



GoPlant Enterprise Edition Installation







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Conventions Used in this Manual

Click: Position the mouse over an item and press the mouse button.

Link, Hyperlink: Text displayed on your browser that will display a new GoPlant screen when you click on it. Links are usually displayed in blue, with an underline.

Hierarchy: GoPlant organizes resources into a "tree" whose branches and sub-branches (possibly many levels of sub-branches) are known as Storage groups. The resource "tree" is usually envisioned upside-down, with the trunk of the tree (the root group) at the top.

Screen, Page, Web Page: A screen displayed in your Web browser.

Select: Use the mouse to highlight an item or choose from a list of items.





Enterprise Edition Installation Prerequisites:

The server or virtual machine that will run the GoPlant application must meet the requirements outlined in a separate document – GoPlant Enterprise Requirements. Installation options allow you to host the GoPlant web site and database on one server or two.

Enterprise Edition Network Layout:

GoPlant supports access from desktop browsers and mobile clients across both public and private networks. Examples of public networks include the Internet and cellular data networks. While installation options allow you to host the GoPlant web site and database on one server, we recommend a two-server installation to optimize database performance.

Only ports 80, 443 (for secure https://), and 1433 for the SQL database connection are required to be open on the web server. If a non-standard port is used on the SQL server for database connectivity this should be updated appropriately. The web site may also be used on a non-standard port if required, but the port identification will need to be added to the URL settings on the device upon Mobile Application installation. The IIS server is the only item that talks with the GoPlant database. Mobile devices and web browsers never attach to the SQL server directly.

A single database user may be configured for the IIS server to access the SQL database. This may also be a Domain account if AD is being used for authentication.



Note: GoPlant may be installed on one server computer

NOTE: Two servers are shown as the typical installation. GoPlant may also be installed on one server adequately sized to handle both the Database and IIS server.





Pre-installation Information:

GoPlant Installation and Configuration Pre-Installation Checklist

To set up a GoPlant system, you will need to perform the following steps:

- 1. Obtain the GoPlant software. Place the files in an easily accessible location by both the IIS server and SQL server.
- If you have not done so already, install Microsoft SQL Server on the Database server machine.
 Please refer to the Microsoft installation information to ensure proper installation. The Database server may or may not be different from the Web server.
- Install or configure the Database server or another server with Internet Information Services (IIS).
 Please refer to the Microsoft installation information to ensure proper installation.
- 4. Have your GoPlant Serial Number handy. This information will be in the USB drive shipped to you or the License certificate. The Serial Number is used to create a Key Code that is sent to <u>goplant.techsupport@skf.com</u> to generate a License Key specific to your servers.

MS SQL Database Installation Required Settings

- 1. MS SQL database should be set up with Mixed Authentication mode if you plan on using SQL authentication for database access.
- SQL server installation: Server Configuration Collation Database Engine Collation page should be set to "SQL_Latin1_General_CP1_CI_AS". This is the North American installation default and cannot be changed.
- 3. MS SQL networking TCP/IP protocol connections turned on via 1433 or other designated port. TCP/IP protocol connection is used for IIS server to connect to the MS SQL GoPlant database.

Microsoft IIS Server Installation Required Settings

- 1. Components required in the Web Server (IIS) Roles and Features Wizard (must be checked and installed):
 - a. Web Server Common HTTP Features HTTP Redirection
 - b. Web Server Performance Dynamic Content Compression





- c. Web Server Security Basic Authentication
- d. Web Server Security URL Authentication
- e. Web Server Security Windows Authentication
- f. Application Development .NET Extensibility 4.8 or greater
- g. Application Development ASP.NET 4.8 or greater
- h. Application Development ISAPI Extensions
- i. Application Development ISAPI Filters
- 2. ASP.NET 4.8 or greater must be registered and available to IIS installations.
- 3. The GoPlant configuration will add the ExtensionlessUrlHandler-Integrated-4.0 to the Handler Mappings. This cannot be blocked by a system IIS setting.
- 4. If IIS Request filtering is enabled, then the following HTTP Verbs must be allowed: GET, POST, DELETE, and OPTIONS.
- 5. CORS must be enabled or installed on the IIS server.
- 6. The GoPlant website API must have the following settings for HTTP Response Headers. The values and items listed are defaults but cannot be changed by local security policy or IIS settings:
 - a. Access-Control-Allow-Methods values GET, PUT, POST, DELETE, HEAD, OPTIONS inherited Local.
 - b. Access-Control-Allow-Origin value * inherited Local.
 - c. Access-Control-Allow-Headers values Origin, X-Requested-With, Content-Type, Accept, UUID inherited Local.





Database Installation Procedure:

- 1. Log into the database server machine as a Windows Administrator (see Chapter 1, *Installing GoPlant*).
- 2. Open Microsoft SQL Server Management Studio and login with an account that has permissions to own and create databases.
- 3. These instructions include creating a GoPlant login account on SQL for use by the IIS web site and the Jaspersoft reporting server. If you are using a Domain or other security account, then creating this username is unnecessary. However, it will be important to substitute your user account for all "GoPlant" user account use in this documentation.
- 4. Expand the Security Folder and Right-Click on the "Logins" folder. Choose 'New Login...'







5. Enter 'GoPlant' for the Login Name. Choose the SQL Server Authentication radio button. Uncheck all three boxes for the Password settings as shown:

Login - New			—		×
Select a page	🖵 Script 🔻 😮 Help				
 Server Roles User Mapping Securables Status 	Login name: Vindows authentication SQL Server authentication Password: Confirm password: Specify old password Old password: Enforce password expiration User must change password	GoPlant tion word at next login		Sea	arch
a c	O				

- 5. Enter the password "P@ssw0rd" for this user. If you wish to use a different password (not this default), please update it and note for later use throughout the instruction.
- 6. Click the 'OK' button to accept the new user. If your security settings do not allow the SQL Server user login rights, then use a Domain account or another account that may be used for IIS server connection to the database. In the rest of these instructions, use that username instead of 'GoPlant' user.





7. Right-click on the 'Databases' folder and select "New Database...".



8. Enter the Database name - GoPlant. Leave the defaults for all other settings unless instructed by a database administrator or IT person.

Select a page Ø General	🖵 Script 🔻	Help					
 Options Filegroups 	Database nar	ne:	GoPlant				
	Owner:		<default></default>				
	✓ Use full-te	xt indexing					
	 ✓ Use full-te Database file 	s:	Filogroup	Initial Sizo	Autogrowth	/ Mayoi	70
	Database file:	st indexing s: File T	Filegroup	Initial Size	Autogrowth	/ Maxsiz	ze
	Database file: Logical GoPlant	xt indexing s: File T ROW	Filegroup PRIMARY	Initial Size 8	Autogrowth By 64 MB, U	/ Maxsiz	ze

- 9. Click on the OK button to create the database.
- 10. Locate the new GoPlant database in the navigation pane on the left-hand side.
- 11. Right-click on the database and choose "New Query". This will select the proper database and prepare for loading the GoPlant SQL file scripts.





12. From the menu choose the open folder icon. Locate and open the GoPlant database initialization

script, GoPlant DB Initialize.sql, in the installation folder.



13. Run the database initialization script with the 'Execute' button in the menu.



Note that if you are using a database Login Name other than GoPlant, this script may report errors around configuring the GoPlant user. Those errors may safely be ignored.

14. From the menu choose the open folder icon. Locate and open the GoPlant database update script, GoPlant DB Update Version XXXX.Y.sql, in the installation folder.



15. Run the database update script with the 'Execute' button in the menu.



16. NOTE: YOU MUST RUN THE SCRIPTS IN THE PROPER ORDER. If you do not, please DELETE the database and start again.





17. This completes the database set up. Please continue to the "Web Site Installation Procedure"





Web Site Installation Procedure:

- 1. Log into the GoPlant IIS Web server with account that has permissions to modify the web site files as well as start/stop the Microsoft IIS server instance.
- Locate the C:\inetpub and create a new folder named "GoPlant" for the web site folder. Note that
 this folder may be located anywhere that the IIS server has security permissions according to your
 company policy. If this default location is not used, please adjust the instructions accordingly and
 document your installation changes to this manual.
- 3. Locate the 'GoPlant Website' folder in the installation files and copy the zip file to a location where it can be unzipped.
- 4. Once unzipped, copy all the web site sub folders and files into the C:\inetpub\GoPlant web site folder.
- 5. Within the web site folder, locate the API sub folder and the ..\API\web.config file.
- Locate the <connectionStrings> section of the new web.config XML file. Your original premise installation contains specific Data Source, Initial Catalog, User ID, and Password data. These four (4) data items need to be updated in the new file with the same values from your original file.
- The new web.config XML file contains placeholder values to aid in text replacement.
 DATASOURCE can be used in a find and replace command (<ctrl> h keyboard shortcut in NotePad) to find and replace with the original data source value from the original web.config file.
- 8. Values to replace are: **DATASOURCE**, **DATABASENAME**, **USERID**, **PASSWORD**
- 9. The values in step #8 are all capitals with two "**" at the beginning and the end to avoid confusion with any other strings in the web.config file. The "**" should be replaced as well replace the entire "**XXXXXXXX*" string.
- 10. Once all four (4) placeholder value items are replaced in the new web.config XML file, please save this file. (There should be no "**" characters in the file, only the proper string values for the file)
- 11. Open the Microsoft IIS Manager UI
- 12. Expand the 'Sites' folder in the left-hand tree view. Right-click on the 'Sites' folder and choose 'Add Web Site..."
- 13. Enter all required information for your installation. The site name is "GoPlant" in the create web site pop-up window. Locate the folder created above for the web site and place that path in the 'Physical path:". Bind the website to "All Unassigned" IP address or the address required for your installation.





- 14. Expand the GoPlant web site folder now listed under the 'Sites' in the left-hand tree view. Rightclick on the "api" folder and choose 'Convert to Application". Leave all settings as default.
- 15. If you plan on creating IIS server certificates for use with https://, please follow external guides or instructions on completing this task. You can then also bind the website to the https:// port and choose the proper SSL certificate.
- 16. This completes the file updates and configuration changes required for the web site.
- 17. Complete all installation steps before starting the web site.
- 18. Please continue to the "Installation of cURL on the IIS Server".





Installation of cURL on the IIS Server:

- 1. Login to the web server machine as a Windows Administrator.
- 2. Under the 'GoPlant Scheduled Tasks' folder locate the 'cURL for Windows' folder from the installation files to the server.
- 3. Select the installer based upon either a 32-bit or 64-bit server machine Operating System.
- 4. Depending upon your server, you may have to install the Microsoft Visual C++ 2015 Redistributable.
- 5. Check the box "I accept the terms in the License Agreement".
- 6. Click on the 'Install' button.
- 7. After cURL software installation, please continue to "Scheduled Task Installation".





Scheduled Task Installation:

- 1. Before creating the scheduled task in this section, the cURL software must be installed.
- The GoPlant scheduled task update should only be done by end users familiar with Windows Server functionality. These instructions are high-level and assume inherent knowledge of server software.
- 3. Obtain the GoPlant Task XML (*.xml) file from the installation files.
- Log into the GoPlant IIS Web server with account that has permissions to run and modify the Windows Task Scheduler. A link is in the Administration Tools of the server or can be found in the Server Manager.
- 5. Open the Task Scheduler.
- 6. Create a folder for GoPlant for the GoPlant scheduled task. Name the folder GoPlant in order to easily find it later. Select the folder to display the tasks in the center pane.

Task Scheduler		- 🗆 ×
File Action View Help		
🗢 🔿 🙍 🖬 🛛 🖬		
Task Scheduler (Local)	News Status Terror Mach Due Time Lot Due Time Lot Due David Arabas Constant	Actions
🗸 🐻 Task Scheduler Library	Task Scheduler Library	GoPlant 🔺
GoPlant		💿 Create Basic Task
		🐌 Create Task
		Import Task
		Display All Running Tasks
	٢	Disable All Tasks History
		1 New Folder
		× Delete Folder
		View
		Refresh
		👔 Help





7. Right-Click in the center pane folder listing and choose 'Import Task...' from the pop-up menu.

Task Scheduler		– 🗆 ×
File Action View Help		
(= =) 2 📰 🛛 🖬		
Task Scheduler (Local)	Name Status Triggers Next Run Time Last Run Time Last Run Result Author Created	Actions
Task Scheduler Library GoPlant	The sk Scheduler strong	GoPlant 🔺
> Microsoft		💿 Create Basic Task
		🐌 Create Task
	Create Basic Task	Import Task
	Create New Task	Display All Running Tasks
	Import Task >	Disable All Tasks History
	Refresh	1 New Folder
		X Delete Folder
		View
		Q Refresh
		2 Help

8. Locate the file GoPlant_Recurring_Task.xml, and once highlighted click 'Open' button. The Create Task window will open.

G	Create Task
General Trigg	gers Actions Conditions Settings
Name:	GoPlant_Recurring_Task
Location:	\Example
Author:	SERVER-01\FAS
Description:	
-Security opt	ons
When runni	ng the task, use the following user account:
SYSTEM	Change User or Group
O Run only	when user is logged on
Run whe	ther user is logged on or not
🗌 Do n	ot store password. The task will only have access to local computer resources.
🗌 Run with	highest privileges
🗌 Hidden	Configure for: Windows Vista™, Windows Server™ 2008 ✓
	OK Cancel

9. Edit the user account if required. The Security account running the task should have access to the





computer and be able to execute web services and the curl.exe executable described in the task. NOTE: If you use a named account, you will be required to update the password any time the account security policy requires it to be changed.

10. Click on the 'Actions' tab. This will display the command line criteria for executing the GoPlant web service API.

٩	Create Task	x
General Triggers Acti	ons Conditions Settings	
When you create a tas	k, you must specify the action that will occur when your task starts.	
Action	Details	
Start a program	"C:\Program Files\cURL\bin\curl.exe" http://GoPlant/api/svc/housekeepe	
<	III >	
New Ed	it Delete	
	OK Cance	I





11. Double-click on the 'Start a program' entry. This will bring up the "Edit Action" window shown below. The highlighted portion is the only changes required for your specific server. Edit the beginning of the command to correspond with your internal GoPlant web site. Command can be http:// or https://, followed by the name of your GoPlant web site – "GoPlant" is used in the example below. Do not modify anything beyond this as it specifies the API call. Next, verify that the "Program/script:" string matches the full path to the curl.exe program as it is installed on your server.

•	Edit Action X	
General	You must specify what action this task will perform.	le le
When y	Action: Start a program 🗸	ite
Action	Settings	
Start a	Program/script:	ei .
	"C:\Program Files\cURL\bin\curl.exe" Browse	
	Add arguments (optional): http://GoPlant/api/svc/h	F te
		es p
<		
New		
		Cancel
	OK Cancel	

**NOTE: If the URL address for your GoPlant installation is changed the scheduled task must be updated as well.

**NOTE: If you specify https://, you may also need to pass the -k argument to cURL to ignore certificate checking.





12. Click 'OK' to close the "Edit Action" window. Click 'OK' to close and create the Task. This completes the creation of the GoPlant Windows scheduled task.

•	Create Task	×
General Triggers	Actions Conditions Settings	
When you creat	e a task, you must specify the action that will occur when your task starts.	
Action	Details	
Start a program	n "C:\Program Files\cURL\bin\curl.exe" http://GoPlant/api/svc/housekeepe	
<		
New	Edit Delete	
	OK Cance	el

13. Please continue to "Reporting Server Installation (Jaspersoft®)"





Reporting Server installation (Jaspersoft®):

- Installation files for these instruction steps are located within the 'GoPlant Reporting' folder on the installation media. Locate the Jaspersoft installation executable. It is recommended to install the Jaspersoft server on the same IIS server as GoPlant. If choosing to install on a separate server, please also perform the optional server installation steps at the end of this document.
- 2. Run the installation program and click 'Next >' at the Welcome screen:

0	Setup	_ D X
	Setup - JasperReports Server CP 7.2.0	
	Welcome to the JasperReports Server CP 7.2.0 Setup Wizard.	
TIBCذ Jaspersoft°		
	< Back Next >	Cancel





 Select 'Yes' to accept the license agreement. This version is the Community Edition and does not require any license to operate the software. Click 'Next >':



4. From the Setup window, please choose "Custom Install" as shown and click 'Next >':

0	Setup	_ □ ×
JasperReports Server Installation	TIBC	Jaspersoft
Please choose an install option below: O Install All Components and Samples (require	s disk space of: 1.5 GB)	
Custom Install		
InstallBuilder	< Back	Next > Cancel





5. Leave the Selected folder default and click 'Next >' NOTE: Remember this folder path as it will be referenced later in the documentation as "<JASPER_INSTALL_PATH>".

0	Setup		_ 🗆 X
Installation f	older	TIBC [®] Jas	persoft [®]
Please, choose Select a folder	a folder to install JasperReports Server CP 7.2.0 C:\Jaspersoft\jasperreports-server-cp-7.2.0		
InstallBuilder		< Back Next >	Cancel

6. Leave the default "I want to use the bundled Tomcat" and click 'Next >':

0	Setup	_ 🗆 X
Tomcat Installation	TIBC	Jaspersoft
Please select the Tomcat configuration you wan	t to use	
$\textcircled{\begin{tabular}{ll} \bullet \end{array}}$ I want to use the bundled Tomcat		
○ I want to use an existing Tomcat		
InstallBuilder —	< Back	Next > Cancel





7. Leave the default "I want to use the bundled PostgreSQL database" and click 'Next >':

0	Setup	_ _ ×	c
PostgreSQL Installation	TIBC	Jaspersoft	t°
Please select the PostgreSQL configuration you war	nt to use		
 I want to use the bundled PostgreSQL database 	2		
○ I want to use an existing PostgreSQL database			
InstallBuilder	< Back	Next > Cancel	

8. Choose "I want to use the bundled PhantomJS" and click 'Next >':

0	Setup	_ _ X
PhantomJS Installation	TIBC	Jaspersoft
Please select the PhantomJS configuration I want to use the bundled PhantomJS I want to use an existing PhantomJS I don't want to install PhantomJS, use	n you want to use	
InstallBuilder	< Back	Next > Cancel





9. Leave all Tomcat Server Ports as default. If port 8080 is already used on this web server, then pick another open IIS port and note for other installation steps. Click 'Next >':

0	Setu	р	_ D X
Tomcat Port Configur	ation	TIBC [®] Jas	spersoft [®]
Please enter the Tomcat	configuration parameters you want	to use.	
Tomcat Server Port:	8080		
Tomcat Shutdown Port:	8005		
Tomcat AJP Port:	8009		
InstallBuilder			
		< Back Next :	> Cancel

10. Leave the default Database Server port and click 'Next >':

0	Setup		_ 🗆 X
PostgreSQL Server Parameters		TIBC® Jas	spersoft [®]
Please enter the port of your database. Database Server port 5432			
InstallBuilder		< Back Next >	Cancel





11. Select 'No' for "Would you like to install sample databases and sample reports?" and click 'Next >':

0	Setup	_ _ ×
Install Sample Data	TIBC	Jaspersoft
Would you like to install sample database Yes No	es and sample reports?	
InstallBuilder	< Back	Next > Cancel

12. Select 'Next >' at the "Ready to Install" Window.

0	Setup	_ 🗆 X
Ready to Install	TIBC	Jaspersoft
Setup is now ready to begin installing Ja	sperReports Server CP 7.2.0 on your com	puter.
InstallBuilder	< Bark	Next > Cancel
	Couck	Concer





13. The software installation will proceed and display a window of the progress:

0	Setup	-		x
Welcome to TIBCO Jaspersoft Jaspersoft empowers millions of people every day to make faste decisions. Register to learn how other customers are using Jaspersoft, or check out the tools and resources to help with you implementation: Product Updates Whitepapers Newsletters Product Demos Solutions Show Register at community.jaspersoft.com				
	Installing			
Direc	tory already exists: C: Uaspersoft (jasperreports-server-cp-7.2.0			
Install	Builder			
	< Back Next >		Cano	:el

14. After file installation the last window will appear. Uncheck "Opt-in for JasperReports Server Heartbeat" and click 'Finish'

🖉 Setu	D	_ 🗆 X
Completing the JasperReports Server CP 7.2.0 Set Wizard	TIBC® Jas	persoft
Setup has finished installing JasperReports Server CP 7.2.0	Setup Wizard	
For release notes and further documentation please see, C Our full documentation is also available at http://communit	:\Jaspersoft\jasperreports-server .jaspersoft.com/documentation	-cp-7.2.0/docs.
Open release notes (PDF Viewer required)		
☑ Start JasperReports Server and open browser to login	page	
Opt-in for JasperReports Server Heartbeat		
Help us build better products by opting in		
www.jaspersoft.com/heartbeat		
InstallBuilder		
I ISCAIDUIUEI	< Back Finish	Cancel





- 15. If any errors or additional information is required, please see the included Jasper Report Server documentation bundled with the GoPlant installation files.
- 16. The default web browser will open and the Jaspersoft login page will be displayed:



17. After verification that the Jaspersoft website login page has loaded properly, save the URL as a favorite for ease of access later and close the web browser.





- 18. The installation automatically starts the JRS service. It is important to stop this service for the next installation steps.
- 19. Locate the "Stop JRS service" icon on the desktop or browse the Start menu and Program files to find the stop service program. Stop the JRS service by running the appropriate icon or menu item.



- 20. The next file update steps assume that the reporting server software is located in the default directory described in these instructions. Please adjust path accordingly if a non-standard installation directory was configured. The steps describe updating and replacing the configuration files in order to update the installation for GoPlant use. No core software is modified, only the configuration files for software operation.
- 21. Copy the file(s) in the installation location "GoPlant Reporting\Jasper Configuration File Updates" folder and update the existing file(s) in the "<JASPER_INSTALL_PATH>\apachetomcat\webapps\jasperserver\WEB-INF" directory. The new configuration files are already located in the appropriate directory tree structure and can be added over the existing folder structure.
- 22. Copy the file(s) in the installation location "GoPlant Reporting\Jasper Configuration File Updates" folder and update the existing file(s) in the "<JASPER_INSTALL_PATH>\apache-tomcat\webapps\jasperserver\themes\" directory folder.





23. Locate the "Start JRS service" icon on the desktop or browse the Start menu and Program files to find the stop service program. START the JRS service by running the appropriate icon or menu item.



The JRS service must be running before you can continue with the upgrade instructions.

24. Please continue to "Report Server Configuration".





Report Server Configuration:

1. After installation, the server's default web browser should open and the Jaspersoft login page will appear. If not or the window was closed, please enter 'localhost:8080/jasperserver/login.html' in a web browser:



NOTE: The default login is 'jasperadmin' with a password 'jasperadmin'.





2. Select the 'Manage' menu and choose the 1st drop down entry 'Users':

TIBC@'Jaspersoft'	•	Library	View 🗸	Manage 🗸
0 Folders	Repository			Users
💼 root	Run	Edit	Open	Roles
🗊 Analysis Components	0	Name		Server Settings
🗐 Content Files				
🗐 Data Sources				
GoPlant				
F Images				
jdbc				
F Reports				
🗐 Themes				

3. Select the "jasperadmin" account from the left-hand menu, and click on the "Edit" button at the bottom of the Properties listing on the right-hand side:







- 4. Enter an updated password and save this for later use. DO NOT LOSE the changed password! The 'anonymousUser' account should also be selected and edited. Choose 'Edit' and deselect the "User is Enabled" button for the 'anonymousUser'. Choose the "Save" button at the bottom.
- 5. Select the 'Add User...' button in the upper left corner of the User's window:



6. The "Add User" pop-up window will appear. Enter the data shown to create the 'GoPlant' user that will connect via the GoPlant web server. Enter a password = "P@ssw0rd". This will match the current database update script shipped with the installation files. If this password is changed, please make a note and the database update script will need to be modified later. Click on the 'Add User' button when finished.

Add User		
11		
Add User User name: GoPlant User ID (required): GoPlant Once created, this value cannot be changed. Email: Password (required): entities Confirm Password (required): entities User is enabled.		
GoPlant		
User ID (required):		
GoPlant		
Once created, this value cannot be changed.		
Email:		
Password (required):		
•••••		
Confirm Password (required):		
✔ User is enabled.		
Add User Cancel		





7. Select the newly created 'GoPlant' user and click on the blue "Edit" button.

IBC@ [®] Jaspers	oft' 🏠	Library	View 🗸	Manage 🗸		jasperadmin User	
sers	Q,				Properties		
d User Enable	Disable	Delete			liser name:		
GoPlant		GoPlant			GoPlant		
anonymousUser		anonymou	sUser				
jasperadmin		jasperadm	in User		Oser ID:		
joeuser		Joe User			Goriant		
					Email:		
					🖉 Uses is eachlad		
					 Oser is enabled. 		
					Roles Assigned: ROLE_USER		
					Profile Attributes:		
					Name	Value	
					domainWhitelist	*	
					Edit Log	in as User	





8. Select the 'Attributes' tab in the upper right-hand area. We will add three attributes to the GoPlant user in the next steps.

DC Jaspers	oft' 🏫	Library	View 🗸	Manage - j	asperadm	in User Log Out		
iers	Q			© Properties				
d User Enable	Disable	Delete					Properties	Attribute
GoPlant	GoPlar	it						
anonymousUser	anonyi	mousUser		User name:				
				GoPlant				
				User ID:				
				GoPlant				
				This value cannot be changed.				
				Email:				
				Password (required):				
				Confirm Password (required):				
				✓ User is enabled.				
				Roles Available		Roles Assigned	I	
				Q				Q
						POLE LISER		
				Kott_sommarkerok		ROLL_OOLK		
				ROLE_ANONYMOUS				

9. Select the '<u>Add new attribute</u>' link as shown. This will be done each time when adding the attributes.

Manage 🗸		jasperadmin User	Log Out		Q
Properties					\frown
				Properties	5 Attributes
Filter by: All					\bigcirc
Name	Value	E	ncrypted	Inherited	
domainWhitelist	*		\Box	true	/
					Add new attribute

10. Add the "Host" attribute as shown below. The Host value will be specific to your installation and is the Host name of IP address (IP address shown as example) of your GoPlant Database server. These attributes define how to connect to your GoPlant database. Click the blue "OK" when done and select <u>Add new attribute</u> link again.





Properties				
			Properties	Attributes
Filter by: All	▼			
Name	Value	Encrypted	Inherited	
domainWhitelist	*		true	/
Host Description:		127.0.0.1		
Encrypt			01	K Cancel

11. Add the "Port" attribute as shown below. The Port value will be specific to your installation and is the IP Port to connect to the GoPlant Database server. The default Port is 1433 for Microsoft SQL installations. These attributes define how to connect to your GoPlant database. Click the blue "OK" when done and select 'Add new attribute' link again.

Properties				
			Properties	Attributes
Filter by: All	~			
Name	Value	Encrypted	Inherited	
domainWhitelist	*		true	/
Host	127.0.0.1		false	/ 🗇
Name: Port		Value: 1433		
Description:				
Encrypt			•	K Cancel

12. Add the "Database" attribute as shown below. The Database value will be specific to your installation and is the Database name of your GoPlant Database. These attributes define how to connect to your GoPlant database.





Properties				
			Properties	Attributes
Filter by: All				
Name	Value	Encrypted	Inherited	
domainWhitelist	*		true	/
Host	127.0.0.1		false	/ 🖻
Port	1433		false	/ 🗇
Name: Database		Value: GoRlant		
Encrypt			OI	Cancel





13. When done with all three attributes, select the blue 'Save' button to save your edited user settings. The default 'domainWhitelist' attribute should be left alone.

Properties					
			Properties At		
Filter by: All					
Name	Value	Encrypted	Inherited		
domainWhitelist	*		true	/	
Host	127.0.0.1		false	/ 🗊	
Port	1433		false	/ 💼	
Database	Gol Value:		false	/ 🖻	
	GoPlant		Ac	ld new attribute	
Save Cancel					

14. <u>Repeat steps</u> #8 to #14 again, but this time choose the 'jasperadmin' user – the account you are currently logged into the server. Repeat the instructions to add the "Host", "Port", and "Database" attributes exactly as you have just completed for the GoPlant user. Setting up the same attributes for the jasperadmin user will allow us to test the database source connection later in the instructions.





15. Select the "Manage" menu and choose "Server Settings":

TIBC	sperso	oft' 👘 🍵	Library	View 🗸	Manage 🗸
Users		Q			Users
Add User	Enable	Disable	Delete	C	Roles
anonymou	sUser	anonyn	nousUser	L	Server Settings

16. Choose the 'Import' selection from the left-hand Settings menu:

TIBCO Jaspersoft: Import	× +	•	-	×
\leftrightarrow \rightarrow C (i) localhost:	8080/jasperserver/adminImport.html		☆	:
TIBC@ Jaspersoft	A Library View - Manage - jasperadmin User Log Out			Q
🗉 Settings	Import			
Log Settings	Import data file:			
OLAP Settings	Choose File No file chosen			
Cloud Settings				
Server Attributes	Import options:			
Restore Defaults	Skip user updates			
• Import	Include access events			
Export	Include server settings (settings take effect immediately)			
	Include themes			
	Import			





17. Click on the 'Choose File' button:

TIBC@ Jaspersoft	☆ Library View → Manage →
0 Settings	Import
Log Settings	Import data file
OLAP Settings	Choose File GoPlant Reports 2017.3.zip
Cloud Settings	
Server Attributes	Import options:
Restore Defaults	Skip user updates
• Import	Include access events
Export	Include server settings (settings take effect immediately)

NOTE: The file name listed in the image above may not match the upgrade version you are installing. This image is for reference only.

18. Locate and select the "GoPlant Reports XXXXXX.zip" file included in the installation files "GoPlant Reporting" folder. Select the "Open" button in the pop-up window.

UNCHECK the last "Include server settings (settings take effect immediately)" option

- 19. After the zip file has been selected and the option unchecked click on the BLUE 'Import' button at the bottom of the Import window.
- 20. Once the import is complete, click on the 'Close' button or wait for it to clear:







21. Click on the white "Home" icon in the blue header menu and then expand the new 'Production' folder in the left-hand navigation tree. Open the 'Data_Sources' folder from the Folders tree view on the left. Your folder tree may vary from the image below.

Folders	Rep	ository						
noot	Run	Edit	Open	Сору	Cut	Paste	Delete	
Production	0	Name				De	scription	
Data_Sources Input_Controls		GoPlant	_JTDS_A	ttr				
E Sub_Reports								

Click on the 'Edit' button after you have highlighted the "GoPlant_JTDS_Attr" data source. This will launch an 'Edit Data Source: GoPlant_JTDS_Attr' window.

22. The Data Source contained in the update will require modification as we have updated to the new JTDS jar file driver. Choose the "Other..." in the JDBC Driver: section:





∏BCØ Jaspe	ersoft	•	Library	View 👻	Manage 🗸			
Edit Data Source:	: GoPlant_J	TDS_/	Attr					
	Cot Dot	- 60	URCO TI		d Droportio	_		
	Set Dat	a 50	urce ij	pe and	u Properties	•		
	First, selec	t the t	ype of dat	a source	you wish to add,	then enter the rea	quired proper	ty values.
	_							
	Type: 🗉	DBC Da	ta Source		Ŧ			
	JDBC Driv	er:						
	Other						•	Add Driver
_	1DBC Driv	er (regi	uired):					
	net source	eforne i	itde idbe Dr	iver			1	
	Hint: org.p	ostores	it unver	ive:				
_	miler orgap	us cyrest	querre					
r r	URL (requi	ired):						
	jdbc:jtds:	sqlserve	er://{attribu	ite('Host','	User')}:{attribute('Port', 'User')};datab		
	Hint: jdbc:	postgre	sql://localhos	st:5432/my	(db)			
	User Name	e:					-	
	GoPlant							
	Dessword							
	Fassword.						1	
	Time Zone	21						
	Use datab	base set	tting				L	•
	HINT: DO NO	x cnang	e the time z	one setting	unless you know the	database timestamp (data is incorrect.	
	Test Co	onnect	ion					

After choosing the "Other..." choice, the "JDBC Driver (required):" and "URL (required):" entry boxes will appear.

Enter "net.sourceforge.jtds.jdbc.Driver" in the "JDBC Driver (required):"entry box.

Enter

"jdbc:jtds:sqlserver://{attribute('Host','User')}:{attribute('Port','User')}/{attribute('Database','User')}" in the "URL (require):" entry box.

The Username and Password will contain the default "GoPlant" and "P@ssw0rd". If your installation used the defaults then you will not need to update these values. Please refer to your installation documentation and update the Username and Password fields as shown below accordingly. This username and password are the credentials used by the IIS server to connect to the GoPlant SQL server database.





23. Please test your connectivity by clicking on the "Test Connection" button as show. Once the Connection passed information is shown, click on the blue 'Save' button to close this window.

lit Data Source: GoPlant_JTDS_Attr
Set Data Source Type and Properties First, select the type of data source you wish to add, then enter the required property values.
Iype: JDBC Data Source
JDBC Driver: NOT INSTALLED: net.sourceforge.jtds.jdbc.Driver (net.sourceforge.jtds.jdbc.Driver)
URL (required):
jdbc:jtds:sqlserver://{attribute('Host','User')}:{attribute('Port','User')}/{attril
Hint: jdbc:postgresql://localhost:5432/mydb
User Name:
GoPlant
Password:
••••••
Time Zone:
Use database setting
Test Connection Passed

Errors in connecting to the GoPlant database will appear in red. If your installation uses an Active Directory user to connect to the database, please adjust the URL string appropriately for the JTDS driver. Instructions are attached in Appendix A of this installation document.

If your SQL server uses an instance name for the GoPlant database, you will need to add a ";instance=<instance_name>" parameter at the end of your URL.

If the username and password is an Active Directory user with a domain, then you will need to add a ";Domain=<Domain_name>" parameter at the end of your URL.

- 24. After the connection is completed and verified, click on the blue "Save" button at the bottom of the Data Source editing window.
- 25. The "Save" pop-up window will then appear. Do not change any data in this window. Leave all data as default and simply choose the blue 'Save' at the bottom of the pop-up window:





Save
Data Source Name (required):
GoPlant_Prod_User_Attributes
Resource ID (required):
GoPlant_Prod_User_Attributes
Description GoPlant Production Database connection with User defined parameters for connectivity
Content Files
Data Sources
🗐 GoPlant 🗸
Save Cancel

26. This completes the website updates to the Jaspersoft server. Choose the 'Log Out' in the top right menu. The web browser may be closed.

		☆ :
jasperadmin User Log Out		Q
	Sort By: Name	Modified Date
Туре	Created Date	Modified D
Report	Today	January 21

- 27. This concludes the Reporting Server configuration.
- 28. Please continue to the "Post Installation Tasks"





Post Installation Tasks:

- 1. Log into the GoPlant IIS Web server with an account that has permissions to run and modify the Windows Task Scheduler.
- 2. Locate and Open the Microsoft IIS Manager User Interface (UI).
- 3. Browse to the IIS Server icon in the left-hand tree view.
- 4. Start the GoPlant web site.
- 5. Open the Windows Task Scheduler. A link is in the Administration Tools of the server or can be found in the Server Manager.
- 6. Locate the folder for GoPlant (if created earlier) or determine the location of the GoPlant scheduled task. Select the folder to display the task in the center pane. Select the task listed for GoPlant, and then right-click and enable it. Ensure that the status is ENABLED for the GoPlant task.

Task Scheduler		-	×
File Action View Help			
🗢 🄿 🙍 📰 🚺 🖬			
(D) Task Scheduler (Local)	Name Status Triggers Next Run Time Last Run Time Last Run Result Author Created	Actions	
V 🐻 Task Scheduler Library	© GoPlant Recurring Task Ready At 12:02 A 1/11/2023 12 11/30/1999 The task has EC2A 1/10/2023 9:24:18 PM	GoPlant	^
Soprant Microsoft		💿 Create Basic Task	
		🐌 Create Task	
		Import Task	
		Display All Running Tasks	
		Disable All Tasks History	
	General Trigger Actions Conditions Settings History	Mew Folder	
	Checker inggers Actions Conditions Security	× Delete Folder	
	Name: GoPlant_Kecurring_Task	View	•
	Location: \GoPlant\GoPlant	Refresh	
	Author:	🕜 Help	
	Description:	Selected Item	•
		Run	
		End End	
		Disable	
	Security options	Export	
	When running the task, use the following user account:	Properties	
	Run only when user is logged on	🗙 Delete	
	P	1 m	*

7. Use a web browser to login to GoPlant. You may use the "starthere" username with "pass1" as the password. This user account should be modified and replaced with your own administrator type account.





8. Navigate to the 'ADMIN' area:

DASHBOARD	چ MANAGER	ADMIN	± 0				SKF admin Demos	G PLANT
Email S GoPlan Asset S Report Externa Event L API Set	ettings ettings ettings Settings I Tag Settings og jings App	hly	Email Settings SMTP Server IP Address mail.mycomp User User Password ******* Confirm Passwo	Port 25				
			System Email Ad Task Manager Alerts	dresses taskmgr⊛goplant.com alerts@goplant.com	Test			

9. The first set up item is email settings. Please enter your email server DNS name or IP address, port, and username/password information if it is required to relay email. Update the System Email Addresses so they match your company's domain. Your IT department may need to whitelist the GoPlant server as a mail relay. Use the Test buttons to ensure email can be sent from the server.

SMTP Server IP Address Port mail.mycompany.com 25
IP Address Port mail.mycompany.com 25
IP Address Port mail.mycompany.com 25
maii.mycompany.com
Hann
User
mailusername
Password

Confirm Password

System Email Addresses
Task Manager goplant.tasks@mycompany.com Test

C





10. The second set up item is Report Settings. Please update the "Reporting Base URL" entry to match your URL with an additional :8080 at the end. If you utilize <u>http://goplant</u> as your URL, then this entry needs to contain <u>http://goplant:8080</u> as the base URL. This points all standard GoPlant reports to the Jasper Server.

Email Settings	Report Settings	
GoPlant Settings	Contract Con	Velue
Asset Settings	setting	value
Report Settings	LoLo Condition	#DA250C
External Tag Settings	Lo Condition	#F39C12
Event Log		
API Settings	Normal	#18C84B
	Hi Condition	#F39C12
Арріу	HiHi Condition	#DA250C
	State Condition	#DA250C
	Reporting Folder Name	Production
	Reporting Base URL	http://goplant:8080
	Include jasper reports in recent reports widget	true





Licensing GoPlant:

GoPlant will run on a grace period for three days without being licensed. To ensure that you do not experience an outage, please begin the license process immediately after installation. You will need to have the license key provided by SKF to complete this process. If you do not have a license key, please contact goplant.techsupport@skf.com.

- 1. Open an HTML 5 compatible Web Browser.
- 2. Type your GoPlant URL in the address bar (example: http://goplant). The Login page appears.



3. Log into GoPlant, then click **GOPlant** at the top right-hand portion of the page. The **About GoPlant** window opens. (Your version will display; the image below is simply an example)







- 4. Click Apply License button.
- 5. Enter the License Key sent from SKF and click Apply License.

Apply License	×
License Key	
	Apply License

6. The licensing is now complete.





OPTIONAL – HTTPS and separate server installation of Jaspersoft®:

If you are using HTTPS to connect to GoPlant or if Jaspersoft was installed on a separate server, the following installation changes will apply.

- 1. Log into the IIS Web server with account that has permissions to access the Microsoft IIS server instance.
- 2. Locate and Open the Microsoft IIS Manager User Interface (UI).
- 3. Browse to the IIS Server icon in the left-hand tree view.
- Check to see if 'Application Request Routing' and 'URL Rewrite' options are installed in the IIS section:







- GoPlant now requires the URL Rewrite and Application Request Routing 3.0 modules installed in the IIS server. These functions are required to route GoPlant reporting requests. If these settings are already installed, please skip the next installation step and continue with step #7.
- Installer 64 and 32-bit versions for the Application Request Routing 3.0 module and URL Rewrite 2.0 module are in the GoPlant installation files if you do not have an internet connection. The Microsoft Web Platform Installer can be used to locate and install the modules if an internet connection is available.
- 7. Once installed, return to the server feature settings and double-click on the Application Request Routing Cache icon. Select the 'Server Proxy Settings...' link on the right hand side:







8. Choose the 'Enable Proxy' checkbox only. Do not modify any other setting. Once checked, select the "Apply" button on the right hand Actions Panel.

Internet Information Services (IIS) Manager	_ D X
	😰 🖂 🟠 🔞 •
Application Request Routing Use this feature to configure proxy settings for Application Request Routing.	Alerts Server routing rules have not been created. Click "Use URL Rewrite to inspect incoming requests" to create these
Proxy Setting HTTP version: Pass through	rules. Enabling proxy allows requests to be potentially routed to servers outside of your server farm.
✓ Keep alive Time-out (seconds): 120	Actions Actions
Reverse rewrite host in response headers Custom Headers	Advanced Routing URL Rewrite

- 9. After Applying the settings, click on the 'Back to ARR Cache' to return to the Features View.
- 10. GoPlant now requires the URL Rewrite installed in the GoPlant IIS server if the reporting services are installed on a separate server. These functions are required to route GoPlant reporting requests properly. If these settings are already installed, please continue with step #13.
- 11. Installer 64 and 32-bit versions for the URL rewrite 2.0 module are in the GoPlant installation files if you do not have an internet connection. The Microsoft Web Platform Installer can be used to locate and install the modules as well.
- 12. Once installed, return to the tree view on the left, and locate your GoPlant web site under the "Sites" folder. Click on your web site in order to open the Features View in the center pane.
- 13. With your web site highlighted in the left-hand pane, the feature settings with multiple icons will appear in the features pane. Locate and double-click on the URL Rewrite icon.





Connections	ο 🙆	plant Ho	me					Actions
🔍 🕶 🔚 🛛 🖉 😽								Edit Der
I Start Page I	Filter:		🗝 🐺 Go 🖂	Show All	Group by: Ar	ea	-	Edit Per
Application Pools	ASP.NET						<u>^</u> ^	Binding
⊿ 🔞 Sites	Eo		404					Basic Se
⊿ 😭 goplant	.NET	NET	.NET Error	.NET	.NET Profile	.NET Roles		View Ar
⊳ 🔐 api	Authorizat	Compilation	Pages	Globalization				View Vi
▷ · initial aspnet_client			1 1 1	ab	9			Manage W
þ · 🧮 css	.NET Trust	.NET Users	Application	Connection	Machine Key	Pages and		🤣 Restart
▷ Ints	Levels		Settings	Strings	-	Controls		Start
▷ Images ▷ Images			e				=	Stop
styles	Providers	Session State	SMTP E-mail					Browse
⊳ · 🛄 tools								10.223.1
▷ · · · · · · · · · · · · · · · · · · ·	IIS						^	Browse
r ana-		ii	A			1		Advanc
		Authorizat		Default	Directory	Frror Pages		Configu
	Addiction	Rules	compression	Document	Browsing	Enorrages		Limits
		:->		20				Gallery
	(in the second s							Help
	Mappings	Redirect	Respon	ISAPI Filters	Logging	IVIIIVIE Types		
				Ω				
			•					
	Modules	Output	Request	SSL Settings	URL Rewrit		~	
	Features Vie	ew 📑 Conte	nt View		\sim			

14. Click on the 'Add Rule(s)...' in the right-hand Actions pane.

	Actions
requested URL address and the content of an	Add Rule(s) Revert to Parent
address:	Manage Server Variables View Server Variables
Match	Manage Providers View Rewrite Maps View Providers
	Inbound Rules
	Import Rules
	Outbound Rules
	View Droconditions

15. The "Add Rule(s)" window will appear. Ensure that the 'blank rule' is highlighed and choose 'OK':





	Add Rule(s)		? X
Select a rule template:			
Blank rule Request blocking	🔀 Rule with rewrite map		
Inbound and Outbound Rules User-friendly URL	🕺 Reverse Proxy		
Blank rule Search Engine Optimization (SEO)			
 Enforce lowercase URLs Append or remove the trailing slash symbol 	📓 Canonical domain name		
		OK	Cancel

16. Create a name for your rule. Enter the URL rewrite based upon your installation of the Jaspersoft server. 'localhost' will be replaced with the server name or specific IP address if required. The pattern must be: ^jasperserver/(.*) Note that your web site may have an SSL certificate, in which case you will update the "Rewrite URL:" to https:// instead of http:// link.





Match URL			٢
Requested URL:		Using:	-
matches the Pattern			
Pattern:			
^jasperserver/(.*)			Test pattern
☑ Ignore case			
Conditions			
Server Variables			
Action			<u>`</u>
Action Action type:			٢
Action Action type: Rewrite			6
Action Action type: Rewrite			٢
Action Action type: Rewrite Action Properties Rewrite URL:			
Action Action type: Rewrite Action Properties Rewrite URL: http://localhost:808	30/jasperserve	r/{R:1}	
Action Action type: Rewrite Action Properties Rewrite URL: http://localhost:808 Append query string	30/jasperserve	r/{R:1}	
Action Action type: Rewrite Action Properties Rewrite URL: http://localhost:806 Append query string Log rewritten URL	80/jasperserve	r/{R:1}	
Action Action type: Rewrite Action Properties Rewrite URL: http://localhost:808 Append query string Log rewritten URL	30/jasperserve	r/{R:1}	

- 17. Once all fields are completed correctly as shown you must click on the 'Apply' link in the Actions section in the right-hand pane.
- 18. Click on 'Apply' and then you are free to close out of the Rules area.





vices (IIS) Manager			_ D X
			📴 🖂 🟠 🔞 •
		Actions	
		Apply	
		Back to R	ules
		Help	
	٢		
Using:			
Regular Expressions	~		

- 19. This completes the rewrite rule required for a separate GoPlant reporting server installation.
- 20. That completes the IIS server settings configuration changes.





Appendix A – jTDS URL parameter information:

This is a condensed listing of "<u>http://jtds.sourceforge.net/faq.html</u>" web site. Please refer to the web site documentation for detailed information if other options are required.

The URL format for jTDS is:

jdbc:jtds:<server_type>://<server>[:<port>][/<database>][;<property>=<value>[;...]]

where <server_type> is one of either 'sqlserver' or 'sybase' (their meaning is quite obvious), <port> is the port the database server is listening to (default is 1433 for SQL Server and 7100 for Sybase) and <database> is the database name -- JDBC term: catalog -- (if not specified, the user's default database is used). The set of properties supported by jTDS is:

domain - Specifies the Windows domain to authenticate in. If present and the user name and password are provided, jTDS uses Windows (NTLM) authentication instead of the usual SQL Server authentication (i.e. the user and password provided are the domain user and password). This allows non-Windows clients to log in to servers which are only configured to accept Windows authentication.

If the domain parameter is present but no user name and password are provided, jTDS uses its native Single-Sign-On library and logs in with the logged Windows user's credentials (for this to work one would obviously need to be on Windows, logged into a domain, and also have the SSO library installed -- consult README.SSO in the distribution on how to do this).

instance - Named instance to connect to. SQL Server can run multiple so-called "named instances" (i.e. different server instances, running on different TCP ports) on the same machine. When using Microsoft tools, selecting one of these instances is made by using "<host_name>\<instance_name>" instead of the usual "<host_name>". With jTDS you will have to split the two and use the instance name as a property.

loginTimeout (default - 0 for TCP/IP connections or 20 for named pipe connections) -

The amount of time to wait (in seconds) for a successful connection before timing out.

If a TCP/IP connection is used to connect to the database and Java 1.4 or newer is being used, the loginTimeout parameter is used to set the initial connection timeout when initially opening a new socket. A value of zero (the default) causes the connection to wait indefinitely, e.g.,until a connection is established or an error occurs. See also socketTimeout.

If a named pipe connection is used (namedPipe is true) and loginTimeout is greater than zero, the value of loginTimeout is used for the length of the retry period when "All pipe instances are busy" error messages are received while attempting to connect to the server. If loginTimeout is zero (the default), a value of 20 seconds is used for the named pipe retry period.





namedPipe (default - false) - When set to true, named pipe communication is used to connect to the database instead of TCP/IP sockets. When the os.name system property starts with "windows" (case-insensitive), named pipes (both local and remote) are accessed through the Windows filesystem by opening a RandomAccessFile to the path. When the SQL Server and the client are on the same machine, a named pipe will usually have better performance than TCP/IP sockets since the network layer is eliminated. Otherwise the JCIFS library is used. JCIFS provides a pure Java named pipe implementation and uses NTLM authentication, so the domain parameter is required.

This feature supports the instance parameter (which changes the named pipe URL), but it does not currently support the named pipe at a location other than /sql/query on the server. The port parameter is ignored if set.

ssl (default - off) -

Specifies if and how to use SSL for secure communication.

Value Description

- off SSL is not request or used; this is the default
- request SSL is requested; if the server does not support it then a plain connection is used
- require SSL is requested; if the server does not support it then an exception is thrown
- authenticate Same as require except the server's certificate must be signed by a trusted CA

useNTLMv2 (default - false) -

Set to true to send LMv2/NTLMv2 responses when using Windows authentication

Properties can be passed to jTDS in one of three ways: in the URL, in the Properties object passed to getConnection() or by using the JtdsDataSource's setters (if connections are obtained through a DataSource rather than using the DriverManager). Because there is no URL when using the JtdsDataSource there are three other properties (with setters and getters) to take the place of those items that are part of the URL's syntax: serverName, portNumber and databaseName (their meaning should be quite clear).





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