



Worksoft Infrastructure Services Installation Guide

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Table of Contents

Chapter 1 Preparing Your System for Worksoft Infrastructure Services	4
Overview	5
Worksoft Infrastructure Services Package	5
System Requirements	6
Configuring Your Application Server	6
Adding Roles and Features	6
Configuring the Web Server Role (IIS) 1	2
Configuring Application/Json MIME Type Compression	.4
Enabling IIS Services	6
Configuring HTTPS on Your Application Server \ldots 1	.7
Chapter 2 Installing Worksoft Infrastructure Services	8
Verifying System Requirements	9
Installing Worksoft Infrastructure Services	9
Using Windows Authorization	23
Appendix A Worksoft Infrastructure Services Silent Installation	6
Silent Install	6
Installation Log File	27
Silent Uninstall	:7
Non-default Website	7

Chapter 1

Preparing Your System for Worksoft Infrastructure Services

In This Chapter

Overview	5
Worksoft Infrastructure Services Package	5
System Requirements	6
Configuring Your Application Server	6
Enabling IIS Services	16
Configuring HTTPS on Your Application Server	17

Overview

Product or Service	Description
Authentication service	This service is an identity provider for Worksoft products.
Worksoft Portal	An administration tool that registers the following for Worksoft products:
	Database settings
	Licenses
	Users
	Email SMTP settings
	Tenants
	Integrations
Cryptography service	Cryptography service for all Worksoft products.
Certify Results Viewer	Worksoft Results UI allows you to view the details of the execution step results.
Bookmark service	Create bookmarks to save favorite Certify folders and processes for execution.
Scheduler service	Schedule tasks and jobs.
Capture Documentation service	Produce Microsoft Word or PDF documentation from Worksoft Capture files.

The Worksoft Infrastructure Services installs the following products and services:

You are able to pick and choose which products and services to install.

Worksoft Infrastructure Services Package

The Worksoft Infrastructure Services package consists of the following components:

Component	Description
Worksoft Infrastructure Services (version).exe	Executable that installs Worksoft Infrastructure Services. Unified installer that will provide user ability to pick and choose which of the products and services are available for installation.
AuthenticationDatabaseScripts.zip	Zip file contains database scripts that create and upgrade Authentication databases.
PortalDatabaseScripts.zip	Zip file contains database scripts that create and upgrade the Worksoft Portal databases.

System Requirements

Before you begin to install Worksoft Infrastructure Services, verify that your environment has the needed system requirements installed for the Worksoft Portal. For information about system requirements, see the Worksoft Help Portal.

Configuring Your Application Server

In order to transform your application server into a web server to host the Worksoft Portal, Microsoft® Internet Information Services (IIS) must be installed and the Server Manager must be configured.

These procedures assume that you have not already configured your IIS. If you have already set up the Roles and Features, verify that the following Role Services on page 13 have been selected.

Adding Roles and Features

The Server Manager allows you to add specific roles and features to your web server that are required for Worksoft products.

• To add roles and features to your web server:

1 From the Start menu, select **Server Manager**.

The Server Manager opens.

Conver M	anagar N Dachboard		- @ F	Managa Toole View
Jerver w	anager - Dashboard		- Will	manage roos view
Dashboard	WELCOME TO SERVER MANAGER			
Local Server All Servers File and Storage Services Þ	1 Confi	igure this local server		
	QUICK START	d roles and features		
	3 Ad	d other servers to manage eate a server group		
	5 CO	nnect this server to cloud services		н
	ROLES AND SERVER GROUPS	9.		
	File and Storage Services	Local Server 1	All Servers 1	
	Manageability	Manageability		
	Events	Events	Manageability Events	
	Events Performance BPA results	Events 6 Services 8 Performance 8 PA results	Manageability Events Services Performance BPA results	

- 2 In the Navigation pane, select **Dashboard**.
- 3 In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles and Features Wizard opens.

Add Roles and Features Wizard		100		×
Before you begin Refore You Begin Installation Type Server Selection Server Roles Features Confirmation Results	This wizard helps you install roles, role services, or features. You determine w features to install based on the computing needs of your organization, such hosting a website. To remove roles, role services, or features: Start the Remove Roles and Features Wizard Before you continue, verify that the following tasks have been completed: • The Administrator account has a strong password • Network settings, such as static IP addresses, are configured • The most current security updates from Windows Update are installed If you must verify that any of the preceding prerequisites have been complete complete the steps, and then run the wizard again. To continue, click Next.	DESTIN hich roles, role as sharing doo	ATION SERV e services cuments, o wizard,	, or or
	CTICHOUS THEAT	in a soll	Surree	

4 Click Next.

The Select Installation Type page opens.

📥 Add Roles and Features Wizard		-		×
Select installation	type	DESTINA	TION SERV	ER
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	 Select the installation type. You can install roles and features on a running physical machine, or on an offline virtual hard disk (VHD). Role-based or feature-based installation Configure a single server by adding roles, role services, and features. Remote Desktop Services installation Install required role services for Virtual Desktop Infrastructure (VDI) to create a or session-based desktop deployment. 	i compute	er or virtu	al
	< Previous Next > Inst	all	Cancel	

5 Select the **Role-based or feature-based Installation** option.

6 Click Next.

The Select Destination Server page opens.

elect destinati	on server			DESTIN	ATION SER	RVE
Before You Begin	Select a server or	a virtual hard disk on which	to install roles and features.			
Installation Type	Select a server	from the server pool				
Server Selection	O Select a virtual	hard disk				
Server Roles	Server Pool					
Features						
Confirmation	Filter:					_
Results	Name	IP Address	Operating System			_
					14 1	
	T Computer(s) fou	nd				
	and that have bee	n added by using the Add	Servers command in Server 1	Anager, Offline	servers a	ver and
	newly-added serve	ers from which data collect	ion is still incomplete are not	shown.		

- **7** Select a server.
- 8 Click Next.

The Select Server Roles page opens.

Add Roles and Features Wizard		– 🗆 X
Select server roles Before You Begin Installation Type	Select one or more roles to install on the selected server.	DESTINATION SERVER
Server Selection Server Roles Features Confirmation Results	Active Directory Federation Services Active Directory Lightweight Directory Services Active Directory Rights Management Services Device Health Attestation DHCP Server DRS Server File and Storage Services (1 of 12 installed) File and Storage Services Storage Services Storage Services Hyper-V Network Policy and Access Services Remote Access Remote Access Remote Desktop Services Volume Activation Services Volume Activation Services Windows Server Update Services Windows Server Update Services	Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.
	< Previous Nex	t > Install Cancel

- **9** From the Server Roles list, select the following roles:
 - File Services
 - Web Server (IIS)
- 10 Click Next.

The Select Features page opens.

📥 Add Roles and Features Wizard			- 🗆 X
Select features			DESTINATION SERVER
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	Select one or more features to install on the selected se Features 	erver.	Description .NET Framework 4.8 provides a comprehensive and consistent programming model for quickly and easily building and running applications that are built for various platforms including desktop PCs, Servers, smart phones and the public and private cloud.
	< Previous	Ne	xt > Install Cancel

- **11** Select the following features:
 - .NET Framework 4.8 Features and all of its child nodes
 - WCF Services and all of its child nodes
 - IIS Hostable Web Core and Media Foundation



12 Verify that Message Queuing Services and Message Queuing Server are enabled.

- **13** Use the scroll bar to verify the **Windows Process Activation Service** is enabled with the following child nodes:
 - Process Model
 - Configuration APIs
- 14 Click Next.

Configuring the Web Server Role (IIS)

The Web Server Role (IIS) page opens if you have not already installed the web server.

1 In the Navigation pane, click **Role Services** under Web Server Role (IIS).



The Select Role Services page opens.

2 In the Role Services list, use the scroll bar to select the following services.

If you have already set up the Roles and Features, verify that the following services have been selected.

Node	Child Nodes
Common HTTP Features	Default Document
	HTTP Errors
	Static Content
	WebDAV - Verify that this option is disabled. Worksoft's RESTful Services will not work correctly if enabled.
Health and Diagnostics	HTTP Logging
	Request Monitor
Performance	Static Content Compression
	Dynamic Content Compression
Security	Request Filtering
Application Development	.NET Extensibility 4.8
	Application Initialization
	ASP
	ASP.NET 4.8
	CGI
	ISAPI Extensions
	ISAPI Filters
	WebSocket Protocol
Management Tools	IIS Management Console
	IIS Management Scripts and Tools
	Management Service

3 Click Next.

The Confirm Installation Selections page opens.

4 Click **Install** to install the role services.

Configuring Application/Json MIME Type Compression

After you have enabled Dynamic Content Compression within IIS, you need to verify HTTP Compression for the application/json MIME type. Certify Automator's mode uses Dynamic Content Compression to improve performance, and HTTP compression must be enabled for the application/json MIME type.

When the Dynamic Content Compression feature is enabled, it will overwrite any previous HTTP compression settings.

To verify application/json MIME type compression:

- 1 Open **IIS Manager**.
- 2 In the left Navigation pane, click on your server.
- 3 In the Management section, double-click the **Configuration Editor**.



The Configuration Editor opens.

4 From the Section drop-down list, select **system.webServer > httpCompression**.

Configuration Editor		Actions
Section: appSettings	•	B/ Apply B _K Cancel
V Dee 🖨 🧰 system webServer	^	Generate Script
(Col e- b tracing file e webday	nt=0)	Configuration Search Configuration
-/ applicationInitialization -/ asp		Section Cock Section
- / cgi - / defaultDocument		'(Collection)' Element
/ directoryBrowse / fastCgi		Edit Items
globalModules // handlers // handlers // httpCompression // httpErrors // httpErrors // httpProtocol // httpProtocol // httpPracing // isapifilters // modules		Help
(Collect / odbcLogging / serverRuntime / serverSideInclude		

5 In the httpCompression section, click **dynamicTypes**.

Configuration Editor			R Apply
ction: system.webServer/httpCompression	•		Bx Cancel
Deepest Path: MACHINE/WEBROOT/APPHOS	T	^	denerate Script
(Collection)	(Count=1)	- 111	Configuration
cacheControlHeader	max-age=86400	- 11 1	Search Configuration
directory	%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files	- 11	e
doDiskSpaceLimiting	True	- 11 1	Section
dynamicCompressionBufferLimit	65536		Lock Section
dynamicCompressionDisableCpuUsage	90	- 11 1	'dynamicTypes' Element
dynamicCompressionEnableCpuUsage	50		
dynamicTypes	(Count≃5)		Lock Element
expiresHeader	Wed, 01 Jan 1997 12:00:00 GMT	_	× Remove
maxDiskSpaceUsage	100		Edit Items
minFileSizeForComp	2700		Help
noCompressionForHttp10	True	- 11	- Hop
noCompressionForProxies	True		
noCompressionForRange	True		
sendCacheHeaders	False	- 11	
staticCompressionDisableCpuUsage	100		
staticCompressionEnableCpuUsage	50	-	
shall of a second second the factor of the	False		

6 Verify that **application/json** is listed in the dynamic compression mime types. If it is not listed, click the **Add** button in the Collection section to add it.

1					A 20.
Items				Actions:	
mimeType text/* message/* application/x-iavascript	enabled True True True	Entry Path MACHINE-WEBROOT/APPHOST MACHINE-WEBROOT/APPHOST MACHINE-WEBROOT/APPHOST		Collection Add Clear All	8
application/javascript	True	MACHINE/WEBROOT/APPHOST		Item Properties	8
/ application/json	False True	MACHINE/WEBROOT/APPHOST		Lock Item Kernove	
<			>	Help Online Help	
Properties:					
enabled mimeType		* True † application/jon			
enabled Data Type:bool					

 After you completed your verification or addition, click the Close button The Configuration Editor opens.

etion: system.webServer/httpCompression	•		U The change successfull	ts have been y saved.	1
Deepest Path: MACHINE/WEBROOT/APPHOST		^	Actions		
(Collection)	(Count=1)		By Apply		
cacheControlHeader	max-age=86400		B _K Cancel		
directory	%SystemDrive%\inetpub\temp\IIS Temporary Compressed Files		A Concerto Co	al al a	-
doDiskSpaceLimiting	True		of Generate of	npt	-
dynamicCompressionBufferLimit 65536			Configurati	ration	
dynamicCompressionDisableCpuUsage	90		Search Con	figuration	
dynamicCompressionEnableCpuUsage	50		Section		
dynamicTypes	(Count=6)		Lock Section		
expiresHeader	Wed, 01 Jan 1997 12:00:00 GMT		LOCK Sectio		
maxDiskSpaceUsage	100		'dynamicTypes'	Element	
minFileSizeForComp	2700		Lock Eleme	nt	
noCompressionForHttp10	True 3		× Remove		
noCompressionForProxies					
noCompressionForRange	True		Edit Items		
sendCacheHeaders False staticCompressionDisableCpuUsage 100 staticCompressionEnableCpuUsage 50		😧 Help			
staticCompressionIgnoreHitFrequency	False	~			
namicTypes					

- 8 Click **Apply** to apply your changes.
- **9** Verify that dynamicTypes lists a count of six.
- **10** Close the editor.

Enabling IIS Services

You will now need to verify that several IIS services are enabled.

To verify IIS services are enabled:

1 If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.

The Server Manager opens.

- 2 In the Navigation pane, select **IIS**.
- **3** Scroll down to the Services section.
- 4 In the Services pane, verify that the following services are enabled and running:
 - World Wide Web Publishing Service
 - Web Management Service
 - Application Host Helper Service
 - Windows Process Activation Service
- **5** If any of these window services are not running, start the services.

To start a service, select the service from the list and click **Start** in the right menu. You can also start services by going to **Administrative Tools > Services** on your machine.

Configuring HTTPS on Your Application Server

Complete the following tasks to configure HTTPS on your application server:

- Request an SSL Certificate from your IT department.
- Add the certificate to IIS.
- Add new binding to port 443.
- Verify your SSL Settings on your application server.



Chapter 2

Installing Worksoft Infrastructure Services

In This Chapter

Verifying System Requirements	19
Installing Worksoft Infrastructure Services	19
Using Windows Authorization	23

Verifying System Requirements

Before you begin to install Worksoft Infrastructure Services, verify that your environment has the needed system requirements installed for the Worksoft Portal and Authorization service. For information about system requirements, see the Worksoft Help Portal.

Installing Worksoft Infrastructure Services

After you have configure your application server, you are now ready to install Worksoft Infrastructure Services on your server.

- **To install Worksoft Infrastructure Services:**
- 1 In the software distribution folder, right-click the **Worksoft Infrastructure Services (version).exe** file and select **Run as administrator**.

The Worksoft Infrastructure Services Install Wizard opens.



2 Click **Next** to begin the installation process.

The Portal and Services Versions Install page opens.



This screen lists the products and services included in the installer.

3 Click Next.



4 Select the features and services that you want to install.

By default, all features and services will be installed.

If you do not want one of the services installed, click the drop-down arrow next to that feature and select **Entire feature will be unavailable**.

When you select a product or service, a description appears under the list.

5 After you have made your selection, click **Next**.

The Destination Folder page opens.

C Worksoft Infrastructure Services Installation	n				×
Destination Folder					
Worksoft Infrastructure Services Installati below.	on will be installed	l inside the folder	displaye	d	
and the second second	and the fact	- Martine			
An 38	vailable Disk Spa 3,190 MB	ace:			5
C:\Program Files (x86)\Worksoft					
SOS (C:)					~
 Program Files (x86) ProgramData Python39 Tomo 					
Users Windows					~
	< <u>B</u> ack	<u>N</u> ext>		Cancel	

6 If you want to accept the default directory for your installation files, click **Next**.

If you do not want to accept the default directory for the installation files, select a different installation directory and click **Next**.

The Worksoft Services Web Site page opens.

G Worksoft Infra	astructure Services Installation	-		×
Worksof	t Infrastructure Services Install	ation		
	Please select the Web site to install selected Worksoft Serv	ices.		
-	Default Web Site	v		
Contractor of the second			172020	
2 Carlos	and a second		i alm	
	< Bark	ate	Cance	10
	(590Y []]6		Cance	

- 7 If you want to accept Default Web Site as your website, click **Next**.
- **8** If you have other websites configured in the IIS, select the server from the drop-down list and click **Next**.

The Base URL page opens.



The Worksoft Services Base URL value in this field will be used to construct URLs for all the products that you selected to install.

9 Enter the Base URL where you want to install Worksoft Services. The Base URL can not be a localhost.

By default, the URL address is populated as http://<servername>. You will need to change it to https for secure authentication.

10 Click Next.

The Ready to Install page opens.



11 Click **Install** to begin the installation.

After the installation completes, the Installation Result page opens.



12 Click Finish.

Using Windows Authorization

If you want to use Windows authorization for Worksoft Infrastructure Services, you must do some additional configuration.

To configure Windows authorization, complete the following:

- Enable Windows Authentication in IIS
- Configure application pool setting
- Configure SQL Server access
- To enable Windows Authentication in IIS
- From the Start menu, select Control Panel > Programs and Features.
 The Programs and Features window opens.
- 2 Click **Turn Windows features on or off**. The Windows Features dialog box opens.
- 3 In the Features list, expand Internet Information Services > World Wide Web Services.
- 4 Select Add Roles and Features.

The Add Roles and Features Wizard opens.

5 Click **Next** until come to the **Server Roles** page.



- 6 Expand the **Web Server IIS** role.
- 7 Under Security, select the **Windows Authentication** option.
- 8 Click **Next** until the Install option is enabled.
- **9** Click **Install** to complete the configuration.
- **10** Open the **IIS Manager**.
- **11** Click **Authentication**.



12 Enable Windows Authentication and disable all other Authentications.

Group by: No Grouping +		
Name	Status	Response Type
Active Directory Client Certificate	Disabled	HTTP 401 Challenge
Anonymous Authentication	Enabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Digest Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

- **•** To create a custom account application pool setting:
- **1** Select **Application Pools > Portal**.
- 2 In the Edit Application Pool section, select **Advanced Settings**.
- **3** Select **Identity** from the list.

The Application Pool Identity dialog box opens.

Application Pool Identity		? ×
O Built-in account:		
		4
Custom account:		
Worksoft0\CertifyTester1		Set
	OK	Cancel

- 4 Select **Custom account**.
- 5 Click Set.

The Set Credentials dialog box opens.

- **6** Enter the Service account user name and password.
 - The user needs to have database credentials.
- 7 Click OK.
- 8 In the Set Credentials dialog box, click **OK**.
- **9** In the Advanced Settings dialog box, click **OK**.

To configure SQL Server access:

Your database administrator will need to add the Service account to Logins under Security in order to provide access to the databases.

Appendix A Worksoft Infrastructure Services Silent Installation

Silent Install

Install all products and services on default path C:\Program Files (x86)\Worksoft:

<installerPath>\Worksoft Infrastructure Services.exe /s

Install in non-default path:

<installerPath>\Worksoft Infrastructure Services.exe /s targetdir="C:\temp\Worksoft"

All products and services install in their individual folders in the C:\temp\worksoft folder.

Parameters for Products and Services

As when you are installing Worksoft Infrastructure Services with the install wizard, all components are selected for installation unless the parameter value is set to **false**.

Example:

<installerPath>\Worksoft Infrastructure Services.exe /s CDS=false Cryptography=false ResultsViewer=false

Product or Service	Parameter
Authentication service	Auth
Worksoft Portal	Portal
Cryptography service	Cryptography
Certify Results Viewer	ResultsViewer
Bookmark service	Bookmark
Scheduler service	Scheduler
Capture Documentation service	CDS

Examples

To install only the Worksoft Authorization service and the Worksoft Portal on the D drive under Worksoft folder:

<installerPath>\Worksoft Infrastructure Services.exe /s targetdir="D:\Worksoft" CDS=false Cryptography=false ResultsViewer=false

To install all products and services under a non-default website on the D drive:

```
<installerPath>\Worksoft Infrastructure Services.exe /s PortalSuiteWebsite=test targetdir="D:\Worksoft"
```

Installation Log File

The default installation log is located at **%userprofile%** of the user who installed Worksoft Infrastructure Services.

```
<installerPath>\Worksoft Infrastructure Services.exe /s /l=C:\temp\myInstalllog.txt
```

Silent Uninstall

To uninstall Worksoft Infrastructure Services silently, run the installer from the command line and enter the following string:

Worksoft Infrastructure Services.exe/s MODIFY=FALSE REMOVE=TRUE UNINSTALL=YES

Non-default Website

A non-default web site where they plan to install Worksoft products needs to exist prior to installation. Installer does not create the website.

<installerPath>\Worksoft Infrastructure Services.exe /s PortalSuiteWebsite=test