

eServ Setup Instructions



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Purpose

The first section of this document describes the instructions for setting up a web server to support the OPS Software web based products. You only need to follow the web server setup instructions if you do not already have your web server activated.

The second section describes how to include the eServ Website into your existing Internet Information Services.

The third section contains information about DB2 Server settings you need to be familiar with.

Before you Begin

Make sure you have installed and set up DB2 before performing these steps. You must be on the current level of DB2 before you continue.

Critical Information!

Make absolutely sure that your firewall, router, or other Internet switching device does not allow port 80 to pass through to your network until you completely finish the Web Server setup. You must apply all patches to the Web Server from the Windows Update site BEFORE you allow port 80 to pass through to your Web Server.

Convert FAT drives to NTFS

You should never install a Web Server on a FAT formatted drive if you EVER plan on allowing Internet access to your Website. There is no longer any valid reason for keeping your drives formatted as FAT.

How to tell what type of drives you have:

Double click My Computer. Right click on a drive and choose properties. You should see a label that says "File System:" If it says FAT anything as the file system type, then your drives are formatted as FAT.

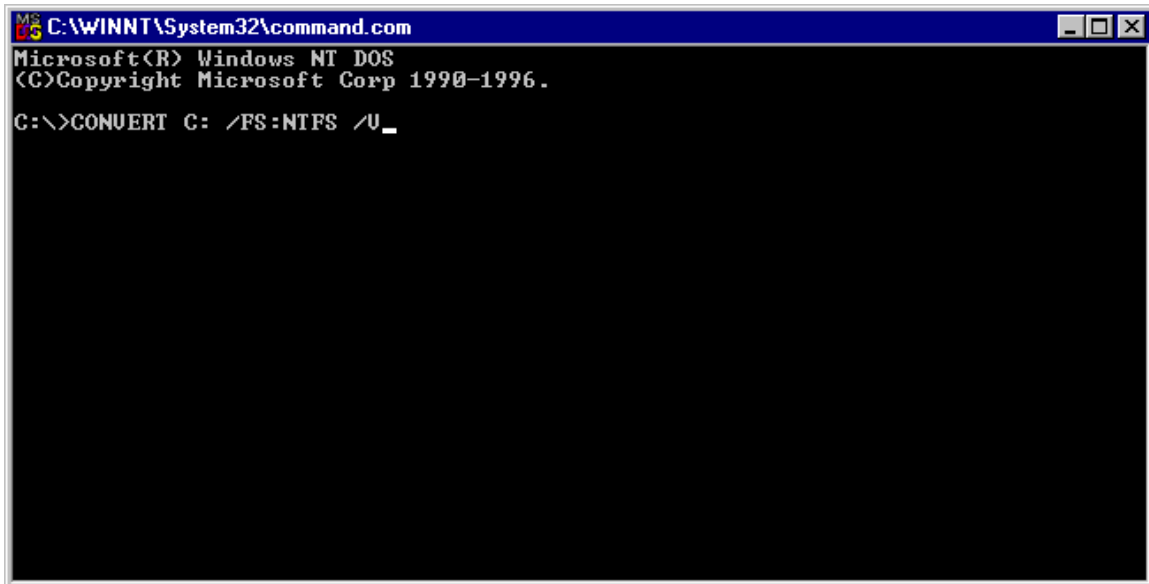
How to change your drives from FAT to NTFS:

Make sure no programs are running. You should have a complete backup of the drive you are converting before performing this operation. Choose Start – Run and then type: COMMAND in the open box. Click OK. A DOS window will appear with a C: prompt. Type: CONVERT C: /FS:NTFS /V and press enter.

You will probably receive a message stating that convert cannot gain exclusive access to the drive and would you like to convert it the next time the system is restarted. Answer Y. When the C: prompt is shown again, type: EXIT and press enter. This will return you to the Windows desktop.

Shutdown and restart your server. When the server re-boots you will see the conversion taking place and the system may restart itself several times. Do not interfere with the startup and patiently wait until Windows restarts.

Example DOS screen with convert command. Be sure to substitute C: with whatever drive you may be converting.

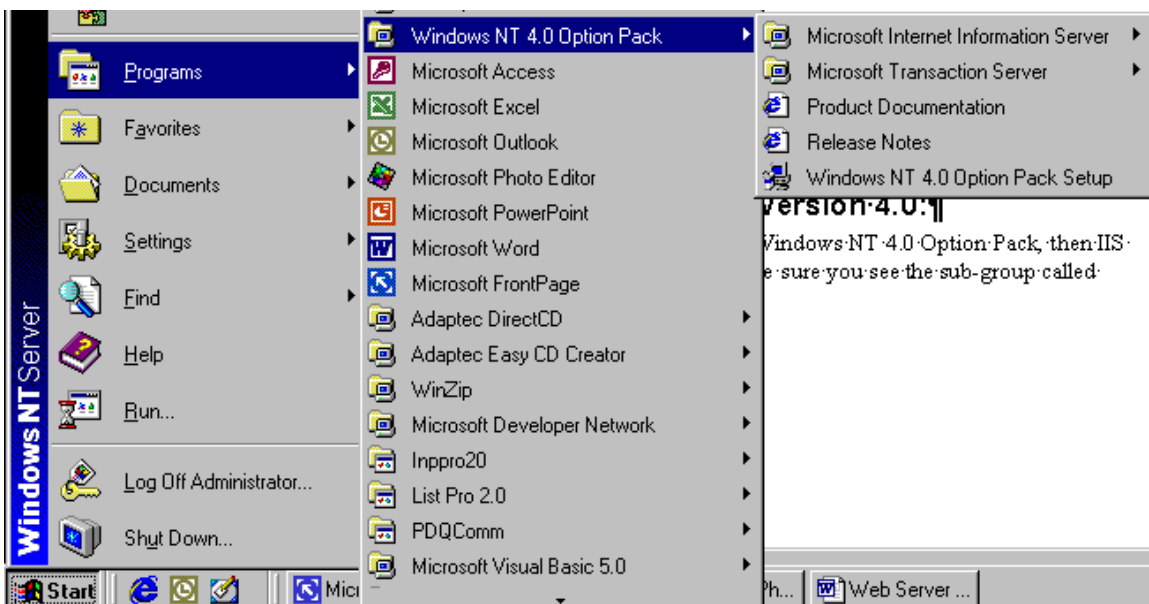


Install Internet Information Service (IIS)

Internet Information Service is required to 'serve up' your web pages. This common service may already be installed on your server. Most vendors install this service by default.

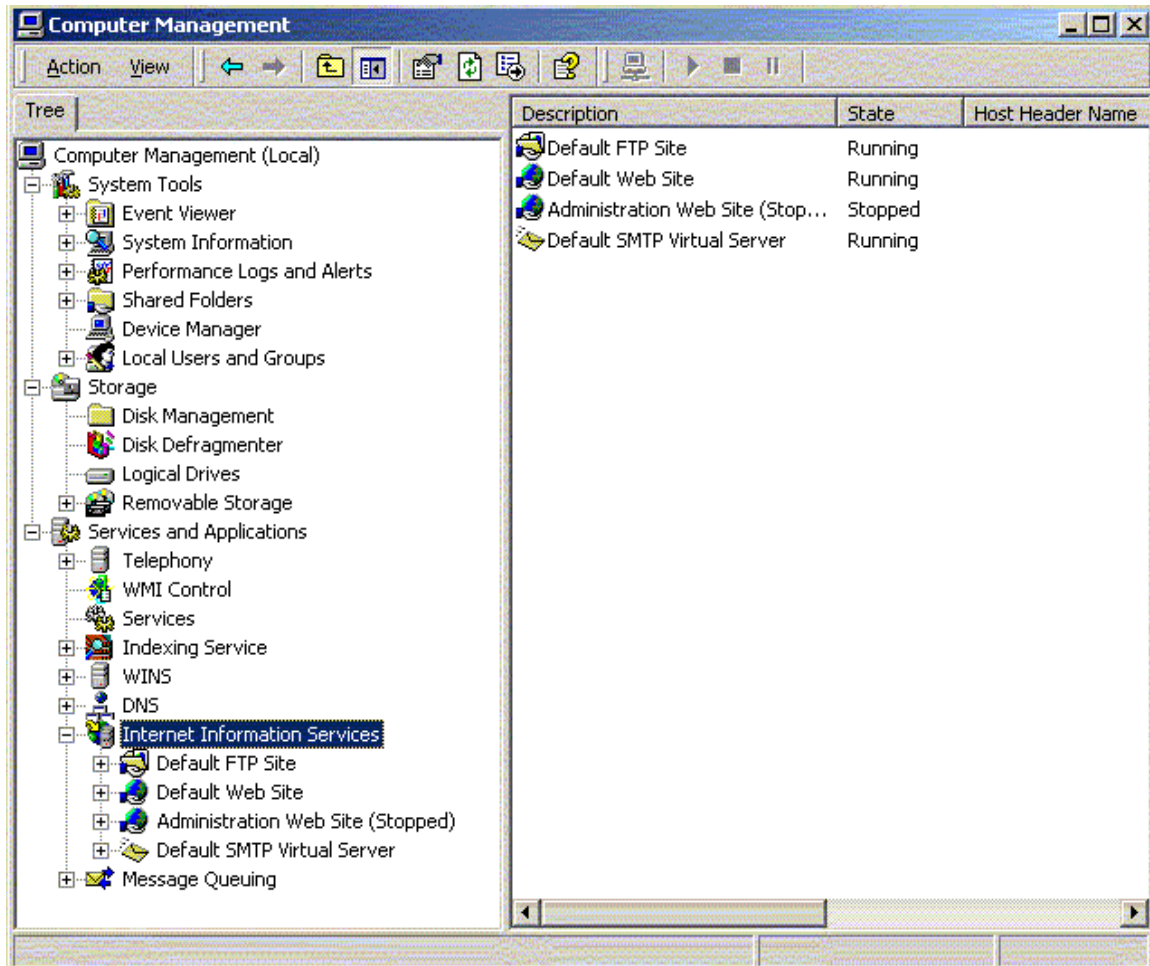
How to tell if IIS is installed on Windows NT version 4.0:

Choose Start – Programs. If you do not see a program group called Windows NT 4.0 Option Pack, then IIS is not installed. If you do see this program group, you must also make sure you see the sub-group called Microsoft Internet Information Server.



How to tell if IIS is installed on Windows 2000:

Right click on My Computer and choose Manage. Expand the Services and Applications group and make sure you see Internet Information Services. If you do not see this item, and the corresponding Default Web Site, then IIS is not installed on your server.



Installing IIS

Installing IIS on Windows NT 4.0:

Insert the OPSoftware ePower CD in your CD drive. Choose Start – Run and then click the Browse Button. Browse to your CD drive. Double click the Server folder. Double click the NT4 folder. Double click the NTOptPk folder. Double click the SETUP.EXE file. Click the OK Button. This will start the NT Option Pack Setup.

You may receive a message that the product has not been tested with your current service pack. Choose yes to continue.

Choose next to begin the setup.

Choose custom setup if asked.

Choose Add/Remove if asked.

In the select components dialog, make sure the following items are checked:

1. Front Page 98 server extensions.
2. Internet Information Server (IIS)
3. Microsoft Data Access Components
4. Microsoft Management Console.
5. NT Option Pack Common Files.
6. Transaction Server.

Choose next to continue the installation. You may be requested to provide locations for the install files. You can change the drive letter, but it is better to leave the default paths alone.

Re-boot your server after installing IIS.

Installing IIS on Windows 2000:

Insert your Windows 2000 CD in the CD drive. This CD should auto start and you should choose the Install Add-On Components. You can also use Start – Settings – Control Panel – Add Remove Programs and then choose Add/Remove Windows Components.

Make sure Internet Information Services and all of its sub-components are selected.

Click next to install.

Apply current service packs

You must make sure your computer has the most recent service packs applied to properly run Internet Information Services.

Windows NT 4.0 Service Pack:

As of the writing of this document, Service Pack 6 was the current release. You should visit the Windows Update site on Microsoft's web site to confirm the latest service pack. You can also download and apply these service packs from the Windows Update site.

Windows 2000 Service Pack:

As of the writing of this document, Service Pack 2 was the current release. You should visit the Windows Update site on Microsoft's web site to confirm the latest service pack. You can also download and apply this service pack from the Windows Update site.

Apply last minute patches

There are recent security patches critical to the operation of IIS. These patches were released after the service packs for both NT 4.0 and Windows 2000. You must visit the Windows Update site and download and apply all critical updates for your server.

You may need to download many updates. You need to keep returning to this site until no more critical or recommended updates are shown.

Windows Update Web Site:

You can get to the Windows Update site by going to www.microsoft.com and then choosing the Downloads link and then Windows Update.

Web Site Activation

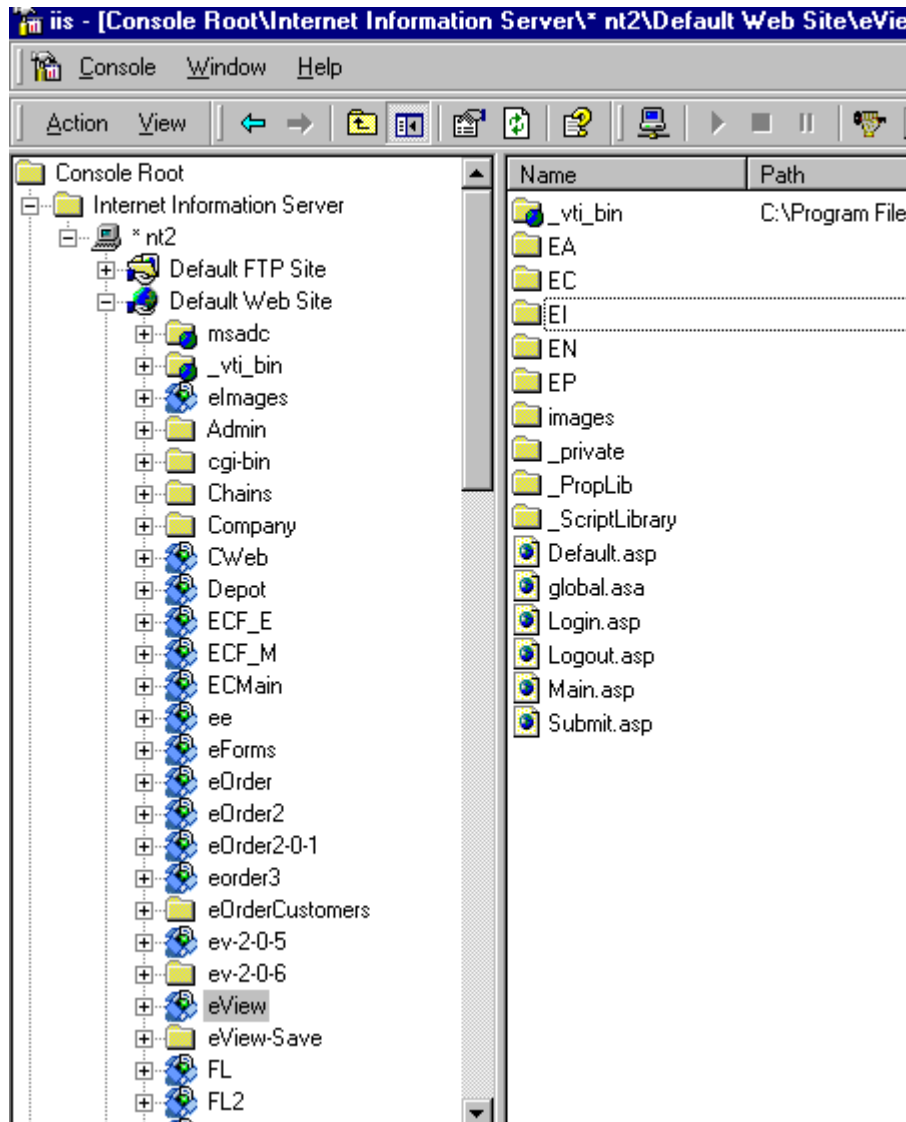
Before you can use your eServ web site, it must be activated using the Internet Information Manager.

How you access Internet Information Manager depends upon the operating system you are using.

Windows NT 4.0:

Choose Start – Programs – Windows NT 4.0 Option Pack – Microsoft Internet Information Server – Internet Service Manager.

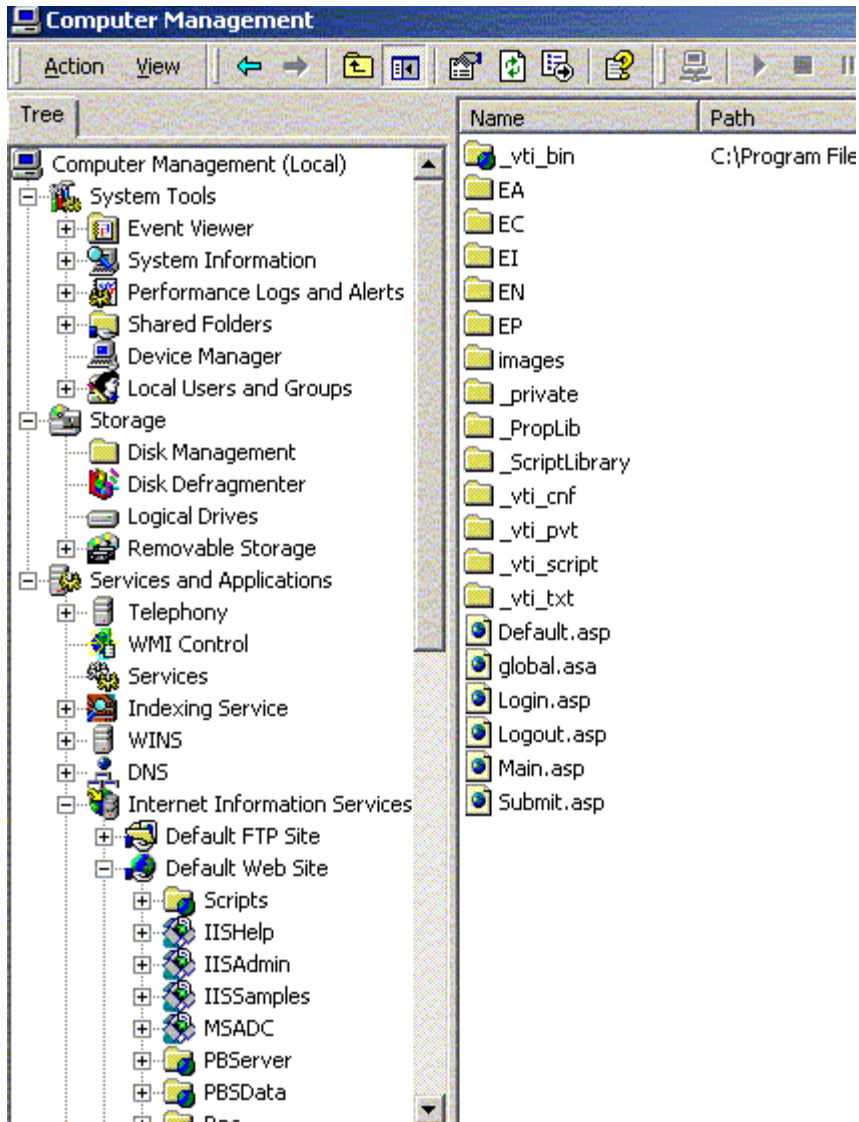
You should see a screen similar to this. You may need to expand the groups by clicking the plus signs until you see Default Web Site and then make sure this item is expanded as well.



Windows 2000:

Right click on My Computer and choose Manage from the pop-up menu.

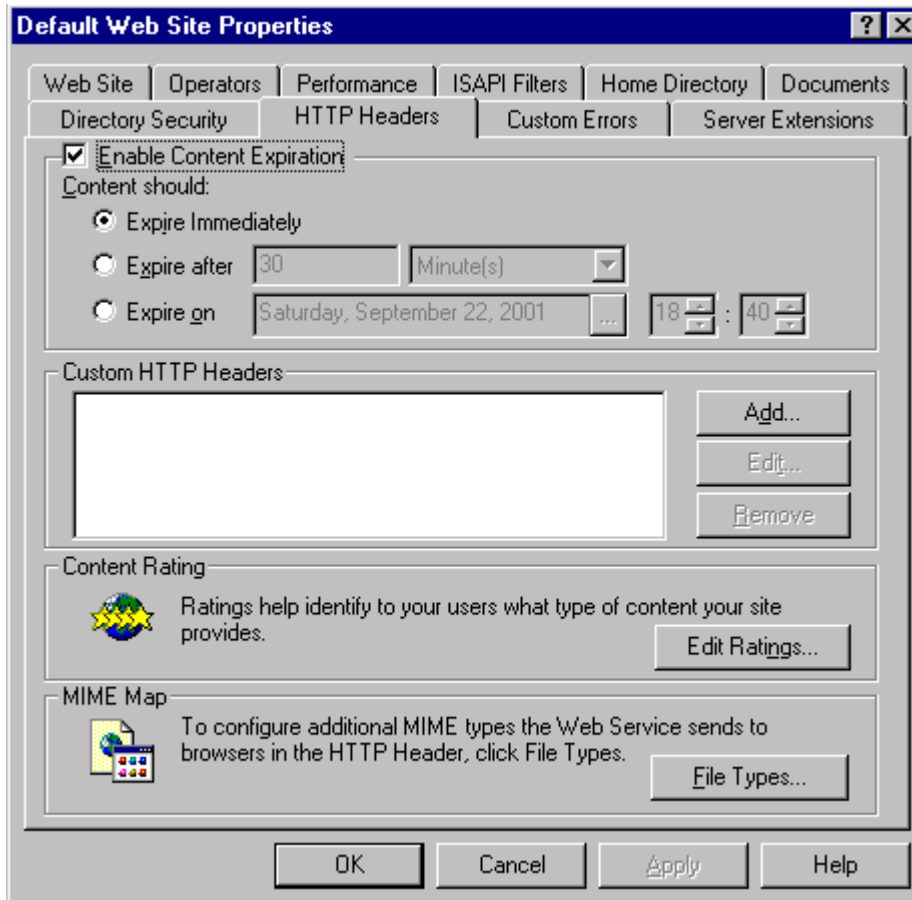
You should see a screen similar to this. You may need to expand the groups by clicking the plus signs until you see Default Web Site and then make sure this item is expanded as well.



Configure the Default Web Site:

Find the Default Web Site item in your list. Right click on the Default Web Site and choose Properties from the pop-up menu. When the Properties window appears, choose the HTTP Headers Tab.

This properties window is similar on both NT 4.0 and Windows 2000:



Make sure the Enable Content Expiration and the Expire Immediately options are selected.

Click the OK button to accept and apply the settings.

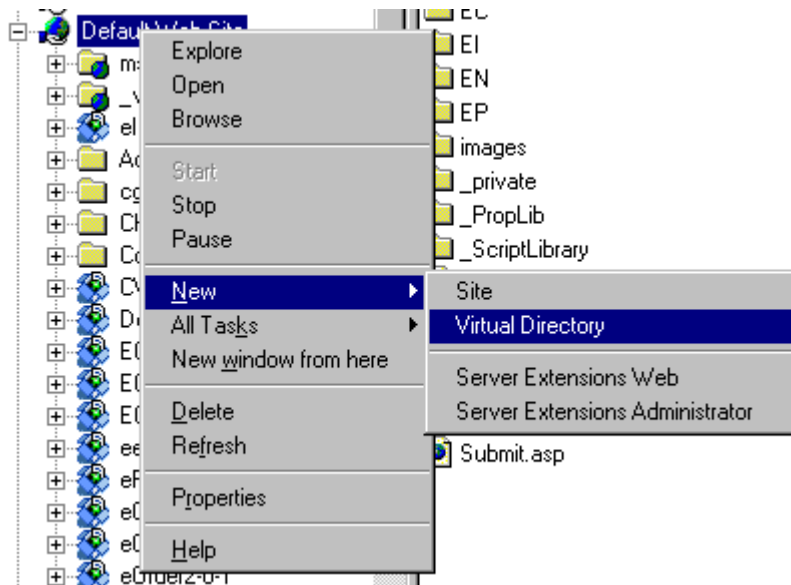
If you receive a message indicating inheritance overrides, make sure you choose to Select All and then Apply to All.

Adding the eServ Web Site.

The eServ web site must be added to Internet Information Services before it can be used.

Find the Default Web Site item in your list. Right click on the Default Web Site and choose New and then Virtual Directory from the pop-up menu.

The following menus and screens are very similar but not necessarily exactly the same on both NT 4.0 and Windows 2000:



The following, or a similar, virtual directory wizard will be displayed:



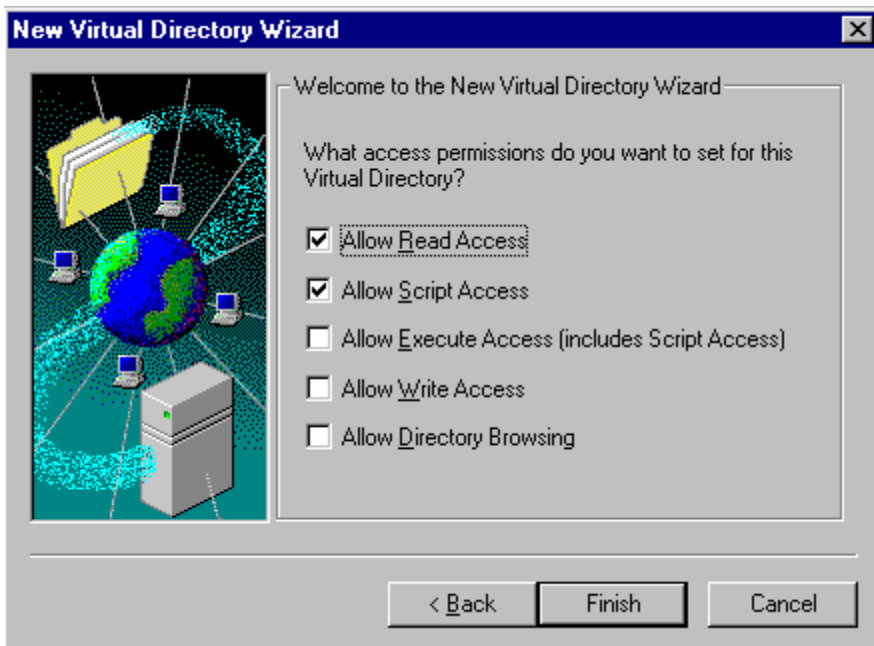
Type eServ (instead of eOrder as shown) as the alias for the virtual directory and then click next.



Click the browse button and browse to your DB2\Web folder and then select the eServ folder. Note that the example shows eOrder. You want to locate the folder: “D:\DB2\WEB\ESERV” if D: is the drive containing your DB2 installation.

Make sure the DB2\WEB\ESERV folder is selected!

Click next to continue the virtual directory creation wizard.



Make sure that read and script access permissions are checked and nothing else.

Click finish to complete the virtual directory creation wizard.

Testing your eServ Web Site

You must either authorize or receive an evaluation code from OPSoftware before you test your eServ Website. Contact Jack Duncan at 800-722-3615 extension 1 to have your account enabled for eServ.

You must complete the installation and initial setup of the DB2 User Member Maintenance before testing your eServ Website. If you do not complete this setup, then eServ will report an error: "Application Missing." See the DB2 User Member Maintenance guide for instructions on installing and setting up this required application.

Open Internet Explorer.

Type `http://computer-name/eserv` in the browser address bar where computer-name is your internal network name for the computer hosting your eServ web site.

The eServ login page should be shown in the browser window. No errors or other messages should be shown.

Close your browser to finish the eServ initial test.

Final Activation

When you are absolutely sure that ALL critical and recommended updates from the Windows Update Website have been successfully applied to your Web Server, you can modify your Internet router or switch to pass port 80 (HTTP) to the internal IP address of your Web Server. It is strongly recommended that you consult with a qualified network person for assistance with your particular setup.

DB2 Server Settings

In order for the eServ Website to maintain current information, you need to make sure your DB2 databases are kept up-to-date. eServ Accounts Receivable relies on your DB2 Customer Database, your DB2 Accounts Receivable Database, and your DB2 Sales History Database. You should, at a minimum, update these databases once per day. Depending upon the accounts receivable posting activities, you may want to update your DB2 Accounts Receivable database more often.

Use the DB2 Scheduler to establish update schedules for these databases and any future databases added to eServ.

Next Steps

Review the DB2 User Member Maintenance instructions and then set up a test user to access eServ. Return to the eServ Website and test logging in with the newly created user.