



IRis For The Web - Holding Pen

Installation Instructions

Before You Begin:

- A full backup of your IRis data is strongly recommended.
- Make sure you are using IRis version 3.0.943:
 - Open IRis 3.0
 - Select **HELP** from the Main Menu
 - Select **ABOUT IRIS 3.0**
 - The version number will be listed on the screen
 - If 3.0.943 **IS NOT** listed as the current version, you **MUST** first download and install the free Update file. The downloadable file and instructions are available on the SunCoast web site. To access the Update file, open IRis 3.0, click Help from the top menu, choose On-line Updates, [Register if needed], follow instructions to download and install the latest Update file.
- Make sure everyone is out of IRis (including you) before you begin any installation procedure.

Step One: Download and unzip/extract the file

- Go to www.suncoastprograms.com/irisweb.htm
- Click on the download link and save the zip file to a location on your local hard drive [the desktop is a good place].
- Unzip/extract the downloaded zip file to a NEW folder on your hard drive [you might name it "IRis HP Install" – note: DO NOT UNZIP THESE FILES DIRECTLY TO YOUR MAIN IRIS 3.0 FOLDER!]. It should contain the following files:
 - § Setup.exe
 - § Settings.ini
 - § IRisHoldingPen.msi
 - § Dotnetfx.exe
 - § Config.ini
- To begin installing the IRis For The Web Holding Pen, click on **setup.exe** [now located in the folder you unzipped it to].

Step Two: Installation to local PC/Server drive

- Installation Notes
 - § If a version of the Holding Pen has been installed previously, you must first uninstall all previous versions of the Holding Pen before running the new installation.
 - § During the installation process, you may click on the Cancel button to exit at any time.
 - § If your computer does not have the Microsoft .NET Framework 1.1 installed, you will be prompted to install it; you will need to accept the installation of the .NET Framework, if prompted during installation.
- When ready to begin installation, click **OK**.
- The installation wizard should start.
- The Welcome Screen appears; click **NEXT**.

- Select an installation folder for the Holding Pen. You should install the Holding Pen and its related files into the same directory as your **installed** IRis 3.0 application [for example: F:/PROGRAM FILES/IRIS 3.0]. Click **NEXT** when you have verified this folder is correct.
- When you are ready to install, click **NEXT** to install the Holding Pen.
- You will see the progress of the installation. When this is complete, the installation wizard will automatically go to the Installation Complete page.
- The installation is now complete. You may now click the **CLOSE** button to exit the installation and configure the Holding Pen.

Step Three: Configuration

- **Security**

NOTE: The IRis For The Web Holding Pen application is an application developed using the Microsoft .NET Framework version 1.1, which allows system administrators to more tightly restrict the features that applications may access on your computer. Because of this, your system may need to be configured to allow the Holding Pen to execute in a secure manner. The following steps demonstrate how to give the Holding Pen “rights” to execute securely on your machine, without circumventing any additional security measures that are in place. In order to complete these steps, you must be an Administrator on the machine to which you are installing the Holding Pen.

- § Launch the Microsoft .NET Framework 1.1 Configuration utility, which can be found under the Administrative Tools menu.
- § Expand the Runtime Security Policy item on the left tree.
- § Expand the Machine item under Runtime Security Policy.
- § Expand the Code Groups item under Machine.
- § Right-click on the All_Code item under Code Groups and select New. A new window will open to allow you to create a new code group.
- § Select the Create a New Code Group option, and enter the name “Holding Pen” in the associated field. Then click the Next button.
- § Under the drop down selection “Choose the condition type for this code group”, select “Strong Name”.
- § Next, select the Import button, and browse to the installation location of the Holding Pen (this should be the same as the IRis 3.0 application folder). Select the file IRisHoldingPenWizard.exe and click the Open button. When you return to the Create Code Group window, you should see the Public Key field filled with a long sequence of letters and numbers. Click Next to continue.
- § Leave the “Use Existing Permission Set” drop down set on “FullTrust” and click the Next button.
- § Click Finish to complete the security configuration. The IRis For The Web Holding Pen wizard now has all the security permissions it needs to execute on your machine.

- **Settings**

- § The first time you run the Holding Pen, you will need to verify some settings. See the section below entitled “Opening the Holding Pen” for more information.

Step Four: Opening the Holding Pen

- The first time you run the IRis 3.0 application after installing the Holding Pen, you will be prompted by IRis 3.0 to add a menu item for the Holding Pen:
 - § Click **YES**, and the Holding Pen will be integrated into your IRis 3.0 application.
 - § *NOTE:* If you have already had an installation of the Holding Pen, do not add the menu item again.
- Open **IRis 3.0**
- Choose **TOOLS**
- Choose **IRIS FOR THE WEB HOLDING PEN**
- Click **NEXT** on the Welcome page to begin using the Holding Pen.

Step Five: Log In to the Holding Pen

- From the Log In page, you can also configure your Holding Pen settings.
 - § Click **CONFIGURE** to choose the settings for the Holding Pen.
- The IRis Holding Pen Configuration page has the following settings:
 - § **IRis Data Path**: this is the directory on your local machine that contains the IRis 3.0 data files (ex. F:\Program Files\IRis 3.0\Data). Make sure that this path points to your IRis data files.
 - § **IRis Site ID**: This field should contain the unique 4-digit SITE ID contained in your IRis 3.0. (ex. FCFH)
 - § **Service URL**: This is the URL location of the Holding Pen Web Service. This should currently be set to the following location: **http://www2.irissoft.com/wsiftw/wsiftw.asmx**.
- Verify the Configuration settings and click **OK**.
- You are now ready to log in to the system using the administrative user name and password from your IRis For The Web users.

Installing to Multiple Workstations

Each workstation will need to install the dotnetfx.exe file from our website www.suncoastprograms.com/irisweb.htm.

Download the zip file

Extract the zip file to a temporary location

Run the **install.exe** file

Then follow **Step 3: Configuration** above.

NOTE:

When an IRis For The Web site has multiple data partners contributing to the site (ex. statewide coalitions or collaborative efforts), please contact SunCoast Custom Programming & Web Design at (704) 525-9771 for information about how each site may use the Holding Pen Update feature.