

Pirouette v4 Installation Guide

Overview

There are four basic steps to installing Pirouette on your server:

- Install the Pirouette libraries and files,
- Configure the web server to point to Pirouette,
- Configure a Pirouette instance,
- Create the Pirouette database.

Installing Pirouette is a relatively complex task designed for system administrators. Please back up your system before making any changes.

The following software and server components must be installed on your server:

- IIS (the web service)
- SQL Server (the database engine – you may also use SQL Server Express Edition)
- At least 350MB of free space for the installation

Important: SQL Server must be configured to use mixed-mode authentication. Pirouette currently only supports SQL Server authentication. The default on a new SQL Server install is Windows Authentication only, which will NOT work. You must enable mixed-mode authentication.

Pirouette does not currently support 64-bit servers.

Pirouette does not currently support 'Regional and Language Options' in Windows Server. Pirouette uses mm/dd/yyyy format for all dates. If you attempt to override this by changing the region settings, Pirouette will not function correctly. We plan to correct this problem in an upcoming release.

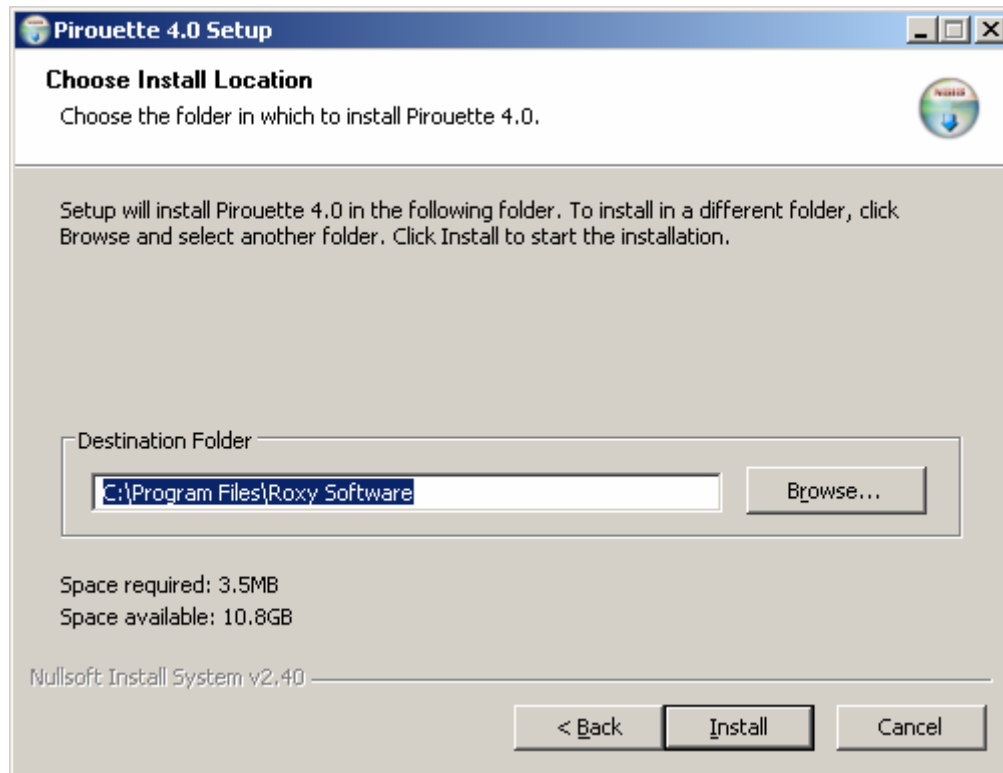
Step 1 – Installing Pirouette

Start by running 'Setup.exe', either on the installation CD or downloaded from our website. You will see this screen:

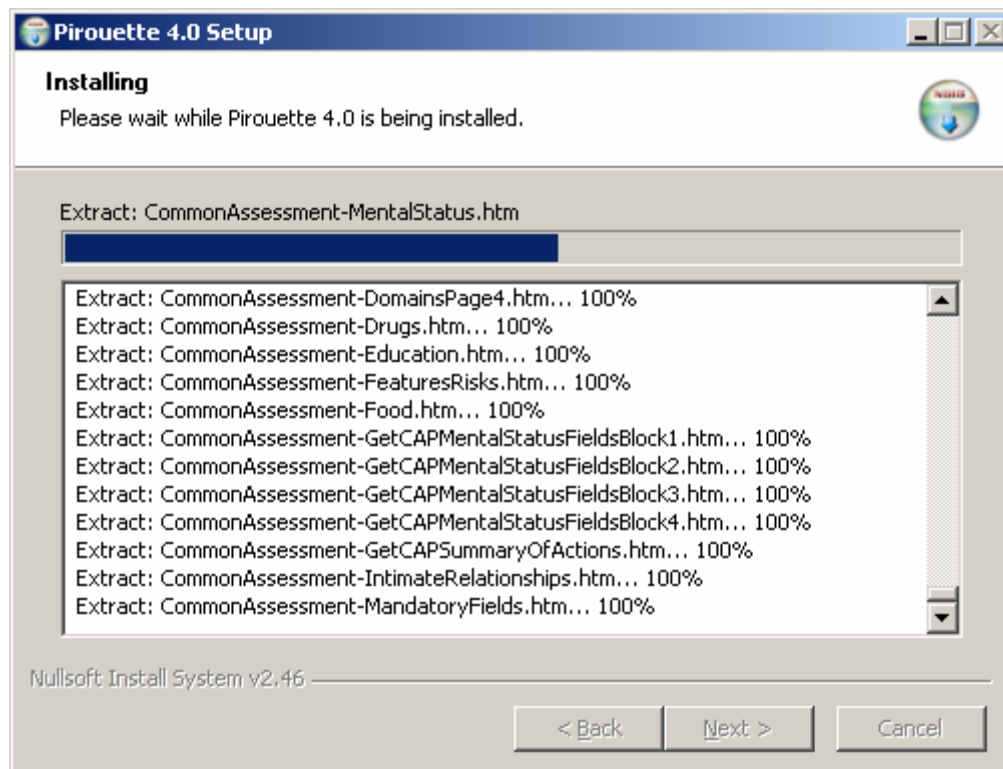


Click 'Next' and then select 'I Agree' to the license agreement (after reading it, of course).

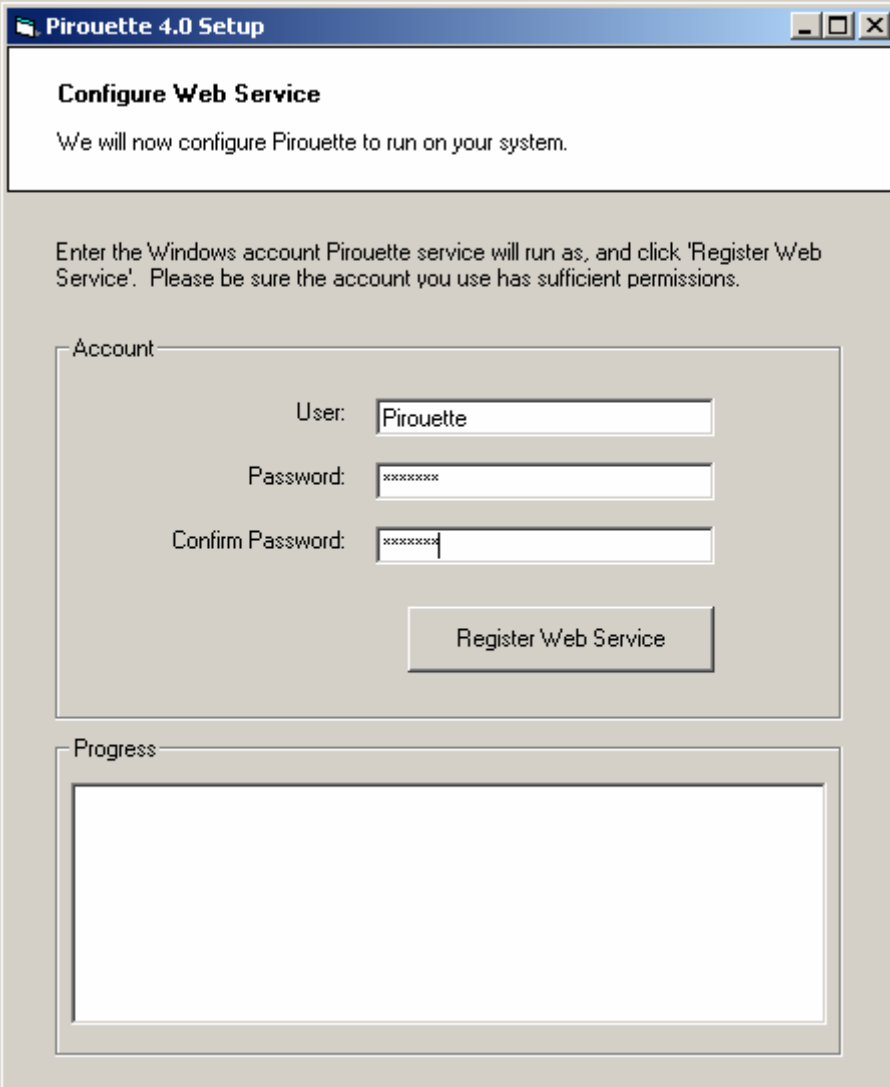
Select the installation directory. We suggest you use the default.



Click 'Install' and the installer will extract the Pirouette files.

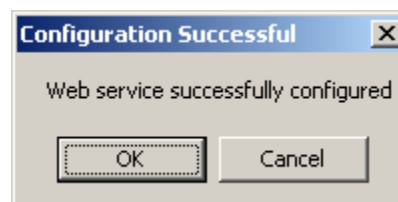


Once the files have been extracted, you must enter the Windows account information that Pirouette will run under. Please be sure the account you use has sufficient permissions:



The screenshot shows a Windows-style dialog box titled "Pirouette 4.0 Setup". The main heading is "Configure Web Service". Below the heading, it says "We will now configure Pirouette to run on your system." The next instruction reads: "Enter the Windows account Pirouette service will run as, and click 'Register Web Service'. Please be sure the account you use has sufficient permissions." There are three input fields: "User:" with the text "Pirouette", "Password:" with "xxxxxxxx", and "Confirm Password:" with "xxxxxxxx". A "Register Web Service" button is positioned below these fields. At the bottom of the dialog, there is a "Progress" section with a large empty rectangular area.

Click the 'Register Web Service' button. If all goes well, you'll see a popup:



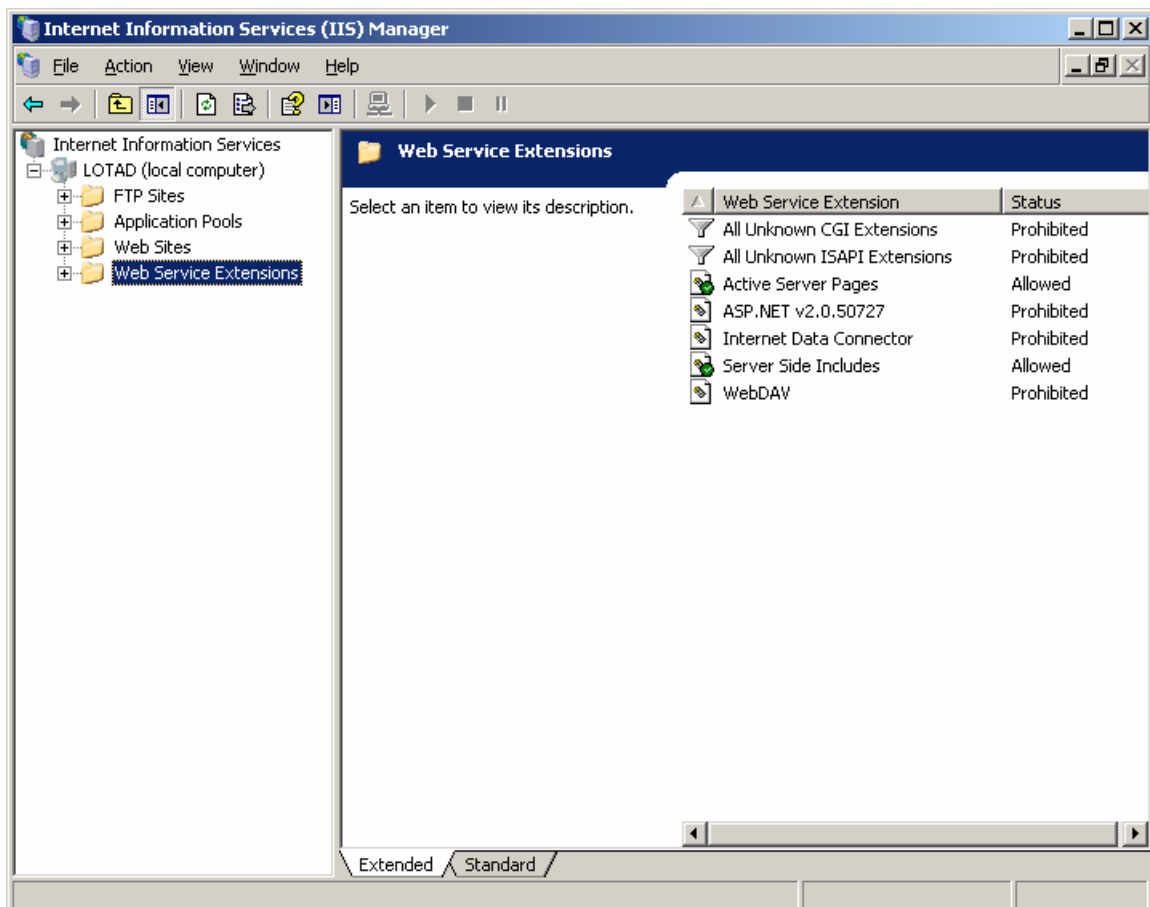
Pirouette is now installed on your system. The next step is to configure your web server to point to Pirouette.



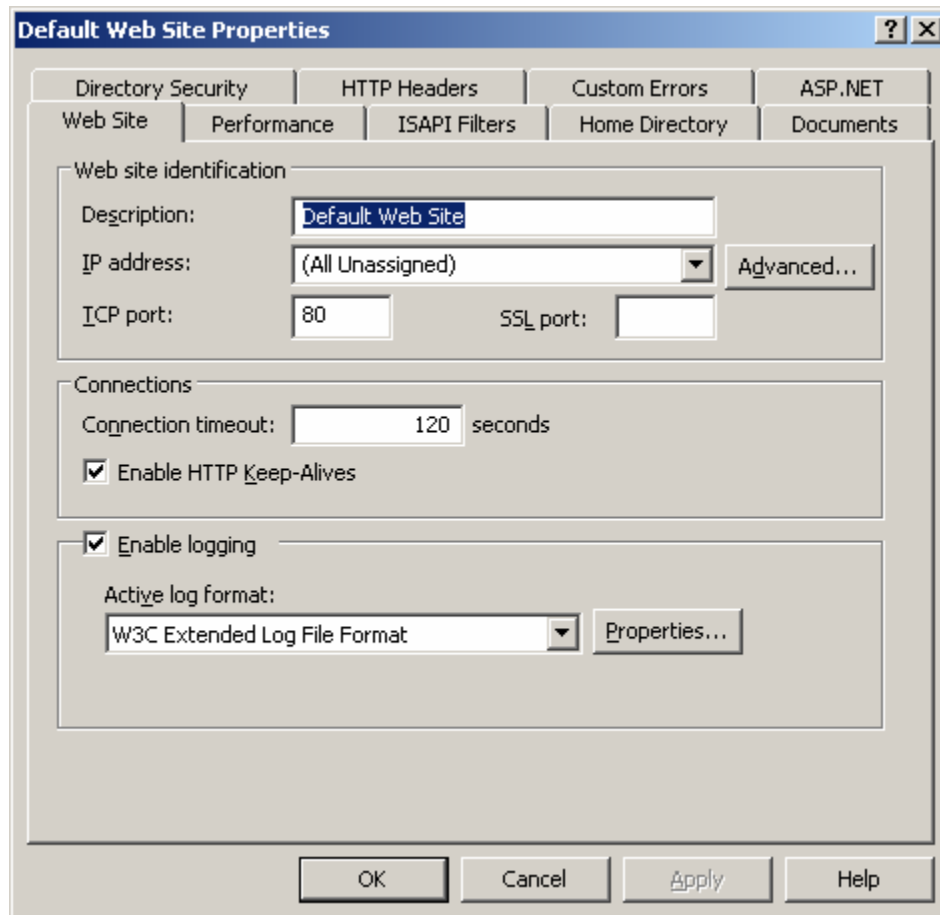
Step 2: Configure the Web Server

Open the IIS Manager panel by selecting ‘Control Panel – Administrative Tools – Internet Information Services’. If you can’t find this panel, it’s likely IIS hasn’t been installed. Refer back to your Windows Server documentation for installation instructions.

Select ‘Web Service Extensions’ from the list on the left. You must enable ‘Active Server Pages’ and Server Side Includes’ if not already allowed:

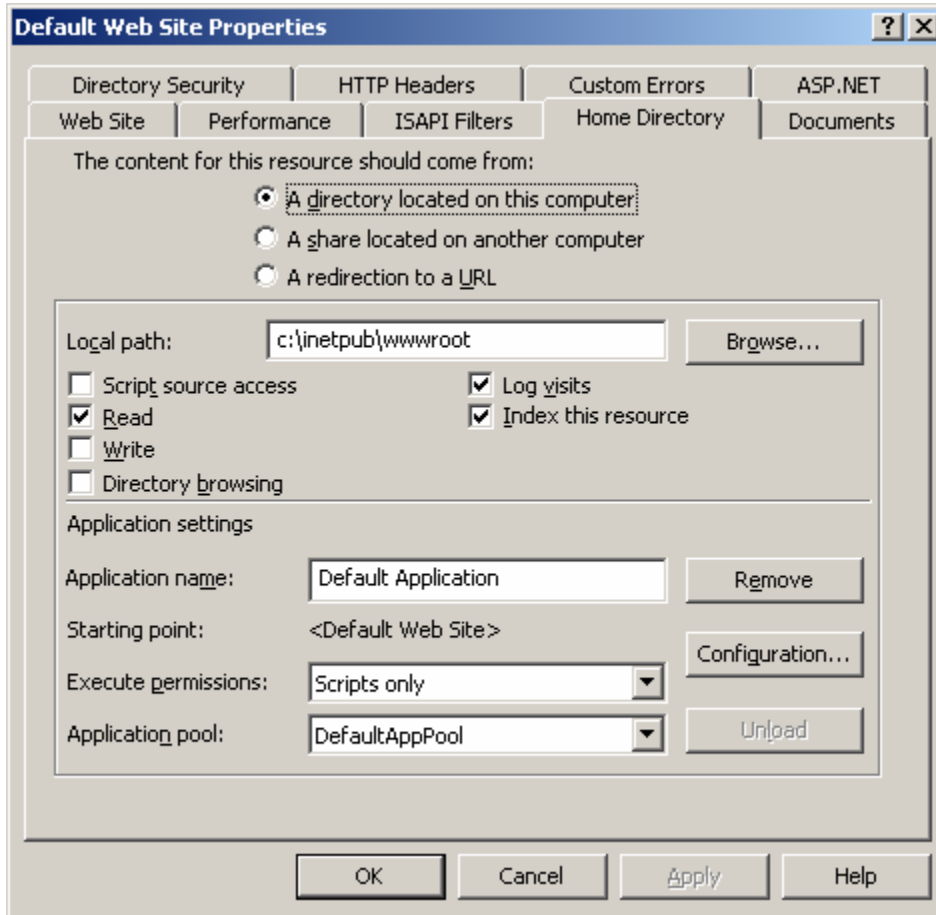


The simplest configuration is to install Pirouette as the default web site for the server. Click the '+' next to the server name, and again next to 'Web Sites' and then right-click on 'Default Web Site'. Select 'Properties'.



Advanced server configurations may have multiple web sites running, possibly using different host-headers. The following general steps apply regardless of the overall configuration.

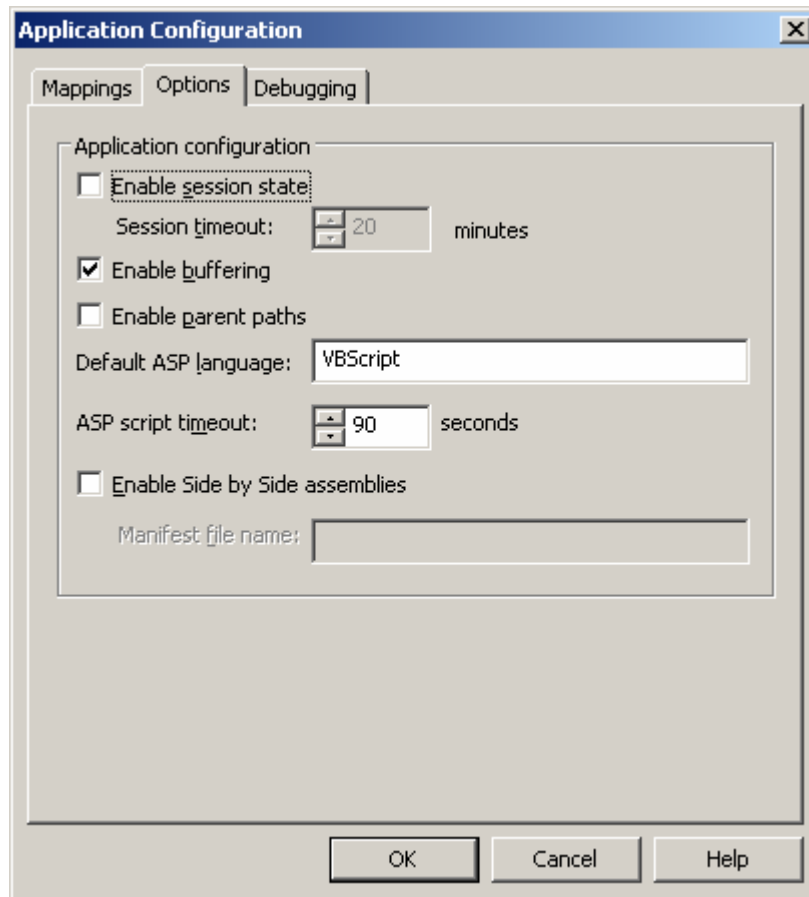
Select the 'Home Directory' tab.



Click 'Browse' and set the local path to C:\Program Files\Roxy Software\Pirouette\Files\WebRoot (Remember to replace 'C:\Program Files\Roxy Software' with your installation folder if you installed to an alternate path during the Pirouette install).

We now want to disable session state, as it's not needed (Pirouette tracks session internally). **If you do not disable session state, Pirouette will not run, as it doesn't know how to handle the additional information passed to it by IIS.**

Click the 'Configuration' button (near the bottom right in the previous screen capture). This will open the 'Application Configuration' window:



Uncheck the 'Enable session state' button, and click 'OK'.

Step 3: Configure a Pirouette Instance

A Pirouette instance tells the software how to access your SQL Server database. The instance is defined in the file C:\Program Files\Roxy Software\Pirouette\Pirouette.conf.

Edit the Pirouette.conf file with a text editor (for example, notepad). Set the configuration files as appropriate – they are defined below.

Instance: Leave this as 'default'.

ApplicationDirectory: The web (not file system) location of Pirouette. In this case, as we've installed the application as the default website, leave this blank.

DataSource: The SQL Server name

Provider: Leave this as 'sqloledb' as you're using a SQL Server database.

Catalog: The name of your Pirouette database.

UserID: The user ID Pirouette should use when accessing the database. Note that you must enable SQL Server authentication.

Password: The related password.

ReadOnlyUserID: Custom queries and reports are executed using a read-only SQL Server account. Specify an account with read-only permissions here.

ReadOnlyPassword: The related password.

CachedHeaders: In general, you'll want to leave this on as the application will run much faster.

Debug: You don't need to use this unless you're developing new panels, and run into trouble.

WindowsAuthentication: If you want to use windows authentication with Pirouette instead of the built-in authentication, set this to 'true'.

BackupLocation: Prior to applying an update a backup will be automatically in this location.

WebRootLocation: The actual filesystem location of the WebRoot directory.

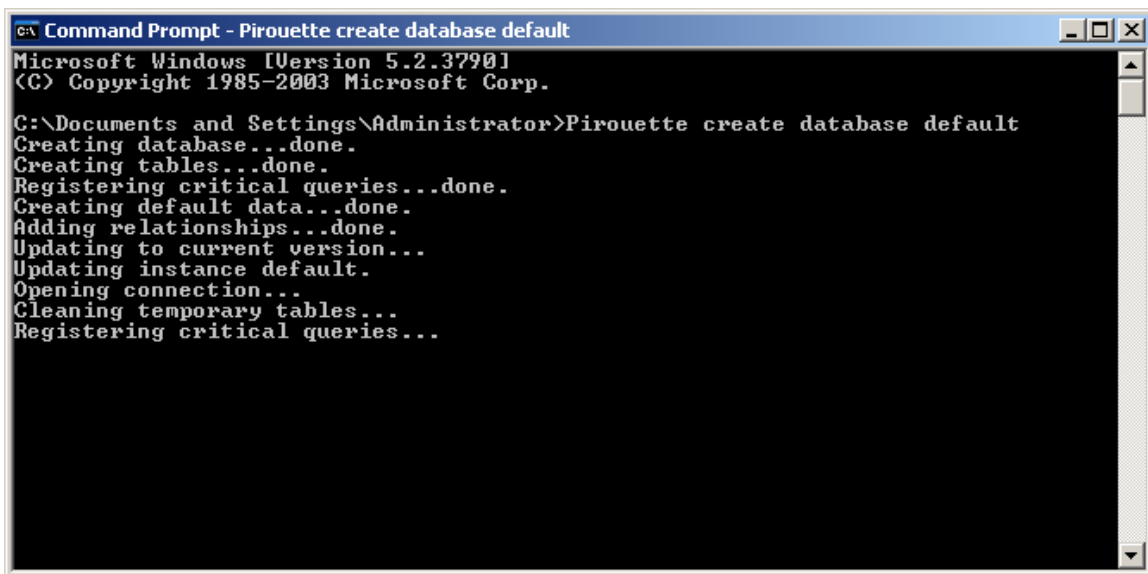
Step 4: Create the Pirouette database

From the command prompt, type:

```
Pirouette create database default
```

If you've defined a named instance, use:

```
Pirouette create database <instance>
```



```
CA Command Prompt - Pirouette create database default
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.

C:\Documents and Settings\Administrator>Pirouette create database default
Creating database...done.
Creating tables...done.
Registering critical queries...done.
Creating default data...done.
Adding relationships...done.
Updating to current version...
Updating instance default.
Opening connection...
Cleaning temporary tables...
Registering critical queries...
```

The 'Pirouette create' command will create the database, tables, and default data fields, register the Pirouette templates and modules, and apply any updates to the software. The process will take a few minutes.

Step 5: Try it out!

You should now be able to open Pirouette using Internet Explorer by browsing to <http://localhost>. Some server configurations may have localhost disabled, in which case use the server IP address or name.

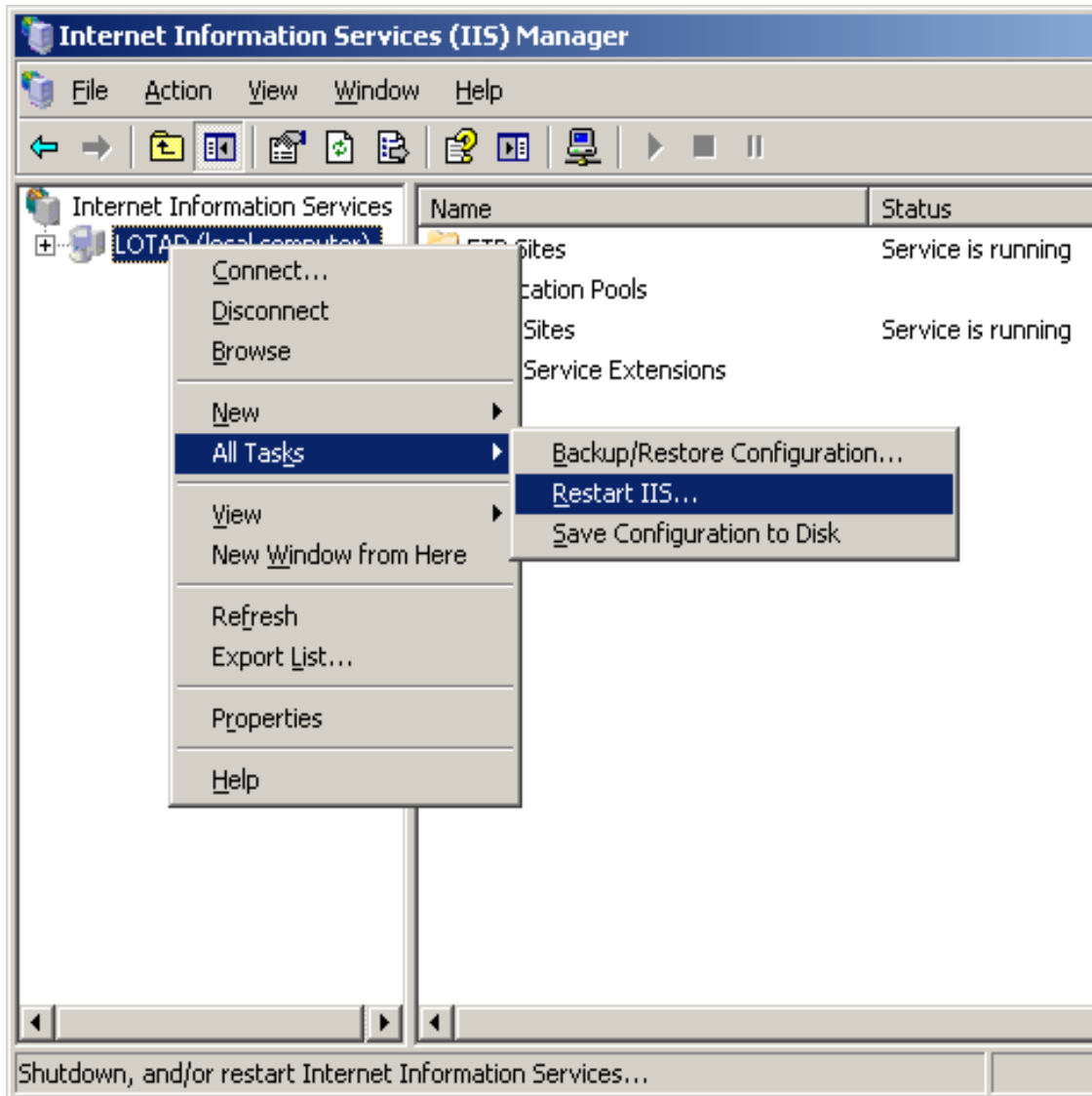
The default username and password for a new Pirouette installation is Administrator/roxyadmin.

Tip: Be sure to change the default password right away to ensure your installation is secure!

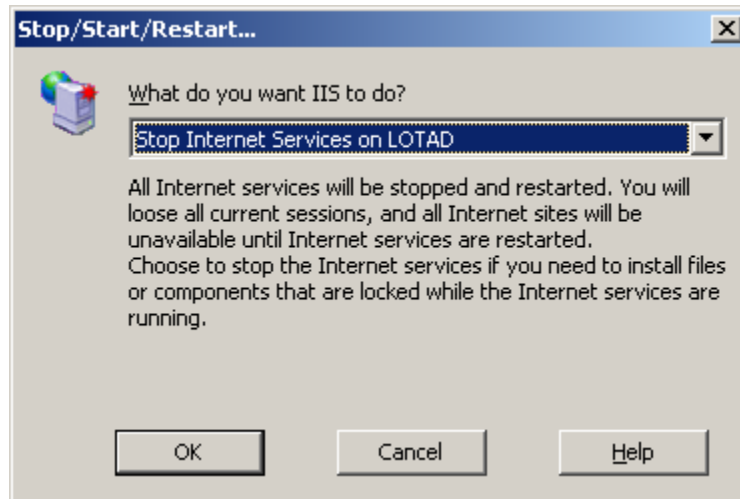
Updating Pirouette

Before updating Pirouette you should stop the related services so there are no locks on the related files.

First, stop IIS by opening the IIS Manager from 'Control Panel' – 'Administrative Tools'.



Select 'Stop Internet Services':

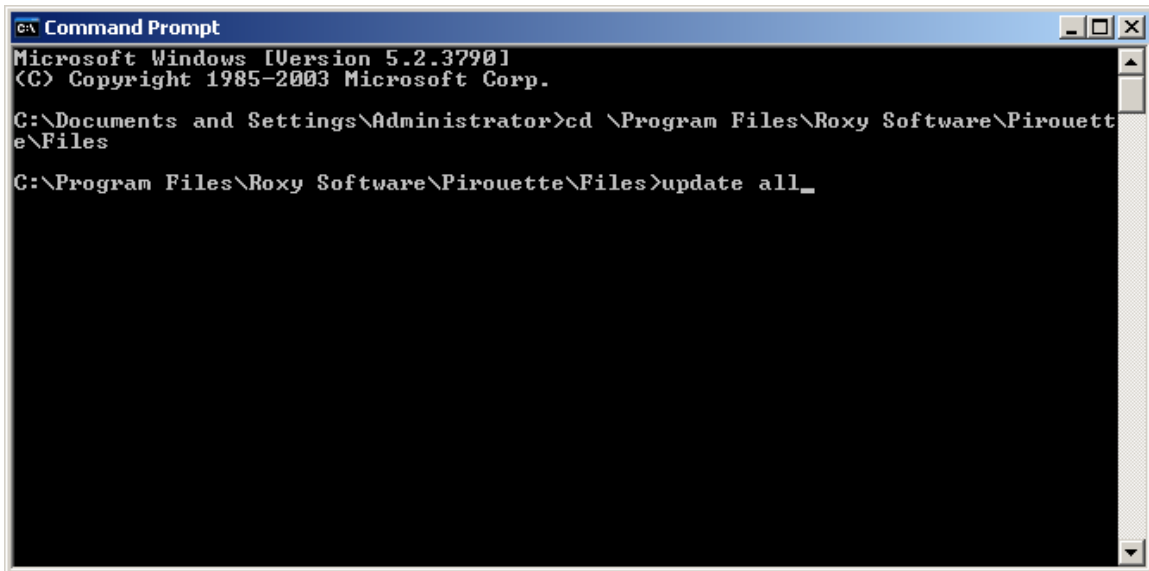


Return to Step 1 of this guide and run the installer (the new one you just got for the update). This will update all the Pirouette files to the latest version.

Now, change to the Files directory by typing: `cd \Program Files\Roxy Software\Pirouette\Files`

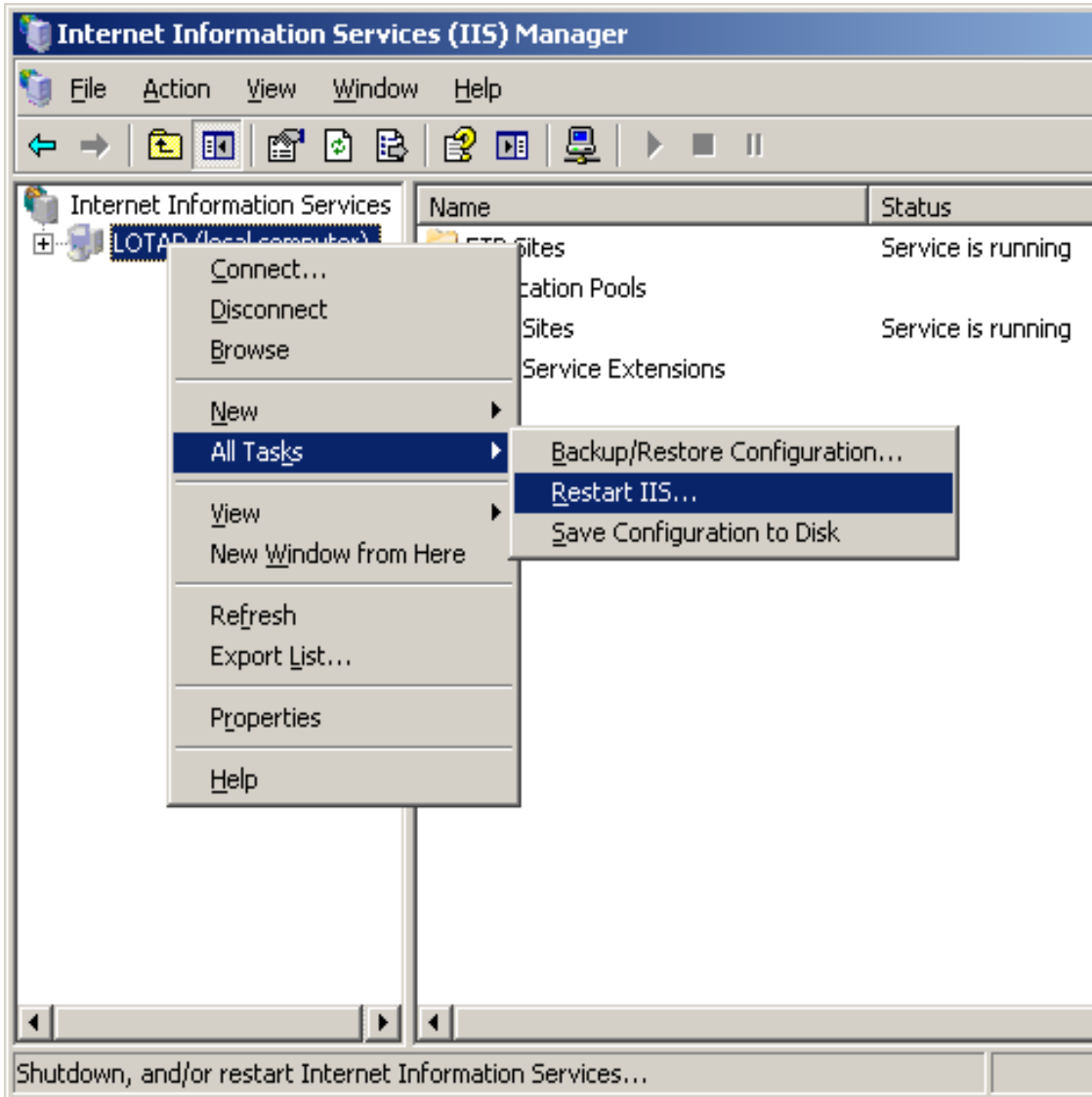
Type: `update all`

This will create a backup of your current data and then apply any required updates to the database.

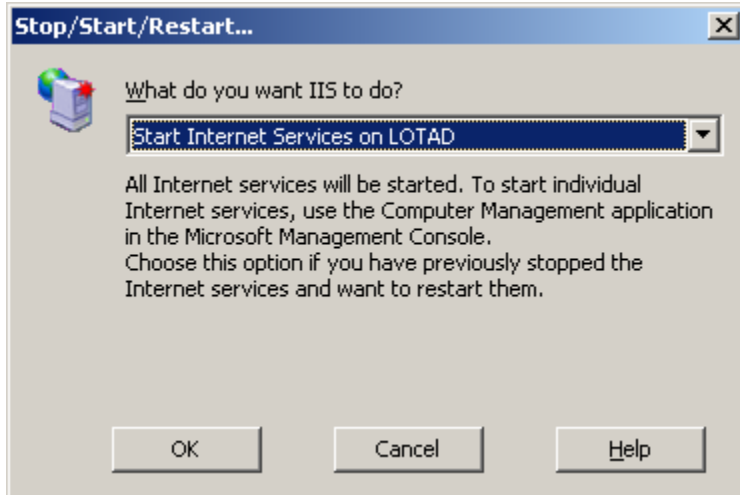


```
CA Command Prompt
Microsoft Windows [Version 5.2.3790]
(C) Copyright 1985-2003 Microsoft Corp.
C:\Documents and Settings\Administrator>cd \Program Files\Roxy Software\Pirouette\Files
C:\Program Files\Roxy Software\Pirouette\Files>update all_
```

That's it – you're now at the current version. Go back to the IIS Manager and start the service:



Select 'Start Internet Services':



You should now be able to open Pirouette.