IrisBG 4 | Installation Guide

This guide covers installation of the IrisBG software and database. General knowledge about installation of software on Windows computers and setup/configuration of MS SQL Server databases is assumed.

1. Software installation
2. Database installation
3. The database connection editor
4. Integration test – verifying the IrisBG installation

1. Software installation

1. 1. New installation of the IrisBG software

If you are using a network management tool to install software, please follow the instructions for that product.

Prerequisites
- A computer running Windows 7 or later (32 or 64 bit).
- The latest setup for IrisBG version 4.
- Optionally, the database connections file "**Iris.DataAccess.config**".

Installing on local computers
1. Logon to the computer with administrator privileges.
2. Run the installation file "**IrisBG4_x_x.msi**".
3. If asked for ".NET Framework 3.5 must be installed",
   follow this link and then re-run the installation.
4. Start IrisBG. The "Database connection editor" tool (see chapter 3) will be displayed.
   - If you have the "**Iris.DataAccess.config**" file, open it in the
     "Database connection editor" (see Chapter 3.1).
   - If the "**Iris.DataAccess.config**" is missing, create it in the "Database connection editor" (see chapter 3.2). The content should match your database installation (see chapter 2).
   - When needed, the installation file can be created for installation on additional computers (see Chapter 3.3).
5. Logon as user "**admin**" with password "**changeme**" to verify the installation.

Note: The same IrisBG version should be installed on all computers used for the system.

1. 2. Upgrading IrisBG software

If you are using a network management tool to install software, please follow the instructions for that product.

Prerequisites
- The latest setup for IrisBG version 4.

Upgrading on local computers
1. Logon to the computer with administrator privileges.
2. Run the installation file "**IrisBG4_x_x.msi**".
3. Start IrisBG and logon to verify the installation.

Note 1: The same IrisBG version should be installed on all computers used for the system.
After the first use of a new version, logon from subsequent users will be stopped until they have upgraded to the same version.
Note 2: As part of the software upgrade the database will automatically be upgraded to the latest version.

2. Database installation

2. 1. Using our Cloud Database hosting for IrisBG

This procedure is based on use of our Cloud Database hosting. It might be necessary to configure the local firewall to enable access to the Azure cloud database.

1. We provide the database connections file "**Iris.DataAccess.config**" necessary for the desktop software to connect to the cloud database.
2. You provide us with static IP-addresses (or IP-range) for the computers that will run IrisBG. The IP-addresses will be used to configure firewall access to the cloud service. Port 1433 is used for communication with the database.

2. 2. Installing a self-hosted multi-user database for IrisBG

This procedure will explain the steps necessary to prepare a self-hosted multi-user SQL Server database.

Prerequisites
1. A server with Microsoft SQL Server version 2014 or later installed. For a small database the free SQL Server Express with Tools can be used. See a comparison of the SQL Server editions.
   Port 1433 is used for communication with the database.
2. Your IrisBG database files "**Iris3_<name>_Data.MDF**" and "**Iris3_<name>_Log.LDF**" provided by us.

Preparing the database
1. Copy the database files to the data folder for Microsoft SQL Server.
   The default data folder for SQL Server is similar to:
   \Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data.

2. Attach the database using the Microsoft SQL Server Management tool.
3. Create a new login for the server called "**IrisSys**" with SQL Server authentication.
   - Disable "Enforce password expiration" for the login.
   - Make a note of the password used for the login.
4. Create a new user "**IrisSys**" in the IrisBG database with login name "**IrisSys**".
   - Assign membership to the roles: **db_datareader**, **db_datawriter** and **db_ddladmin**.
5. Enroll the new database in your backup schedule.
6. Start IrisBG. If the database connections file "**Iris.DataAccess.config**" is missing, the "Database connection editor" tool (see chapter 3) will be displayed:
   - Select Connection type = SQLServer and fill in the fields:
     - Display name: <Your choice>
     - Data Source: <MYSERVER\SQL2012> (your server instance)
     - Initial catalog: Iris3_<name>
     - User ID: IrisSys
     - Password: <password for "**IrisSys**" database login>
       - Verify the connection by clicking [Test].
       - Click [Save] followed by [Close].
7. Logon as user "**admin**" with password "**changeme**" to verify the installation.

2. 3. Installing a self-hosted single-user database for IrisBG

The free Microsoft SQL Server Express can be used as a single-user database for IrisBG.
We <u>do not recommend</u> this option as it will not provide access to the database for other users.

Depending on the user's privileges on the computer, the authentication modes can be:
- Integrated Windows security. Administrative privileges for the user are <u>required</u>.
- Mixed authentication mode. Administrative privileges for the user are <u>not required</u>.

Prerequisites
- Your IrisBG database files "**Iris3_<name>_Data.MDF**" and "**Iris3_<name>_Log.LDF**" provided by us.

Preparing the database
1. Download and install the compliant SQL Server Express version (32 or 64 bit) on your computer.
2. Copy the IrisBG database files to the folder "*C:\ProgramData\Iris3*". Create the folder if necessary.
   Note: The *C:\ProgramData* folder is hidden. Hidden folders can be accessed by typing the path or by switching on "Show hidden Files and Folders" in Windows Explorer.
3. For Mixed authentication mode <u>only</u>:
   - Attach the database using the Microsoft SQL Server Management tool.
   - Create a new login for the server called "**IrisSys**" with SQL Server authentication.
     - Disable "Enforce password expiration" for the login.
     - Make a note of the password used for the login.
   - Create a new user "**IrisSys**" in the IrisBG database with login name "**IrisSys**".
     - Assign membership to the roles: **db_datareader**, **db_datawriter** and **db_ddladmin**.
4. Enroll the new database in your backup schedule.

5. Start IrisBG. If the database connections file "**Iris.DataAccess.config**" is missing, the "Database connection editor" tool (see chapter 3) will be displayed:
    - Select Connection type = SQLExpress and fill in the fields:
        - Display name: <Your choice>
        - Data Source: .\SQLEXPRESS
        - AttachDbFileName: C:\ProgramData\Iris3\Iris3_<name>_Data.MDF
        - Initial catalog: Iris3_<name>
        - User ID: IrisSys
        - Password:
          "N/A" for Integrated Windows security
          Defined password for Mixed authentication mode
    - Verify the connection by clicking [Test].
    - Click [Save] followed by [Close].
6. Logon as user "**admin**" with password "**changeme**" to verify the installation.

3. The Database connection editor

The "Database connection editor" manages the database connections file, "**Iris.DataAccess.config**", used by the desktop software to connect to your database server. The editor will be shown during IrisBG startup if the database connections file is missing.

The configuration file will be encrypted during its first use.

3. 1. Start using an existing configuration file
1. Open the file.
2. Verify the connection by clicking [Test].
3. Click [Save] followed by [Close].

3. 2. Create a new configuration file
1. Select the relevant Connection type (*SQLServer / SQLExpress / SQLAzure*).
2. Fill in the fields.
3. Verify the connection by clicking [Test].
4. Click [Save] followed by [Close].

3.3. Create a copy of the configuration file
Use a copy of the configuration file when installing IrisBG on additional computers.

1. Go to the Maintenance > Configurations screen and click [Edit] to the right of the "Database Connections" list to open the editor.
2. Verify the connection by clicking [Test].
3. Click [Create file] followed by [Close].

The file should be kept in a location that is available when installing on additional computers. Open the file when requested during the installation (see Chapter 1.1).

4. Integration test – verifying the IrisBG installation

Use this guide to verify that the installation of IrisBG has been completed successfully and that the runtime environment is correctly configured.

We recommend completing the verification process when installing IrisBG in environments where System Management Tools are used to control how software access resources.

If you have problems completing any of the tests, please contact IrisBG support.

1. Login
   a. Start IrisBG and login with user id "admin". In case of a new installation use the password "changeme".
2. Mapping
   a. Requires internet access and purchase of the mapping module.
   b. Navigate to the "Localities" screen.
   c. Click the map button in the latitude / longitude field.
   d. The map screen should be displayed.
   e. Switch between different map providers from the Map Type dropdown.
   f. Close the screen when done.
3. Excel integration
   a. Requires Excel compatible software
   b. Navigate to the "Reports" screen.
   c. Select the report "99-Miscellaneous: Code01 Code lists".
   d. Click [View].
   e. An Excel spread sheet with code list data should appear.
   f. Close the screen when done.
4. Word integration
   a. Requires Microsoft Word and the presence of accession records.
   b. Select the report "01-Accession objects: Obj01 Accessions catalogue".
   c. Click [View].
   d. A Word document with accession data should be displayed.
   e. Close the screen when done.
5. Web integration
   a. Requires internet access and the presence of taxa records.
   b. Navigate to the "Taxa" screen.
   c. Click search on the toolbar.
   d. Select one of the taxa from the list using the spacebar or with double click.
   e. Click "Web Search" on the toolbar and select "Wikipedia".
   f. Your web browser should display a Wikipedia web page.
   Note: Wikipedia may or may not have details about the selected taxon.