

# **Worksoft Infrastructure Services Installation Guide**

# Worksoft Infrastructure Services Installation Guide

## Version 14.6

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# Chapter 1      Preparing Your System for Worksoft Infrastructure Services

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## Overview

The Worksoft Infrastructure Services installs the following products and services:

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: <ul style="list-style-type: none"> <li>• Database settings</li> <li>• Licenses</li> <li>• Users</li> <li>• Email SMTP settings</li> <li>• Tenants</li> <li>• Integrations</li> </ul>
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.

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.

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## System Requirements

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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](#).

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## Configuring Your Application Server

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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 11](#) have been selected.

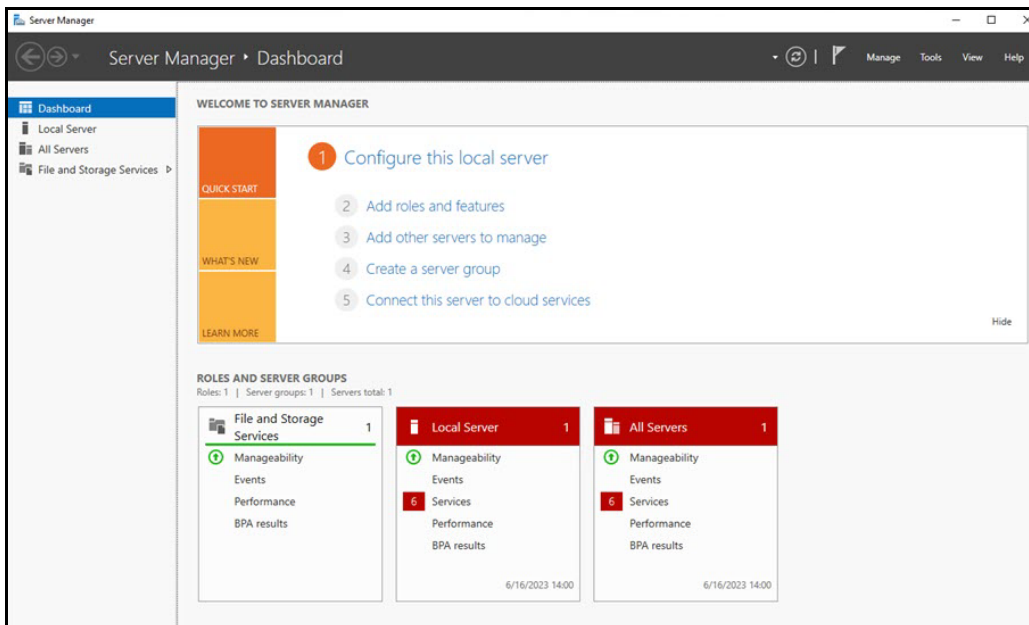
### Adding Roles and Features

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:**

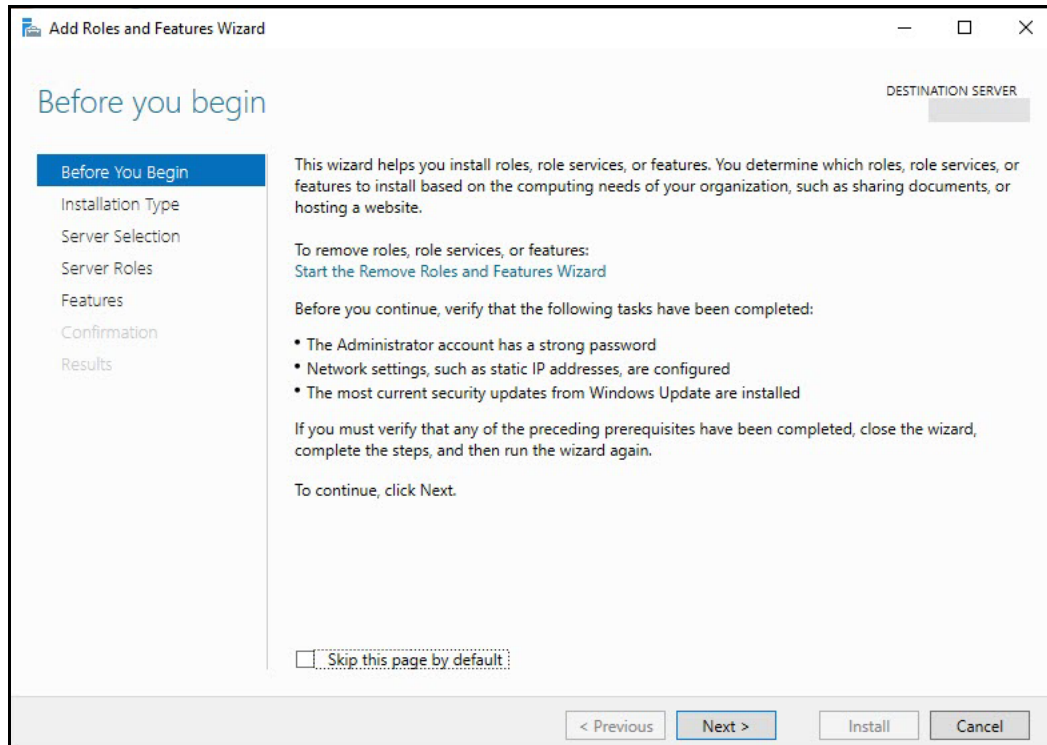
- 1 From the Start menu, select **Server Manager**.

The Server Manager opens.



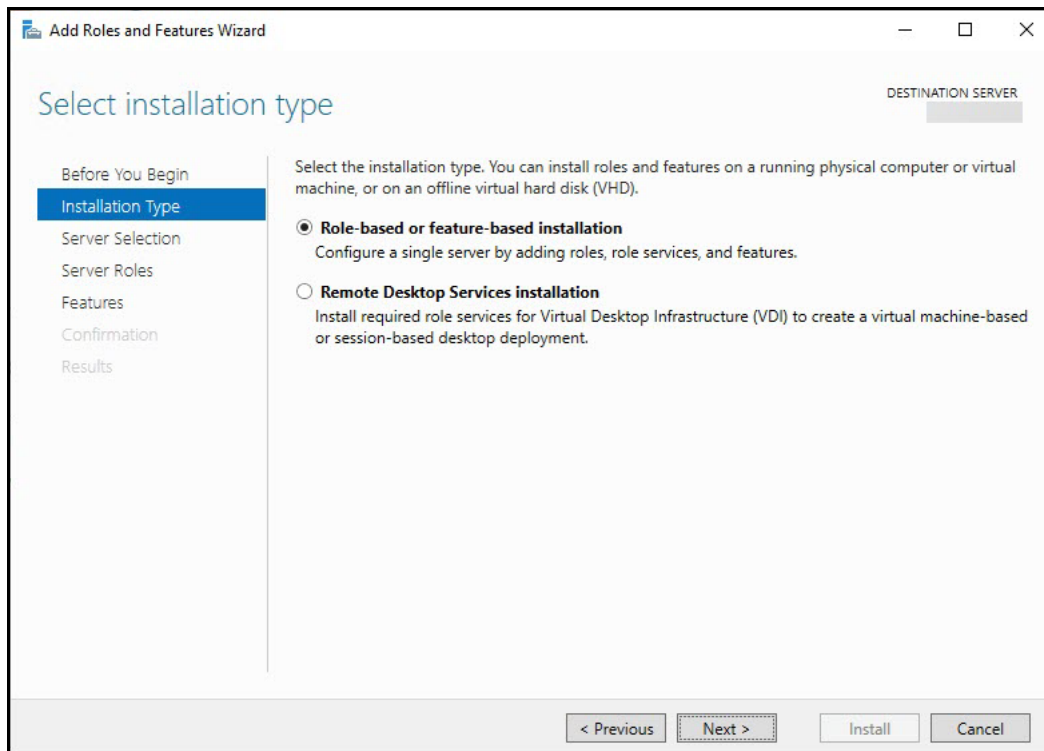
- 2 In the Navigation pane, select **Dashboard**.
- 3 In the Summary Tasks pane, select **Add Roles and Features**.

The Add Roles and Features Wizard opens.



4 Click **Next**.

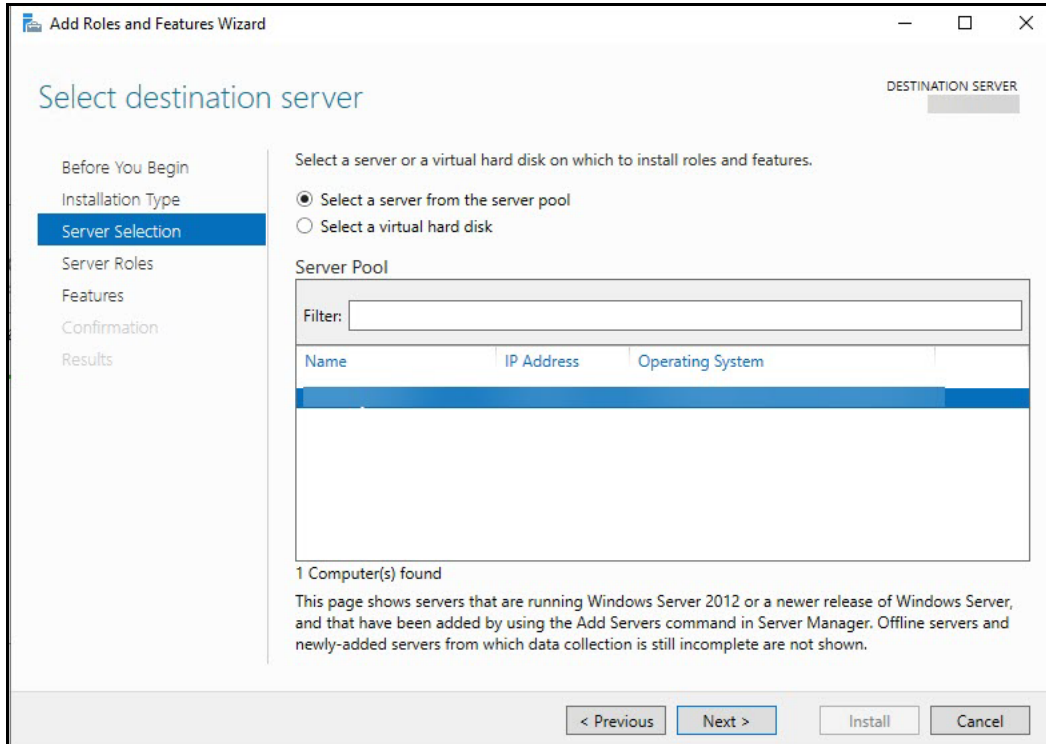
The Select Installation Type page opens.



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

6 Click **Next**.

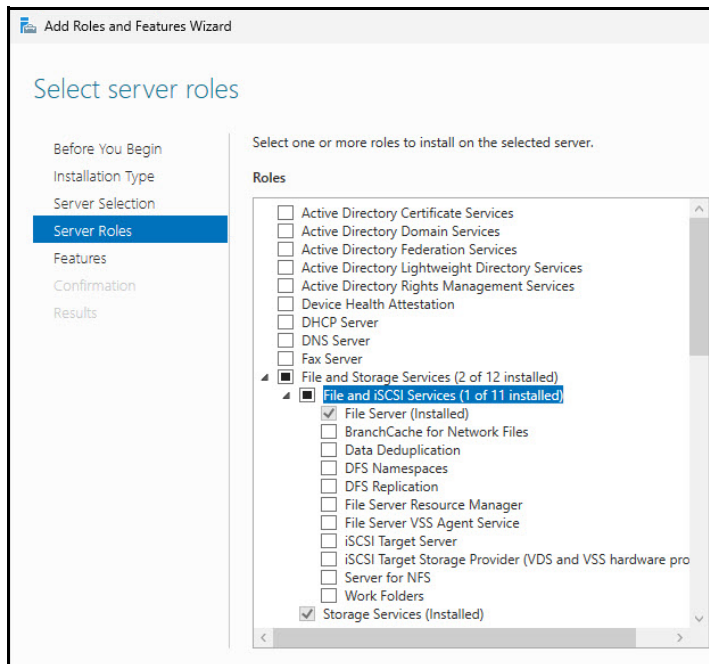
The Select Destination Server page opens.



7 Select a server.

8 Click **Next**.

The Select Server Roles page opens.

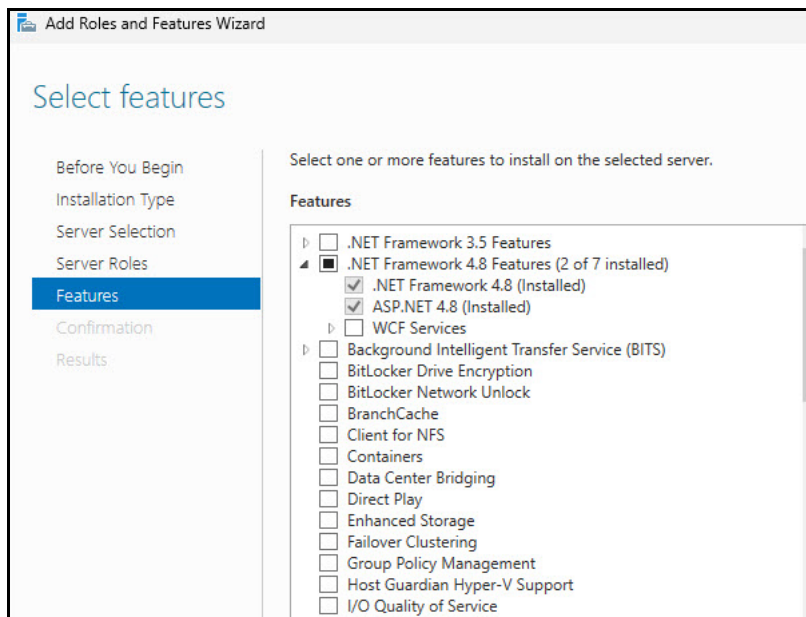


- 9 From the Server Roles list, select the following roles under the specified section:

Section	Roles
File and Storage Services	<ul style="list-style-type: none"> <li>• <b>File Server (Installed)</b></li> <li>• <b>Storage Services (Installed)</b></li> </ul>
Web Server (IIS) > Web Server	<p>Expand the <b>Common HTTP Features</b> section and select the following options:</p> <ul style="list-style-type: none"> <li>• <b>Default Document</b></li> <li>• <b>HTTP Errors</b></li> <li>• <b>Static Content</b></li> </ul> <p>Expand the <b>Health and Diagnostics</b> section and select the following options:</p> <ul style="list-style-type: none"> <li>• <b>HTTP Logging</b></li> <li>• <b>Request Monitor</b></li> </ul> <p>Select the <b>Performance</b> section and verify these two options are chosen:</p> <ul style="list-style-type: none"> <li>• <b>Static Content Compression</b></li> <li>• <b>Dynamic Content Compression</b></li> </ul> <p>Expand the <b>Security</b> section and select the <b>Request Filtering</b> option.</p> <p>Expand the <b>Application Development</b> section and select following options:</p> <ul style="list-style-type: none"> <li>• <b>.Net Extensibility 4.8</b></li> <li>• <b>ASP .Net 4.8</b></li> <li>• <b>ISAPI Extensions</b></li> <li>• <b>ISAPI Filters</b></li> <li>• <b>WebSocket Protocol</b></li> </ul>
Management Tools	<ul style="list-style-type: none"> <li>• <b>IIS Management</b></li> <li>• <b>ISI Management Scripts and Tools</b></li> </ul>

- 10 Click **Next**.

The Select Features page opens.

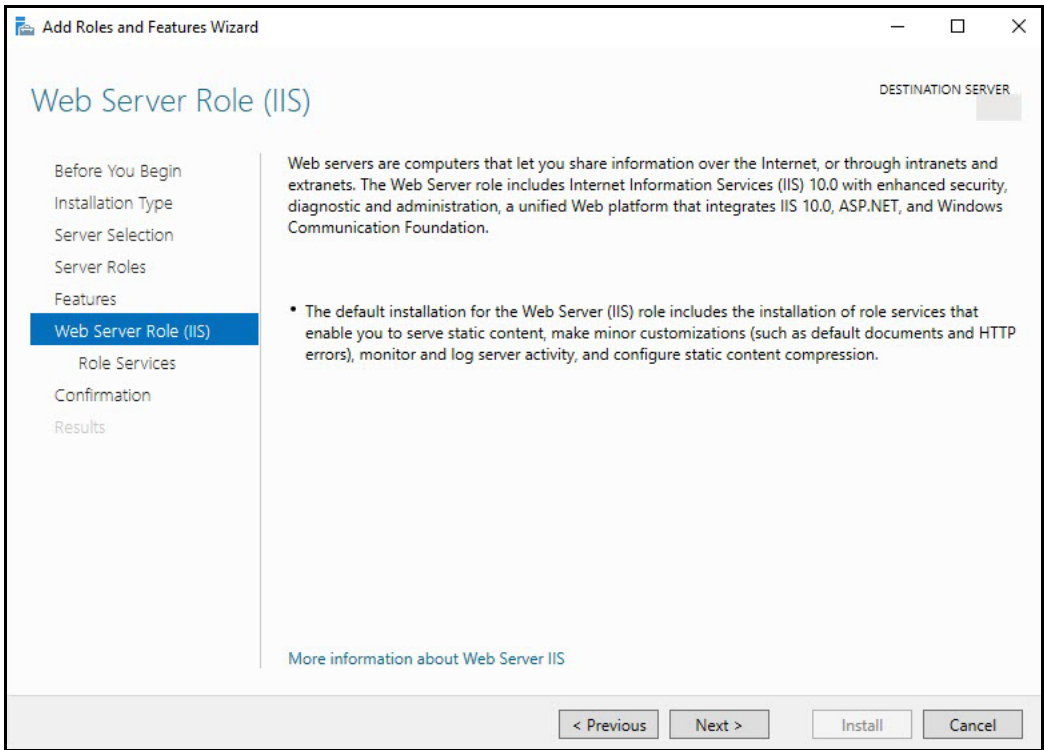


- 11 Expand the **.NET Framework 4.8 Features** section and select the following features:
  - **.NET Framework 4.8**
  - **ASP.NET 4.8**
- 12 Select the following features:
  - **IIS Hostable Web Core**
  - **Microsoft Defender Antivirus**
  - **System Data Archiver**
  - **Windows Admin Center Setup**
- 13 Expand the **Windows PowerShell** section and select the **Windows PowerShell 5.1** option.
- 14 Expand the **Windows Process Activation Service** section and select the following features:
  - **Process Model**
  - **Configuration APIs**
- 15 Select the following features:
  - **Wireless Lan Service**
  - **Wow64 Support**
  - **XPS Viewer**
- 16 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

Node	Child Nodes
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.

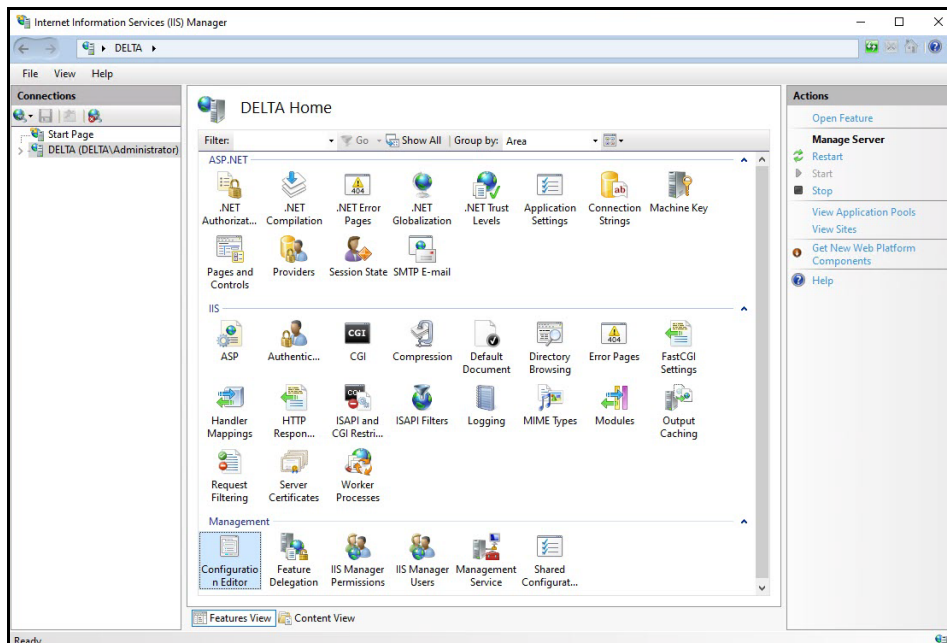
## Configuring Application/Json MIME Type Compression

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.

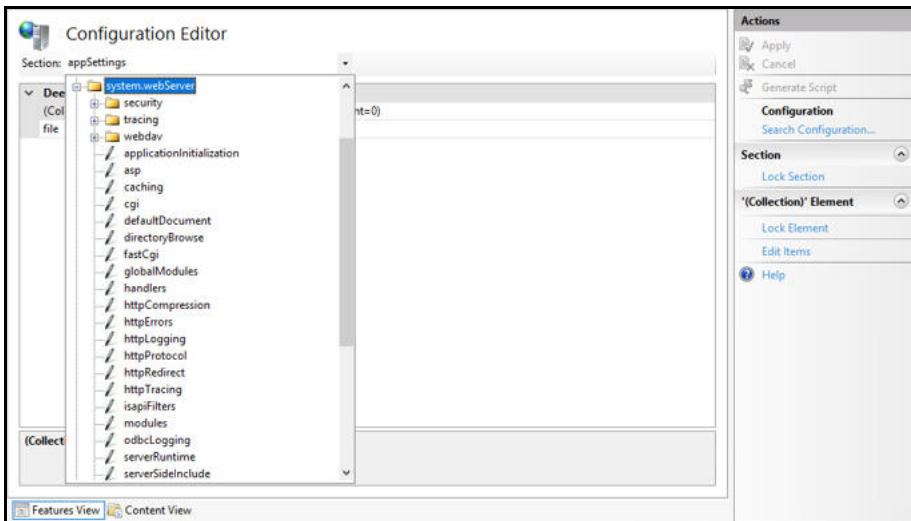
### ► To verify application/json MIME type compression:

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

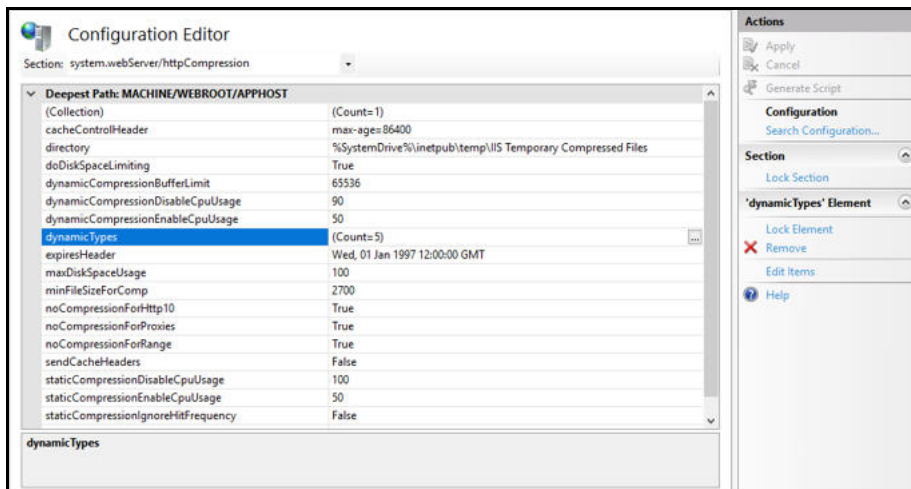


The Configuration Editor opens.

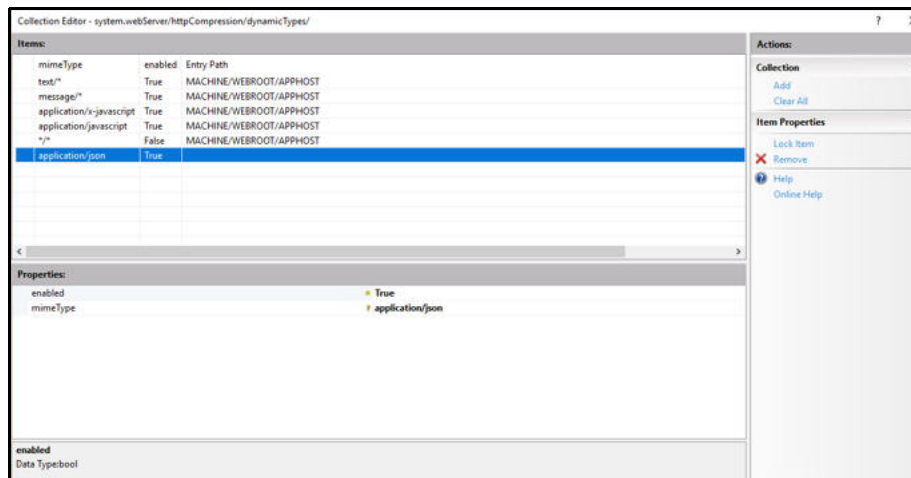
- 4 From the Section drop-down list, select **system.webServer > httpCompression**.



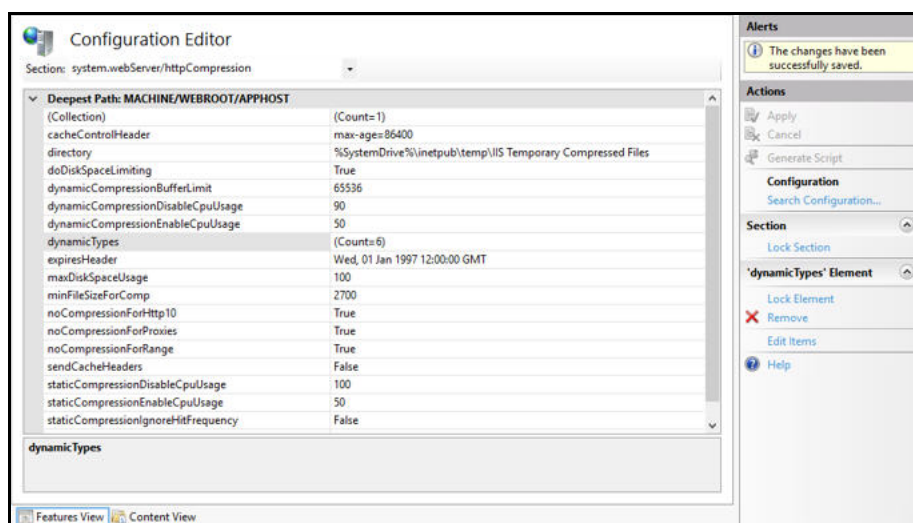
- 5 In the httpCompression section, click **dynamicTypes**.



- 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.



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



- 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:

- If the Server Manager is not open, select **Administrative Tools > Server Manager** from the Start menu.  
The Server Manager opens.
- In the Navigation pane, select **IIS**.
- Scroll down to the Services section.
- 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**
- 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.

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## **Configuring HTTPS on Your Application Server**

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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

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## Verifying System Requirements

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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](#).

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## Installing Worksoft Infrastructure Services

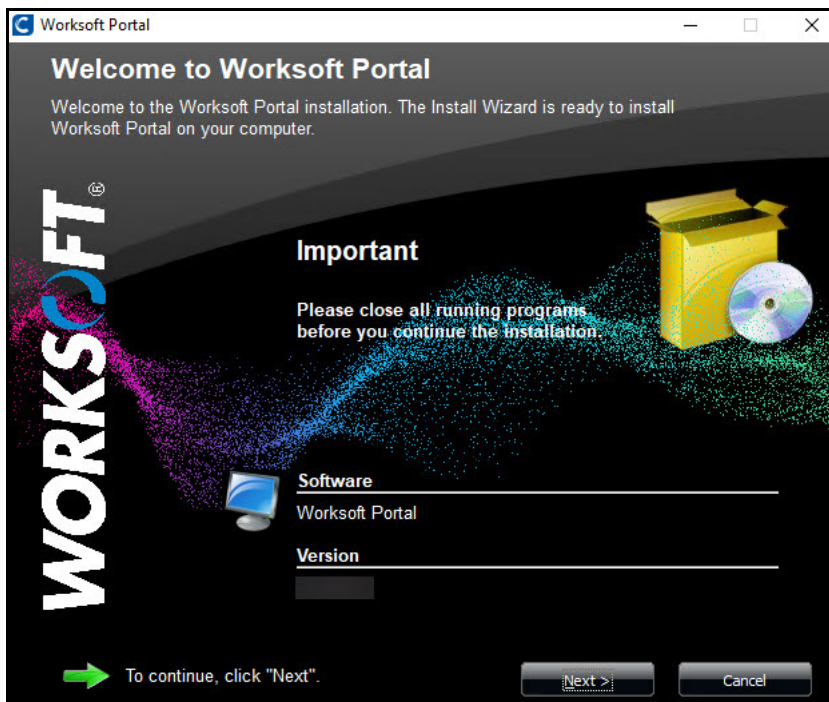
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After you have configured your application server, you are now ready to install Worksoft Infrastructure Services on your server.

► **To install Worksoft Infrastructure Services:**

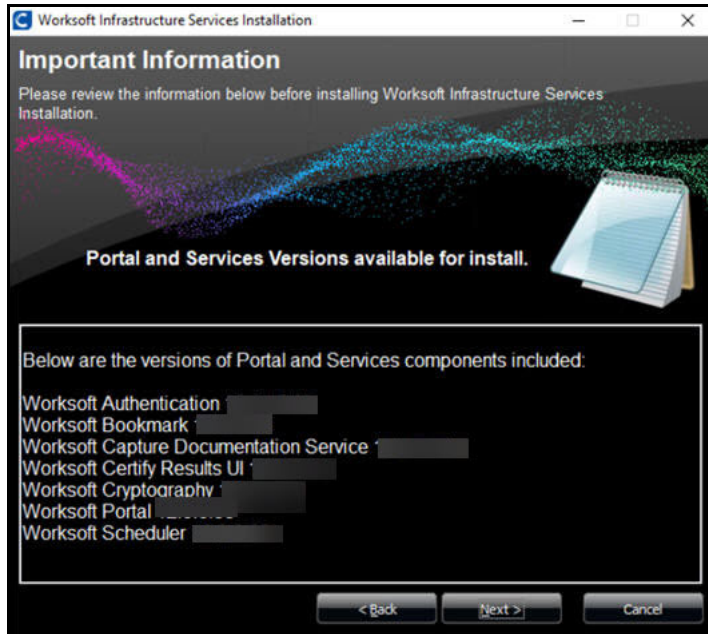
- 1 In the software distribution folder, right-click the **Worksoft Infrastructure Services (version).exe** file and select **Run as administrator**.

The Worksoft Infrastructure Services Install Wizard opens.



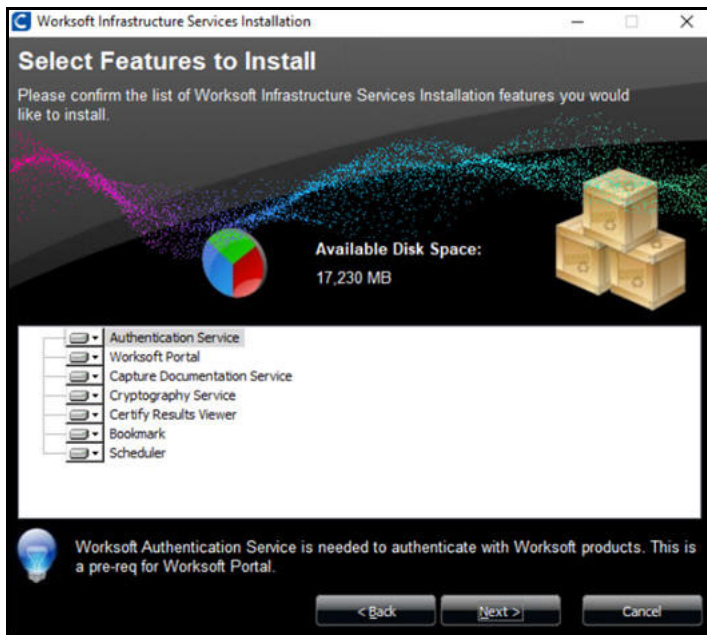
- 2 Click **Next** to begin the installation process.

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.

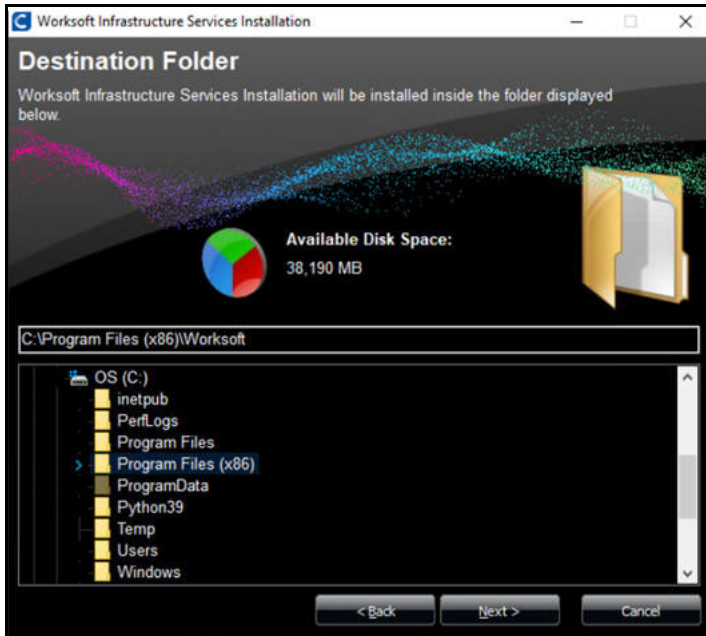
By default, all features and services will be installed.

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**.

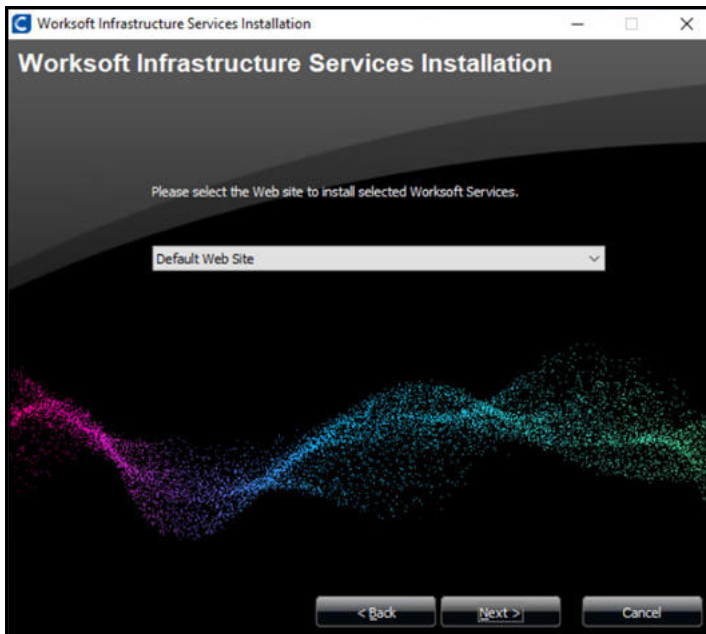
The Destination Folder page opens.



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**.

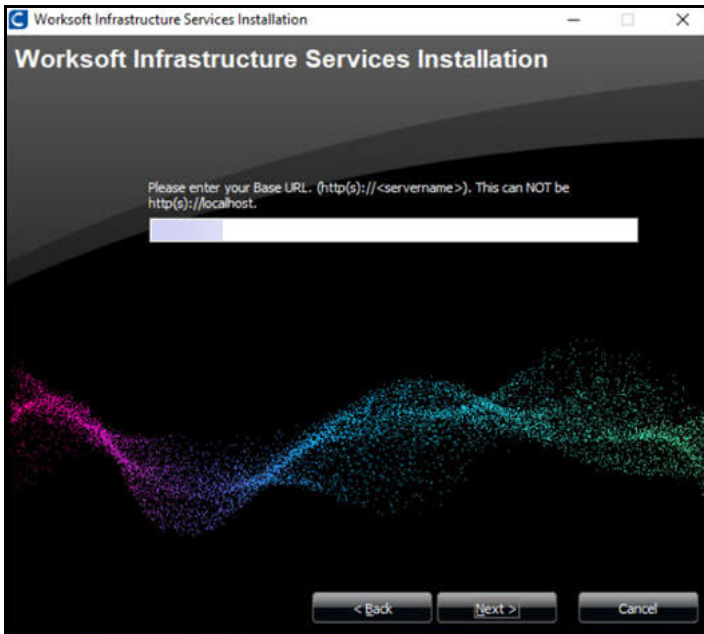
The Worksoft Services Web Site page opens.



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**.

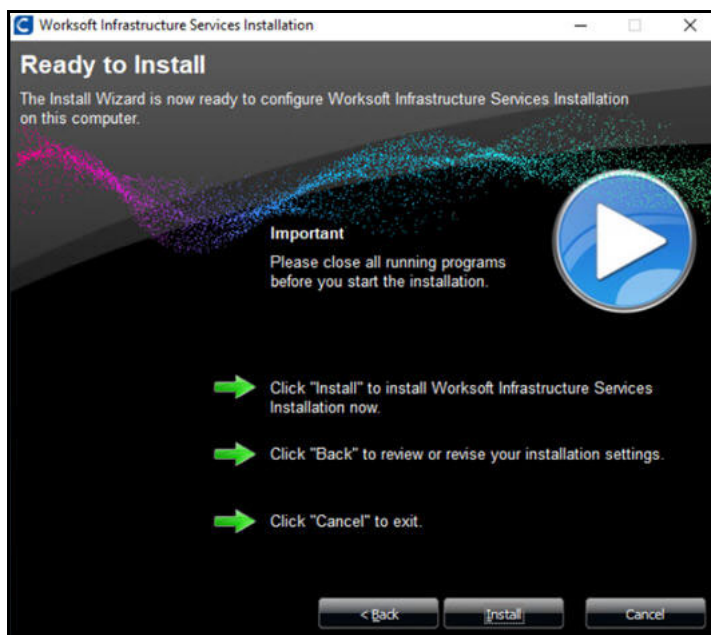
The Base URL page opens.



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

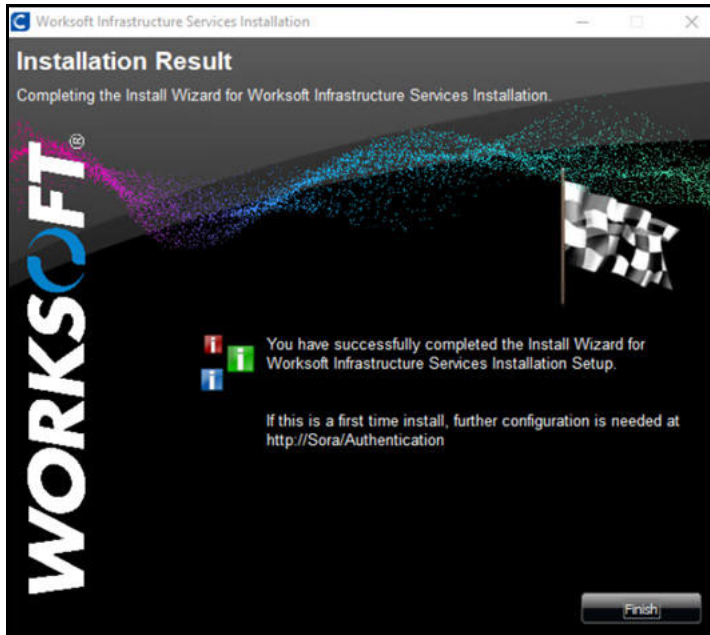
- 9 Enter the Base URL where you want to install Worksoft Services. The Base URL can not be a localhost. By default, the URL address is populated as `http://<servername>`. You will need to change it to `https` for secure authentication.
- 10 Click **Next**.

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**.

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## Using Windows Authorization

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

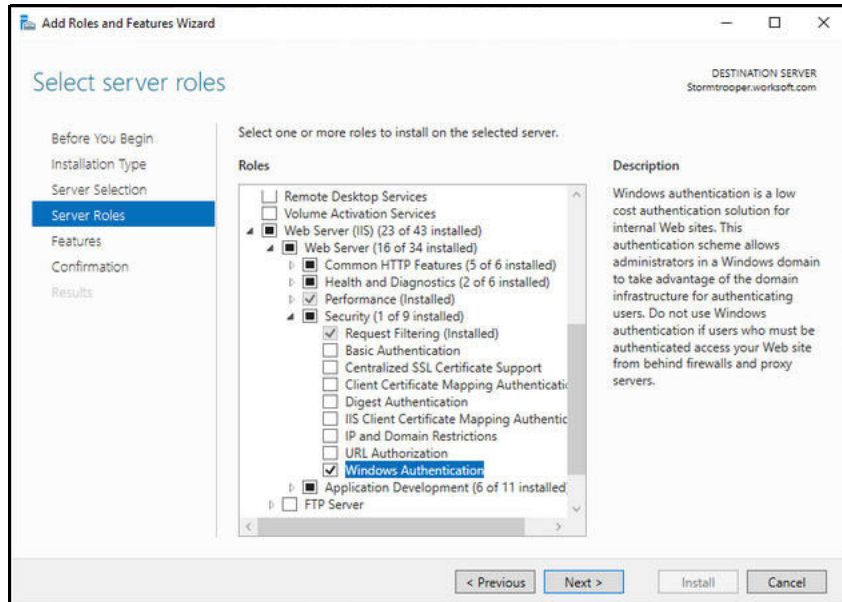
To configure Windows authorization, complete the following:

- ◆ Enable Windows Authentication in IIS
- ◆ Configure application pool setting
- ◆ Configure SQL Server access

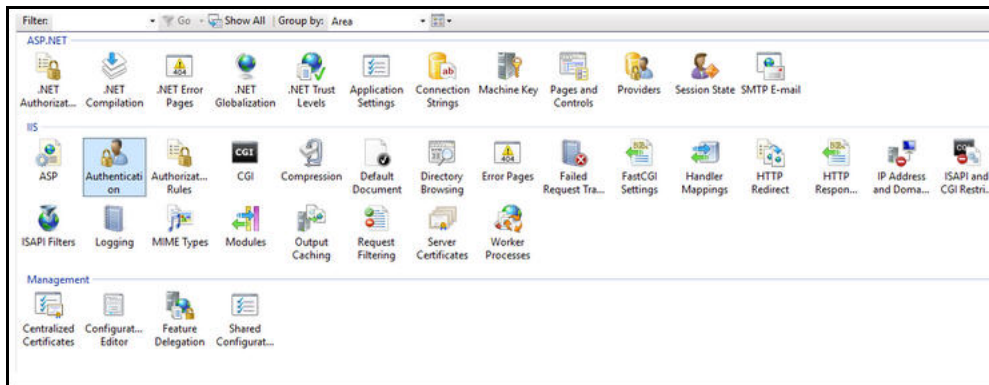
▶ **To enable Windows Authentication in IIS**

- 1 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.

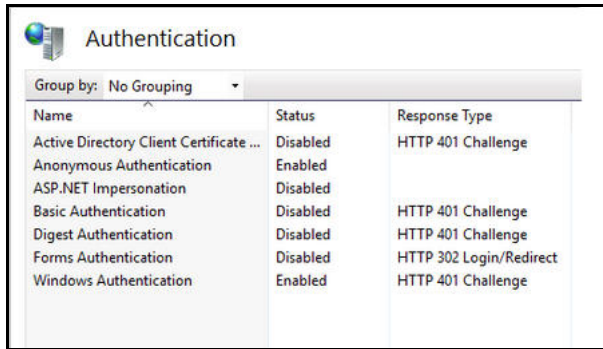
- 5 Click **Next** until come to the **Server Roles** page.



- 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**.



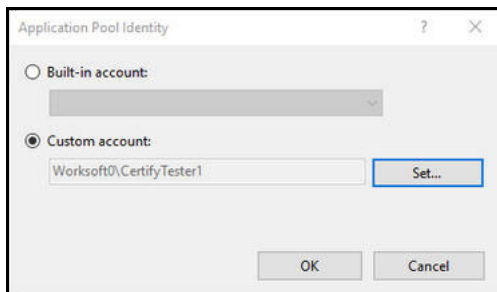
- 12 Enable **Windows Authentication** and disable all other Authentications.



► **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.



- 4 Select **Custom account**.
- 5 Click **Set**.
- 6 Enter the Service account user name and password.
- 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
```