openCRX Server Installation

Version 2.5.1

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. It should point to your JDK installation directory, e.g. to D:\Java\jdk1.5.0.

2.2   Ant 1.7.0

Download Ant 1.7.0 (available from http://ant.apache.org/) for your platform and install it by expanding the downloaded file to a directory of your choice.

Ant v1.7.1 might work as well. However, we recommend Ant v1.7.0 (there are some combinations of JDK versions and Ant v1.7.1 that "don't like each other"...)

Don't forget to set the **environment variable** ANT_HOME as follows: **ANT_HOME** should point to the installation directory of Ant, e.g. D:\apache-ant-1.7.0 on Windows or /opt/apache-ant-1.7.0 on Linux.

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-2.5.1-windows-installer.exe

Installer for Linux:
openmdxTomcatEjb-2.5.1-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-2.5.1-windows-installer.exe

Installer for Linux:
opencrxServer-2.5.1-linux-installer.bin

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

> Please note that HSQLDB is neither a high performance DBMS nor is it meant to be used as a productive DBMS for openCRX. However, it gets lots of points for "ease of installation" and that is what counts for getting off the ground fast.
>
> Once you're comfortable with openCRX you can easily migrate to another DBMS without losing any data. More information about choosing a suitable DBMS and migrating from HSQLDB to another DBMS is available here:
>
> - http://www.opencrx.org/faq.htm#db
> - http://www.opencrx.org/faq.htm#changedb

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-2.5.1-windows-installer.exe

2. Click [Next] on the following screen:
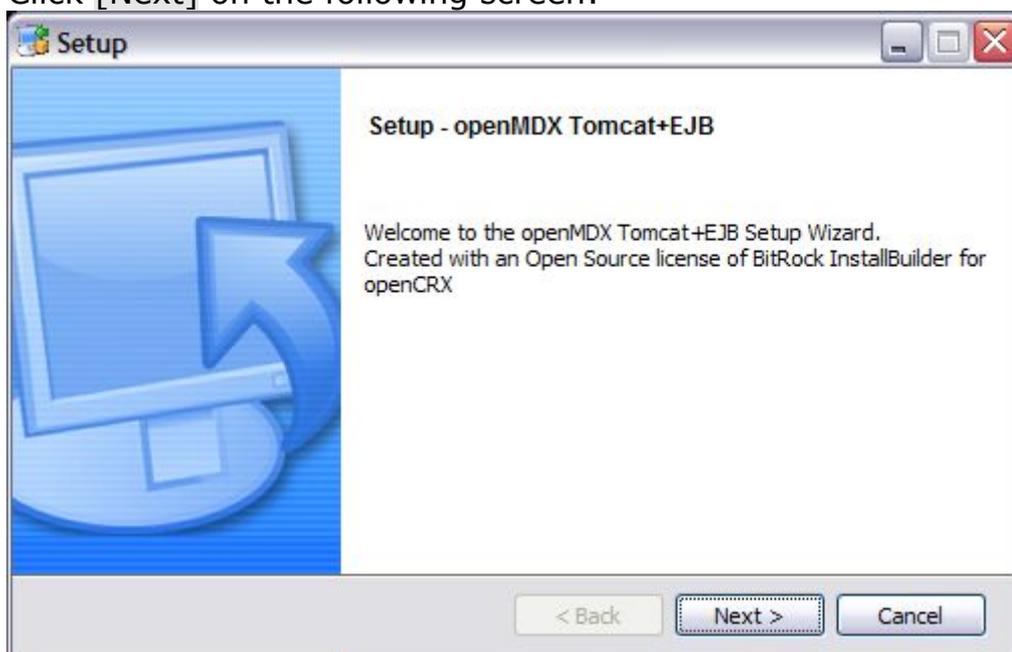
3. Accept the BSD License Agreement and click [Next] again:

4. Choose an **installation directory** (instead of 2.x.x you will be seeing the repsective version number; the directory 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
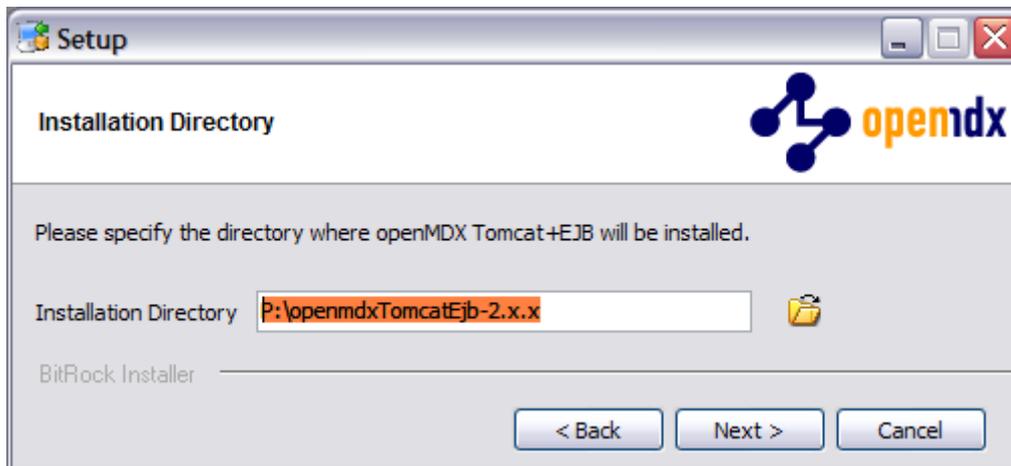
5. Please note the information on the following screen. It is assumed that you have installed JDK 1.5 (also called JDK 5.0) appropriate for your platform (see Prerequisites). Click [Next] to continue:
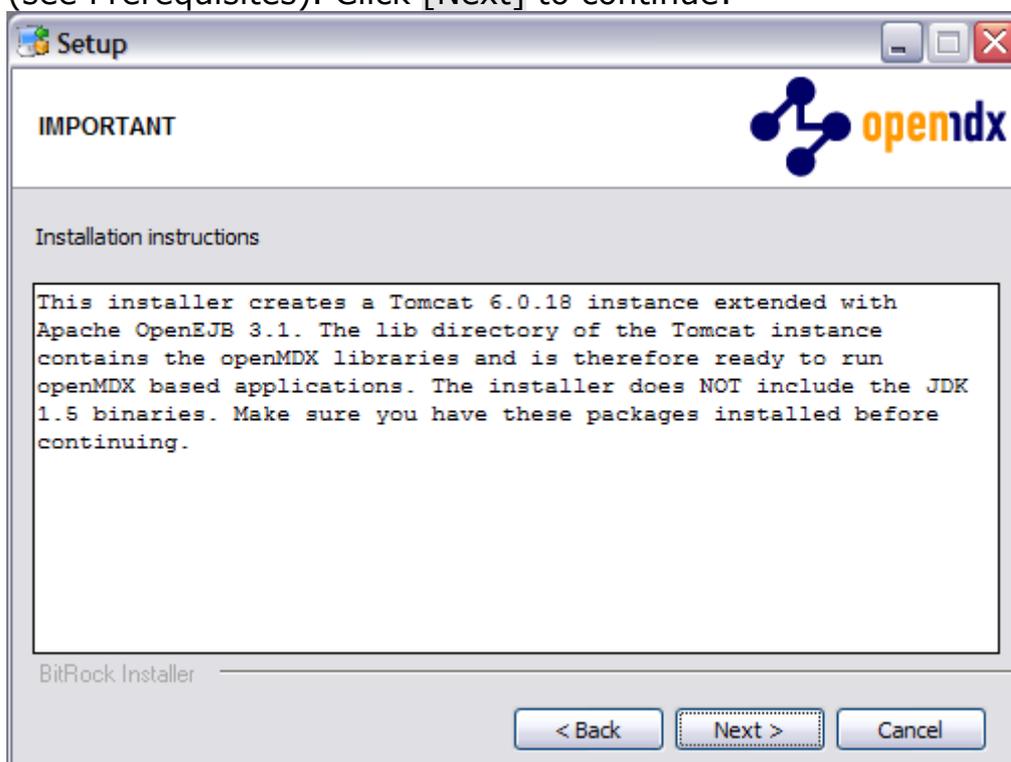
6. Select the home directory of your JDK 1.5 installation - for example **D:\Java\jdk1.5.0** - and then click [Next] to continue:
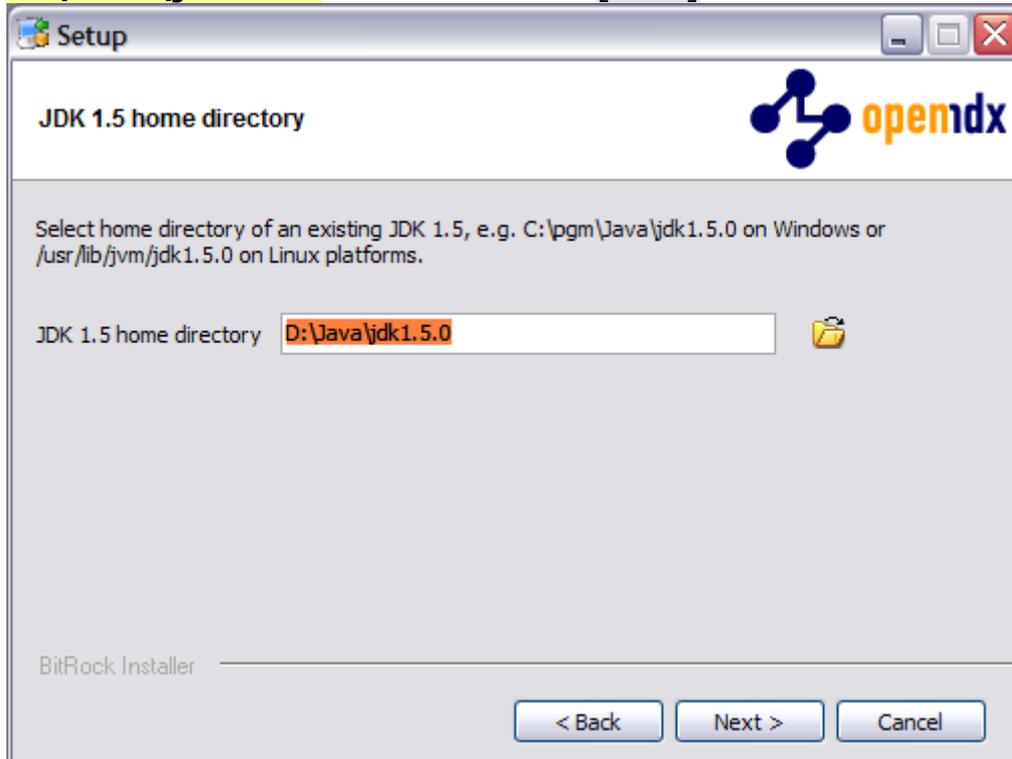
7. Select the home directory of your Ant installation – for example D:\apache-ant-1.7.0 - and then click [Next] to continue:
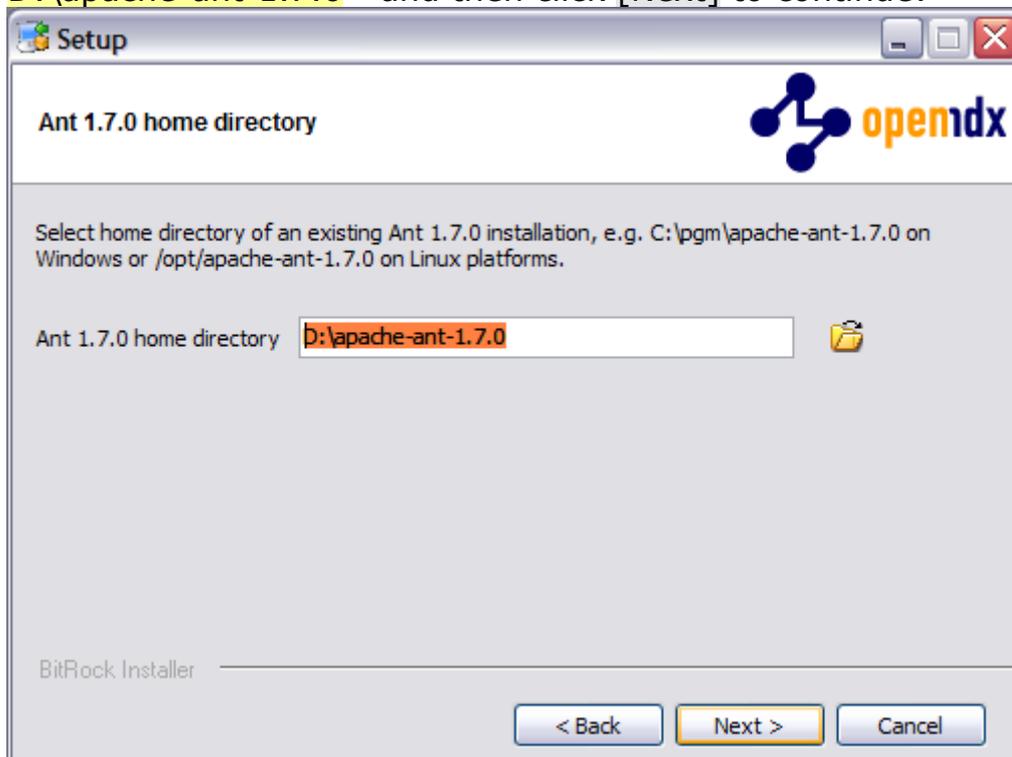
8. Enter the Tomcat ports (defaults are shown below). Please note that Tomcat does not start properly unless it has exclusive use of these ports, i.e. make sure that the chosen ports are indeed available. Click [Next] to continue:

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

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

```
Post Installation Script Result

Buildfile:
P:\openmdxTomcatEjb-2.x.x\installer\openmdx-tomcat-ejb\bin\postinstaller.xml

postinstall:
     [mkdir] Created dir: P:\openmdxTomcatEjb-2.x.x\apache-tomcat-6\temp
     [mkdir] Created dir: P:\openmdxTomcatEjb-2.x.x\apache-tomcat-6\maildir

BUILD SUCCESSFUL
Total time: 0 seconds

                              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 (instead of 2.x.x you will be seeing the respective version number):

Start Tomcat+EJB 2.x.x (8080)   Stop Tomcat+EJB 2.x.x (8080)   Login Tomcat+EJB 2.x.x (8080)
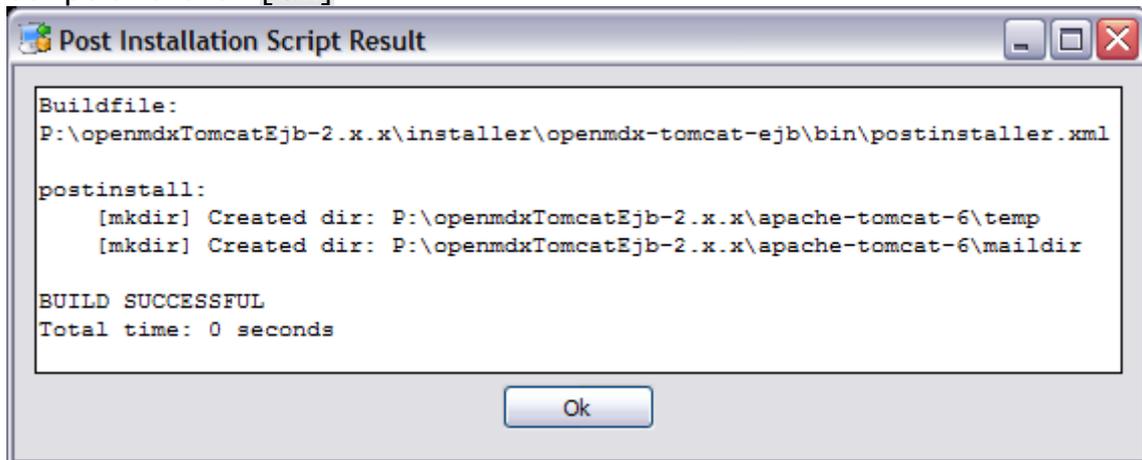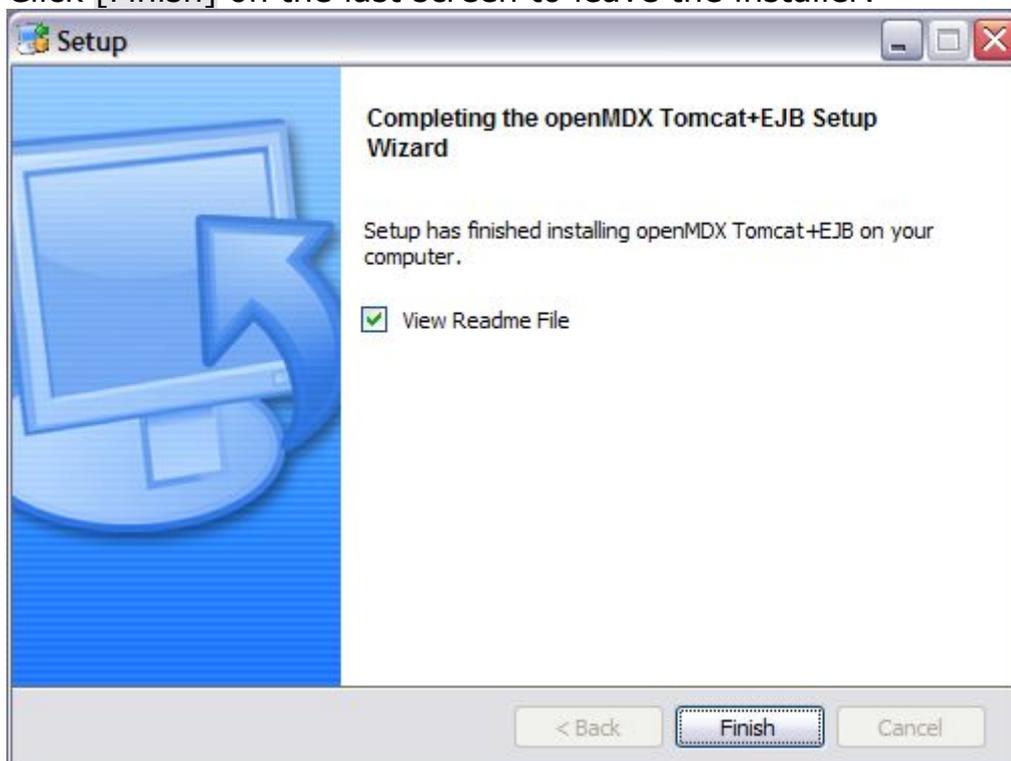
3.2 openCRX

1. Launch the Installer opencrxServer-2.5.1-windows-installer.exe

2. Click [Next] on the following screen:

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

4. On the following screen, navigate to the **Tomcat installation directory** – for example **P:\openmdxTomcatEjb-2.x.x** (use the respective version number instead of 2.x.x) – and then click [Next] to continue:

5. Please note the information on the following screen and then click [Next] to continue:
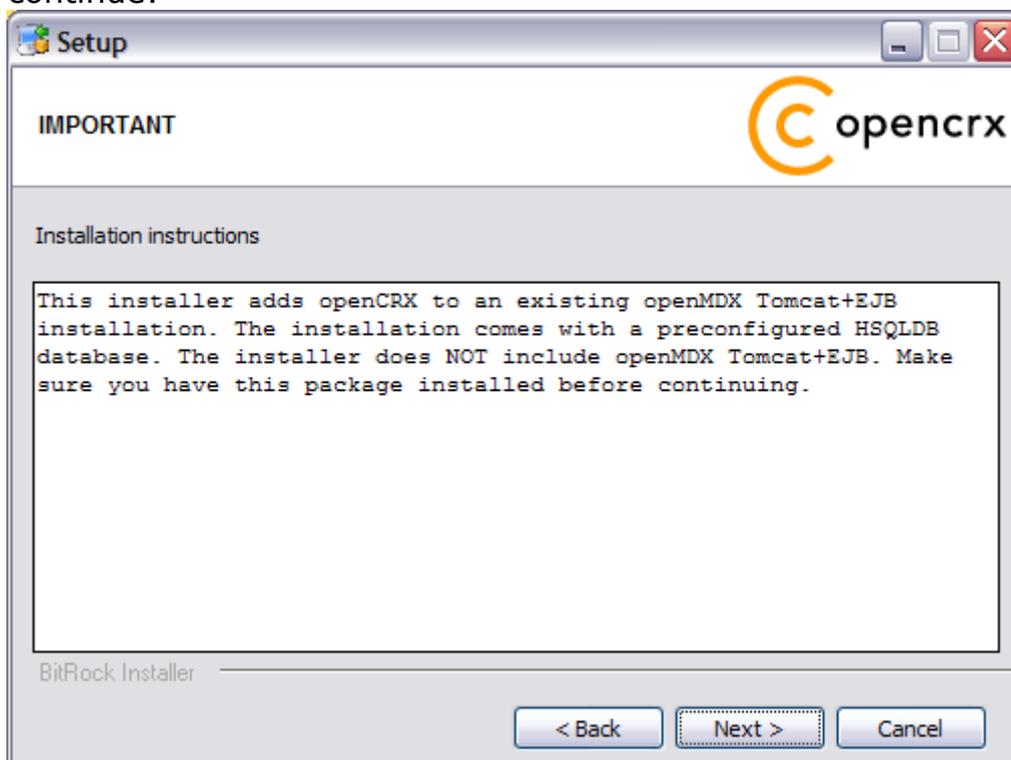
6. Select the home directory of your JDK 1.5 installation - for example **D:\Java\jdk1.5.0** - and then click [Next] to continue:
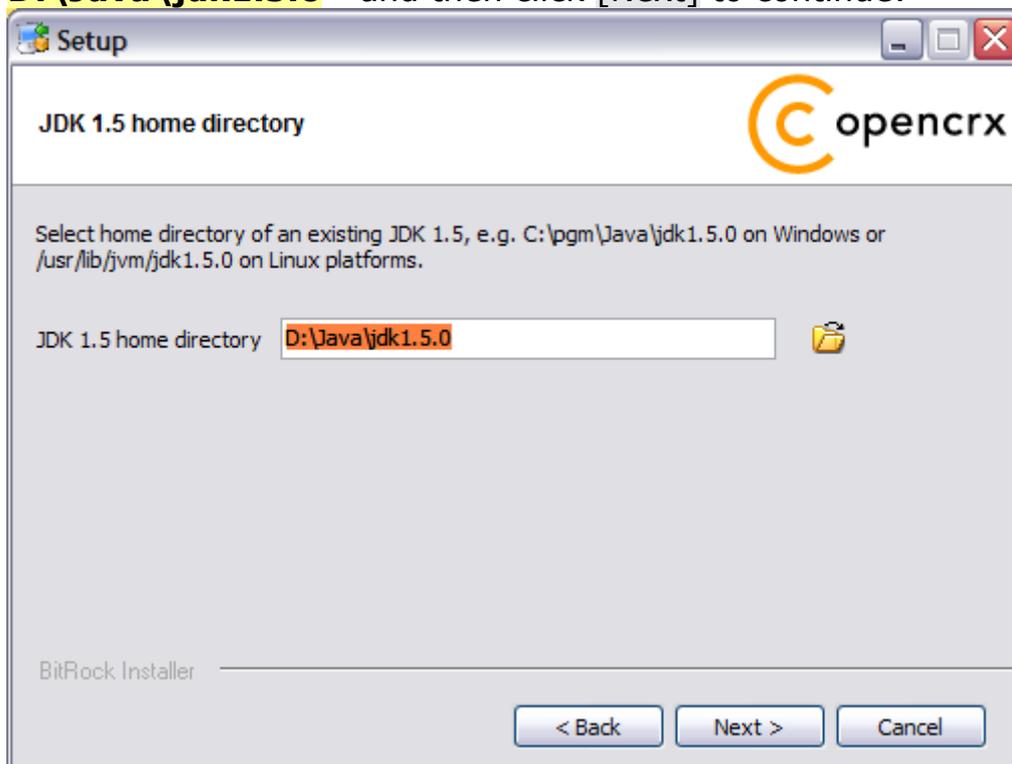
7. Select the home directory of your Ant installation – for example **D:\apache-ant-1.7.0** - and then click [Next] to continue:

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:

9. Finally, click [Next] to start the installation:
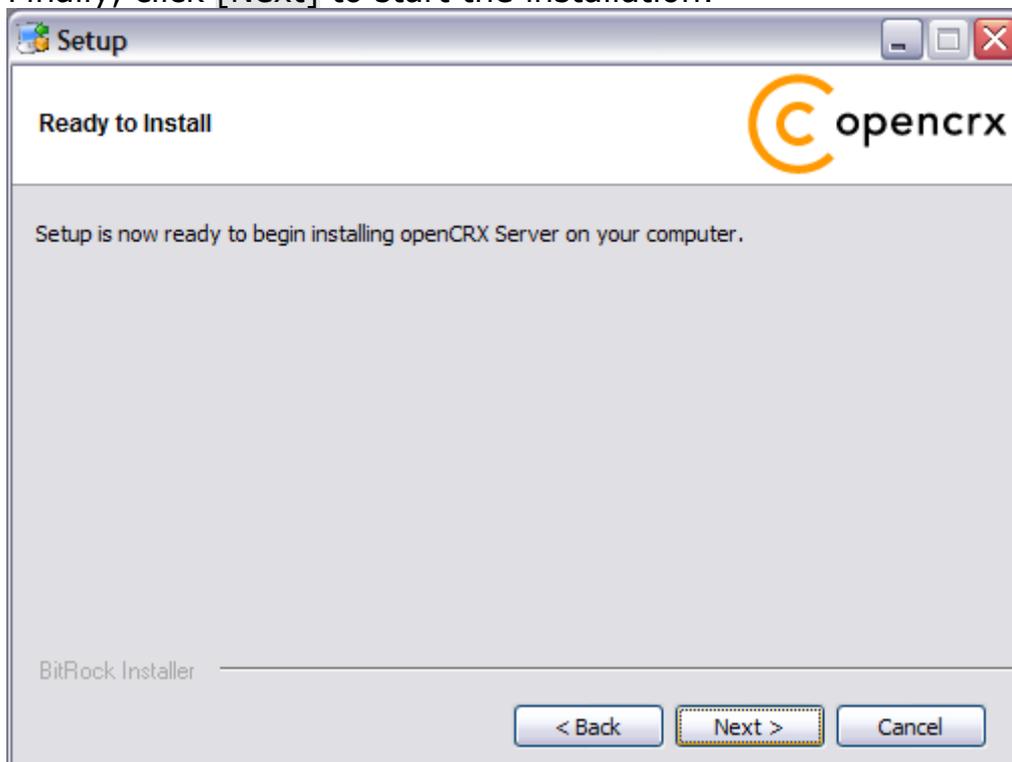
10. Verify that the post installation completed with errors and then click [OK]:
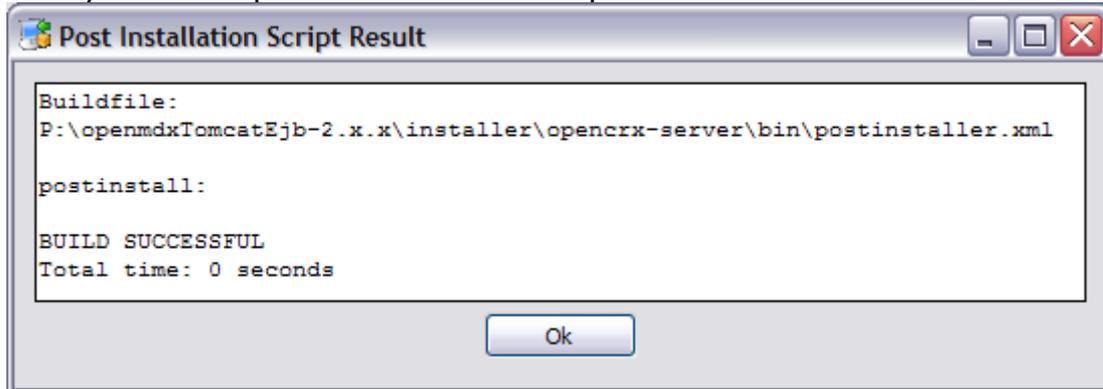
11. Once the installation is complete, click [Finish] on the last screen:
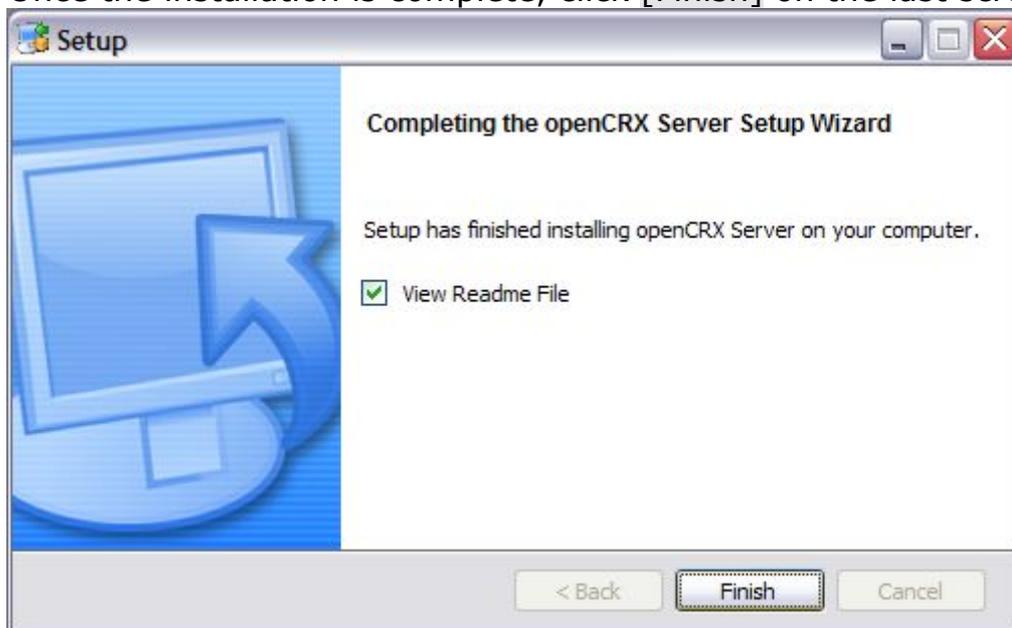
12. Finally, please carefully read the README, in particular information about **valid URLs**, preconfigured **users** and **passwords**:
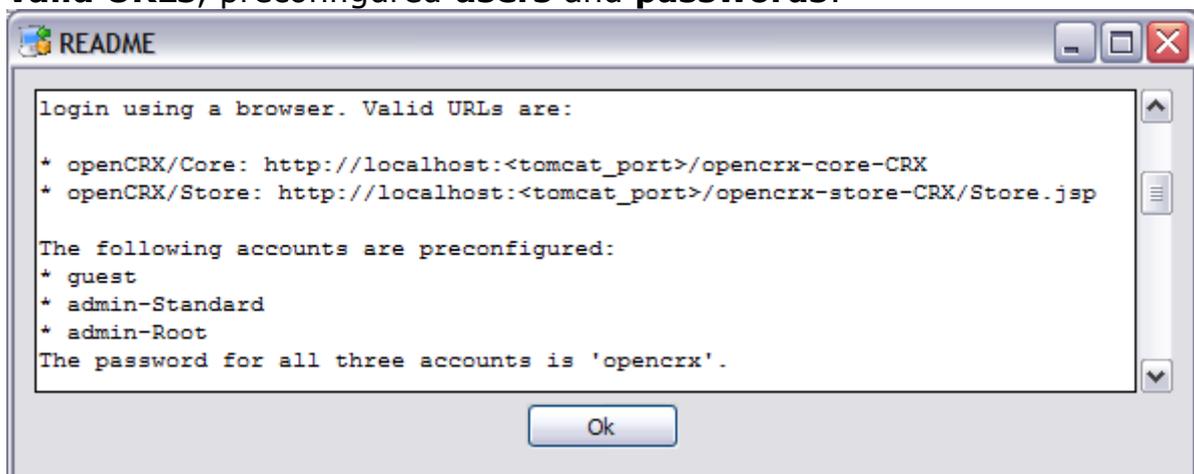
13. On your desktop, you should now see the following shortcuts (instead of 2.x.x you will be seeing the respective version number):
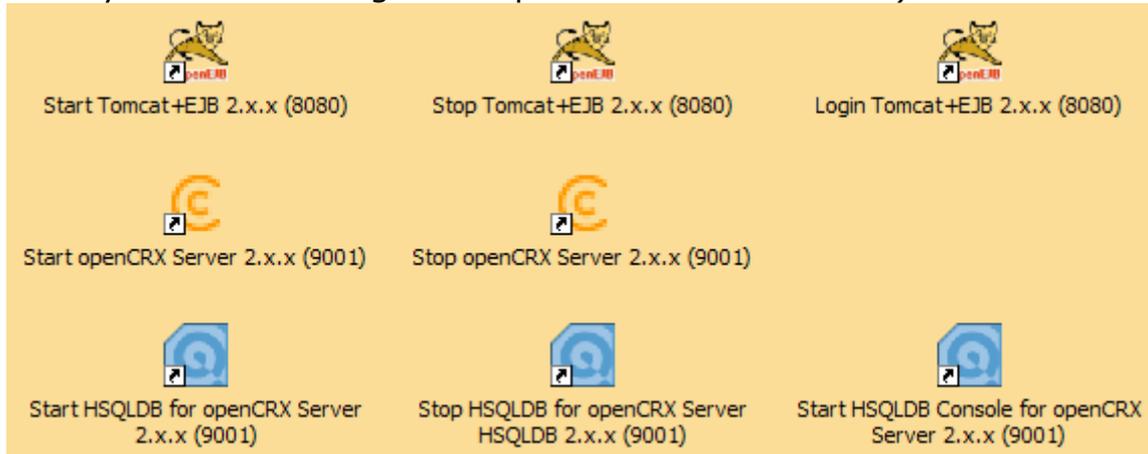
4 Installing openCRX Server on Linux

There is no need to install openCRX as root. We created a user **crx** and the whole installation procedure is done as user **crx**.
In case your system is GUI-less, you can launch the installer in text/console mode with the parameter --mode text.

4.1 Apache Tomcat / OpenEJB

1. Launch the Installer openmdxTomcatEjb-2.5.1-linux-installer.bin

2. Click [Forward] on the following screen:

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

4. Choose an **installation directory** (instead of 2.x.x you will be seeing the respective version number); it will be created automatically if it does not exist yet). Then click [Forward] to continue:
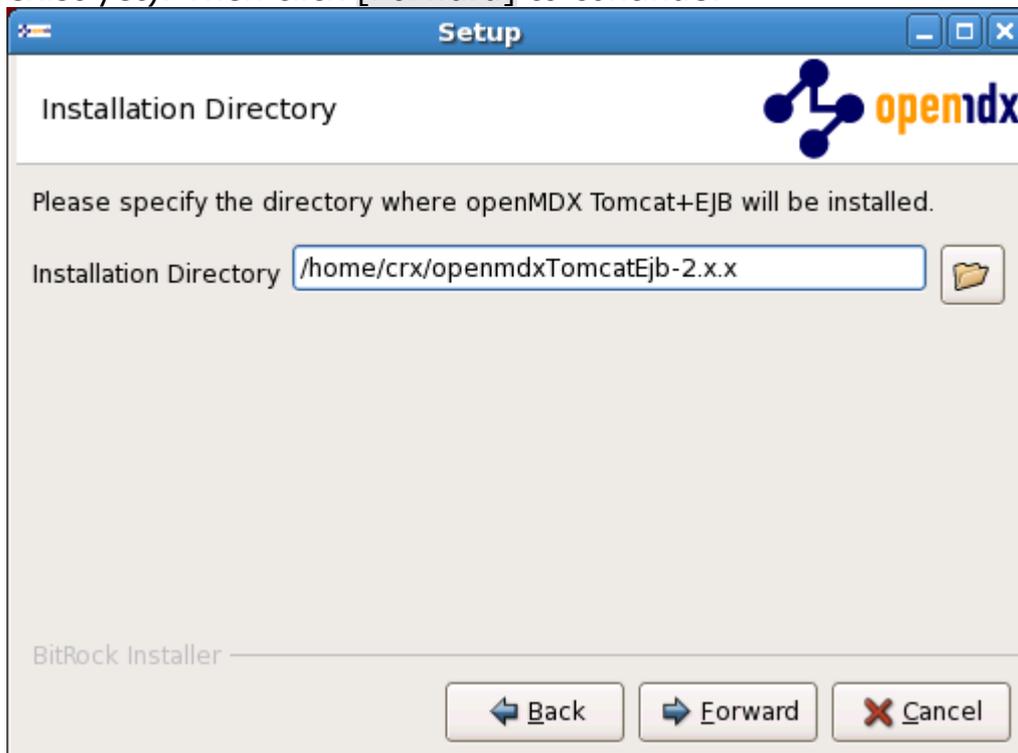
5. Please note the information on the following screen. It is assumed that you have installed JDK 1.5 (also called JDK 5.0) and Ant v1.7.0 appropriate for your platform (see Prerequisites). Click [Forward] to continue:
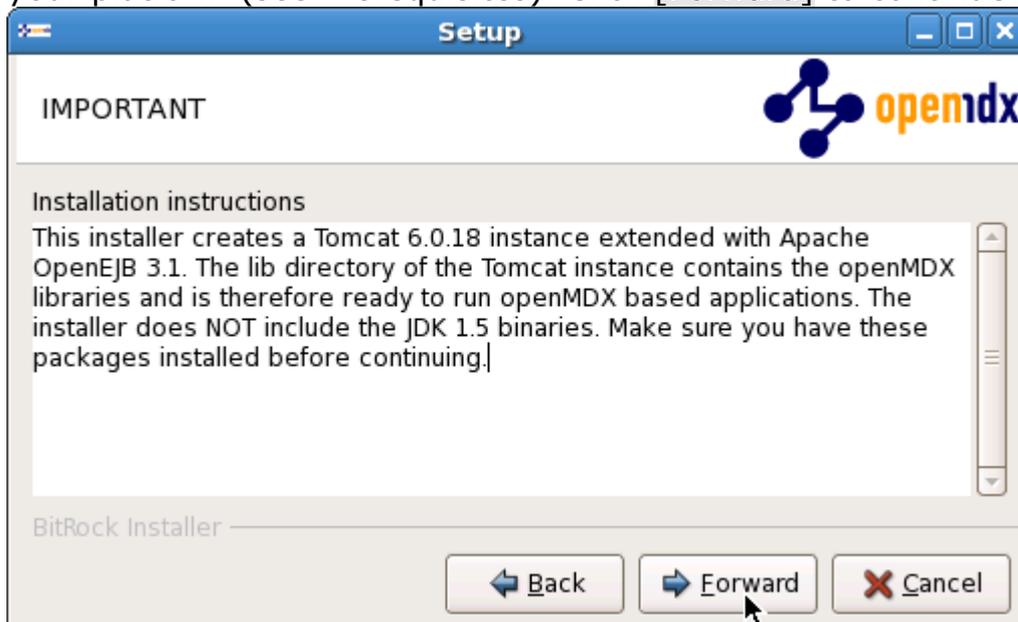
6. Select the home directory of your JDK 1.5 installation - for example
    /opt/jdk1.5.0_17 - and then click [Forward] to continue:

7. Select the home directory of your Ant installation - for example
    /opt/apache-ant-1.7.0 - and then click [Forward] to continue:
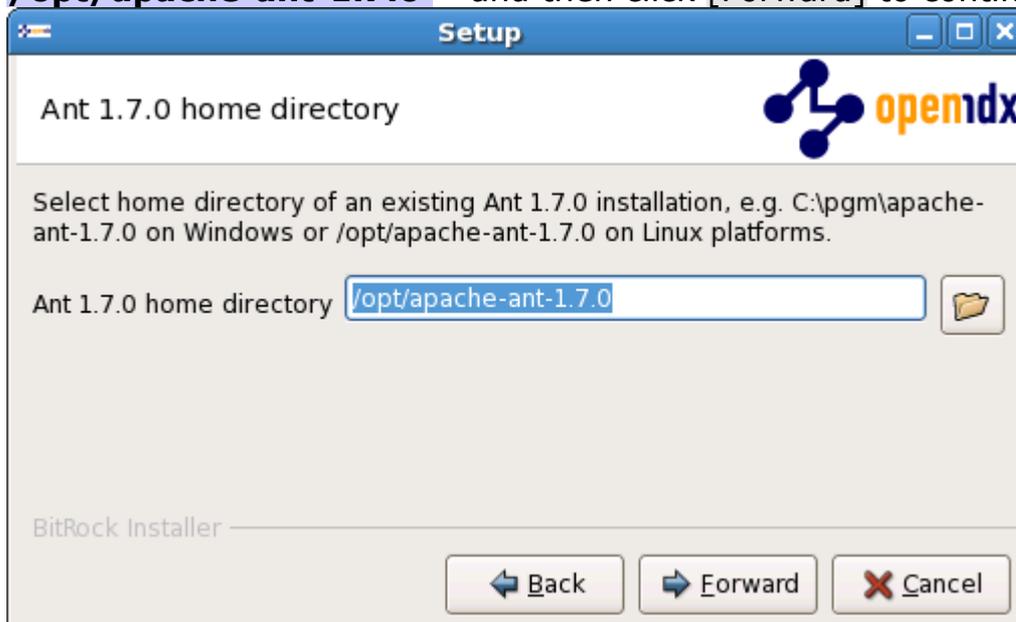
8. Enter the Tomcat ports (defaults are shown below). Please note that Tomcat does not start properly unless it has exclusive use of these ports, i.e. make sure that the ports you choose are not already in use. Click [Next] to continue:
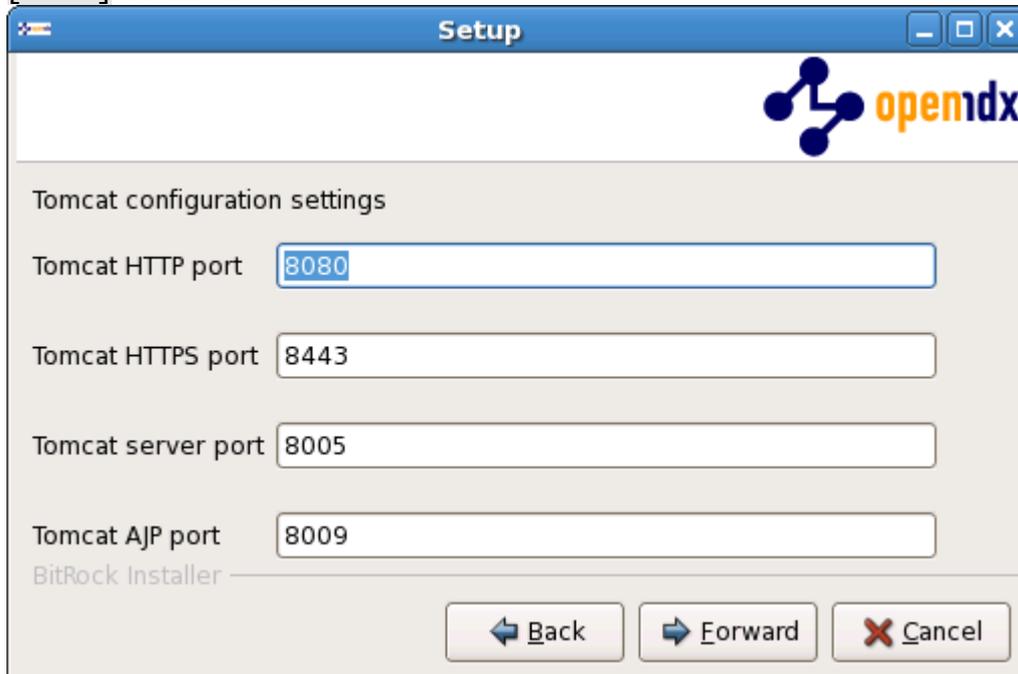
9. Finally, click [Forward] to start the installation:
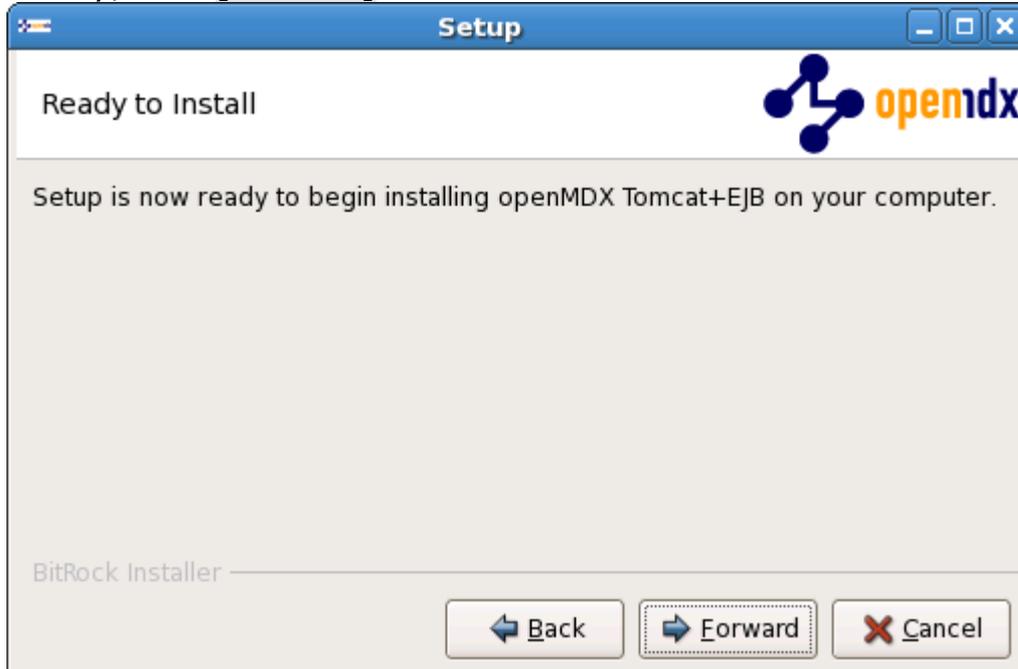
10. Once the installation is complete, verify the result of the post installation script and click [Ok]:

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

12. On your desktop, you should see the following new shortcuts created by the installer (instead of 2.x.x you will be seeing the respective version number):

4.2 openCRX

1. Launch the Installer opencrxServer-2.5.1-linux-installer.bin

2. Click [Forward] on the following screen:

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

4. On the following screen, navigate to the **Tomcat installation directory** – for example **/home/crx/openmdxTomcatEjb-2.5.1** – and then click [Forward] to continue:
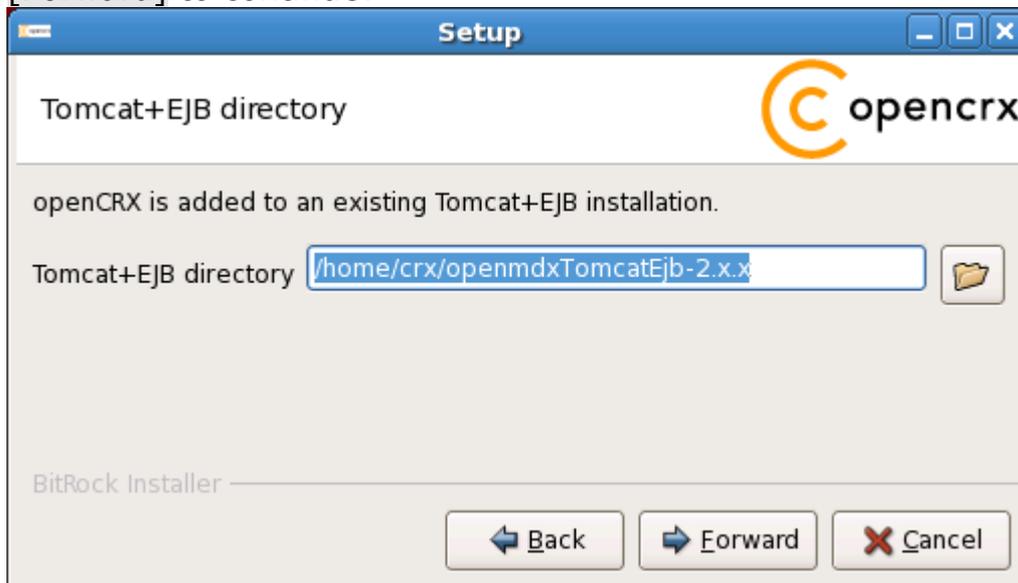
5. Please note the information on the following screen and then click [Forward] to continue:
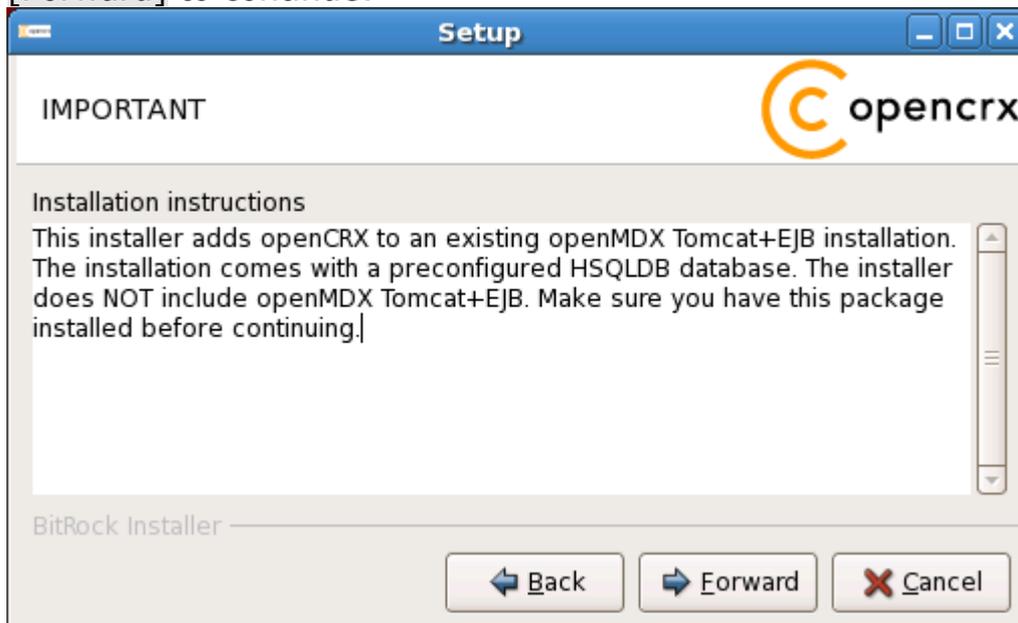
6. Select the home directory of your JDK 1.5 installation - for example
    /opt/jdk1.5.0_17 - and then click [Forward] to continue:
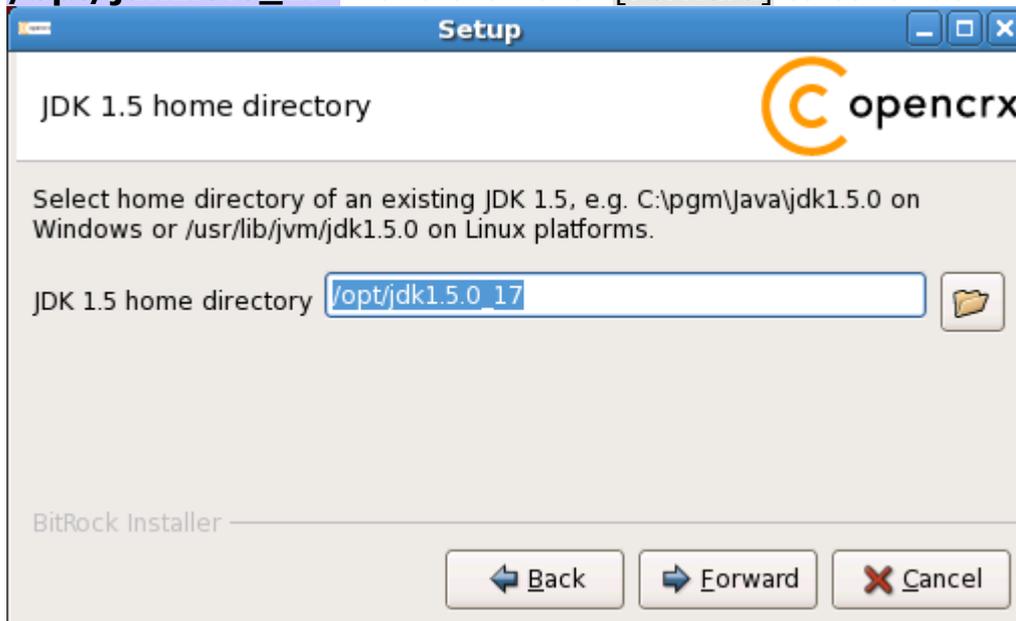
7. Select the home directory of your Ant installation – for example
    /opt/apache-ant-1.7.0 – and then click [Forward] to continue:
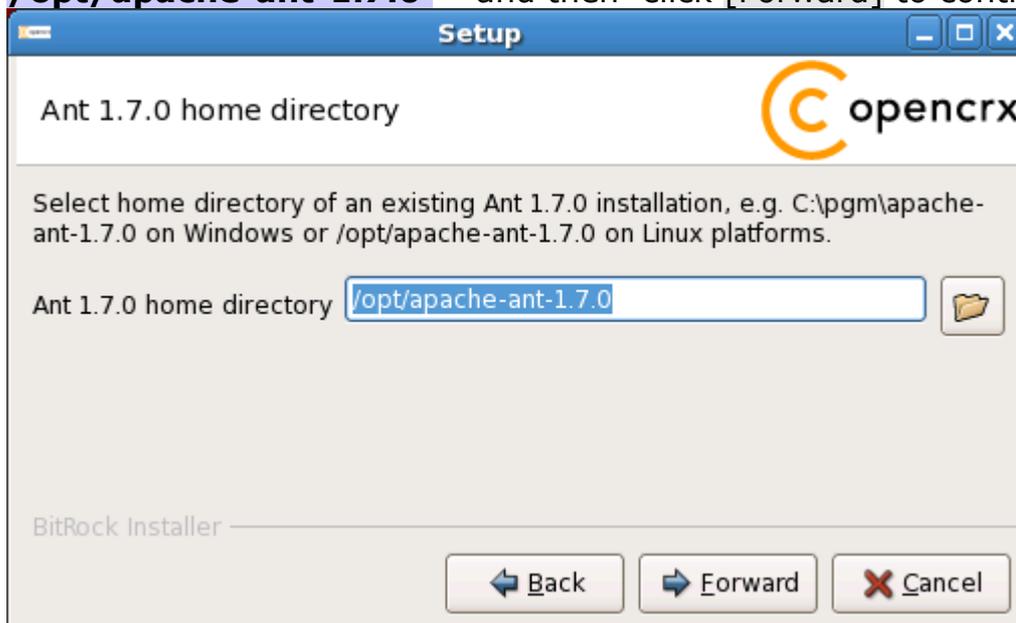
8. Enter the port number of the **HSQLDB service**. You can choose any port available on your system. The default is **9001**. Click [Forward] to continue:
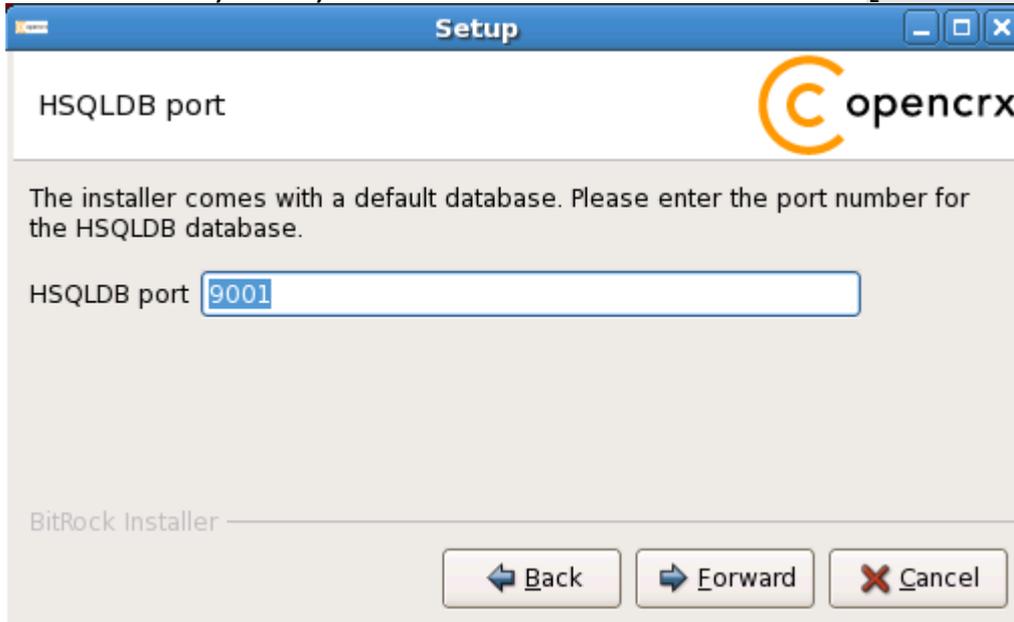
9. Next, click [Forward] to start the installation:
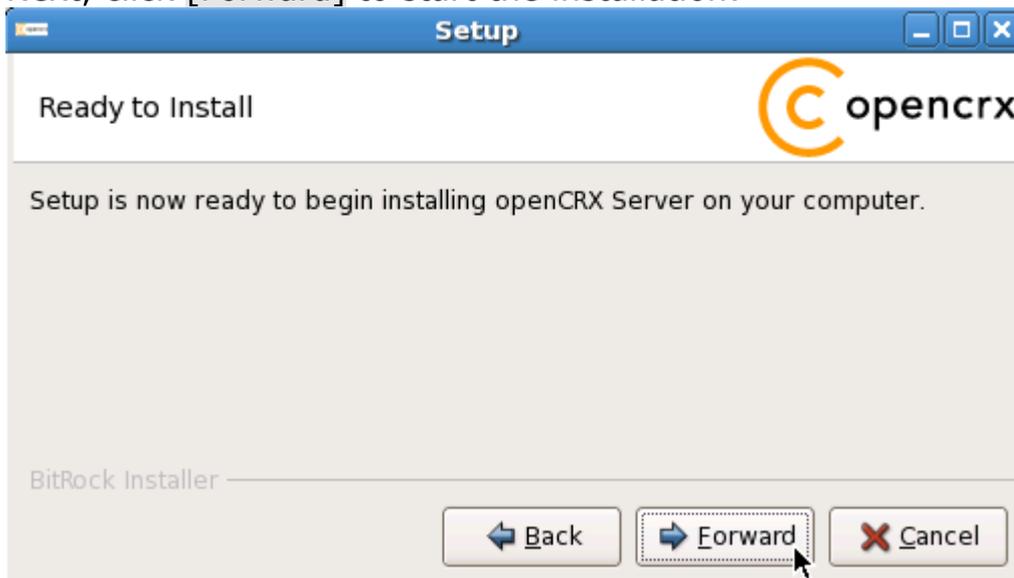
14. Verify that the post installation completed with errors and then click [OK]:
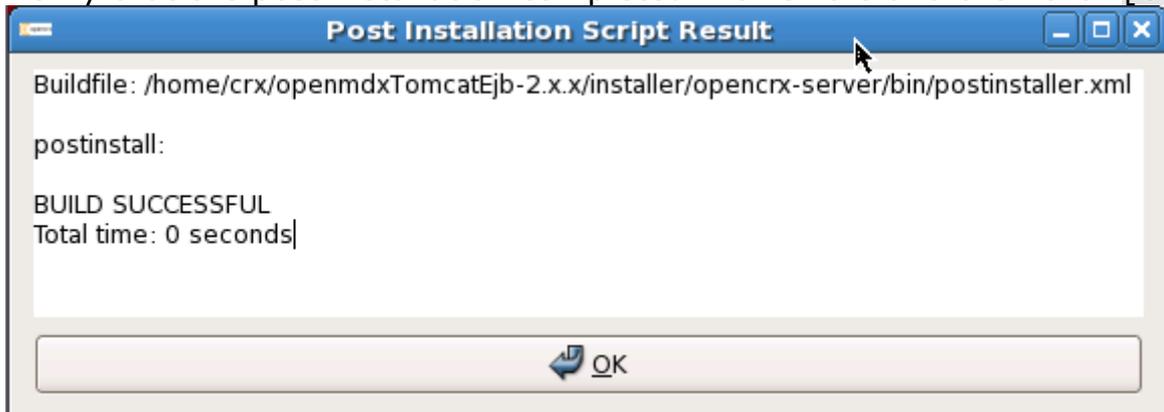
Post Installation Script Result

Buildfile: /home/crx/openmdxTomcatEjb-2.x.x/installer/opencrx-server/bin/postinstaller.xml

postinstall:

BUILD SUCCESSFUL
Total time: 0 seconds

OK

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

← Back   Finish   ✗ Cancel

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

README

* openCRX/Core: http://localhost:<tomcat_port>/opencrx-core-CRX
* openCRX/Store: http://localhost:<tomcat_port>/opencrx-store-CRX/Store.jsp

The following accounts are preconfigured:
* guest
* admin-Standard
* admin-Root
The password for all three accounts is 'opencrx'.

OK
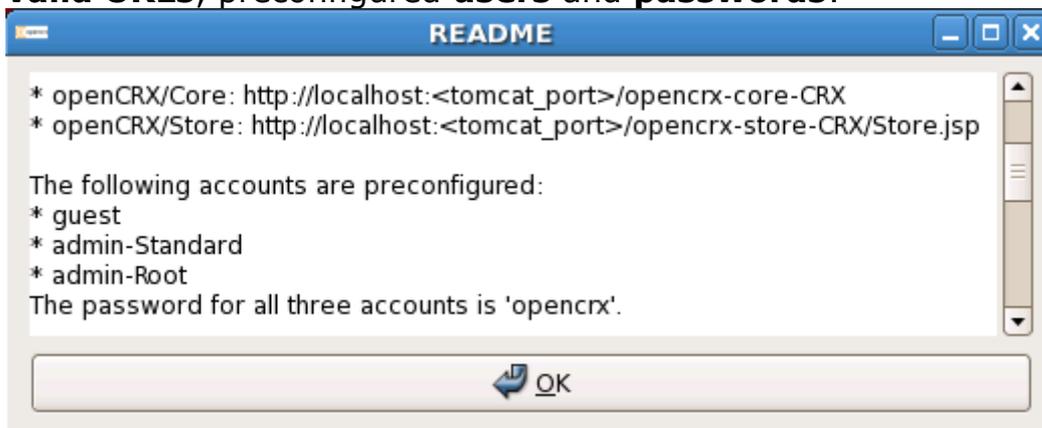
12. On your desktop, you should now see the following shortcuts (instead of 2.x.x you will be seeing the respective version numbers):

5   Running openCRX Server

The installation process created 8 shortcuts on your desktop (instead of 2.x.x you will be seeing the respective version numbers):

Start Tomcat+EJB 2.x.x (8080)	Start Tomcat+EJB
Stop Tomcat+EJB 2.x.x (8080)	Stop Tomcat+EJB
Login Tomcat+EJB 2.x.x (8080)	Login Tomcat+EJB (launch browser and connect to Tomcat)
Start openCRX Server 2.x.x (9001)	**Start openCRX Server** (start HSQLDB, start Tomcat and deploy openCRX)
Stop openCRX Server 2.x.x (9001)	**Stop openCRX Server** (stop Tomcat, stop HSQLDB)
Start HSQLDB for openCRX Server 2.x.x (9001)	Start HSQLDB
Stop HSQLDB for openCRX Server HSQLDB 2.x.x (9001)	Stop HSQLDB
Start HSQLDB Console for openCRX Server 2.x.x (9001)	Launch Management Console of HSQLDB
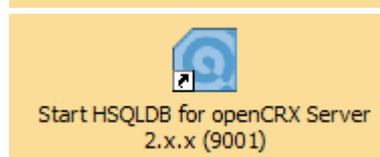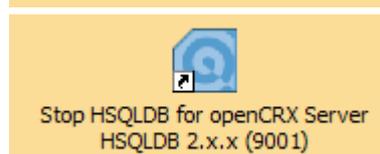
5.1 Start openCRX Server

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:

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.