

# **BaanERP**

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## **Installation Guide for BaanERP Windows Client**

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# About this document

This document describes two ways to install the BaanERP Windows Client software. If you install BaanERP Windows Client with the Microsoft Windows Installer, you must follow the directions in chapters one, three, and four. If you decide to install the software the old way, you must follow the directions described in chapters two, three and four.

The chapter content is as follows:

Chapter 1 describes how you can install the BaanERP Windows client software for Windows installer.

Chapter 2 describes how you can install the BaanERP Windows client software.

Chapter 3 describes how you can perform miscellaneous administration tasks.

Chapter 4 describes how you can use the BaanERP system policy options.



# 1 To install BaanERP Windows for Windows installer

This chapter describes:

- The hardware and software requirements for BaanERP Windows (BW)
- The installation procedure for the BaanERP Windows software

BaanERP Windows (BW) is a graphical user interface (GUI) program in BaanERP. It runs on an Intel-compatible PC in a Windows 95, Windows 98, Windows NT 4.0, or Windows 2000 environment. BW displays BaanERP as an application with the same look and feel as a native Windows application.

## Hardware and software requirements

You need the following software and hardware before you can install BaanERP Windows (BW).

- The operating system Windows 95, Windows 98, Windows NT Workstation, Windows NT Server, Windows 2000 Professional, Windows 2000 Server, or Windows 2000 Advanced Server must be installed and running.
- The system on which BaanERP Windows will be installed, must be at least an Intel-based system with a 50 Mhz 486DX processor. Furthermore, BaanERP Windows requires at least a SVGA video display, 16 MB of main memory (RAM), and 20 MB of free disk space.
- A network adapter that supports TCP/IP.
- TCP/IP network software must be installed and running.

## To install the BaanERP Windows (BW) software

To install the BaanERP Windows (BW) software, you must follow one of the procedures described below:

- If you have an UNIX or AS/400 BaanERP server, the BaanERP Windows (BW) software can be copied from the server to the client. Use **ftp** to copy the software from the directory **\$BSE/mswindows/BW/i386** to a temporary directory on the client. Double-click the file **setup.exe**. This action starts the BW installation program.
- If the client has a local CD-ROM drive (and you have the BaanERP distribution CD-ROM for Windows NT), you can install BaanERP Windows (BW) directly, by using the BaanERP distribution CD-ROM. If not, you must share the CD-ROM of the server.

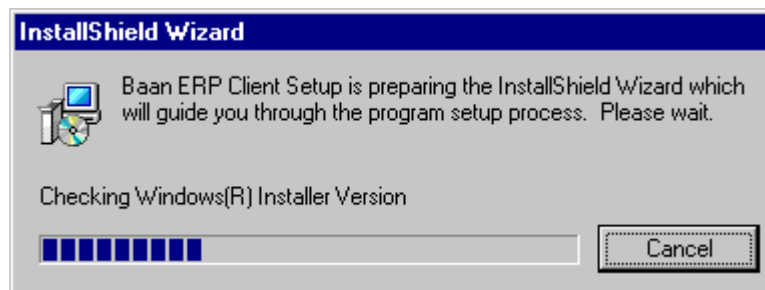
**NOTE** Advertised install does not work on a Windows95 machine without Active Desktop, although it is shown in the installation dialog box. Also, advertised install must be supported on NT4 with SP5 and Active Desktop, but this feature is not shown in the installation dialog box. If you install the advertised install from a CD and the CD is not available, the installer shows an incorrect location for the CD.

**NOTE** The description below assumes that your client has a local CD-ROM drive.

Take the following steps to install BaanERP Windows.

- 1 Close all running applications and insert the BaanERP Windows distribution CD-ROM in the CD-ROM drive. If the Baan ERP Client fails to start automatically, double click the file **setup.exe**. The setup file is located in the route directory of the BaanERP Windows distribution CD-ROM in your CD-ROM drive.

You know that the setup file is working when an **InstallShield Wizard** dialog box appears.





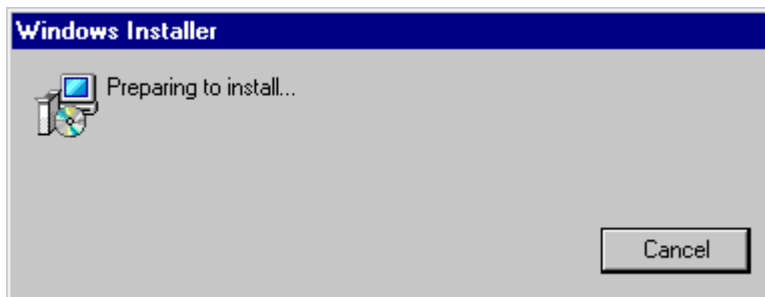
This dialog box disappears automatically. If Windows 2000 is installed, or if the Windows Installer has been previously installed, the **Windows Installer** dialog box shown in Step 4 is shown next. Otherwise, the Microsoft Windows Installer will be installed.

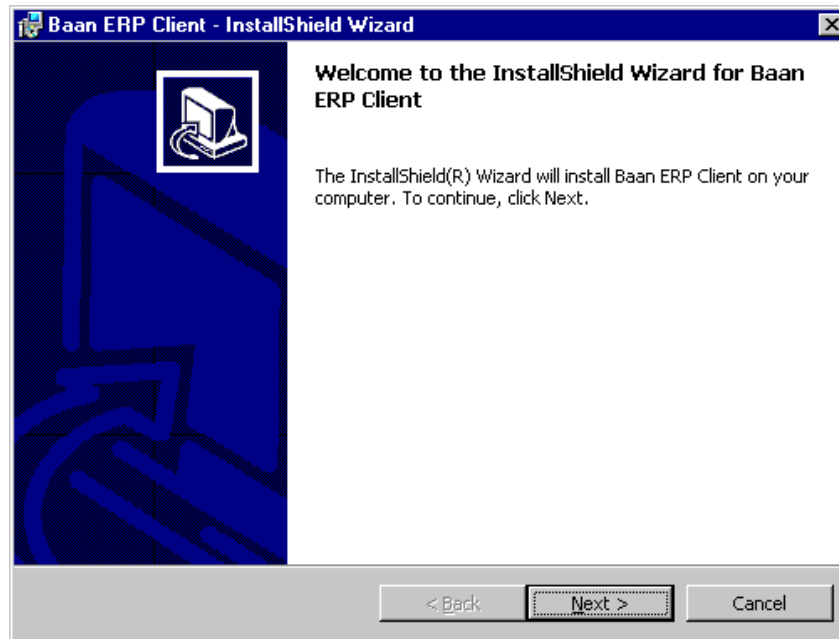
A **Restart System** dialog box appears after Windows Installer has been installed.



- 2 Click **Restart System**. After your system restarts, log on again if you are prompted to do so. The Baan ERP Client Setup will automatically start.

The **Windows Installer** dialog box appears, which is followed by a Welcome message.

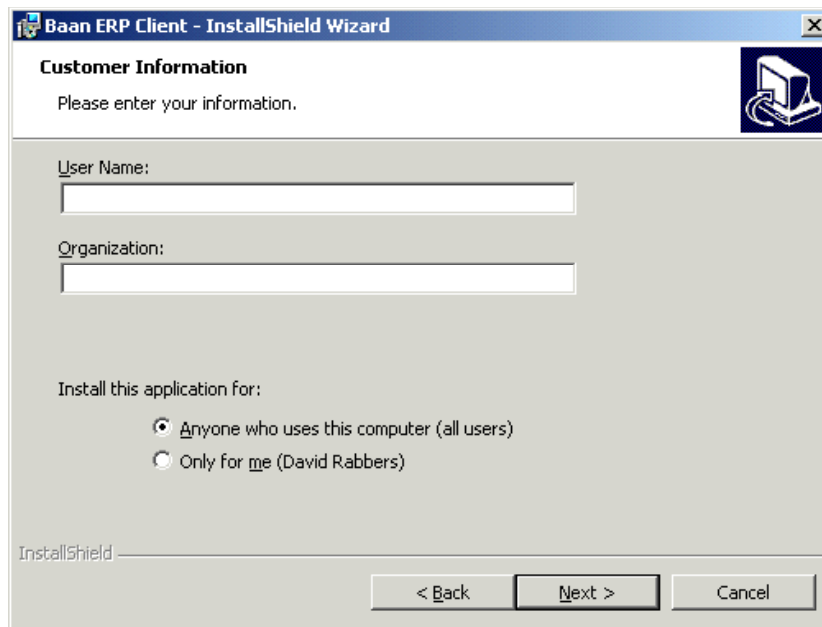




- 3 Click **Next**. A short delay can occur before the **Next** button is enabled. A **License Agreement** message screen appears. Click **I accept the terms in the license agreement**.

#### 4 Click Next.

A Customer Information screen appears.

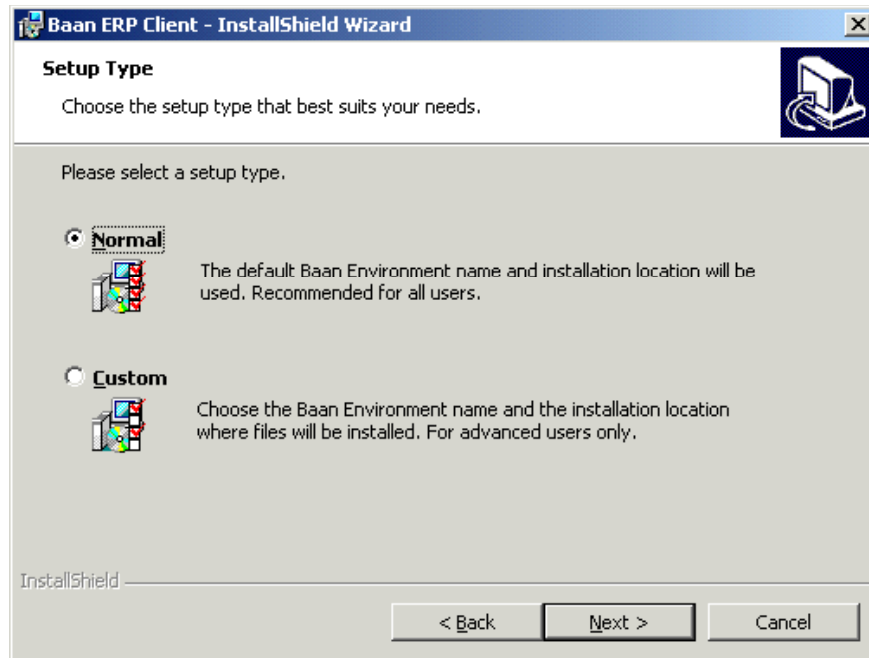


The image shows a Windows installer window titled "Baan ERP Client - InstallShield Wizard". The window has a blue title bar with standard Windows window controls. Below the title bar, the text "Customer Information" is displayed in bold, followed by the instruction "Please enter your information." in a smaller font. To the right of this text is a small icon of a computer monitor with a circular arrow. Below the instruction, there are two text input fields. The first is labeled "User Name:" and the second is labeled "Organization:". Below these fields, the text "Install this application for:" is displayed, followed by two radio button options: "Anyone who uses this computer (all users)" (which is selected) and "Only for me (David Rabbers)". At the bottom of the window, the "InstallShield" logo is visible on the left, and three buttons are on the right: "< Back", "Next >", and "Cancel".

Typically, BaanERP menu items will appear on the menus of all users of this computer. If you want these menu items to appear only on the menus of the current user, click **Only for me**. This option is not displayed for all operating systems. If this option is not displayed, BaanERP menu items will be accessible to all users.

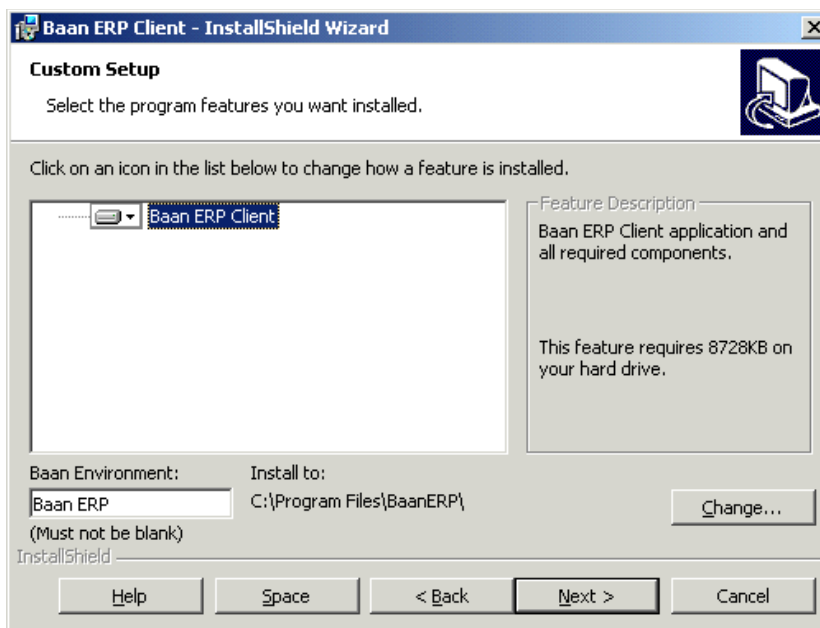
- 5 Click **Next**.

A **Setup Type** screen appears.

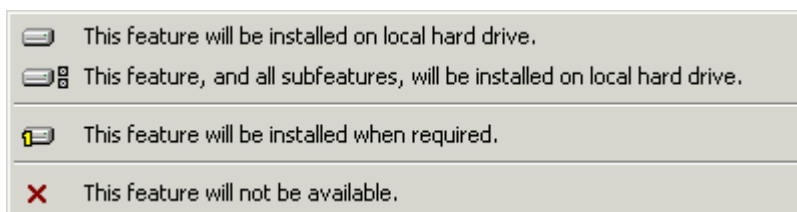


- 6 Select setup type **Normal**, click **Next**, and skip to Step 10. For advanced options, select the setup type **Custom**, and click **Next** to continue.

The **Custom Setup** screen appears.



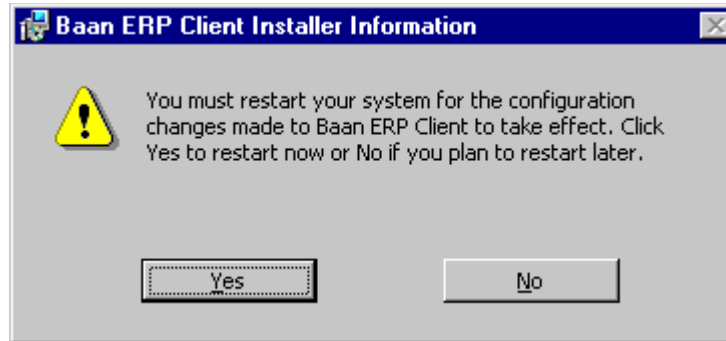
- 7 If you want to defer the installation of the BaanERP Client software, click the tiny down arrow located immediately to the right of the hard drive icon ( ).
- 8 On the drop down menu that appears, select **This feature will be installed when required**, click **Next**, and skip the remainder of this step. Note that this deferred installation option, called Install-On-Demand, is not supported on operating systems that do not have the Microsoft Active Desktop feature installed and functioning. The Install-On-Demand feature is always available on Windows 2000.



If you select the deferred installation option above, any specifications you make to the **Baan Environment** or the installation location will be ignored.

If desired, change the name of the **Baan Environment**.

- 9 Accept the default path or click **Change...** to enter another path. Click **Next** to continue.
- 10 In the **Ready to Install the Program** dialog box, click **Finish** to continue with the displayed setup (or click **Back** to change the displayed setup).
- 11 After the software is installed, you must click **Finish** to exit the installation script. If you are prompted to restart your computer, you must do so before continuing.



Proceed with the Miscellaneous Administration Tasks in Chapter 3.

## 2 To install BaanERP Windows

This chapter describes:

- The hardware and software requirements for BaanERP Windows (BW)
- The installation procedure for the BaanERP Windows software

BaanERP Windows (BW) is a graphical user interface (GUI) program in BaanERP. This program runs on an Intel-compatible PC in a Windows 95, 98, or Windows NT 4.0 (or later) environment. BW displays BaanERP as an application with the same look and feel as a native Windows application.

### Hardware and software requirements

You need the following software and hardware before you can install BaanERP Windows (BW).

- The operating system Windows 95, 98 Windows NT Workstation or Windows NT Server must be installed and running.
- The system on which BaanERP Windows must be installed, must be at least an Intel-based system with a 50 Mhz 486DX processor. Furthermore, BaanERP Windows requires at least a SVGA video display, 16 MB of main memory (RAM), and 20 MB of free disk space.
- A network adapter that supports TCP/IP.
- The TCP/IP network software must be installed and running.

## To install the BaanERP Windows (BW) software

To install the BaanERP Windows (BW) software, you can follow one of these procedures:

- If you have a UNIX or AS/400 BaanERP server, the BaanERP Windows (BW) software can be copied from the server to the client. Use ftp to copy the software from the directory \$BSE/mswindows/BW/i386 to a temporary directory on the client. Double-click the file setup.exe, which starts the BW installation program.
- If the client has a local CD-ROM drive (and you have the BaanERP distribution CD-ROM for Windows NT), you can install BaanERP Windows (BW) directly by using the BaanERP distribution CD-ROM. If your client does not have this type of drive, you must share the CD-ROM of the server.

**NOTE**

The description below assumes that your client has a local CD-ROM drive and is running the Windows NT operating system.

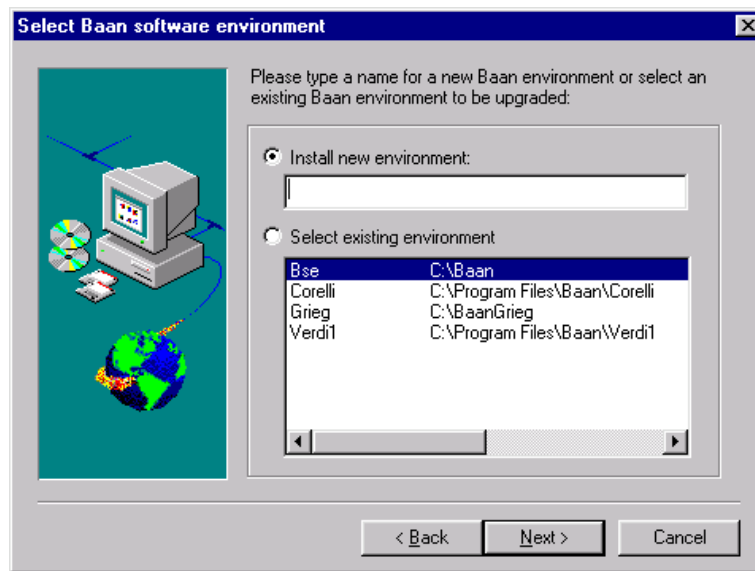
Take the following steps to install BaanERP Windows.

- 1 Close all running applications and insert the BaanERP distribution CD-ROM in the CD-ROM drive. A Welcome message appears.
- 2 Click **Next**. A **Software Licence Agreement** message screen appears.



3 Click **Yes**.

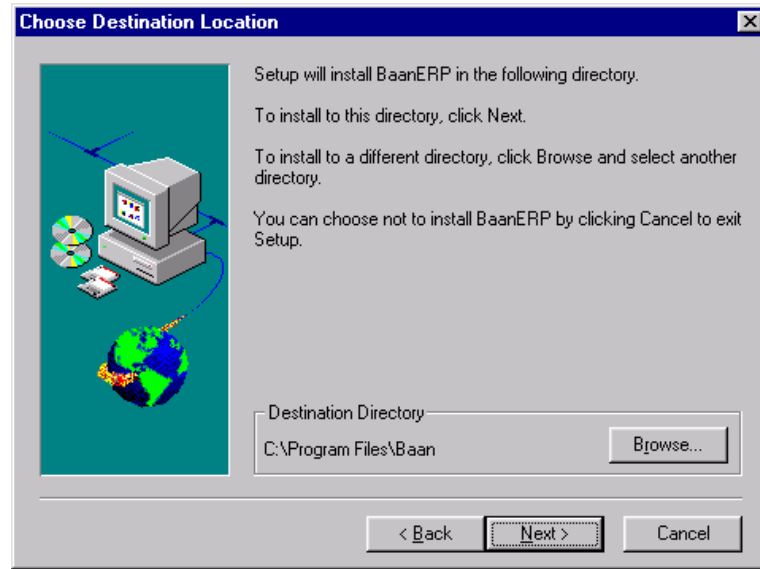
The Select Baan software environment dialog box appears.



- 4 If you perform a new installation, click **Install New Environment** and enter a name for the new installation. If you want to upgrade an existing BW installation, you must click **Select Existing Environment**. In addition, you must select the existing environment to be upgraded from the list box.

- 5 Click **Next** to continue.

The Choose Destination Location dialog box appears.



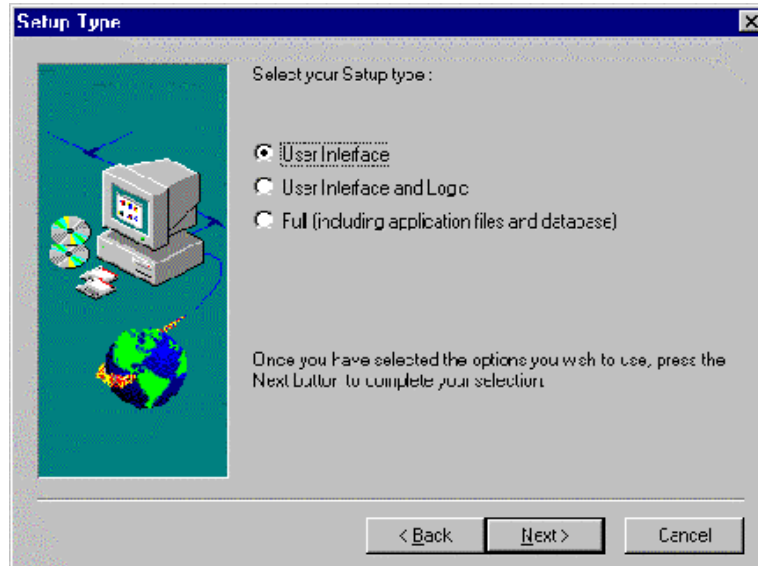
Accept the default path or click **Browse** to enter another path (if you supply a non-existing directory, you will be asked if the Install Wizard must create the directory).

**NOTE**

Only if you are installing from the BaanERP BackOffice distribution CD-ROM, the dialog box shown in step 6 appears. In all other installation scenarios you must skip step 6, and continue the installation with step 7.

- 6 Click **Next** to continue.

The **Setup Type** dialog box appears.



You can select the following server types:

- **User Interface**  
This type is a BaanERP Windows (BW) client.
- **User Interface and Logic**  
This type is a stripped version of a BaanERP Windows NT server (with local application logic).
- **Full (Including Application Files and Database)**  
This type is the full installation of the complete BaanERP Windows NT server version.

**7 Select User Interface and click Next.**

The **Select Program Folder** dialog box appears.

- 8** Select the Program Folder to which the BaanERP Windows icons must be added (default BaanERP) and click **Next**. The **Setup Information** dialog box appears.
- 9** Click **Next** to continue with the displayed setup (or click **Back** to change the displayed setup).
- 10** After the software is installed, click **OK** to exit the installation script. Proceed with the Miscellaneous Administration Tasks in Chapter 3.



## 3 Miscellaneous administration tasks

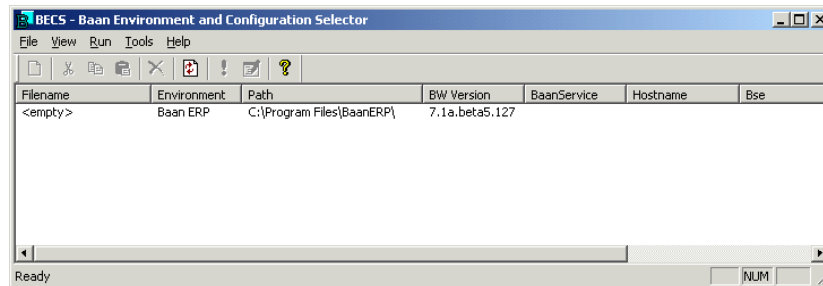
This chapter describes miscellaneous administration tasks and contains the following sections:

- The Baan Environment and Configuration Selector.
- The installation directory of BaanERP Windows (BW)
- The BaanERP Windows (BW) environment variables
- The procedure to uninstall BaanERP Windows

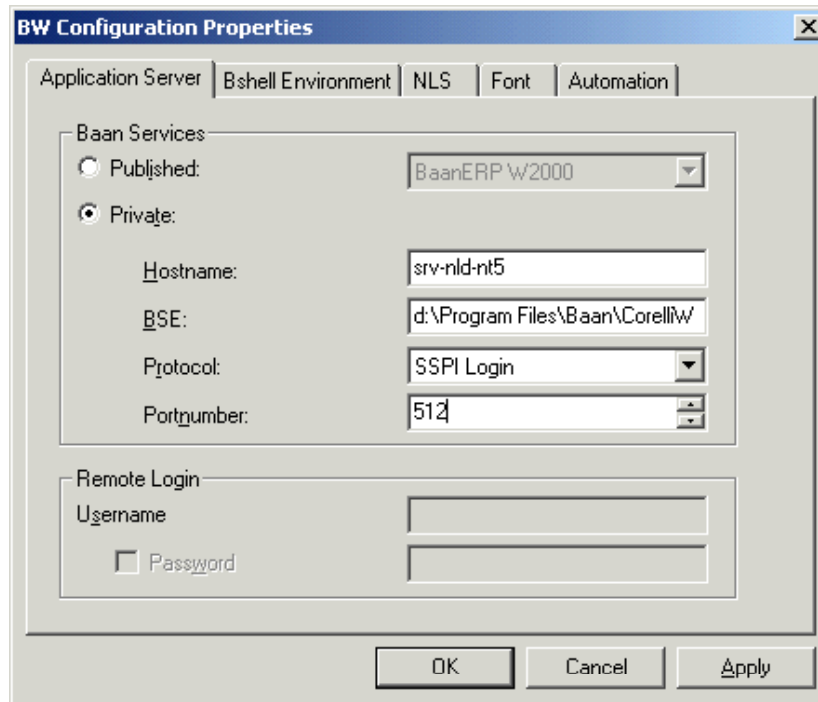
### The Baan Environment and Configuration Selector

The Baan Environment and Configuration Selector is a tool that allows you to run different Baan Windows versions on a single client. To add a new environment, you must perform following steps:

- 1 Click **Start ► Programs ► Baan ERP ► Baan ERP**. The **BECS – Baan Environment and Configuration Selector** window appears.



- 2 Select the new environment (preceded with <empty>), and select the **New** command in the **File** menu. The BW Configuration Properties dialog box appears.



3 Supply the following information:

On the **Application Server** tab, you can select the following Baan services:

**Published**

This option will use the Active Directory Service (ADS) feature. The connection information will be retrieved from ADS if you select the appropriate environment name in the browse window.

**Private**

You must fill in the following fields:

- **Host Name**  
Enter the host name of the BaanERP server.
- **BSE**  
Enter the path to the BSE environment on the BaanERP server (equals the BSE environment variable on the BaanERP server).

- **Protocol**

You can select (depending on the protocol that is installed and configured on the BaanERP server) one of the following protocols: Rexec, BaanLogin, and SSPI Login. For more information about the protocol to be selected, refer to the relevant BaanERP server installation guide.

**NOTE**

In Windows 95, 98, and NT, the Published feature will only work if

- You are actually logged on to the Windows network.
- You have installed the Active Directory Services Interface (ADSI) correctly on your system. ADSI can be obtained from the Microsoft Web site.

You can only make use of the SSPI feature if your BaanERP server is a Windows NT server and you are logged on to the Windows network.

- **Portnumber**

If you want to change the default port number, you must have selected BaanLogin as the protocol to be used. If you intend to change the default, you must be sure that the supplied port number is the same as the port number on which the BaanLogin daemon on the server is listening.

- **Username**

Enter a valid user name that is known on the BaanERP server. If you selected SSPI Login as the protocol to be used, you do not have to supply a username because your current Windows network identity will be used.

- **Password**

If this option is enabled (not applicable if you use the SSPI Login), your password will be stored in the Baan configuration .bwc file .

On the **Bshell Environment** tab you must fill in the following fields:

- **Bshell Name**

Enter the application logic to use on the remote BaanERP host (changing the default of bshell will only be useful during debugging).

- **Command**

Enter the option you want to pass to the bshell. You can, for example, define environment variables by using the following syntax:

```
-- -set Environment Variable1=xxx -set Environment Variable2=yyy
```

On the **NLS** tab, you must fill in the **Locale** field. This box allows you to select the character set to be used (the default character set is International [ISO]).

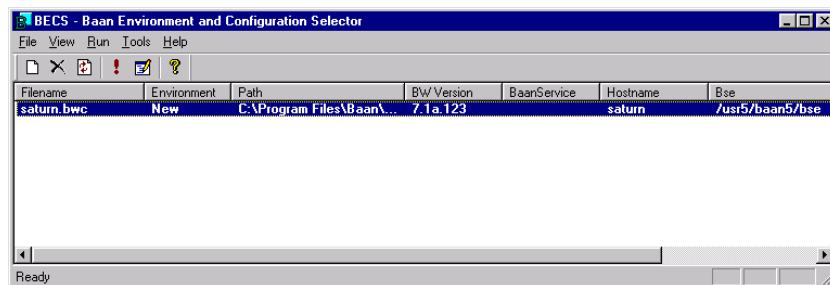
On the **Font** tab, fill in the **Font type** field. This box allows you to enter the desired font type. You can change the setting if you click on the button at the right side of the font boxes.

**NOTE**

Font settings only affect the BW character windows (for example, display browser).

On the **Automation** tab, you can review the information in the **Class Name** field. This field contains the name of the Baan automation object **Baan.Application.server**, where *server* is the hostname of the BaanERP server you supplied on the **Application Server** tab.

- 4 Click **OK** to save the new configuration in a configuration file. The **BECS – Baan Environment and Configuration Selector** window is displayed again, but now the new configuration is shown.



You can start BW by selecting and double-clicking the entry for the new configuration.

**NOTE**

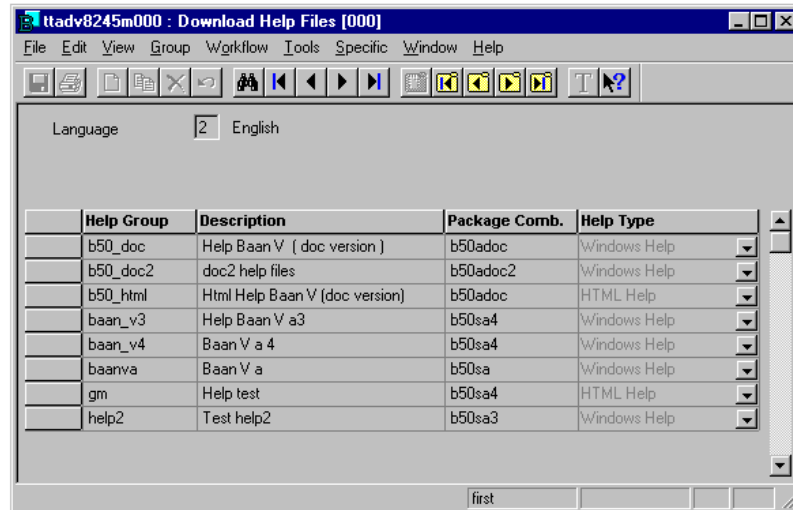
The BaanERP .bwc files are registered by the Windows NT or Windows 95 operating system. You can find the .bwc files in the directory Lib\User under the installation directory of the BaanERP client software. This placement implies that you can start a BaanERP logon procedure by double-clicking the icon in front of the relevant .bwc file in the File Manager. You can also make BaanERP program icons by dragging the .bwc configuration files to a Program Group.

- 5 From the BaanERP **Tools** menu, choose **Software Installation► Installation**. Open the Download Help Files (ttadv8245m000) session. This session has two options:
  - **Download help files**  
This command installs the Windows Help files on your client. Select the Help Groups for which you want to see Help and choose **Download Help Files** from the **Specific** menu.



– **Edit HTML Help transfer script**

If you install HTML help on an HTTP server, you must edit the HTML Help transfer script. This script is used to transfer the HTML Help files from the application server to the HTTP server. To run this script, you need access to the HTTP server.



## Installation directory of BaanERP Windows (BW)

The installation directory C:\Program Files\BaanERP is created during the setup process of BaanERP Windows (BW). During setup you can change this installation directory. This section assumes you have chosen the default name for the installation directory of BaanERP Windows (BW).

The following subdirectories are created in directory C:\Program Files\BaanERP during setup:

- bin  
This directory contains the bw.exe program to start the BaanERP application, as well as the bwconfig.dll for the configuration program.
- lib  
This directory contains the files bw.tlb (type library information for OLE Automation) and tss\_bw (language support).
- log  
This directory contains logging information about BaanERP Windows.
- samples  
This directory contains a Microsoft Excel spreadsheet, which outlines the use of OLE Automation to access BaanERP dynamic link libraries.
- tmp  
This directory contains the temporary files.
- help  
This directory contains the Help files. The C:\Program Files\Baan\lib. subdirectory is created in the directory.
- nlsinf  
This directory contains the special character set file xwindows.in.
- user  
This directory contains the configuration files.
- The following subdirectories are created in the directory C:\Winnt\Baan (for Windows NT) or C:\Windows\Baan (for Windows 95 or 98).
  - bin  
This directory contains all binaries that are shared between different versions of BW, for example, becs.exe.
  - lib  
This directory is empty.

## To uninstall the BaanERP Windows client

To uninstall BaanERP Windows, start the **Windows Control Panel** and then start the **Add/Remove Programs** control panel applet. Select **Baan ERP Client** and click **Remove**. Click **OK** on the **Add/Remove Programs** dialog box, which will appear after the remove is completed.



## 4 BaanERP system policy options

The current version of BW supports options to centralize the following configuration actions on the network domain controller instead of on the local client:

- Password storage
- BW configuration editing

This chapter describes how you can centralize these configuration actions on the network domain controller.

### Password storage

With this BW version, each user can store and retrieve passwords, which are used to authenticate a user to a Baan Application Server. Some secure environments do not want a BW password to be stored on the local client. This structure can allow unauthorized individuals to access the Baan environment without logging on if such a password file is stolen or accidentally put on a shared directory.

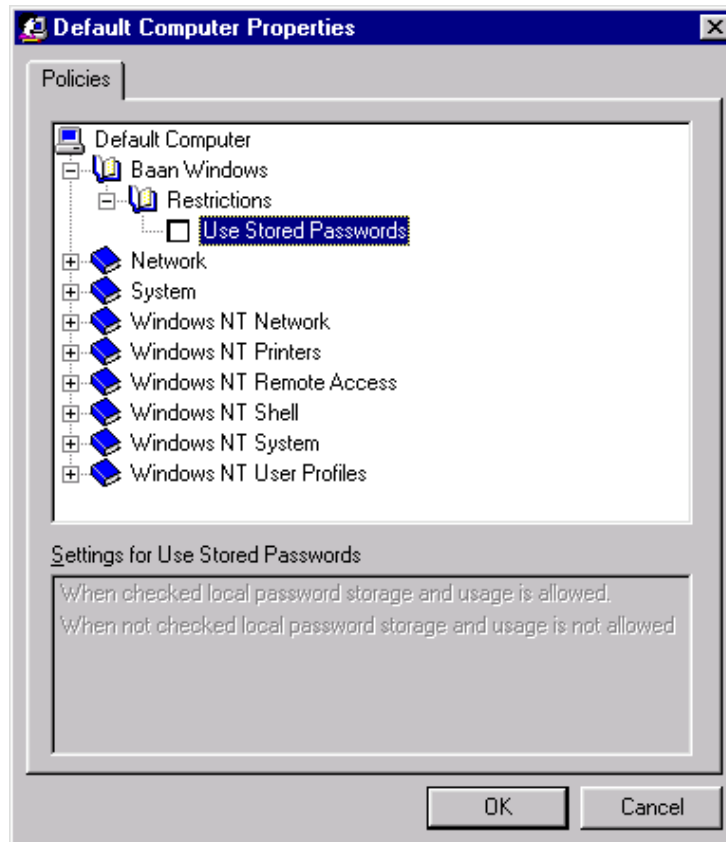
This potential problem is solved in this version of BW by an option to disable the local storage of the BW password.

The enabling or disabling of the password storage and retrieval feature is related to a registry key setting under HKEY\_LOCAL\_MACHINE. By default, this section of the registry can only be updated by a person with system administrators rights.

The system administrator can disable the local storage of BW clients by taking the following steps:

- 1 Log on as user with admin rights on the Windows NT server that is the domain controller of the Windows network.
- 2 Copy the C:\Program Files\Baan\Lib\bw.adm file (from a BW client) to the directory C:\WINNT\INF on the domain controller.
- 3 Start the **System Policy Editor**.
- 4 From the **Options** menu, select the **Policy Template**.
- 5 Click **Add**, and select **C:\WINNT\INF\bw.adm**.

- 6 Click **Open**. The C:\WINNT\INF\bw.adm is added in the **Policy Template** dialog box. Select this entry and click **OK**.
- 7 Select the **Open Policy** command from the **File** menu in the **System Policy Editor** dialog box (or **New Policy** if you want to add one).
- 8 Select the systems (or groups of systems) for which you want to disable local password storage, and select the **Properties** command in the **Edit** menu.
- 9 Disable local storage as shown below and click **OK**.



## BW configuration editing

In some environments, BW configuration files are stored on a shared drive and managed centrally by a system administrator. In such a configuration, each individual user must not be able to create, delete, and modify BW configuration files. Therefore, an optional feature is added that permits only system administrators to perform these activities.

The system administrator can disable local configuration editing by taking the following steps:

- 1 Log on as user with admin rights on the Windows NT server that is the domain controller of the Windows network.
- 2 Copy the C:\Program Files\Baan\Lib\bw.adm file (from a BW client) to the directory C:\WINNT\INF on the domain controller.
- 3 Start the **System Policy Editor**.
- 4 Select the **Policy Template** from the **Options** menu.
- 5 Click **Add**, and select C:\WINNT\INF\bw.adm.
- 6 Click **Open**. The C:\WINNT\INF\bw.adm is added in the **Policy Template** dialog box. Select this entry and click **OK**.
- 7 Select the **Open Policy** command from the **File** menu in the **System Policy Editor** dialog box (or **New Policy** if you want to add one).
- 8 Select the user (or groups of users) for which you want to disable local configuration editing, and select the **Properties** command in the **Edit** menu.

- 9 Disable local configuration editing as shown below and click **OK**.

