



# Infor PLM for Discrete On-Prem Solution Configuration

Release 2022.x

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## About this document

This document explains the process to configure Infor PLM for Discrete On-Prem components on the server.

This document explains the installation and configuration of PLM OnPrem Components for below:

- On-Prem CAD Vault
- Kisters CAD Viewer
- Text Search

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

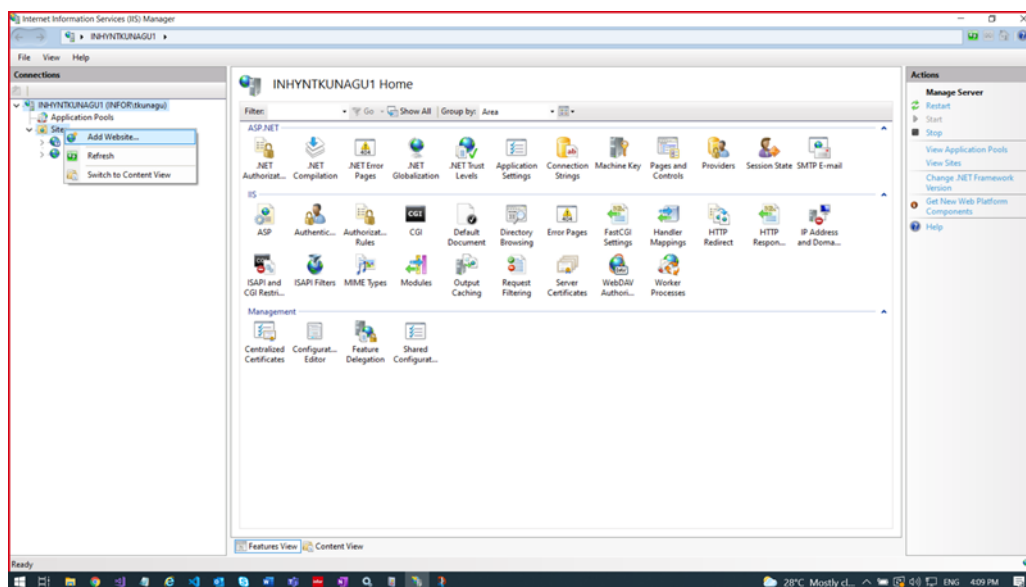
The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

# Chapter 1: Configuring On-Prem Components solution

For the latest CAD Connectors and OnPrem Components, refer to [KB 2226796](#).

- 1 Unzip the InforPLMforDiscrete\_OnPrem\_IntgComponents\_xxxx.xx..zip file to a temp folder for example c:\Temp.
- 2 Copy the folder to the required location. For example, c:\Installation\.
- 3 Open **Windows > IIS manager**.
- 4 Right-click on **Sites > Add WebSite**.



- 5 Specify the **Site** name, **Physical** path. For example, c:\Installation\.
- 6 Click **OK**.
- 7 Browse the URL to create configuration file. For example, https://hostname.infor.com:port/default.aspx.
- 8 Access the Web.config file from the Physical path. For example, c:\Installation\.
- 9 Update this appSettings:

```
<appSettings>
  <add key="kisters_input_files_path" value="<Temporary path for download files for Kisters>" />
  <add key="exepath" value="C:\Kisters\WebViewer\KAS.exe" />
  <add key="outputpath" value="C:\Kisters\WebViewer\models\integration_sample_models\" />
  <add key="markuppath" value="C:\Kisters\WebViewer\models\integration_sample_models\" />
  <add key="kisterurl" value="http://hostname:port/index.html?file=C:/Kisters/WebViewer/mod
els/integration_sample_models/" />
</appSettings>
```



```
<add key="solrURL" value="http://hostname:port/solr" />
</appSettings>
```

Update kisterurl value based on configuration. See, [Kisters Installation Process](#) on page 17.

Update solrURL value based on configuration. See, [SOLR Installation Process](#) on page 24.

## Configuring On-Prem solution URL in PLM for CAD Viewer

After configuring On-Prem solution, an Administrator must perform these steps and configure the Kisters URL in PLM, to work on CAD Viewer application:

- 1 Access the Vaults (pdadm1510m000) session.
- 2 Click  (New) to create a new vault or select a record and click  to update existing vault.
- 3 Update/Specify the corresponding On-Prem Solution URL:

### CAD Viewer Server:

On-Prem Solution URL that is configured for the On-Prem Server

For example: `https://inhyvplmes.infor.com:443/Home/Index?req_data=%1`

### User Name:

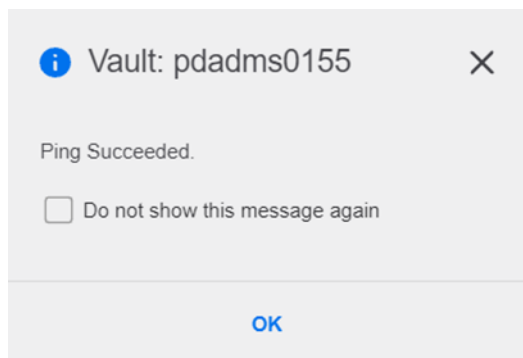
The username to authenticate On-Prem Server.

### Password:

The password to authenticate On-Prem Server.

**Note:** The Username and Password must match with the On-Prem solution configuration explained in the [Login details for OnPrem Components](#) on page 13.

- 4 Click **Validate** to check if the On-Prem solution is working. This message is displayed if the solution is running in the On-Prem server:





For the LN server to be able to ping OnPrem Server, the certificate of OnPrem server should be imported by using the session ttaad7270m000. This is the mandatory step to be followed.



## Configuring On-Prem Solution URL in PLM for File Operations

This configuration is required to perform download and upload file operation from PLM sessions to On-Prem server.

- 1 Access the Vaults (pdadm1510m000) session.
- 2 Click  (New) to create a new vault or select a record and click  to update existing Vault.
- 3 Update/Specify the corresponding On-Prem Solution URL:

### **Vault Server:**

On-Prem solution URL that is running on the On-Prem server.

For example, `https://inhyvwplmesc.infor.com:443`

### **User Name:**

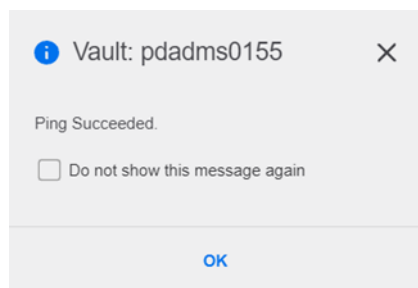
The username to authenticate On-Prem Server.

### **Password:**

The password to authenticate On-Prem Server.

**Note:** The **User Name** and **Password** must match with the On-Prem solution configuration as explained in the [Login details for OnPrem Components](#) on page 13.

- 4 Click **Validate** to check if the On-Prem solution is working, this message is displayed if the solution is running in the On-Prem server:



For the LN server to be able to ping On-Prem Server, the certificate of On-Prem server should be imported by using the session ttaad7270m000. This is the mandatory step to be followed.

## Configuring On-Prem Solution URL in PLM for Text Search

- 1 Access the Text Search Preferences (**pdadm0204m000**) session.
- 2 Update/Specify the details:

### **Search Engine URL**

On-Prem solution URL which is running on the On-Prem server.

For example, `https://hostname.infor.com:443`

**Collection Name**

The collection name configured during installation of the Solr. See, [SOLR Installation Process](#) on page 24.

**Default File Results**

Specify count for how many records display for a request.

**User Name**

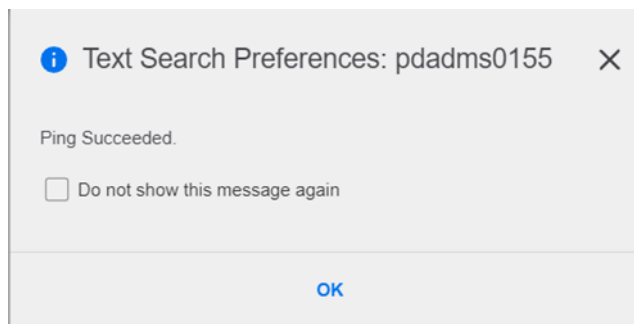
The username to authenticate On-Prem Server.

**Password**

The Password to authenticate On-Prem Server.

**Note:** Username & Password should be matched with the On-Prem solution configuration as explained in the [Kisters Installation Process](#) on page 17.

- 3 Click **Validate** to check if the On-Prem solution is working, this message is displayed if the solution is running in the On-Prem server:



For the LN server to be able to ping On-Prem Server, the certificate of OnPrem server should be imported by using the session ttaad7270m000. This is the mandatory step to be followed.

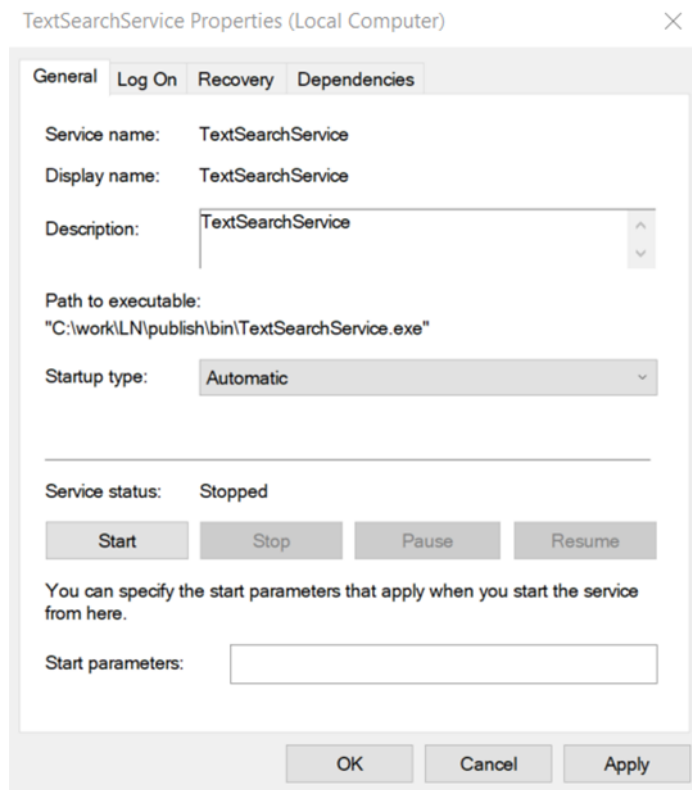
## Installing Text Search as Service

- 1 Right-click on the **TextSearchService.bat** file from the physical folder which is configured in IIS for On-Prem Solution ex: c:\Installation and click **Edit**.
- 2 Replace the <Specify Text Search Service path> with the TextSearchService.exe full path in **TextSearchService.bat** file. For example, c:\Installation\ TextSearchService.exe.
- 3 Replace the <Specify Text Search Service path> with the TextSearchService.exe full path in **UninstallTextSearchService.bat** file. For example, c:\Installation\ TextSearchService.exe.
- 4 Save and close the file.
- 5 Right-click on the **TextSearchService.bat** file and click on **Run as administrator**.
- 6 Run Services.msc to verify the TextSearchService has installed.
- 7 Right-click on the Service, Go to **Properties > Change the Startup type** as shown below.

**Note:**

If curl.exe does not exist, download from this URL:

<https://curl.se/download.html>.



- 8 Start the service, click on **Apply** and **OK**.

## Uninstall the Text Search Service

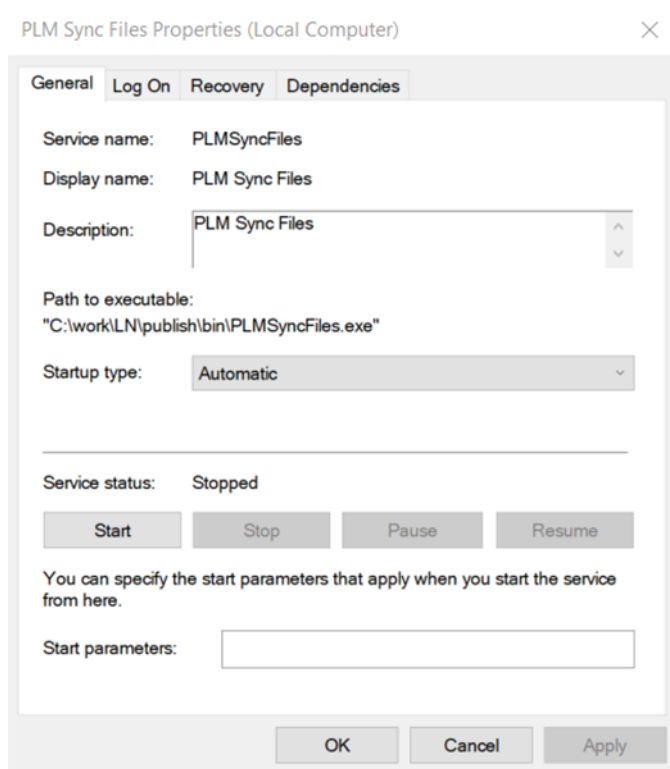
To uninstall the service, right-click on the **UninstallTextSearchService.bat** file and select **Run as administrator**.

## Installing PLM Sync Files as Service

This component and configuration is required if customer wants to use an On-Prem CAD Vault.

- 1 Right-click on the **PLMSyncFiles.bat** file from the `c:\Installations` and click **Edit**.
- 2 Replace the <Specify PLM Sync Files Service path> with the PLMSyncFiles.exe full path in PLMSyncFiles.bat file. For example, `c:\Installation\PLMSyncFiles.exe`.
- 3 Replace the <Specify PLM Sync Files Service path> with the PLMSyncFiles.exe full path in UninstallPLMSyncFiles.bat file. For example, `c:\Installation\PLMSyncFiles.exe`.

- 4 Save and close the file.
- 5 Right-click on the **PLMSyncFiles.bat** file and click **Run as administrator**.
- 6 Run Services.msc to verify the PLMSyncFiles has installed.
- 7 Right-click on the service. Go to **Properties > Change the Startup type** as shown below.



- 8 Start the service, click **Apply** and **OK**.

## Uninstall the PLM Sync Files Service

To uninstall the service, right-click on the **UninstallPLMSyncFiles.bat** file and select **Run as administrator**.

## Chapter 2: Login details for OnPrem Components

### Login details for On-Prem Components

When PLM is running in Cloud, ION API file with proper authentication is required from InforOS in which PLM is running.

For this, PLM should be defined as a Backend Service in Authorized Apps in ION API.

Refer to [Create and Download ION API](#) on page 26 File.

Download the ION API file.

Below steps are required to configure the Authentication from OnPrem to PLM in Cloud.

On the On-Prem Server, in a browser start `https://<hostname>/default.aspx`.

In the below screen, select Authentication type as OAuth2:



## PLM On-Prem Components Configuration

Login Info

Authentication Type

OAuth2

ION-API File

Choose File

No file chosen

Tenant ID

URL

Company

0422

Windows Service Configuration

▼

Vault Server Authentication

▼

CAD Viewer Server Authentication

▼

Text Search Configuration

▼

Save

Click **Choose File** and upload the ION API File.

Next continue with below configurations as explained **Windows Service Configuration**.

- **Log Info:** Enable to log the extra information in log file (default value is true).
- **Log File Path:** Specify the log file path to store the log info.
- **Time interval:** Interval at which windows service executes (in milli seconds).

For example, 120000 milli seconds is for 2 mins.

### Vault Server Configuration

- **Vault Name:** OnPrem Vault name which is specified in PLM Session pdadm1510m000.
- **Username:** Vault Username.
- **Password:** Vault Password.

**Note:** The **Username** and the **Password** must match with values that are provided in the Vault session in PLM (pdadm1510m000).

Vault: LNHandler LN Handler ☐ Is M

Vault Type: On-Prem S3 Bucket:

☒ Accessible From Server

Sync Task Field: s002

Last Sync Date Time:

Vault

Vault Server: https://inhyvwplmes.infor.com:443

User Name: huser

Password:

VALIDATE

### CAD Viewer Server Authentication

- **Username:** CAD Viewer Username.
- **Password:** CAD Viewer Password.

**Note:** The **Username** and the **Password** must match with values that are provided in the Vault session in PLM (pdadm1510m000).

Vault: LNHandler LN Handler ☐ Is Main Vault SET AS MAIN VAULT

Vault Type: On-Prem S3 Bucket:

☒ Accessible From Server

Sync Task Field: s002

Last Sync Date Time:

Vault

Vault Server: https://inhyvwplmes.infor.com:443

User Name: huser

Password:

VALIDATE

CAD Viewer

CAD Viewer Server: https://inhyvwplmes.infor.com:443/Home/Index?req\_data=%1

User Name: huser

Password:

VALIDATE

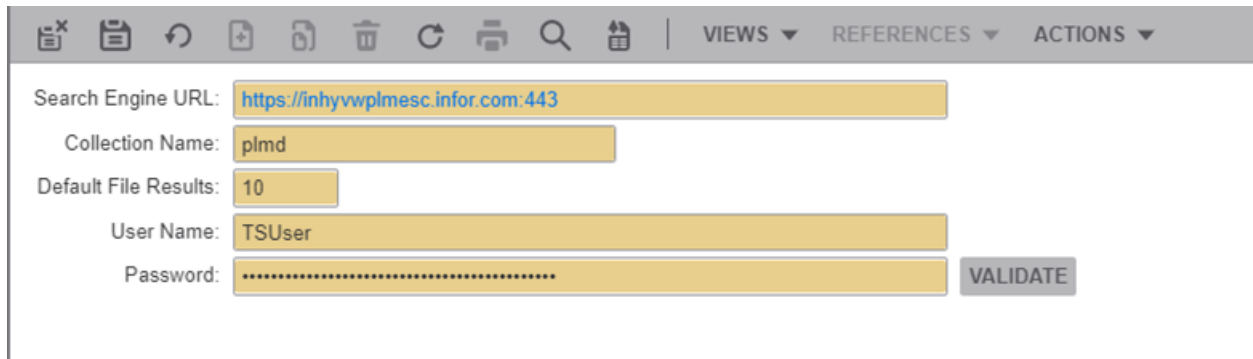
\*\*\*\*

### Text Search Configuration

- **Download path:** Specify the path on the server where files will be downloaded.
- **Solr path:** Path where Solr is installed.

- **Time interval:** The interval at which Text search executes (in milli seconds).  
For example, 120000 milli seconds is for 2 mins.
- **CURL Path:** The path where the curl.exe exists.
- **Username:** Text Search Username.
- **Password:** Text Search Password.

**Note:** The **Username** and the **Password** must match with values that are provided in the Text Search Preferences (pdadm0204m000) session in PLM.



Search Engine URL:

Collection Name:

Default File Results:

User Name:

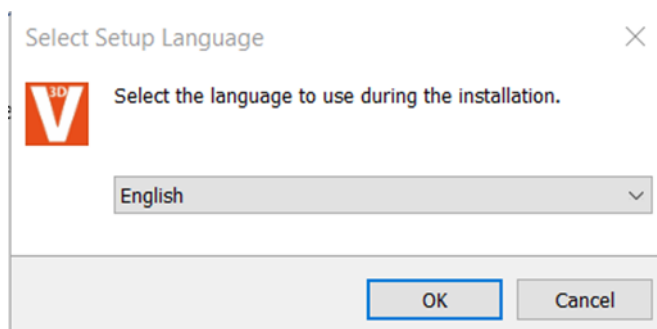
Password:



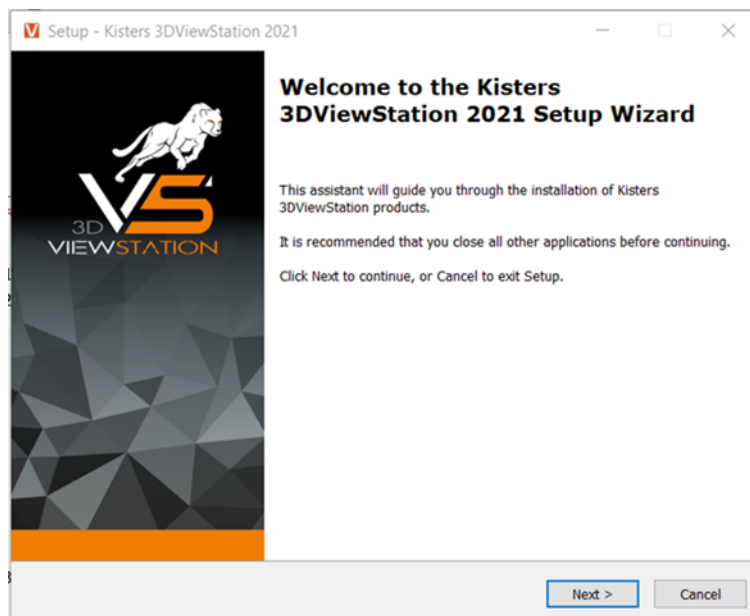
## Chapter 3: Appendix A: Kisters Installation Process

### Download & Installation of Kisters

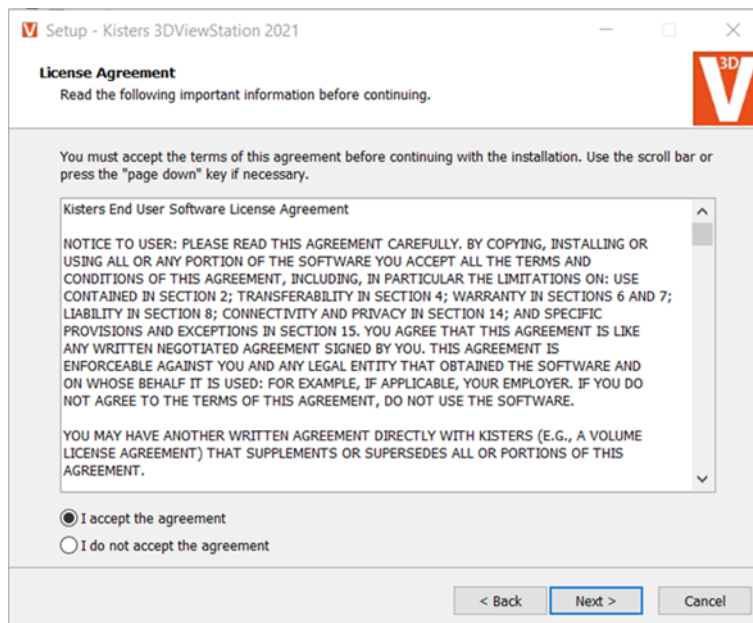
- 1 Click .exe file from zip file which is shared by Kisters team/website: <https://viewer.kisters.de/en/downloads.html>.
- 2 Select the language for installation process.



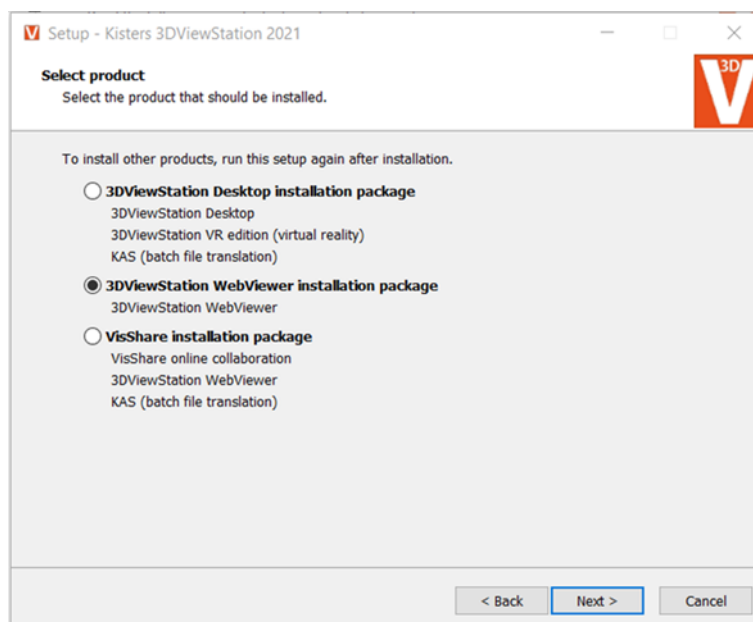
- 3 Click **OK**. This screen is displayed:



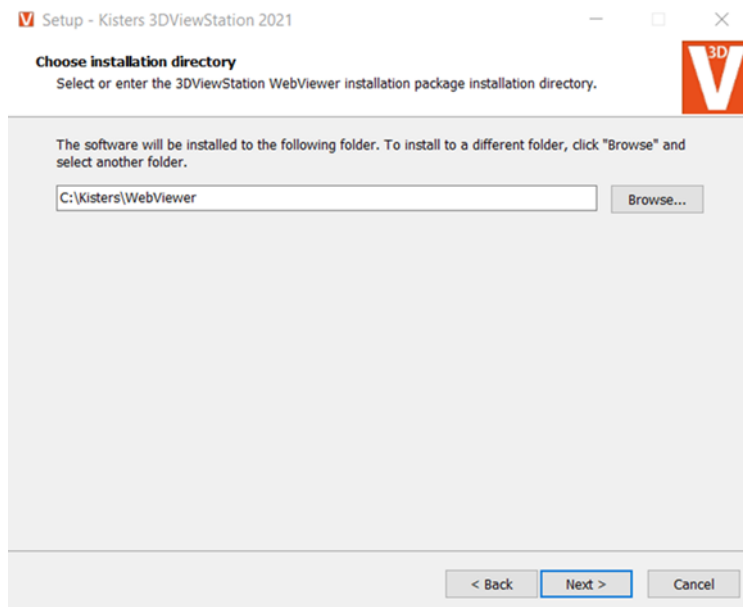
- 4 Click **Next**. This screen is displayed:



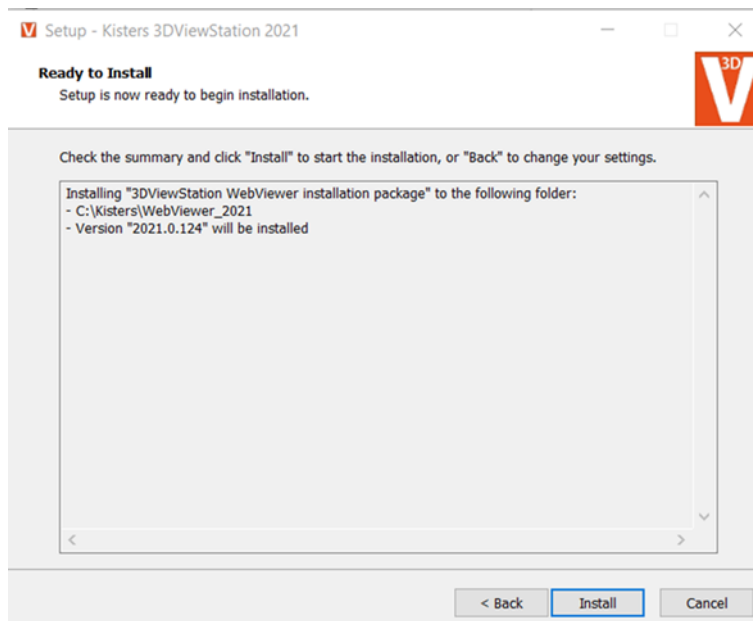
- 5 Accept the license agreement and click **Next**. This screen is displayed:



- 6 Select the **3DViewStation WebViewer Installation Package** option.
- 7 Click **Next**. This screen is displayed:



- 8 Specify the installation directory.
- 9 Click **Next**. This screen is displayed:



- 10 Click **Install**.

## Requesting License for Kisters

Check with the Infor Support or Infor Sales Executive regarding the procedure to get the License for Kisters.

Kisters CAD Viewer is licensed based on MAC Address of the server on which it is installed.

Typically license request can be initiated by sending email to [orders@viewstation.de](mailto:orders@viewstation.de), but check with Infor before initiating the request.

## Configuring HTTPS using nginx

Prerequisites for this task are

- Create a certificate for the server to Kisters in https.
- Extract the Certificate Name & Key from the generated certificate. This can be done by System Administrator.

After the above information is ready, proceed with below steps.

- 1 Download nginx zip file from <http://nginx.org/en/download.html>.
- 2 Extract the zip file and open the nginx.conf file from the ~/conf/ nginx.conf.
- 3 Copy and change values highlighted in yellow with correct information:

```
server
{
    listen <YOUR PORT NUMBER> ssl;
    server_name <HOSTNAME>.infor.com;
    ssl_certificate <CERTIFICATE NAME>;
    ssl_certificate_key <CERTIFICATE KEY>;

    location / {
        #proxy_redirect off;
        proxy_pass http://127.0.0.1:PORT_NUMBER/;
        # WebSocket support
        proxy_set_header Upgrade $http_upgrade;
        proxy_set_header Connection "upgrade";
    }
}
```

- 4 Add the changed information of Step3 above in the **nginx.conf** file, in the http {} section.
- 5 Access the command prompt with **Run as Administrator**.
- 6 Change the directory as `cd <nginx folder path>`.
- 7 Specify `nginx.exe` and press enter.
- 8 Test the website with the https configuration:

`https://hostname.infor.com/ <change to the correct URL >`

## Performing the post installation steps

There are two ways to complete the post installation steps

Method - 1: Follow 2-9 steps

Method - 2: Follow 10-15 steps

- 1 Go to Kisters installation directory and copy the license files provided by the Kisters team.  
For Example, copy the WebViewer.lic in C:\Kisters\WebViewer\ folder.  
To get the license file, refer to [Requesting License for Kisters](#) on page 19.

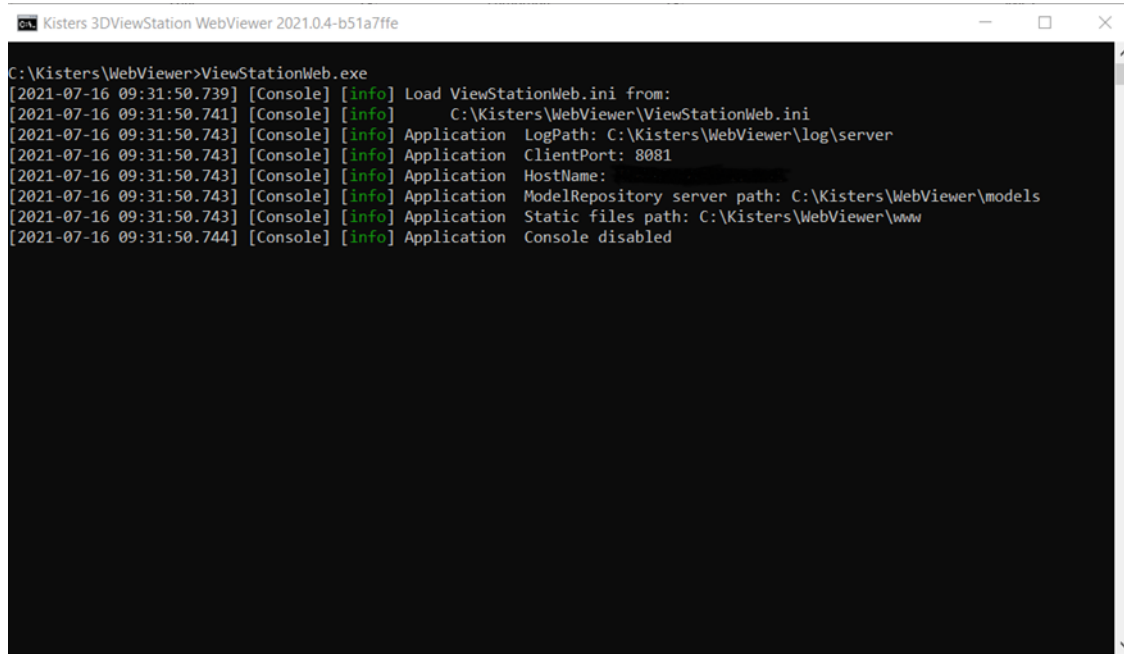
## Method-1

- 1 Remove \_ for the files **ViewStationWeb.ini** and **CRendererInstance.ini**.
- 2 Open the **ViewStationWeb.ini** file and update this information:
  - **Client port:** 8081 or any other port which is free.
  - **Log Path:** Custom log file storage path.
  - **Model repository:** Converted models stored path.
  - **Static Files:** Static files of the application path.
  - **Host name with port:** hostname:port.
  - **Console:** 0.
- 3 Open the **CRenderInstance.ini** file.
- 4 Change the Log Path and Model repository paths.
- 5 Change the value of g\_sWebSocketAdress in the ~\www\custom\override.js file:
  - http: ws://HOSTNAME:PORT/ws
  - https: wss://HOSTNAME:PORT/ws
- 6 Download the **Kisters\_Custom\_configs.zip** file from the [KB 2226796](#).
- 7 Extract the zip file and copy the customScripts.js and userdefined.js files into ~\www\custom folder.
- 8 Open customScripts.js file and search the keyword “Hostname” and replace with respective Hostname of the server.

## Method-2

- 1 Download the **Kisters\_Custom\_configs.zip** file from the [KB 2226796](#).
- 2 Copy the **CRendererInstance.ini** and **ViewStationWeb.ini** files installation folder.  
For Example, C:\Kisters\WebViewer\ folder.
- 3 Open **ViewStationWeb.ini** file and find the “**ClientPort**” and assign the port number, similarly “**HostName=<Hostname:port>**” and replace with respective Hostname and port number.  
For Example,  
ClientPort=8081  
HostName=myhostname:8081
- 4 Copy the customScripts.js, userdefined.js and override.js files into ~\www\custom folder.
- 5 Open the **customScripts.js** file and find the keyword “**Hostname**” and replace with the respective Hostname, save and close the file.

- 6 Open the `override.js` file and change the value of `g_sWebSocketAddress`
  - `http: ws://HOSTNAME:PORT/ws`
  - `https: wss://HOSTNAME:PORT/ws`
- 7 Run the **start\_WebViewer\_log.bat** file to start the Kisters server. A command prompt window is displayed with the system details:



```

C:\Kisters\WebViewer>ViewStationWeb.exe
[2021-07-16 09:31:50.739] [Console] [info] Load ViewStationWeb.ini from:
[2021-07-16 09:31:50.741] [Console] [info] C:\Kisters\WebViewer\ViewStationWeb.ini
[2021-07-16 09:31:50.743] [Console] [info] Application LogPath: C:\Kisters\WebViewer\log\server
[2021-07-16 09:31:50.743] [Console] [info] Application ClientPort: 8081
[2021-07-16 09:31:50.743] [Console] [info] Application HostName:
[2021-07-16 09:31:50.743] [Console] [info] Application ModelRepository server path: C:\Kisters\WebViewer\models
[2021-07-16 09:31:50.743] [Console] [info] Application Static files path: C:\Kisters\WebViewer\www
[2021-07-16 09:31:50.744] [Console] [info] Application Console disabled
  
```

Else, an error message is displayed.

- 8 Modify this URL.  
`http://<hostname>:<port>/index.html?file=<C:/Kisters/WebViewer/models/integration_sample_models/>`
  - **Hostname:** Kisters installed server Hostname.
  - **Port:** Allotted port number for Kisters.
  - **File:** Converted sample file location.
- 9 Test the URL to confirm that the Kisters is working.

## Run Kisters server as Windows Service

Modify the `Install_WebViewer_Service.bat` file and run the file to install as service:

```

"C:\Kisters\WebViewer\instsrv.exe" "Kisters WebViewer Server" "C:\Kisters\WebViewer\ViewStation Web.exe"
Pause
  
```

**Note:** Paths can vary based on the installation directory.

## Upgrade of Kisters Version

- 1** Download the new version of the **exe** file from Kisters Team or the website.
- 2** Stop the running Kisters server in services.msc.
- 3** Rename the old folder as **~Kisters\WebViewer\_(old version number)**. For example, ~\WebViewer\_2020.
- 4** Install the new version in the same folder as **~Kisters\WebViewer**.
- 5** Copy these files from the old version folder to newly created folder with respective to the paths.
  - License file (3DVS.lic)
  - CRendererInstance.ini
  - ViewStationWeb.ini
  - ~\www\custom\customScripts.js
  - ~\www\custom\overrides.js
  - ~\www\custom \userdefined.js
- 6** Start the Kisters server in services.msc.

## Chapter 4: Appendix B: Solr installation & Configuration

### Download and Install of Solr

- 1 Download Apache Solr from the web.  
From <http://lucene.apache.org/solr/downloads.html>  
Make Sure to Download the version which has the fix for Vulnerability CVE-2021-44228.
- 2 Unzip the `solr-<current version>.zip` on the system.  
**Note:** All commands to be performed in the command line are relative to the folder where Solr has been saved.
- 3 Run Command Prompt.
- 4 Change the directory using the command.  
For example, `cd C:\Installations\solr-8.7.0\bin`

### Starting the Solr

You must the run this command:

```
C:\Installations\solr-8.7.0\bin>solr.cmd start
```

By default, Solr uses port 8983. However, you can change the port using the `-p` parameter.

**Note:** For this guide, it is assumed that the default port is used.

You can check if Solr is running properly by browsing to <http://localhost:8983/solr> or <http://serverName:8983/solr>.

### Create a Core or Collection in Solr

Create a core or collection in Solr for all DMS documents using this command:

```
bin\solr.cmd create -c plmdms -s 2
```

You can specify the name of the DMS as required.



**Note:** An error is displayed if the plmdms collection already exists.

## Update Solr Configuration

- 1 Open this folder where Solr is downloaded:  
`<solrpath>\Collection Name\conf.`  
 For example, `C:\Installations\solr-8.7.0\server\solr\plmdms\conf.`
- 2 Rename the managed-schema file to schema.xml.
- 3 Remove all ManagedIndexSchemaFactory definitions in the **`solrconfig.xml`** file.
- 4 Add `<schemaFactory class="ClassicIndexSchemaFactory"/>` above the `<codecFactory class="solr.SchemaCodecFactory"/>` line in the **`solrconfig.xml`** file.
- 5 Modify the **`solrconfig.xml`** file in the `<updateRequestProcessorChain>` tag by setting `update.autoCreateFields` to **false**.
- 6 Add these lines after the `<luceneMatchVersion>` tag.

```
<lib dir="C:\Installations\solr-8.7.0\contrib\extraction\lib" regex=".*\.jar" />
<lib dir="C:\Installations\solr-8.7.0\dist\" regex="solr-cell-\.d.*\.jar" />
```

`C:\Installations\solr-8.7.0\` is the path where Solr is downloaded.

- 7 Add this code above the line:

```
<!-- -A request handler that returns indented JSON by default -- >
<requestHandler name="/update/extract" startup="lazy" class="solr.extraction.ExtractingRequestHandler" >
  <lst name="defaults">
    <str name="lowernames">true</str>
    <str name="fmap.content">_text_</str>
  </lst>
</requestHandler>
```

- 8 Reload the core(s).  
**Note:** This step is required only when the core or collection is initially created.
- 9 Ensure Solr is started automatically after a reboot. This can be done by creating a startup file.

## Delete a Core or Collection in Solr

You can use this command to remove a collection:

```
bin\solr.cmd delete -c plmdms
```

**Note:** You must specify the name of the DMS as required.

## Chapter 5: Appendix C: Create and Download ION API File

- Login into the Tenant for which we want to create the ION API File
- Go to Authorized Apps under Infor ION API
- Click '+' to create a new
- Enter the Proper Name and select 'Backend Service' as Type and enter proper description and Save the configuration
- After the configuration is saved, click on **Download Credentials**.

The screenshot displays a configuration form for an ION API application. At the top, there is a toggle switch labeled 'Enforce Scopes' which is currently turned off. Below this, the 'Client ID' field contains the text 'QACNA001\_TST~zcdhU6tmy7Zp7\_UQauCZ'. The 'Secret' field is represented by a series of dots, indicating a masked password. To the right of the Secret field are two buttons: 'Download Credentials' and 'Reset Secret'. At the bottom, the 'OAuth 2.0 Access Token' field is a dropdown menu currently set to '2 Hours'.

In the dialog, select the **Create Service Account** option and in the user name type and select the correct user who has Authorization to Access LN in Infor OS.

### Download Credentials

Service account credentials will only be included if Create Service Account is enabled

☒ Create Service Account

Associate a user with this service account if the request needs to be made with user context.

Full Name

XXXXXXXXXXXXX x

Select the scopes that this service account will access.

Scopes

Select the User Management property for ID translation

This will be your only opportunity to download these credentials. You are responsible for storing these credentials securely.

DOWNLOAD

CANCEL

- Click **Download** and Save the ION Api file in a proper location.