'SQLOLEDB',
    @datasrc=N'DBServerName';

sp_addlinkedsrvlogin @rmtsrvname = 'CADDATABASE',
    @useself = "false",
    @locallogin = "Domain\YuniqueImpersonationAccount",
    @rmtuser = "SQLAccountWithROAccessToRelDB",
    @rmtpassword = "SQLAccountPassword";

sp_addlinkedsrvlogin @rmtsrvname = 'CADDATABASE',
    @useself = "false",
    @locallogin = "Domain\UserID",
    @rmtuser = "SQLAccountWithROAccessToRelDB",
    @rmtpassword = "SQLAccountPassword";

select top 50 * from [CADDATABASE].[RelDatabaseName].[dbo].cad_cats

```

---

The first command will remove a linked server called CADDATABASE if it exists. The name CADDATABASE is the alias name that YuniquePLM™ uses to access the CAD Relational Database. The name of the linked server must be called CADDATABASE. YuniquePLM™ can only connect to a single AccuMark CAD Relational database.

The second command creates the linked server called CADDATABASE. The name or IP address of the AccuMark SQL Server would replace DBServerName in the command.

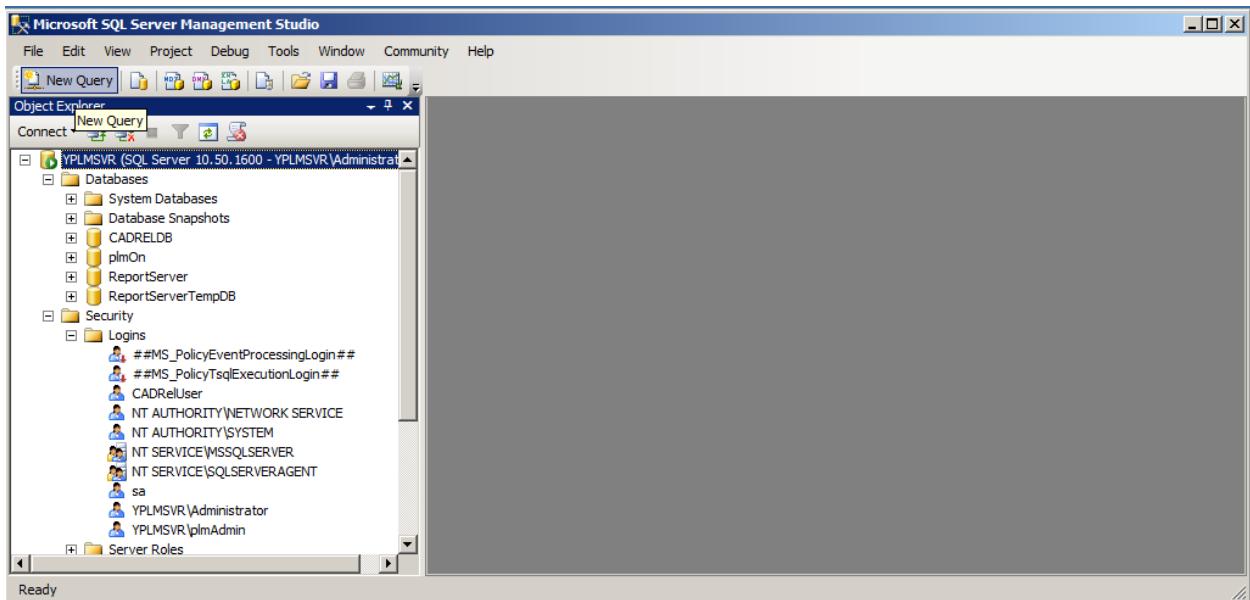
The third command defines which accounts that would have permissions to access CADDATABASE. The Windows Impersonation account for YuniquePLM™ would replace Domain\YuniqueImpersonationAccount in the command. The SQL user account and password on the AccuMark SQL Server that has “datareader” permissions to the CAD Relational database would replace SQLAccountWithROAccessToRelDB and SQLAccountPassword.

The fourth command is a repeat of the third command, but provides permission to the currently logged in account to access CADDATABASE. The currently logged in account name would replace Domain\UserID in the command. The SQL user account and password on the AccuMark SQL Server that has “datareader” permissions to the CAD Relational database would replace SQLAccountWithROAccessToRelDB and SQLAccountPassword. The reason for this command is to test the linked server connection.

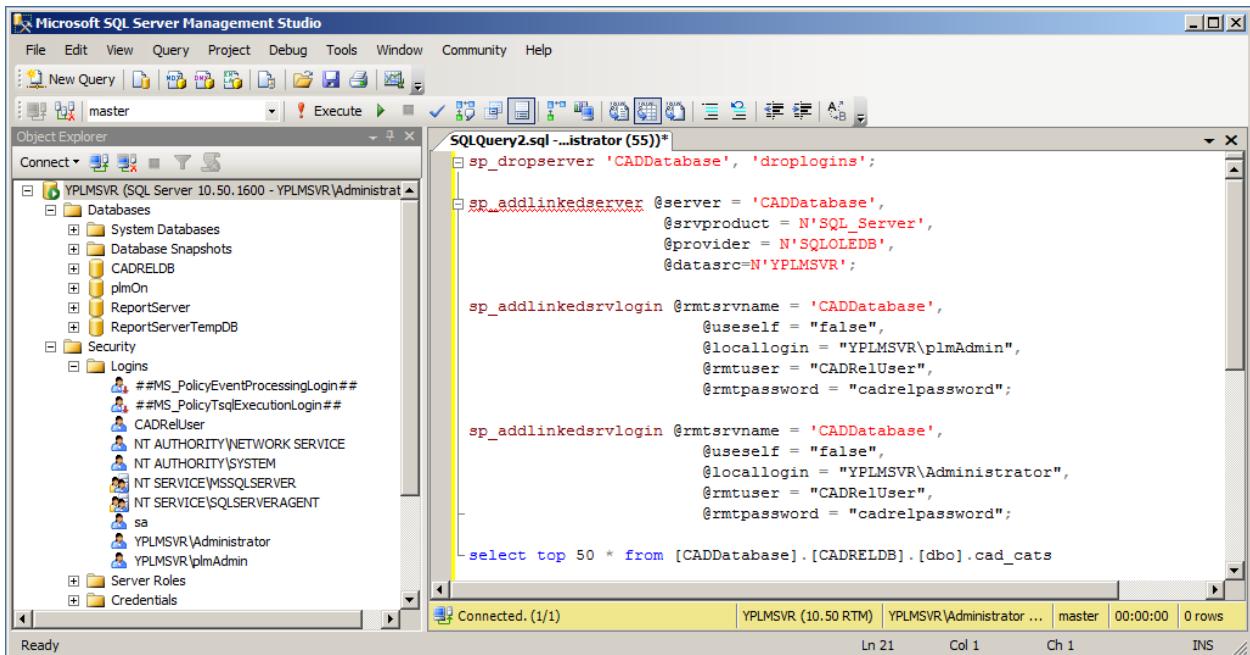
The fifth command is used to test the linked server connection. The AccuMark CAD Relational Database name would replace RelDatabaseName. For testing purposes the data table called cad\_cats is used. Other data tables in the AccuMark CAD Relational Database can be used.

The following is an example using a single server, where the AccuMark CAD Relational Database and the YuniquePLM™ database are on the same server:

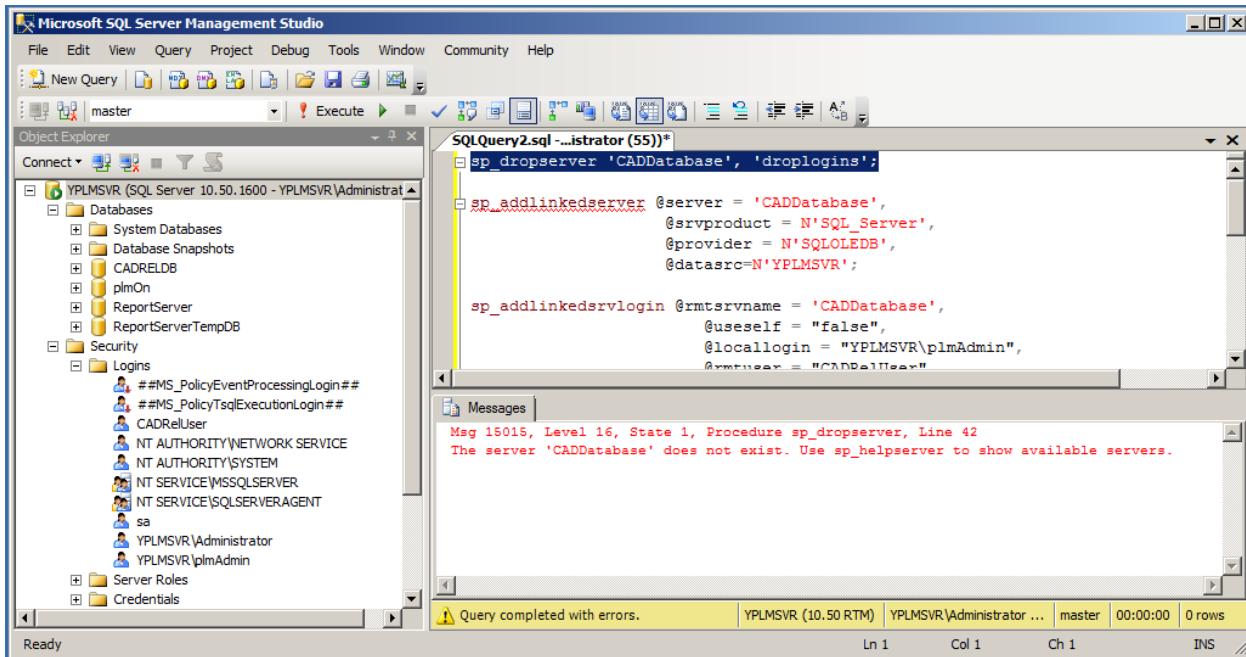
- Start and log into Microsoft SQL Server Management Studio. Select “New Query”



- You can copy and paste the script above and edit the appropriate fields



- Select the first command (highlight) and press the “!Execute” button. If a linked server called CADDATABASE does not exist the message window will indicate it does not exist. Otherwise the message window will indicate the linked server called CADDATABASE was successfully dropped.



The screenshot shows the Microsoft SQL Server Management Studio interface. In the Object Explorer, the database 'YPLMSVR' is selected. In the center pane, a query window titled 'SQLQuery2.sql - [Administrator (55)]' contains the following T-SQL code:

```

sp_dropserver 'CADDATABASE', 'droplogins';

sp_addlinkedserver @server = 'CADDATABASE',
    @srvproduct = N'SQL_Server',
    @provider = N'SQLOLEDB',
    @datasrc=N'YPLMSVR';

sp_addlinkedsrvlogin @rmtsrvname = 'CADDATABASE',
    @useself = "false",
    @locallogin = "YPLMSVR\plmAdmin",
    @rmtuser = "CADDATABASE"

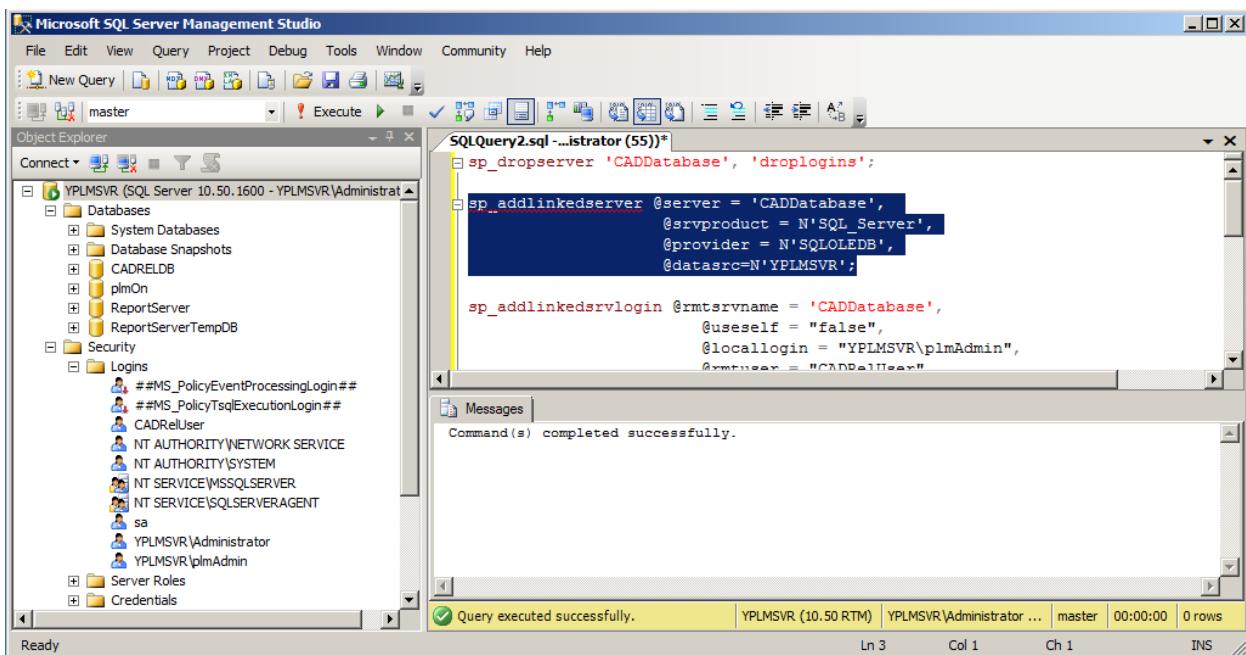
```

The first command, 'sp\_dropserver', is highlighted in yellow. The 'Messages' pane at the bottom displays an error message:

Msg 15015, Level 16, State 1, Procedure sp\_dropserver, Line 42  
The server 'CADDATABASE' does not exist. Use sp\_helpserver to show available servers.

The status bar at the bottom right indicates 'Query completed with errors.'

- Select the second command (highlight) and press the “!Execute” button. This command creates a linked server called CADDATABASE to the database server YPLMSVR.



The screenshot shows the Microsoft SQL Server Management Studio interface. In the Object Explorer, the database 'YPLMSVR' is selected. In the center pane, a query window titled 'SQLQuery2.sql - [Administrator (55)]' contains the same T-SQL code as the previous screenshot:

```

sp_dropserver 'CADDATABASE', 'droplogins';

sp_addlinkedserver @server = 'CADDATABASE',
    @srvproduct = N'SQL_Server',
    @provider = N'SQLOLEDB',
    @datasrc=N'YPLMSVR';

sp_addlinkedsrvlogin @rmtsrvname = 'CADDATABASE',
    @useself = "false",
    @locallogin = "YPLMSVR\plmAdmin",
    @rmtuser = "CADDATABASE"

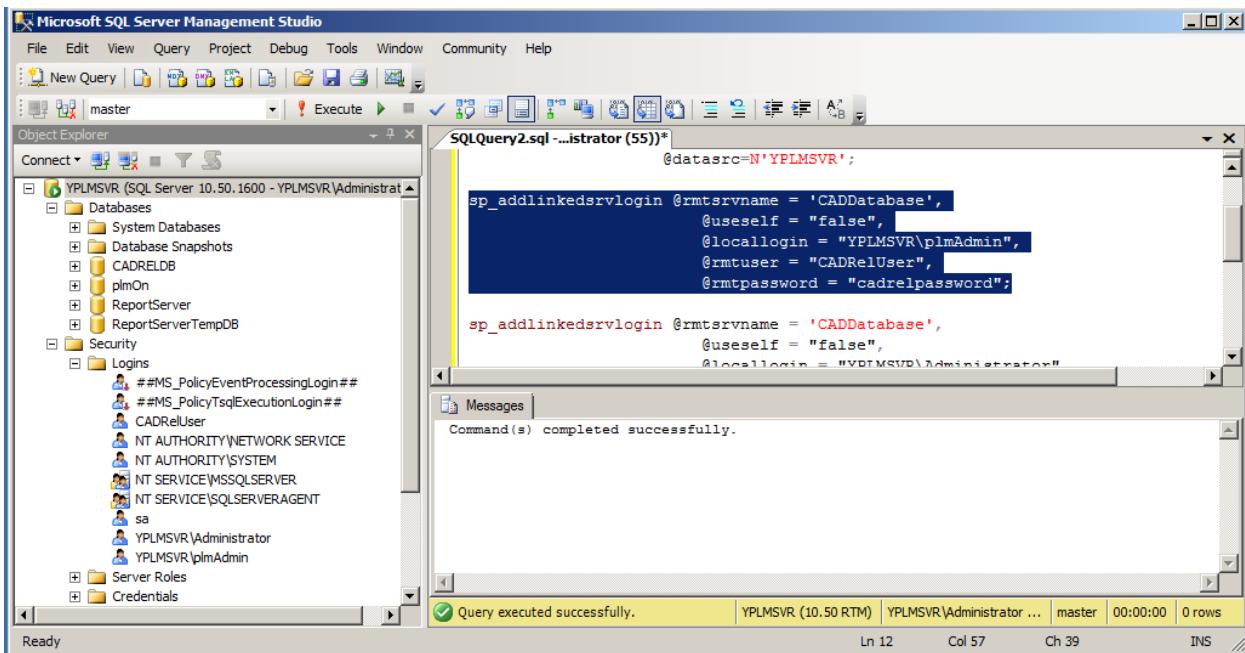
```

The second command, 'sp\_addlinkedserver', is highlighted in yellow. The 'Messages' pane at the bottom displays a success message:

Command(s) completed successfully.

The status bar at the bottom right indicates 'Query executed successfully.'

- The third command creates permissions for the YuniquePLM™ impersonation account YPLMSVR\plmAdmin to access the CADDATABASE link server. The SQL account on the AccuMark server that has datareader permissions is CADRelUser with the password cadrelpassword.



```

File Edit View Query Project Debug Tools Window Community Help
New Query Execute
Object Explorer
Connect master
SQLQuery2.sql - [Administrator (55)]
@datasrc=N'YPLMSVR';

sp_addlinkedsvrlogin @rmtsrvname = 'CADDATABASE',
@useself = "false",
@locallogin = "YPLMSVR\plmAdmin",
@rmtuser = "CADRelUser",
@rmtpassword = "cadrelpassword";

sp_addlinkedsvrlogin @rmrtsrvname = 'CADDATABASE',
@useself = "false",
@locallogin = "YPLMSVR\Administrator"

```

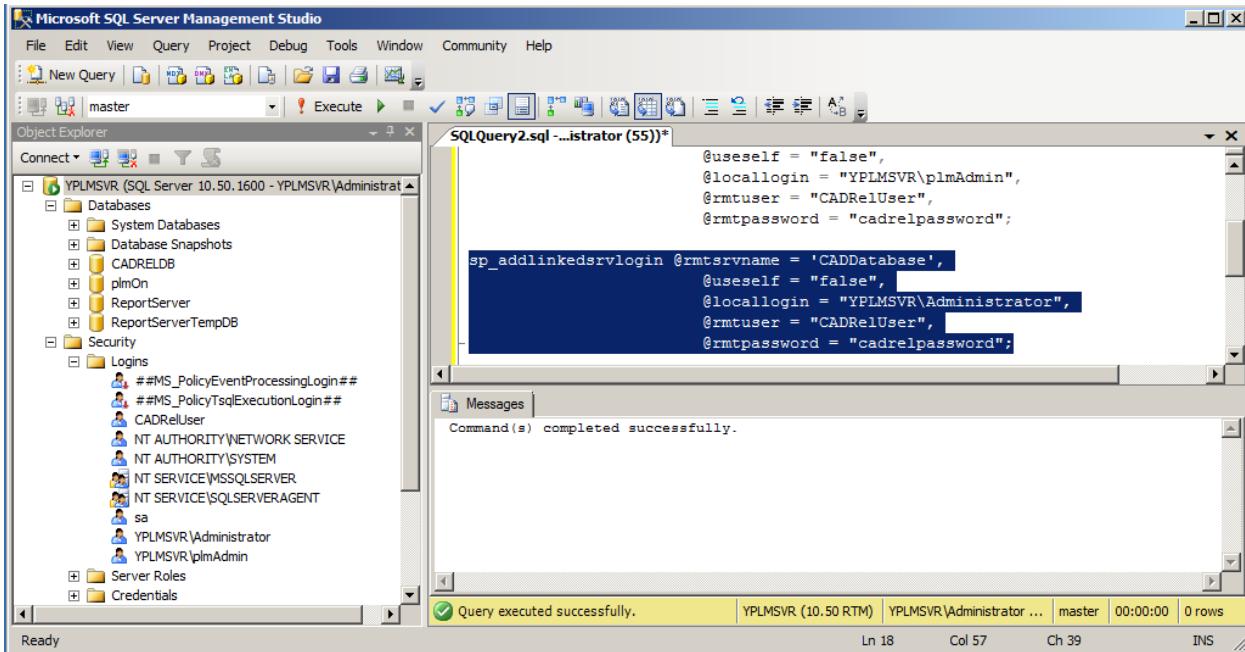
Messages

Command(s) completed successfully.

Query executed successfully. YPLMSVR (10.50 RTM) YPLMSVR\Administrator ... master 00:00:00 0 rows

Ready Ln 12 Col 57 Ch 39 INS

- The fourth command creates permissions for the local server account YPLMSVR\Administrator to access the CADDATABASE link server. The SQL account on the AccuMark server that has datareader permissions is CADRelUser with the password cadrelpassword. This will all testing the linked server.



```

File Edit View Query Project Debug Tools Window Community Help
New Query Execute
Object Explorer
Connect master
SQLQuery2.sql - [Administrator (55)]
@useself = "false",
@locallogin = "YPLMSVR\plmAdmin",
@rmtuser = "CADRelUser",
@rmtpassword = "cadrelpassword";

sp_addlinkedsvrlogin @rmrtsrvname = 'CADDATABASE',
@useself = "false",
@locallogin = "YPLMSVR\Administrator",
@rmtuser = "CADRelUser",
@rmtpassword = "cadrelpassword";


```

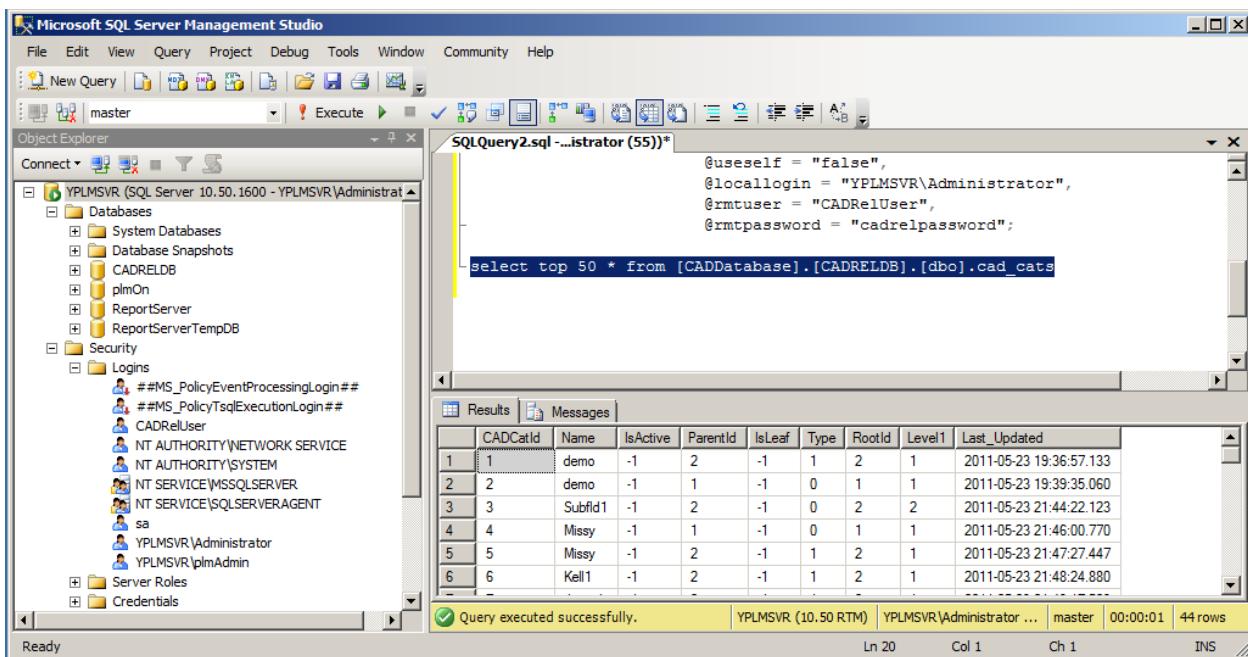
Messages

Command(s) completed successfully.

Query executed successfully. YPLMSVR (10.50 RTM) YPLMSVR\Administrator ... master 00:00:00 0 rows

Ready Ln 18 Col 57 Ch 39 INS

- The fifth command will test the linked server connection. Since the currently logged in account is YPLMSVR\Administrator, and that account was granted permissions to access the CADDatabase Link Server, the contents of data table cad.cats in database CADRELDDB should display in the Results window.



Microsoft SQL Server Management Studio

```

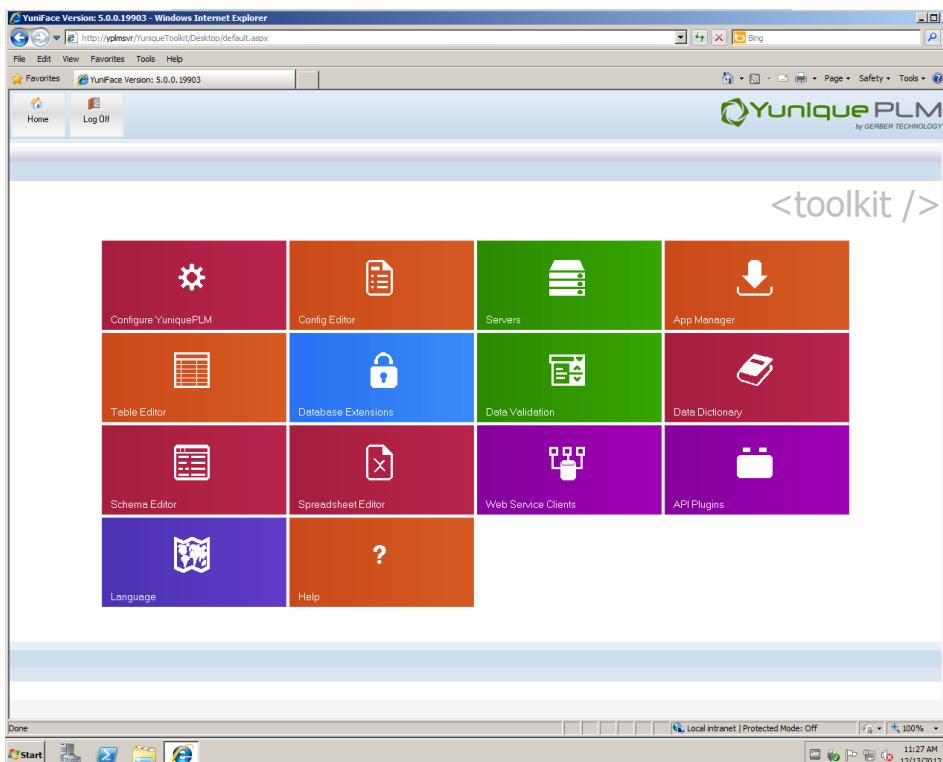
@useself = "false",
@locallogin = "YPLMSVR\Administrator",
@rmtuser = "CADRelUser",
@rmpassword = "cadrelpassword";

select top 50 * from [CADDatabase].[CADRELDDB].[dbo].cad_cats

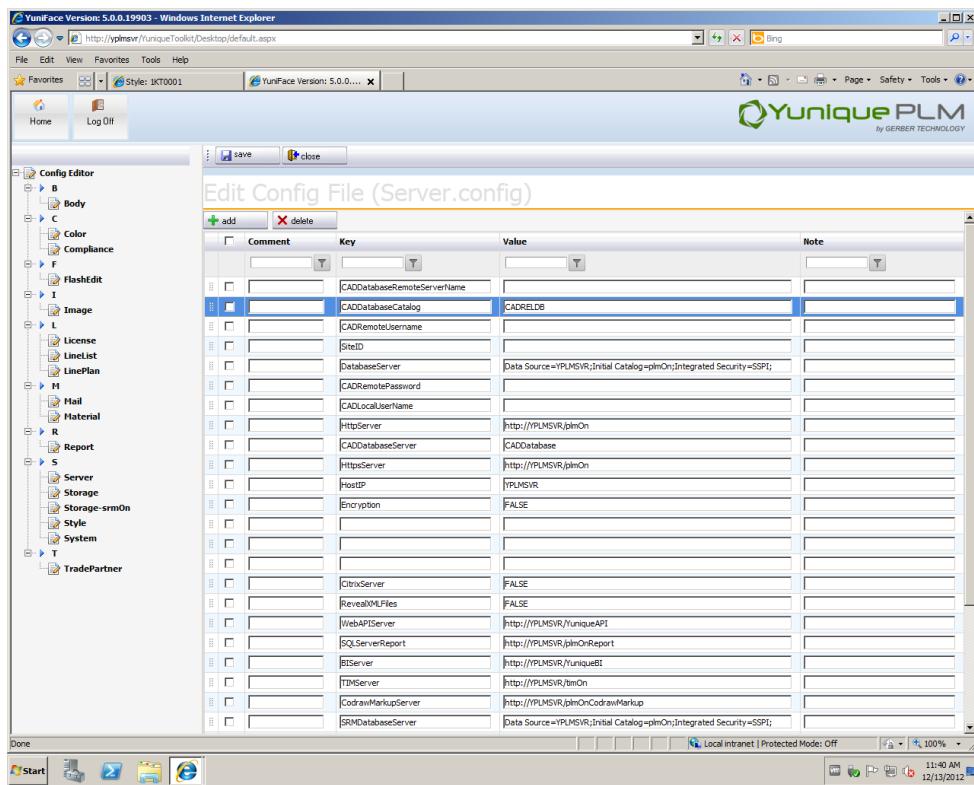
```

CADCatId	Name	IsActive	ParentId	IsLeaf	Type	RootId	Level1	Last_Updated
1	demo	-1	2	-1	1	2	1	2011-05-23 19:36:57.133
2	demo	-1	1	-1	0	1	1	2011-05-23 19:39:35.060
3	Subfld1	-1	2	-1	0	2	2	2011-05-23 21:44:22.123
4	Missy	-1	1	-1	0	1	1	2011-05-23 21:46:00.770
5	Missy	-1	2	-1	1	2	1	2011-05-23 21:47:27.447
6	Kell1	-1	2	-1	1	2	1	2011-05-23 21:48:24.880
-	-	-	-	-	-	-	-	-

- Now YuniquePLM™ needs to know the AccuMark CAD Relational Database name. Start the YuniqueToolKit and login. Select the Config Editor button.



- Select the Server config entry and find the CADDatabaseCatalog entry. Enter the name of the AccuMark CAD Relational database. Press the Save button.



- To further test, log into plmOn, open a style that has a style-model or style-marker bubble, select add. When selecting the folder, the information from the AccuMark CAD Relational Database should display. In the example below, the style-marker bubble was selected, and the Spring folder was selected from the AccuMark CAD Relational Database. A list of markers in the AccuMark CAD Relational Database should display for selection.

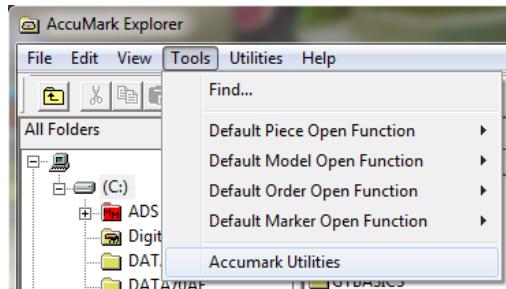
Model Name	Marker Name	Description	Width In	Length Yd	Efficiency	Modified Date
1234	1234-JKT-M		54	3.3921	74.9277	10/4/2012 8:15 PM
1234	1234-JKT-I		54	1.7487	56.4225	10/4/2012 8:20 PM
1100-M-SKIRT	1100-M-1		54	0.9195	33.3332	9/28/2012 2:20 AM
1100-M-SKIRT	1100-M-I		44	0.9125	18.7499	9/28/2012 2:20 AM
1100-M-SKIRT	1100-M-L		45	1.1441	90.1628	9/28/2012 2:21 AM
1100-M-SKIRT	1100-M-S		54	1.1853	89.4461	9/28/2012 2:25 AM
B2-MENS-TROUSER	B2-MENS-TROUSER	mens flat front pant	59.0551	5.6182	83.6491	9/21/2012 8:03 PM
B2-MENS-TROUSER	B2-TROUSER-POCKETBAG	pant pocketing	59.0551	2.469	80.2983	7/7/2011 3:10 PM
1100-SKIRT	1100-I		54	0.9195	16.6666	10/15/2012 4:53 AM
1100-SKIRT	1100-L		48	0.5738	90.3961	10/15/2012 3:12 PM
1100-SKIRT	1100-S		54	0.8975	61.966	10/15/2012 4:55 AM

## Appendix C: AccuMark Integration / Workstation configuration

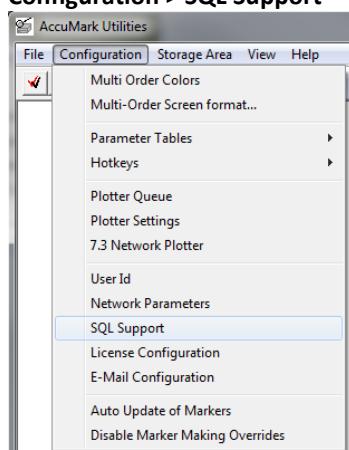
### Create a Relational Database using AccuMark Version 8+

The Relational Database is created and populated with AccuMark. After the database is created by an initial user, all users can enter the CAD Relational Database information in their AccuMark SQL Support configuration. Then, any time a save function is used in AccuMark, new data will be pushed to the Relational Database.

1. To create the Relational Database: AccuMark Explorer > Tools > AccuMark Utilities

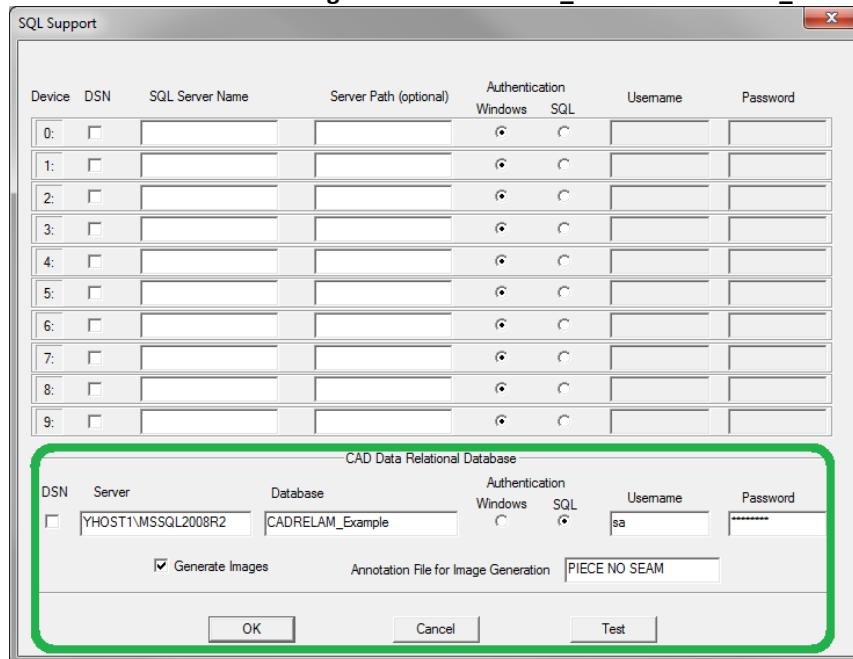


2. Configuration > SQL Support



3. Enter the following in the bottom area 'CAD Data Relational Database':

- SQL Server Name
  - Can be on the same SQL Server as the YuniquePLM™ database, or separate
- Database Name
  - AccuMark Support conventionally names this CADRELAM
  - This process will create the database, it does not have to pre-exist
- Authentication Type and Credentials
  - The initial user must have dbcreator privileges to create the database
  - All following users must have db\_datareader and db\_datawriter permissions

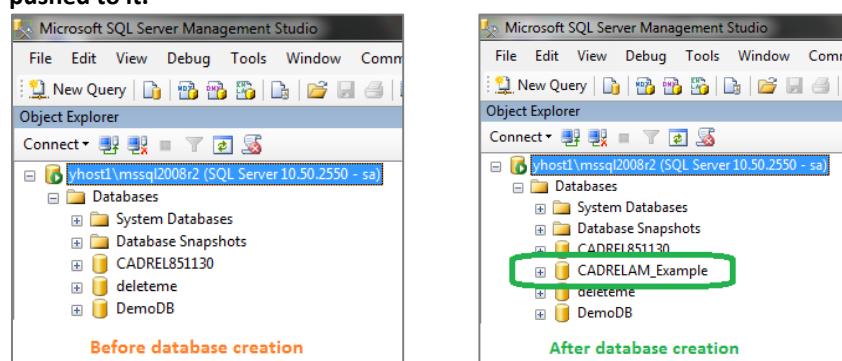


4. Click the 'Test' button, then the 'OK' button

*(Note: You may get "Cannot Connect to CAD Relational Database or Database May Not Exist" error messages if your database does not exist yet. Just click 'OK' to continue with step 5 to create the database.)*

5. Reboot the AccuMark user's machine

6. Save or copy a model or marker in AccuMark Explorer. The database will be created and data will be pushed to it.



## ***YuniquePLM™ & AccuMark Compatibility***

AccuMark yuniquePLM	8.4.1	8.4.1 +SP	8.5.0	8.5.1	9.0
<b>4.0</b>	✓	✓	✓	✓	
<b>4.1</b>	✓	✓	✓	✓	
<b>4.2</b>	✓	✓	✓	✓	
<b>5.0</b>	✓	✓	✓	✓	
<b>5.1</b>	✓	✓	✓	✓	✓

### **Note:**

Service Pack 12102010 for AccuMark V8.4.1 adds a rule table column to Cad\_Piece\_Details table the next time a model is saved in AccuMark. To manually add the column, run this script:

```
'ALTER TABLE Cad_Piece_Details ADD Rule_Table_Name VARCHAR(64) NULL
GO'
```

## AccuMark 8.5.1 pushes additional marker information

1. Cad\_Marker\_Details table new columns are added to the end of the table
  - laylimits table
  - block/buffering table
  - matching table
2. Cad\_MK\_Size
  - Ordered size names
3. Cad\_MK\_Model
  - Model Option name
  - Size Code Table
4. Cad\_MK\_Piece
  - Model\_code is now being updated and not left as NULL

## AccuMark 9.0 pushes additional information and allows for longer names

1. Additional marker information
  - fabric cost
  - fabric weight
  - cost per bundle
  - cost per dozen
  - marker cost
  - marker weight
  - net weight bundle
  - gross weight bundle.
2. Increased field lengths for
  - storage area names (20)
  - marker name (50)
  - model name (50)
  - piece name (50)
  - size (30)
  - fabric type (10).

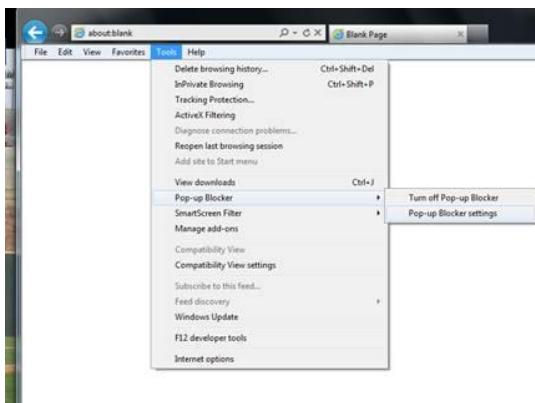
Note: if don't use the larger length names in AccuMark V9, then it will work with other PLM versions.

## Appendix D: Microsoft Internet Explorer Settings

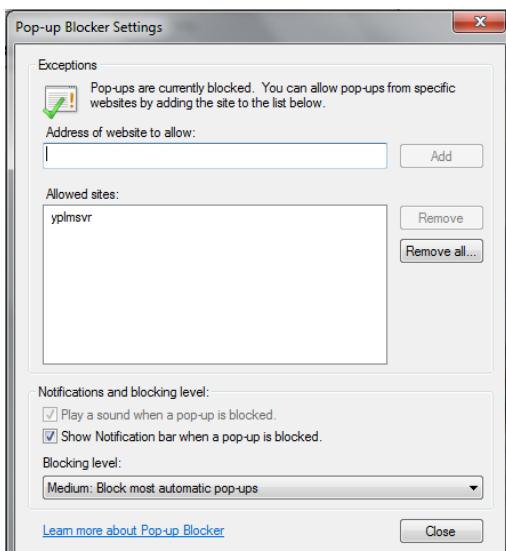
For YuniquePLM™ to operate correctly certain settings in Microsoft Internet Explorer need to be checked. First, make sure that all pop-up blockers are either turned off, or set to allow pop-ups from the YuniquePLM™ web server. If additional browser toolbars are installed (i.e. Google, Yahoo, etc.), these toolbars also have settings for blocking pop-ups.

Please make sure your IE settings are as follows:

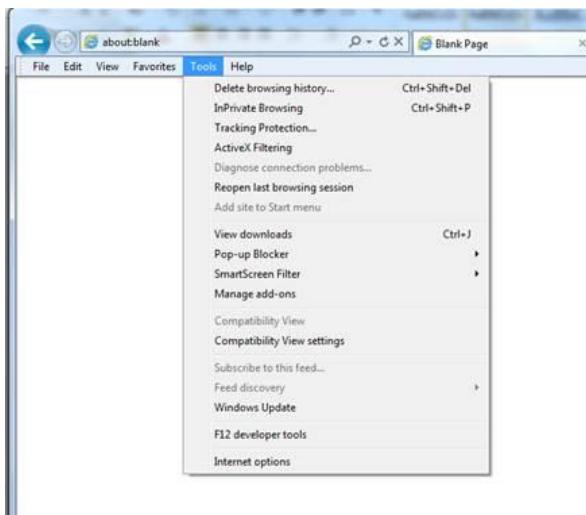
- In the IE Tools menu select “Internet options”, “Pop-up Blocker”, “Pop-up Blocker settings”. You can turn off the Pop-up blocker, or if you want to leave it on, select Pop-up blocker settings.



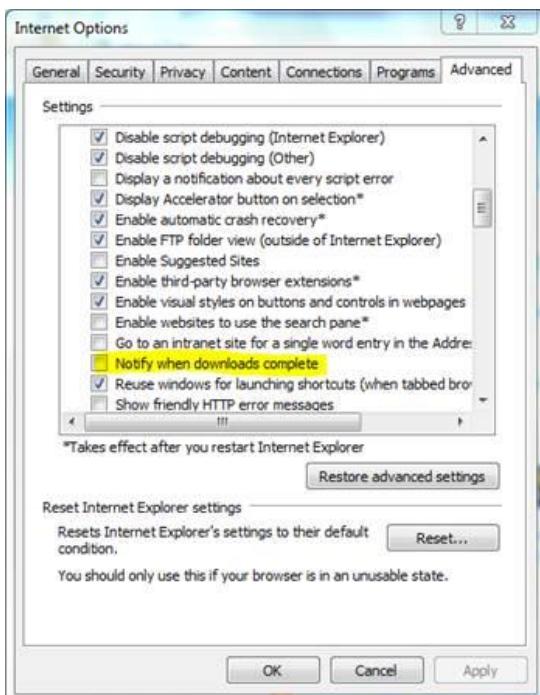
- In the “Address of website to allow” box enter the website URL or IP address and press the “Add” button, then “Close”



- In the IE Tools menu select “Internet options”



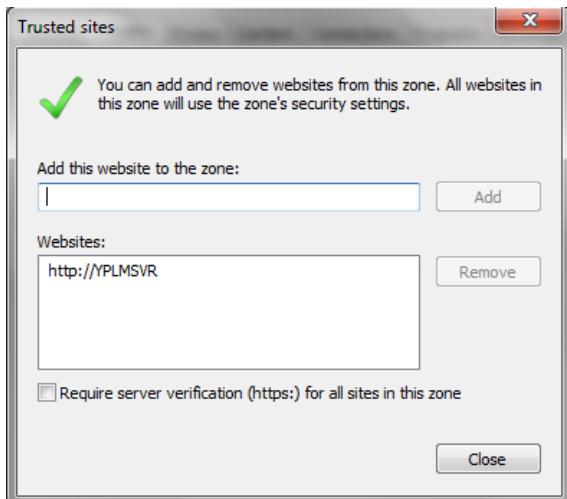
- Select the “Advanced” tab, turn off “Notify when downloads complete”.



- Select the “Security” tab and click on the “Trusted sites” ICON.



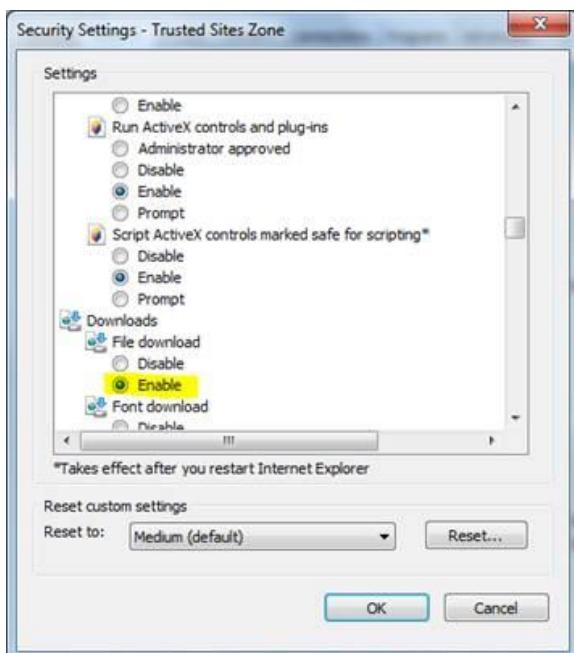
- Enter the website URL or IP address into the “Add this website to the zone” box and press the “Add” button, then the “Close” button.  
**Note:** the “Require server verification (https: ) for all sites in this zone” should be unchecked.



- With the “Trusted sites” ICON still selected, press the “Custom level...” button



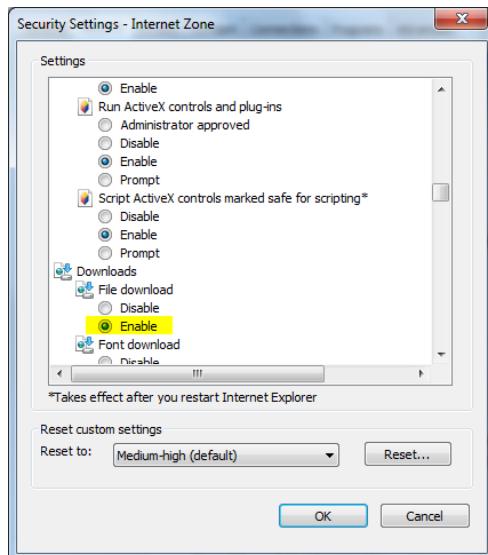
- Scroll through the “Security Settings - Trusted sites Zone” list and find “Downloads” and select “Enable”, then press the “OK” button



- Select the Internet ICON and press the “Custom level...” button



- Scroll through the “Security Settings - Internet Zone” list and find “Downloads” and select “Enable”, then press the “OK” button



- You should also set the “Local Intranet” Downloads to Enable as well.

## Appendix E: YuniquePLM™ Maintenance and Backup Plan

### Back up your Databases

At Gerber Technology, we dedicate ourselves to providing our customers a quality product. Ensuring that software glitches, hardware failures, or vindictive acts do not compromise the creative work your users do is critical. The single most important thing that you can do is to back up your database. The following questions will help determine how frequently your database(s) should be backed up.

1. How much data/work are you willing to lose?  
Let us assume putting a line in requires the creation of 160 folders during a 40-hour workweek or 4 folders per hour. That means you will lose 4 folders per hour of down time.
2. What types of resources are available to perform database backups?
3. How stable is your environment? Do you have network outages?

### Check your Database for reliability

Just because a database backup has recently been performed does not mean that you can restore your database. The database backup needs to be:

- a) Checked for errors. ( DBCC CHECKDB WITH NO\_INFOMSGS)
- b) Restored during a testing phase to ensure that the backup plan works. You do not want to find out during an emergency that your database backup cannot be restored.

Once you have restored a database (at least once) and are checking for errors, your investment in people, time and money are protected.

### Backup and recovery for SQL Server

SQL Server supports 3 different types of backups:

- 1) Full database backups: All of the data in your database is saved. This is effectively a database snapshot.
- 2) Differential database backups: Saves off all of the data that has changed since the last time a full database backup occurred. If your last full database backup was at 1:00 A.M. and your most recent differential database backup occurred at 3:00 A.M., it would have recorded all changes in the database between 1:00 A.M. and 3 A.M.
- 3) Transaction log backups: Saves off on an individual basis all changes/transactions that have occurred in the database.

Gerber recommends to our customers the following information:

- a) Backup your database regularly (with a full database backup) every night.
  - a. Perform a transaction log backup at least once per evening and preferably every 8 hours. As long as the log file gets backed up your valuable work is protected.
- b) Backup the 'master' database after an upgrade.

In the event of total disaster (i.e. disk crash) your worst data loss under the above mentioned scenario is 8 hours' work lost. However, if Raid 5 is being used your window of time data loss is much less than 8 hours.

To restore your database from the full database backup and transaction log backup mentioned above, you will need to:

- 1) Restore the most recent full database backup.
- 2) Apply all transaction logs created after the last full database backup was created.

### Checking your SQL Server Database for errors

There are several routines that are supplied by the SQL Server database vendor that help to check a database for errors. They are all part of the DBCC (Database Consistency Check) command. Each of the commands mentioned below should be scheduled on a periodic basis with the results checked for errors.

- a) DBCC CHECKDB - Checks the allocation and structural integrity of all the objects in the specified database.
- b) DBCC CHECKALLOC - Checks the allocation and use of all pages in the specified database.

Each of these routines is described in detail in the SQL Server Transact SQL (T-SQL) manual.

❖ Note: Companies typically use 3<sup>rd</sup> party backup software to back up their databases. Always remember to purchase the plug-ins that allows a database backup to occur while it is online. Otherwise, you may find that out that your database backups are worthless because the files were locked and they did not actually get saved off to tape or disk.

### Image files

YuniquePLM™ does not store any images within the database. All images are stored on a file server. The RDBMS system backup does not save the images stored on the Windows file system to tape/disk. You need to backup these separately.

Each time that you perform a full database backup, differential database backup, or transaction log backup you should be performing an incremental or full backup of your image files on your Windows system. This incremental backup of your image files assumes that a backup of the image files currently exist.

## Server

Please remember to back up your server. If you do not maintain a relatively current backup of your system along with any necessary emergency boot disks you may have to install your server, RDBMS and the YuniquePLM™ system from scratch. It takes significantly more time to recover from a server failure if you need to re-install than if you just reload from an archive.

## Summary

Create 1 or more maintenance plans to accomplish the following:

1. Rebuild the table indexes of the YuniquePLM™ database at least monthly. Increase frequency depending on transactional volume.
2. Reorganize indexes and update statistics at least weekly. Increase frequency depending on transactional volume.
3. Backup the transaction log of the YuniquePLM™ database on a scheduled periodic basis. Depending on load this could be anywhere from every 15 minutes to every 8 hours. This depends on corporate risk tolerance.
4. Shrink the transaction log of the YuniquePLM™ and Reportserver databases. This will eliminate log creep. Backing up the transactions logs will not actually shrink the transaction log file size.
5. Perform scheduled full database backups of the YuniquePLM™ and ReportServer databases. This should be performed at least once a day.
6. Move/Delete old transaction log backups that are more than x days old (x is infrastructure based). Never delete the log backups if they have not been saved to offline storage.
7. Move/Delete the full database backups for the YuniquePLM™ and ReportServer databases. Do not delete old backups if they have not been saved to offline storage. Just like transaction log backups the frequency of cleanup is typically tied to corporate infrastructure (AKA disaster recovery policy, and disk storage availability). It is always easier and faster to restore from an online backup than it is to from tape/offline storage.

## Appendix F: Temporary File Folder Maintenance Procedures

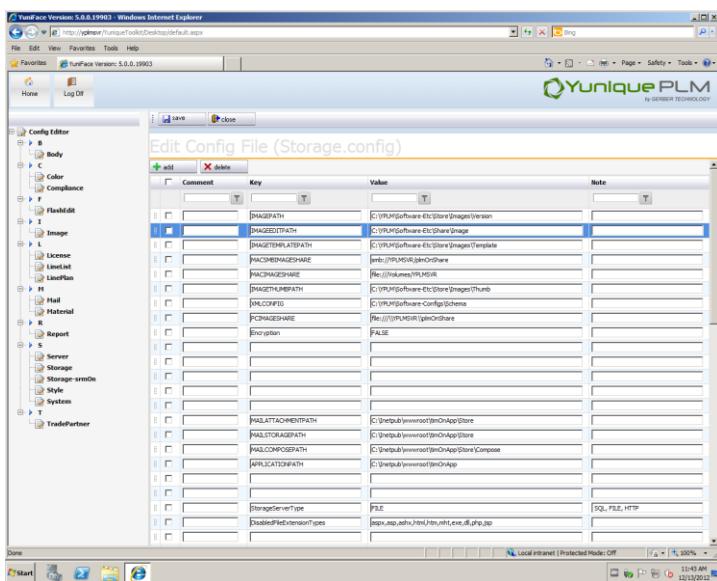
Over time, temporary file folders created by YuniquePLM™ may grow in size and if allowed to grow too large, will consume available drive space possibly causing serious server problems. To prevent failures due to lost drive space capacity, these temporary file locations are managed automatically through normal YuniquePLM™ program procedures and through the use of an automated scheduled script procedure. Normal program operations should effectively control temporary file folder sizes. However certain events such as changes to system passwords, folder structures or system crashes might prevent YuniquePLM™ from effectively removing all temporary files.

### AUTOMATED DEFAULT PROCESS

The YuniquePLM™ setup utility will install, if selected, a visual basic script file to run as a scheduled task to clean up the necessary temporary file folder. The script file called *DeleteTemporaryFiles.vbs*, by default, is scheduled through Windows Task scheduler to run daily to remove any temporary files over a certain age. Under normal circumstances, these actions are sufficient to control the temporary file folders sizes. If the automatic temporary file control system fails to run and the temporary file folders grow in size, they will need to be manual cleaned.

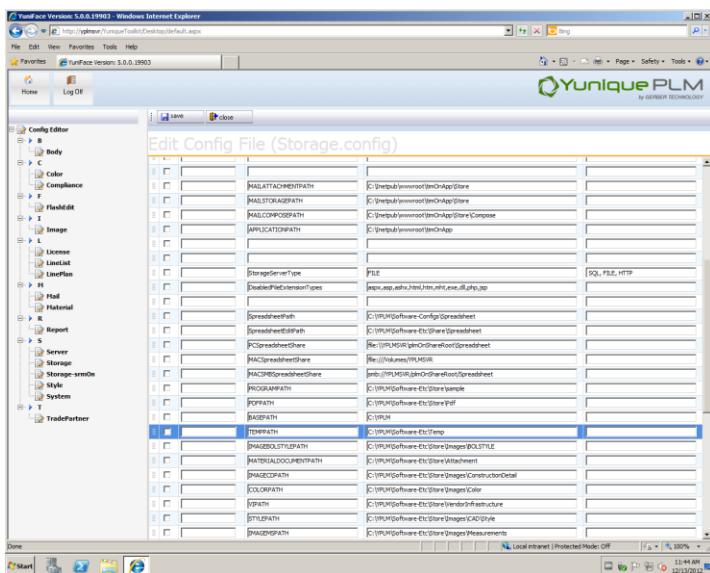
### Manual File Control

YuniquePLM™ places the temporary files it creates into two separate folders. The exact name and location of each folder can be found using the YuniqueToolKit in the “storage” configuration section. The two folder locations for temporary files are defined in the “ImageEDITPATH” and “TempPATH =” keys of the storage config section of the YuniquePLM™ database.



**The "IMAGEEDITPATH" key specifies the folder name and path location where temporary image files are placed. Temporary image files are placed in this directory while images are being edited in YuniquePLM™ and are immediately removed when the image being edited is either updated or image editing is cancelled.**

***Residual files may remain in the directory and collect over time. This directory should be checked and cleared out if needed every 60 days.***



**The "TempPATH" key defines the folder and path location of all other temporary files created by YuniquePLM. This folder is typically a top level "Temp" folder. Temporary files located in this location are placed in the directory within a hierarchy of folders. The top level files and all sub folders should be deleted when clearing out the temp directory.**

***The Temp folder has the ability to grow in size and should be checked regularly, approx. every 30 days.***

## Appendix G: LDAP Integration

When LDAP Integration is enabled, YuniquePLM™ will authenticate a user's login with an LDAP/Active Directory server. When a user enters their YuniquePLM™ login name and password the YuniquePLM™ database searched to see if the user has an active YuniquePLM™ account. Then YuniquePLM™ verifies the user ID and password using the LDAP/Active Directory server. If LDAP/Active Directory authentication fails, or the user's LDAP/Active Directory account is inactive, login to YuniquePLM™ fails. YuniquePLM™ permissions are maintained in the YuniquePLM™ database, LDAP/Active Directory is only used to authenticate a user's login. When LDAP Integration is enabled, passwords are not maintained in the YuniquePLM™ database.

### Creating YuniquePLM™ accounts using LDAP/Active Directory

YuniquePLM™ user account names must match LDAP/Active Directory user account names. Before activating LDAP Integration add a YuniquePLM™ user account name that will be a YuniquePLM™ administrator and add to the YuniquePLM™ Administrators group. This user account name must have a matching LDAP/Active Directory account name.

Activate LDAP Integration (as documented below) and login to YuniquePLM™ using this account name and the LDAP/Active Directory password.

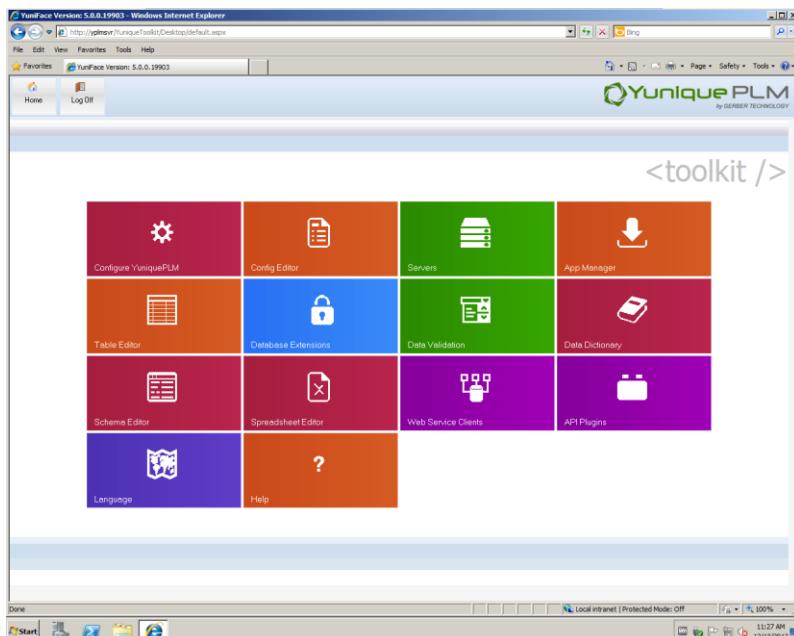
- From the plmOn home screen select the “Admin” folder
- Select the “Team” folder
- Select the “New” button
- YuniquePLM™ will display user names retrieved from the LDAP/Active Directory server in the left window.
- Select the users that will be allowed to login to YuniquePLM™ in the left window and add them to the right window
- Press the “Add” button to add the selected users to the YuniquePLM™ “Team” list

## Enabling LDAP Integration

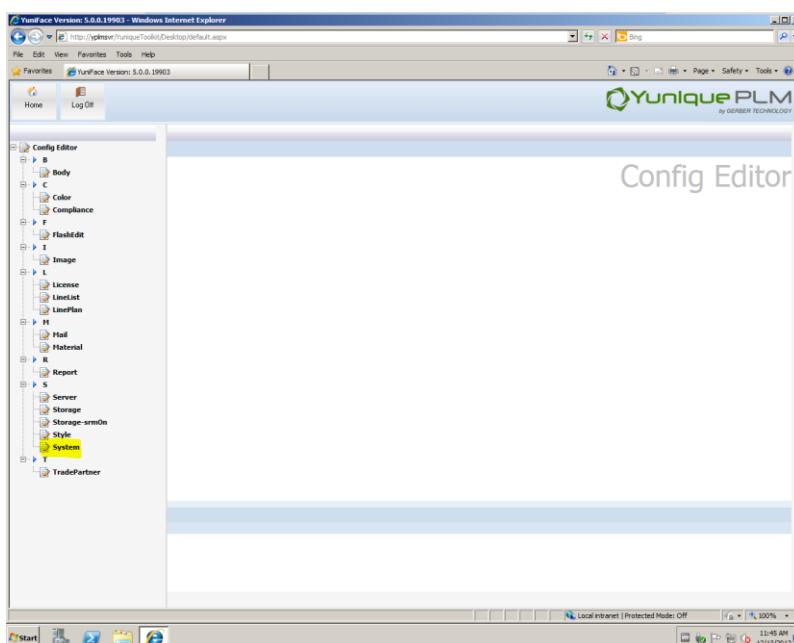
The following information is needed:

- The fully qualified domain name of the LDAP/Active Directory server
- A domain user ID and Password that has read permissions to access the domain user information.

Login to the YuniqueToolkit and select Config Editor



Select the System configuration



Find the following keys and set the values accordingly:

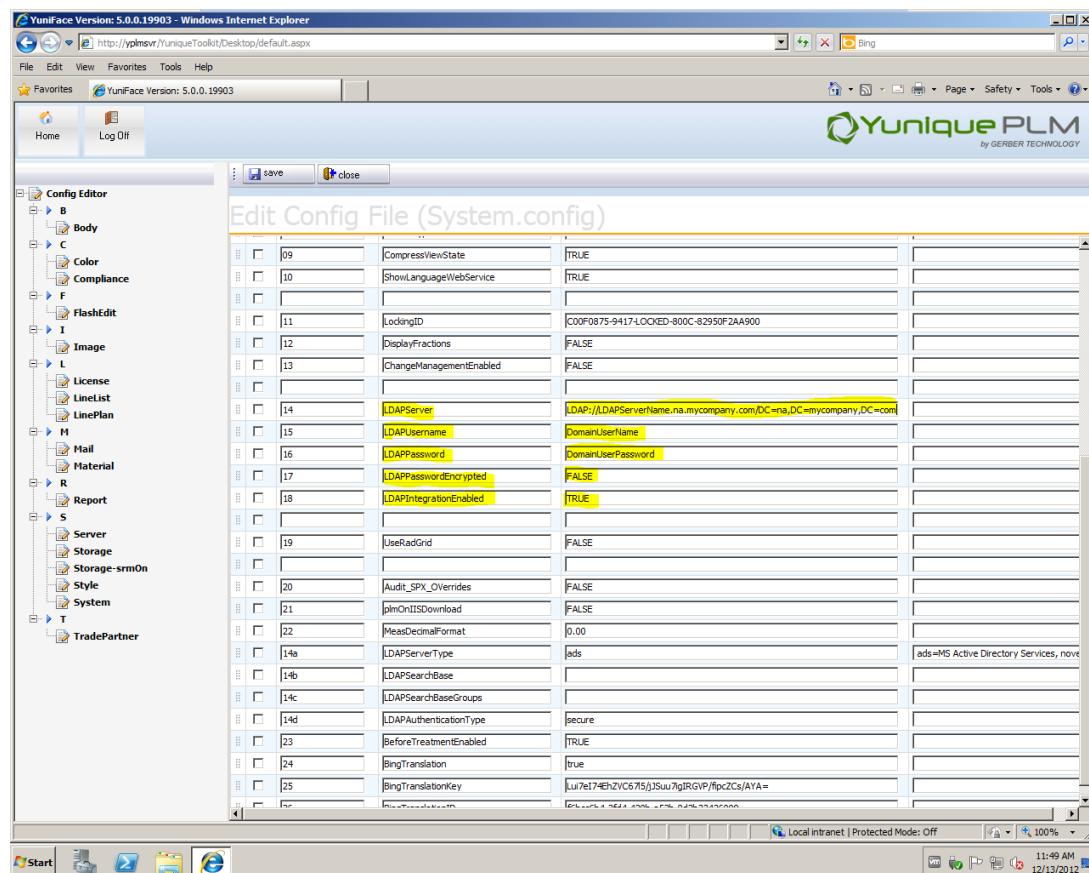
Key	Value
LDAPServer	LDAP://LDAPServerName.na.mycompany.com/DC=na,DC=mycompany,DC=com
LDAPUsername	DomainUserName
LDAPPassword	DomainUserPassword
LDAPPasswordEncrypted	TRUE or FALSE
LDAPIntegrationEnabled	TRUE or FALSE

For the LDAPServer key, “LDAPserverName.na.mycompany.com” can be the fully qualified domain name for the LDAP/Active Directory server, and “DC=na,DC=mycompany,DC=com” are the components of the fully qualified domain name, or can be the LDAP/Active Directory server name and TCP/IP port address, such as “LDAPserverName:3211”.

If you do not want the password entered as clear text it can be encrypted using a utility program and the encrypted password entered for the LDAPPassword value.

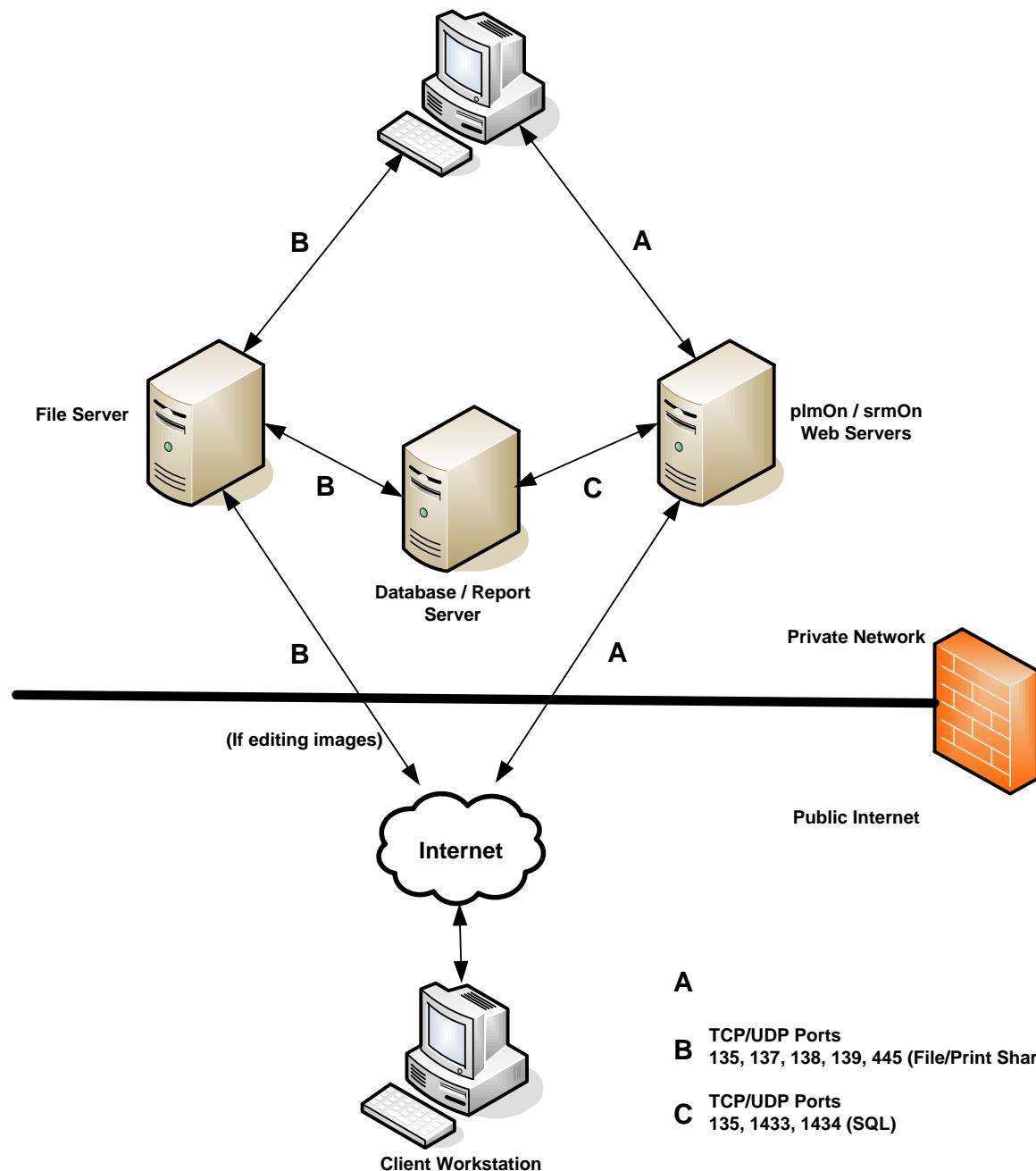
For an unencrypted password, the LDAPPasswordEncrypted key should be set to FALSE.  
For an encrypted password, the LDAPPasswordEncrypted key should be set to TRUE.

Set the LDAPIntegrationEnabled key to TRUE to enable LDAP Integration.



Press the “Save” button to save your entries.

## Appendix H: YuniquePLM™ TCP/IP Port Utilization



## Appendix I: YuniquePLM™ Impersonation And User Accounts

### **YuniquePLM™ requires three (3) Windows user accounts**

All three accounts must be local administration accounts, or domain user accounts with local administrator rights on the YuniquePLM™ servers

1. Used by YuniqueSolutions during remote connections for remote access, configuration, and administration (ex: PLMRemote1)
2. Used by YuniqueSolutions as a backup/joint access during remote connections, configuration, and administration (ex: PLMRemote2)
3. Used as the Impersonation account for the YuniquePLM™ website and/or database access. (ex: PLMAdmin) (Required)

Please note: The impersonation account meets the needs for security for client/server web applications. This account should NOT be used for remote access. For more details, refer to MS article:  
<http://technet.microsoft.com/en-us/library/cc961980.aspx>

### **For YuniquePLM™ to function properly, set up the impersonation account (ex: PLMAdmin) with the following options:**

#### **Password set not to expire:**

Check 'Password never expires'

#### **Cannot change password:**

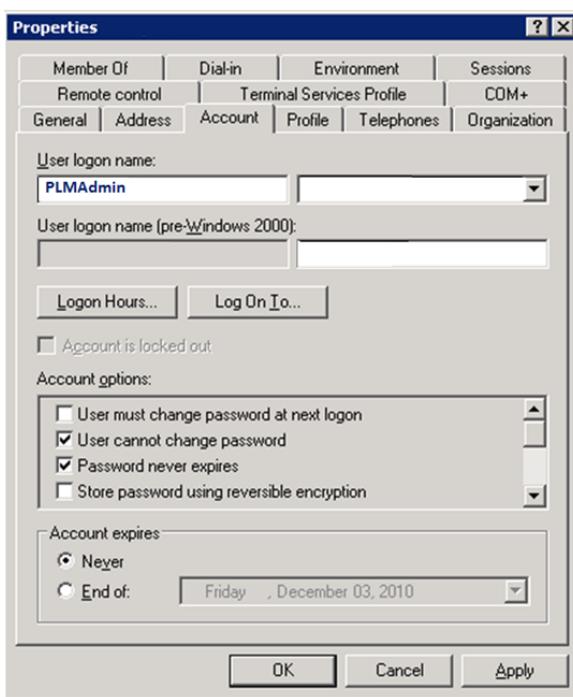
Check 'User cannot change password'

#### **No Requirement to change password at next login**

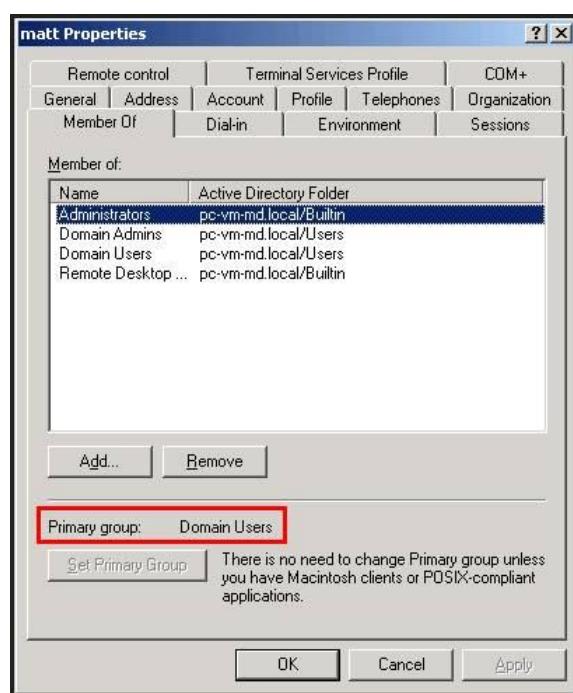
Uncheck 'User must change password at next login'

#### **In YuniquePLM™ version 4.1 and higher:**

Security Policies\User Rights Assignment 'Local login as a Service' permissions needed (local login where plmOnServices is installed)



Active Directory example of user set up with correct credentials



Active Directory example of group administration

## Appendix J: YuniquePLM™ PreInstallation Worksheet

### YuniquePLM Pre-Installation Worksheet

Company Name:

Date:

Contact Name

Email and Phone

To make your YuniquePLM installation proceed as smoothly as possible, please ensure the servers and workstations meet the basic hardware and software requirements as outlined by your PLM Professional Services Manager.

Please complete and return this information to [PLMSupport@GerberTechnology.com](mailto:PLMSupport@GerberTechnology.com) or via fax to 972.238.8683.

Before an installation can be scheduled this form must be completed and returned to Gerber Technology.

#### Basic Information

Environment Type:	<input type="checkbox"/> Development	<input type="checkbox"/> QA	<input type="checkbox"/> Production	<input type="checkbox"/> Other
YuniquePLM Version:	<input type="checkbox"/> Latest	<input type="checkbox"/> Specific (Please specify)		
Type of Installation:	<input type="checkbox"/> New	<input type="checkbox"/> Upgrade	<input type="checkbox"/> Migration	
Notes:				
Location:	<input type="checkbox"/> Customer Site	<input type="checkbox"/> Gerber In House (Development or QA only)		
Server Arrangement:	<input type="checkbox"/> Single Server	<input type="checkbox"/> Multi Server (Specify number)		
Gerber Use Only	Number of Licenses:	For Client:	SO number	
		For Gerber:		

#### Database Server Information (SQL 2008R2 or SQL 2012)

Name of SQL Server:
IP Address:
Operating System & Version (2008R2 or 2012):
OS Language (Must be client's native):
Login Name/Password (Must have full admin rights):
Number of Processors:
Installed RAM:

#### Web/Application Server Information

Name of Web Application Server:
IP Address:
Operating System & Version (2008R2 or 2012):
OS Language (Must be client's native):
SQL Management Studio Installed (Recommended):
Login Name/Password (Must have full admin rights):
Number of Processors:
Installed RAM:
Drive on which to install data (e.g. E):

#### File Server Information

Name of File Server:
IP Address:
Operating System & Version (2008R2 or 2012):
OS Language (Must be client's native):
Login Name/Password:
Number of Processors:
Installed RAM:
Drive on which to install application (e.g. E):

#### Report Server Information (SQL 2008R2 or SQL 2012)

Name of File Server:
IP Address:
Operating System & Version (2008R2 or 2012):
OS Language (Must be client's native):
Login Name/Password (Must have full admin rights):
Number of Processors:
Installed RAM:
Drive on which to install application (e.g. E):

**Target Installation Date**

Target Connection Test Date (*At least one week prior to installation*)

In preparation for the installation of YuniquePLM, please have the following items installed and functioning prior to your assigned installation date

Windows Server 2008R2 or 2012	<input type="checkbox"/> Application Server <input type="checkbox"/> File Services <input type="checkbox"/> Web Server
Microsoft SQL Server 2008R2 or SQL 2012 <i>(Standard default configuration settings)</i>	<input type="checkbox"/> Database <input type="checkbox"/> Analysis <input type="checkbox"/> Reporting <input type="checkbox"/> Business Intelligence Development Studio <input type="checkbox"/> Integration Services <input type="checkbox"/> Management Tools - Basic <input type="checkbox"/> Management Tools - Complete
If multi-server setup:	<input type="checkbox"/> Domain Impersonation Account

**Remote Access Information**
**Preferred Method of Remote Connectivity (Initial connection) (If applicable)**

- VNC       Remote Desktop  
 Direct Network (VPN) (*Provide link to VPN client*)  
 Other (*Please specify*)

IP address:

Username/Password:

**Remote Access Method**

- NetMeeting       Remote Desktop       WebEx       Terminal Server  
 Other (*Please specify*)

IP address:

Username/Password:

**Preferred Method of Obtaining Software**

- Gerber FTP       USB Flash Drive  
 Client FTP      URL:  
 Username/Password:

**Domain Impersonation Account**

Username:  
Password:

**SQL 'SA' Account**

Username:  
Password:

**SMTP Information**

SMTP Server:  
Port:  
Username/Password (*If required*):  
"From" Email Address:  
Email Address to Receive Alerts:

Interface AccuMark database with this system?     Yes     No

CAD Relational Database Server Name:  
CAD Relational Database Name:  
Windows / SQL Login Name/ Password:  
Accumark Version Installed:

**Installation Details**

Date Started [Click here to enter a date.](#)

Date Completed [Click here to enter a date.](#)

Time Spent

Issues