openCRX Server Installation

Version 2.4.0



www.opencrx.org

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1 About this Book

This book describes how to **install an openCRX Server** with the BitRock installer **on Windows or Linux** platforms. Please note that this is a guide to set up a **runtime environment** suitable for evaluation and testing purposes. It is not recommended to use this configuration for a production site.

openCRX is the leading enterprise-class open source CRM suite. openCRX is based on openMDX, an open source MDA framework based on the OMG's model driven architecture (MDA) standards. This guarantees total openness, standards compliance, a state-of-the-art component-based architecture, and virtually unlimited scalability.

1.1 Who this book is for

The intended audience are openCRX administrators and advanced users interested in evaluating openCRX.

1.2 What do you need to understand this book

This book describes how to install openCRX with the BitRock installer, which takes care of all the tricky configuration issues for you. The prerequisites are minimal (JDK) and once they are met you should have openCRX up and running in less than 5 minutes.

1.3 Tips, Warnings, etc.

We make use the following pictograms:



Information provided as a "Tip" might be helpful for various reasons: time savings, risk reduction, etc. - it goes without saying that we advise to follow our guides meticulously

> **meticulous** \muh-TIK-yuh-luhs\, *adjective*: Extremely or excessively careful about details.



You should carefully read information marked with "Important". Ignoring such information is typically not a good idea.



Warnings should not be ignored (risk of data loss, etc.)

2 Prerequisites

2.1 JDK 5.0

Install the Sun Java JDK 5.0 available from http://java.sun.com/javase/downloads/index_jdk5.jsp



You really need Java 5, i.e. neither Java 4 nor Java 6 will work.



It is not sufficient to have a Java Runtime Environment (JRE) only. The full-blown **JDK** is required to run openCRX.



It is a good idea to **avoid paths containing blanks** like the default installation directory ...\Program Files\... on Windows.



Don't forget to set the **environment variable** JAVA_HOME

2.2 Ant 1.7.0

Install Ant 1.7.0 for your platform. Downloads are available from http://ant.apache.org/



It is a good idea to **avoid paths containing blanks** like the default installation directory ...\Program Files\... on Windows



Ant v1.7.1 should work as well. However, if the installation of the openCRX SDK fails with Ant v1.7.1, please try Ant v1.7.0 (some combinations of JDK versions and Ant don't "like" each other...

2.3 openMDX Tomcat EJB Installer

Download the openMDX Tomcat EJB Installer appropriate for your platform from Sourceforge: http://www.openmdx.org/downloads.htm

Installer for Windows: openmdxTomcatEjb-2.4.0-windows-installer.exe

Installer for Linux:

openmdxTomcatEjb-2.4.0-linux-installer.bin

The openMDX Tomcat EJB Installer will install Apache Tomcat v6.0.18 including Apache's OpenEJB on your system.

2.4 openCRX Server Installer

Download the openCRX Server Installer appropriate for your platform from Sourceforge: http://www.opencrx.org/downloads.htm

Installer for Windows: opencrxServer-2.4.0-windows-installer.exe

Installer for Linux: opencrxServer-2.4.0-linux-installer.bin

The openCRX Server Installer will install the openCRX EARs, an openCRX database (HSQLDB), and various configuration files on your system.

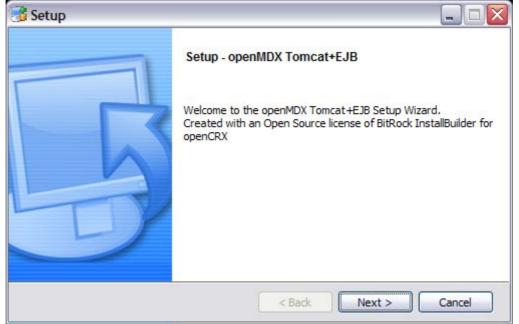
2.5 Hardware

We recommend a decent CPU and at least 1GB RAM. More detailed information about the requirements of openCRX are available from http://www.opencrx.org/faq.htm#hardware

3 Installing openCRX Server on Windows

3.1 Apache Tomcat / OpenEJB

- 1. Launch the Installer openmdxTomcatEjb-2.4.0-windows-installer.exe
- 2. Click [Next] on the following screen:



3. Accept the BSD License Agreement and click [Next] again:



4. Choose an **installation directory** (it will be created automatically if it does not exist yet). Then click [Next] to continue:



It is a good idea to **avoid paths containing blanks** like the default installation directory ...\Program Files\... on Windows

📑 Setup	
Installation Directo	rv 🦆 operndx
Please specify the dire	ctory where openMDX Tomcat+EJB will be installed.
Installation Directory	P:\openmdxTomcatEjb-2.4.0
BitRock Installer —	
	< Back Next > Cancel

5. Please note the information on the following screen. It is assumed that you have installed JDK 1.5 (also called JDK 5.0) appropriate for your platform (see Prerequisites). Click [Next] to continue:

📑 Setup 📃 🗆 🔀
IMPORTANT opendx
Installation instructions
This installer creates a Tomcat 6.0.18 instance extended with Apache OpenEJB 3.1. The lib directory of the Tomcat instance contains the openMDX libraries and is therefore ready to run openMDX based applications. The installer does NOT include the JDK 1.5 binaries. Make sure you have these packages installed before continuing.
BitRock Installer Cancel

6. Select the home directory of your JDK 1.5 installation - for example
 D:\Java\jdk1.5.0 - and then click [Next] to continue:

📑 Setup		
JDK 1.5 home directe	огу	spendx opendx
Select home directory of /usr/lib/jvm/jdk1.5.0 on l	an existing JDK 1.5, e.g. C: \pgm\Java\jdk1.5.0 inux platforms.	on Windows or
JDK 1.5 home directory	D:\Java\jdk1.5.0	6
BitRock Installer		
DICHOCK INStaller	< Back Nex	xt > Cancel

Select the home directory of your Ant installation – for example
 D:\apache-ant-1.7.0 - and then click [Next] to continue:

📑 Setup		
Ant 1.7.0 home directo	ry	🐤 opemdx
	n existing Ant 1.7.0 installation, e.g. C:\pgm\ap nt-1.7.0 on Linux platforms.	ache-ant-1.7.0 on
Ant 1.7.0 home directory	D:\apache-ant-1.7.0	6
BitRock Installer		
	< Back Nex	t > Cancel

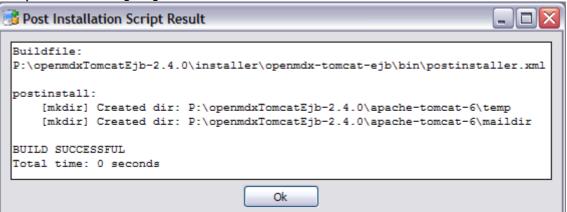
8. Enter the Tomcat ports (defaults are shown below). Please note that Tomcat does not start properly unless it has exclusive use of these ports. Click [Next] to continue:

📑 Setup	
	opemdx 🛃
Tomcat configuration s	
Tomcat HTTP port	8080
Tomcat HTTPS port	8443
Tomcat server port	8005
Tomcat AJP port	8009
BitRock Installer —	< Back Next > Cancel

9. Finally, click [Next] to start the installation:

🕃 Setup	
Ready to Install	• openıdx
Setup is now ready to begin installing openMDX Tomcat+EJB on your computer.	
BitRock Installer	
< Back Next >	Cancel

10. Once the installation is complete, verify the result of the post installation script and click [Ok]:



11. Click [Finish] on the last screen to leave the installer:

📑 Setup	
	Completing the openMDX Tomcat+EJB Setup Wizard Setup has finished installing openMDX Tomcat+EJB on your computer. ✓ View Readme File
	< Back Finish Cancel

12. On your desktop, you should see the following new shortcuts created by the installer:



3.2 openCRX

1. Launch the Installer opencrxServer-2.4.0-windows-installer.exe

2. Click [Next] on the following screen:



3. Accept the BSD License Agreement and click [Next] again:

📑 Setup 📃 🗖	X			
License Agreement	rx			
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.				
This software is published under the BSD license as listed below.				
Copyright (c) 2004-2009, CRIXP Corp., Switzerland All rights reserved.				
Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met:	~			
Do you accept this license? O I do not accept the agreement I do not accept the agreement				
BitRock Installer Kext > Cancel Cancel				

 On the following screen, navigate to the Tomcat installation directory – for example P:\openmdxTomcatEjb-2.4.0 – and then click [Next] to continue:

📑 Setup		×
Tomcat+EJB directory		Copencrx
openCRX is added to an existi	ng Tomcat+EJB installation.	
Tomcat+EJB directory	enmdxTomcatEjb-2.4.0	6
BitRock Installer		
	< Back	Next > Cancel

5. Please note the information on the following screen and then click [Next] to continue:

📑 Setup	_ = 🛛
IMPORTANT	Copencrx
Installation instructions	
This installer adds openCRX to an existing openM installation. The installation comes with a prec database. The installer does NOT include openMDX sure you have this package installed before cont	onfigured HSQLDB Tomcat+EJB. Make
BitRock Installer	Next > Cancel

6. Select the home directory of your JDK 1.5 installation - for example
 D:\Java\jdk1.5.0 - and then click [Next] to continue:

📑 Setup				
JDK 1.5 home direct	ory		Copencrx	
Select home directory of an existing JDK 1.5, e.g. C:\pgm\Java\jdk1.5.0 on Windows or /usr/lib/jvm/jdk1.5.0 on Linux platforms.				
JDK 1.5 home directory	D:\Java\jdk1.5.0		6	
BitRock Installer				
Dithock installer		< Back	Next > Cancel	

7. Select the home directory of your Ant installation – for example
 D:\apache-ant-1.7.0 - and then click [Next] to continue:

📑 Setup			_ 🗆 🔀
Ant 1.7.0 home directo	ory	6	opencrx
	n existing Ant 1.7.0 installatio ant-1.7.0 on Linux platforms.	n, e.g. C:\pgm\apache	-ant-1.7.0 on
Ant 1.7.0 home directory	D:\apache-ant-1.7.0		6
BitRock Installer	<	Back Next >	Cancel

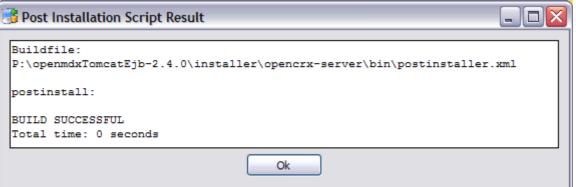
8. Enter the port number of the **HSQLDB service**. You can choose any port available on your system. The default is **9001**. Click [Next] to continue:

📑 Setup	_ 🗆 🔀
HSQLDB port	Copencrx
The installer comes with a default database. Please enter the port database.	number for the HSQLDB
HSQLDB port 9001	
BitRock Installer	Next > Cancel

9. Finally, click [Next] to start the installation:

📑 Setup	2
Ready to Install	Copencrx
Setup is now ready to begin installing openCRX Serve	er on your computer.
BitRock Installer	
	< Back Next > Cancel

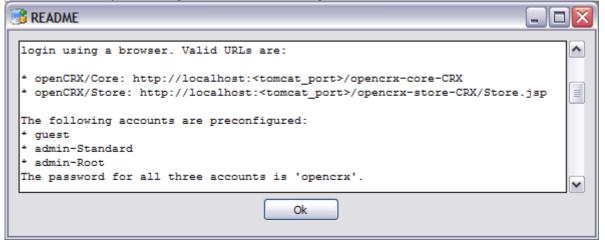
10. Verify that the post installation completed with errors and then click [OK]:



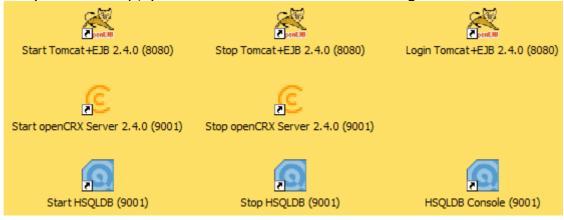
11. Once the installation is complete, click [Finish] on the last screen:

📑 Setup	
	Completing the openCRX Server Setup Wizard
G	Setup has finished installing openCRX Server on your computer.
	< Back Finish Cancel

12. Finally, please carefully read the README, in particular information about **valid URLs**, preconfigured **users** and **passwords**:



13. On your desktop, you should now see the following shortcuts:



4 Installing openCRX Server on Linux



There is no need to install openCRX as root. We created a user **crx** and the whole installation procedure is done as user **crx**.

4.1 Apache Tomcat / LWC

- 1. Launch the Installer openmdxTomcatEjb-2.4.0-linux-installer.bin
- 2. Click [Forward] on the following screen:



3. Accept the BSD License Agreement and click [Forward] again:

9 ==	Setup	
License Agreement		🦆 openıdx
agreement before continuing	-	
This software is pu as listed below.	blished under the BSD l	icense
Copyright (c) 2004- All rights reserved	2009, OMEX AG, Switzerl	and 🗸
Do you accept this license?	 I accept the agreement I do not accept the agreement 	t
BitRock Installer		
	🖨 <u>B</u> ack 🖨 🖨 Eorward	d X <u>C</u> ancel

4. Choose an **installation directory** (it will be created automatically if it does not exist yet). Then click [Forward] to continue:

3 35	Setup	•	
Installation Directory			• openıdx
Please specify the directory wh	ere openMDX Tom	cat+EJB will be ir	nstalled.
Installation Directory //home/cr/	k/openmdxTomcat	Ejb-2.4.0	
BitRock Installer	🖨 <u>B</u> ack	Eorward	Cancol
		Porward	X <u>C</u> ancel

5. Please note the information on the following screen. It is assumed that you have installed JDK 1.5 (also called JDK 5.0) and Ant v1.7.0 appropriate for your platform (see Prerequisites). Click [Forward] to continue:

	Setup	
IMPORTANT		opendx 🕹
Installation instructions		
OpenEJB 3.1. The lib dire libraries and is therefore	omcat 6.0.18 instance extended ectory of the Tomcat instance con e ready to run openMDX based a le the JDK 1.5 binaries. Make sure re continuing.	ntains the openMDX pplications. The
BitRock Installer ———	⊕ Equal box Back ☐	orward X Cancel

6. Select the home directory of your JDK 1.5 installation - for example **/opt/jdk1.5.0_17** - and then click [Forward] to continue:

;==	Setup	
JDK 1.5 home directory		opemdx 🕹
Select home directory of an Windows or /usr/lib/jvm/jdk1	existing JDK 1.5, e.g. C:\pgm\J 5.0 on Linux platforms.	ava\jdk1.5.0 on
JDK 1.5 home directory /op	t/jdk1.5.0_17	
BitRock Installer		▶
	🗢 <u>B</u> ack 🖨 Eor	ward X Cancel

7. Select the home directory of your Ant installation - for example
/opt/apache-ant-1.7.0 - and then click [Forward] to continue:

»=	Setup	-	
Ant 1.7.0 home directory		•••	openıdx
Select home directory of an exist ant-1.7.0 on Windows or /opt/apa			m\apache-
Ant 1.7.0 home directory /opt/ap	ache-ant-1.7.0		
BitRock Installer			
	🗢 <u>B</u> ack	Eorward	🗙 <u>C</u> ancel

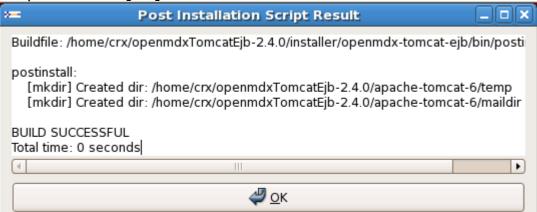
8. Enter the Tomcat ports (defaults are shown below). Please note that Tomcat does not start properly unless it has exclusive use of these ports. Click [Next] to continue:

3 	Setup	
		open ıdx
Tomcat configuration	n settings	
Tomcat HTTP port	8080	
Tomcat HTTPS port	8443	
Tomcat server port	8005	
Tomcat AJP port BitRock Installer ——	8009	
	🗢 <u>B</u> ack 🖨 🖨 Eorward	X <u>C</u> ancel

9. Finally, click [Forward] to start the installation:

3 	Setup	
Ready to Install		opendx 🕹
Setup is now ready to begin ins	stalling openMDX Tomcat+	EJB on your computer.
BitRock Installer		
	⊕ Back □	orward X Cancel

10. Once the installation is complete, verify the result of the post installation script and click [Ok]:



11. Click [Finish] on the last screen to leave the installer:

3 	Setup _ 🗆 🗙	
	Completing the openMDX Tomcat+EJB Setup Wizard	
	Setup has finished installing openMDX Tomcat+EJB on your computer.	
LA	☑ [View Readme File]	
P		
	Gancel	

12. On your desktop, you should see the following new shortcuts created by the installer:



4.2 openCRX

- 1. Launch the Installer opencrxServer-2.4.0-linux-installer.bin
- 2. Click [Forward] on the following screen:



3. Accept the BSD License Agreement and click [Forward] again:

	secup	
License Agreement		Copencrx
Please read the following Lic agreement before continuin	ense Agreement. You must ac g with the installation.	cept the terms of this
This software is pu as listed below.	blished under the BS	D license
Copyright (c) 2004- All rights reserved	2009, CRIXP Corp., S	Gwitzerland
Do you accept this license?	I accept the agreement	
bo you accept this license:	\bigcirc I do not accept the agree	ement
BitRock Installer		
	🗢 <u>B</u> ack	rward X Cancel

On the following screen, navigate to the Tomcat installation directory – for example /home/crx/openmdxTomcatEjb-2.4.0 – and then click [Forward] to continue:

jene -	Setup	
Tomcat+EJB directory		Copencrx
openCRX is added to an existin	g Tomcat+EJB installation.	
Tomcat+EJB directory //home/c	rx/openmdxTomcatEjb-2.4.	C 🎓
BitRock Installer		
		ward X Cancel

5. Please note the information on the following screen and then click [Forward] to continue:

100	Setup	
IMPORTANT		Copencrx
Installation instructions		
This installer adds openCRX to a The installation comes with a pr does NOT include openMDX Tor installed before continuing.	econfigured HSQLDB data	abase. The installer
BitRock Installer —————	⊕ Equal to the second	orward X Cancel

6. Select the home directory of your JDK 1.5 installation - for example **/opt/jdk1.5.0_17** - and then click [Forward] to continue:

ica	Setup	
JDK 1.5 home directory		Copencrx
Select home directory of an ex Windows or /usr/lib/jvm/jdk1.5.		\Java\jdk1.5.0 on
JDK 1.5 home directory /opt/jd	lk1.5.0_17	
BitRock Installer —————	◆ <u>B</u> ack	orward X <u>C</u> ancel

7. Select the home directory of your Ant installation – for example
 /opt/apache-ant-1.7.0 – and then click [Forward] to continue:

/opt/apacne-ant-1./.0	– and then	CIICK [Forward	<u>j to contin</u> l
	Setup		
Ant 1.7.0 home directory		• <mark>)</mark>	pencrx
Select home directory of an exis ant-1.7.0 on Windows or /opt/apa			\apache-
Ant 1.7.0 home directory //opt/ap	oache-ant-1.7.0		
BitRock Installer			
	🖨 <u>B</u> ack	Eorward	K <u>C</u> ancel

8. Enter the port number of the **HSQLDB service**. You can choose any port available on your system. The default is **9001**. Click [Forward] to continue:

E	Setup	
HSQLDB port		Copencrx
The installer comes with a defau the HSQLDB database.	ılt database. Please enter th	ne port number for
HSQLDB port 9001		
BitRock Installer		
	⊕ Eorv ■	vard X <u>C</u> ancel

9. Next, click [Forward] to start the installation:

1	Setup	
Ready to Install		Copencrx
Setup is now ready to begin ir	nstalling openCRX Server	on your computer.
	2 .	
BitRock Installer		
	🖨 <u>B</u> ack 🔿	Eorward

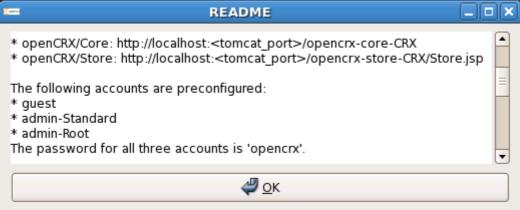
14. Verify that the post installation completed with errors and then click [OK]:

Post Installation Script Result	
Buildfile: /home/crx/openmdxTomcatEjb-2.4.0/installer/opencrx-server/bin/p	ostir
postinstall:	
BUILD SUCCESSFUL Total time: 0 seconds	
	►
<i>4</i> [₽] <u>о</u> к	

10. Once the installation is complete, click [Finish] on the last screen:

Setup _ 🗆 🗙
Completing the openCRX Server Setup Wizard
Setup has finished installing openCRX Server on your computer.
☑ View Readme File
Gancel

11. Finally, please carefully read the README, in particular information about **valid URLs**, preconfigured **users** and **passwords**:



12. On your desktop, you should now see the following shortcuts:



5 Running openCRX Server

The installation process created 8 shortcuts on your desktop:

The instantion process	created o shorteuts on your desktop.
Start Tomcat+EJB 2.4.0 (8080)	Start Tomcat+EJB
Stop Tomcat+EJB 2.4.0 (8080)	Stop Tomcat+EJB
Login Tomcat+EJB 2.4.0 (8080)	Login Tomcat+EJB (launch browser and connect to Tomcat)
Start openCRX Server 2.4.0 (9001)	Start openCRX Server (start HSQLDB, start Tomcat and deploy openCRX)
Stop openCRX Server 2.4.0 (9001)	Stop openCRX Server (stop Tomcat, stop HSQLDB)
Start HSQLDB (9001)	Start HSQLDB
Stop HSQLDB (9001)	Stop HSQLDB
HSQLDB Console (9001)	Launch Management Console of HSQLDB

5.1 Start openCRX Server

Double-click the shortcut **Start openCRX Server**.

5.2 Connect and Login

Double-click the shortcut **Login Tomcat+EJB**. This will launch your default browser and take you to the Tomcat home page. In the lower left corner you will see a box labeled openCRX CRM:

openCRX CRM	
openCRX Core	
openCRX Store	
openCRX Core openCRX Store openCRX Web Site	

Click on **openCRX Core** to load the openCRX login page. Enter a valid username (e.g. guest) and the corresponding password (e.g. opencrx) and then click [Login]. Initialization takes place during the first login after (re)starting Tomcat, so please be patient. Subsequent logins will be very fast.

5.3 Stop openCRX Server

Double-click the shortcut **Stop openCRX Server**.

6 Next Steps

Now that you have successfully installed openCRX you might want to have a look at some of the additional documentation published at http://www.opencrx.org/documents.htm.