

Workshop on Census Data Processing

Installing Teleform



TeleForm Installation Lab

Purpose

The purpose of this lab is to help understand the different types of TeleForm installations, the different installation options, installation requirements, and to do a TeleForm installation for use with future labs.

Objectives

- Fully understand the TeleForm installation requirements and process.
- Successfully install TeleForm V10 on your machine.

Instruction Type

Presentation
Hands on Lab

Lab Exercise

The following will walk you through all of the necessary steps required for the hands on portion of this lab.

Step 1 – Check System Requirements

Before beginning the installation, you must make sure that your system meets the minimum requirements set forth for TeleForm V10.

Mandatory Requirements (Desktop/SU NFR)

Hardware

- Intel® Pentium® III-based processor running at 600 MHz or higher
- 500 MB free hard-drive space for complete installation
- 256 MB of RAM
- VGA color or better monitor
- CD-ROM drive
- Network Card
- Mouse

Software

- Microsoft Windows 2000 Pro or Windows XP Pro

Other optional items

- Compatible scanner
- Compatible fax server
- MS SQL Server 2000 SP3 (or higher)

TeleForm Installation Lab

_ MS SQL Server 2005

Step 2 – Backup Existing TeleForm System

The following section is only applicable to systems that are being upgraded. If this is a new TeleForm install go to [Step 3 – Create TeleForm database](#).

Full System backup

It is important to note, that for a production system prior to doing any of the steps below to backup individual pieces, or install, a complete backup should be performed on the TeleForm Server (where the TeleForm directory is located) as well as the TeleForm database. For the purpose of this exercise, we will skip these steps.

Create a backup folder

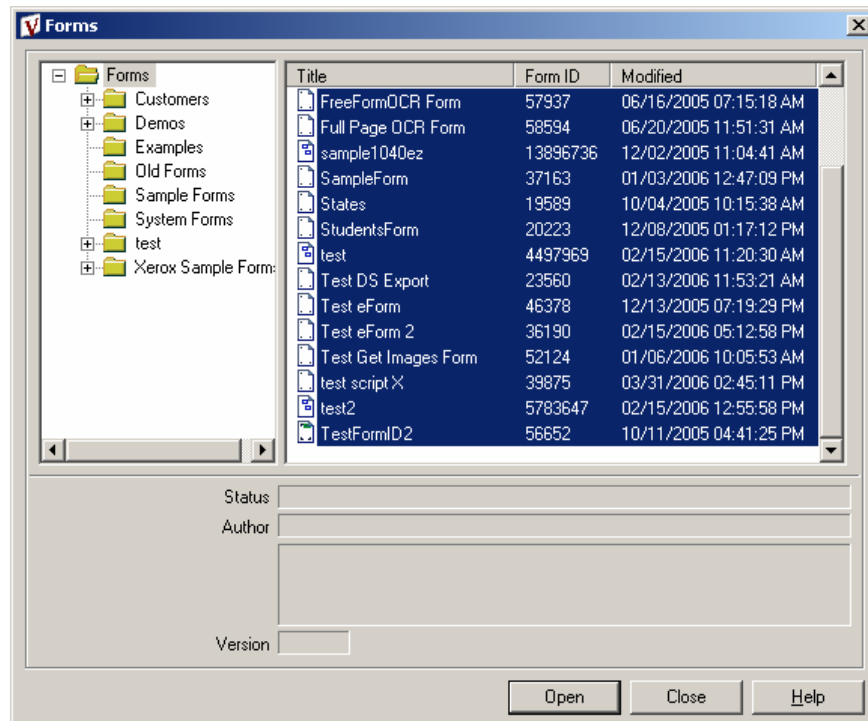
Create a folder on your system that we can backup all items from the current TeleForm system (i.e. C:\TeleForm backup).

Exporting forms

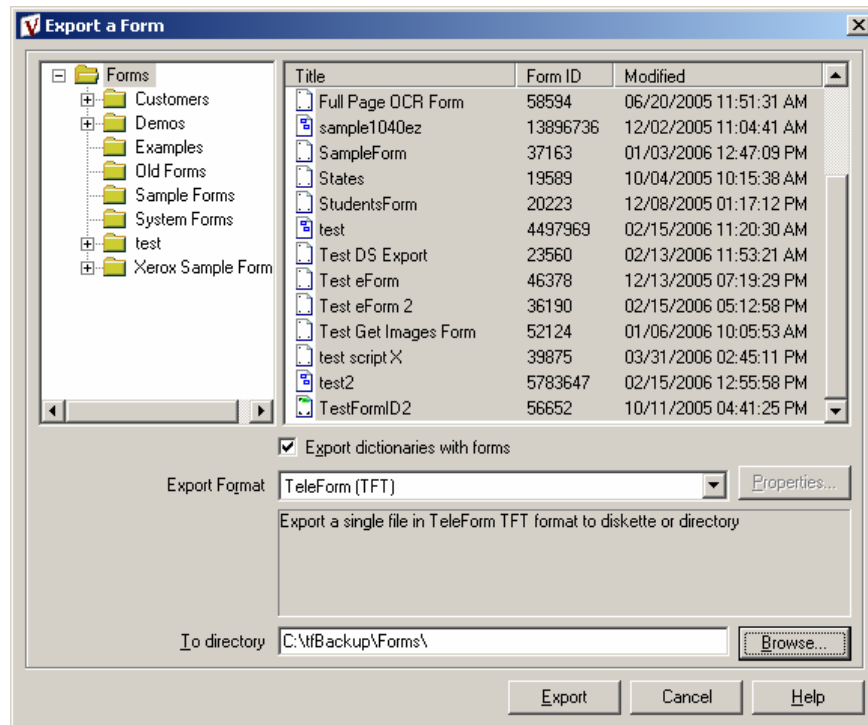
Although we will do a System snapshot, it is always a good idea to manually backup all important (production) forms and scripts manually. This way if you only need one particular item, a complete system restore wouldn't be necessary, you can simply import the particular item.

1. Open TeleForm Designer.
2. Select File, Forms.
3. When the Forms Dialog opens, select the Forms you wish to Export.

TeleForm Installation Lab



4. Right Click and Choose Export.
5. Check Export Dictionaries
6. Select TFT as the format to export the forms in.
7. Place the forms in your TeleForm backup directory (created earlier in this exercise) in a folder called Forms.



TeleForm Installation Lab

8. Click Export to Export the Forms.

***NOTE** - Because you are only able to select visible forms for export, you may need to repeat this step for other folders. Again, it is worth doing this for any form you feel may be “Important”, but may not be necessary for all forms.

9. Create a new Directory in your TeleForm backup directory called “Scripts”

10. In Widows Explorer, locate your TeleForm directory (By default in 9.1, C:\Program Files\Verity\TeleForm).

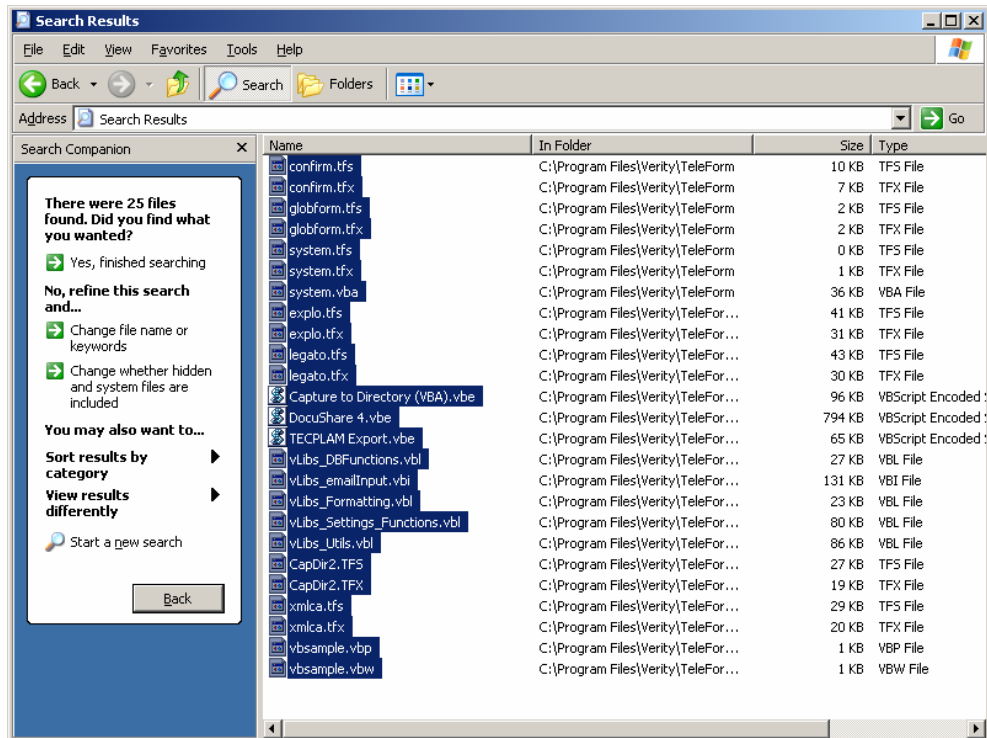
11. Locate all Script files (both Basic Script and VBA)

12. An easy way to locate all of these files is to search for them by extension.

13. Click the Search button in Explorer (or F3)

14. Click “All Files and Folders”.

15. In the file name field type “*.tfs,*.tfx,*.vba?”. This will find all basic Script files (.tfs and .tfx) as well as VBA script files (.vba, .vbi, .vbe, .vbl).



16. Click Search

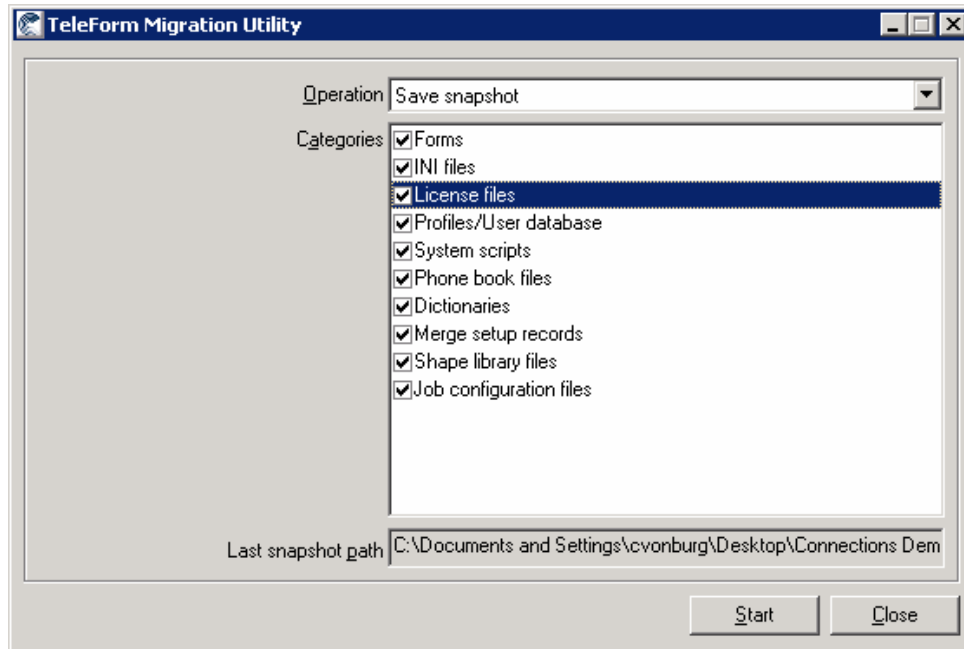
17. Copy all script files to your TeleForm Backup\scripts folder.

Saving the System Snapshot

In addition to manually copying important files, we can also use the TeleForm Migration Utility to create a System Snap Shot for us. This system snap shot will contain all part of the system that may be needed to recreate it (forms, scripts, user info, etc).

TeleForm Installation Lab

1. Close any TeleForm applications (or services that are running).
2. Locate the TeleForm Migration Utility (tfmigutl.exe) in the TeleForm workstation directory (by default in 9.x c:\Program Files\Verity\TeleForm).
3. Double Click the Executable to open the Migration Utility.
4. Select “Save System Snap Shot” from the Tasks drop list.
5. Select all items in the list.



6. Click Start.
7. You will be prompted to choose a location to save the file. Save this file in your TeleForm Backup Directory (the directory created earlier in this exercise).
8. When the operation is complete, close the utility.

Backup the TeleForm database

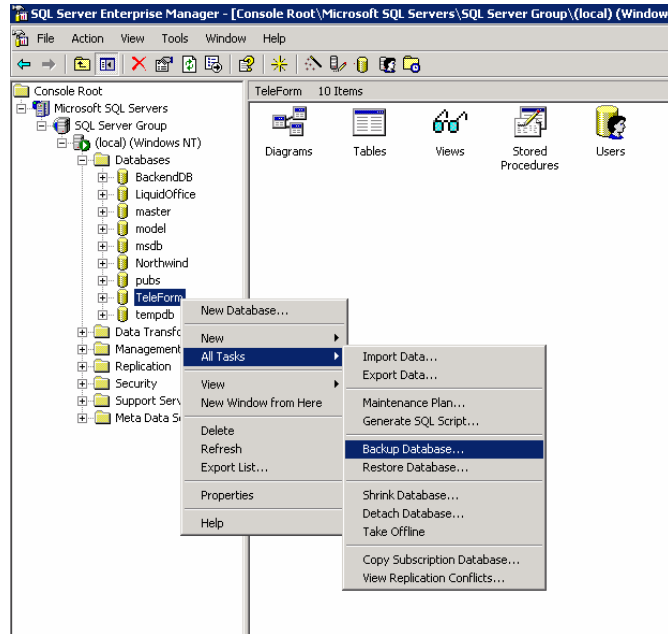
It is important to note, that although we have backed up TeleForm files both manually and through the Migration Utility we do not have any backup of the TeleForm database which contains much of the system data. In addition to the full backup of the database mentioned earlier, it is a still a good idea to ensure that we have also backed up the database with all of the other components.

The following section will walk you through the steps needed to backup your TeleForm database. Please note, these steps require access to the database via the MS SQL Enterprise manager which may require an installation of MS SQL. If you are using MSDE and don't have Enterprise manager, please go to [Step 3 – Create TeleForm database](#).

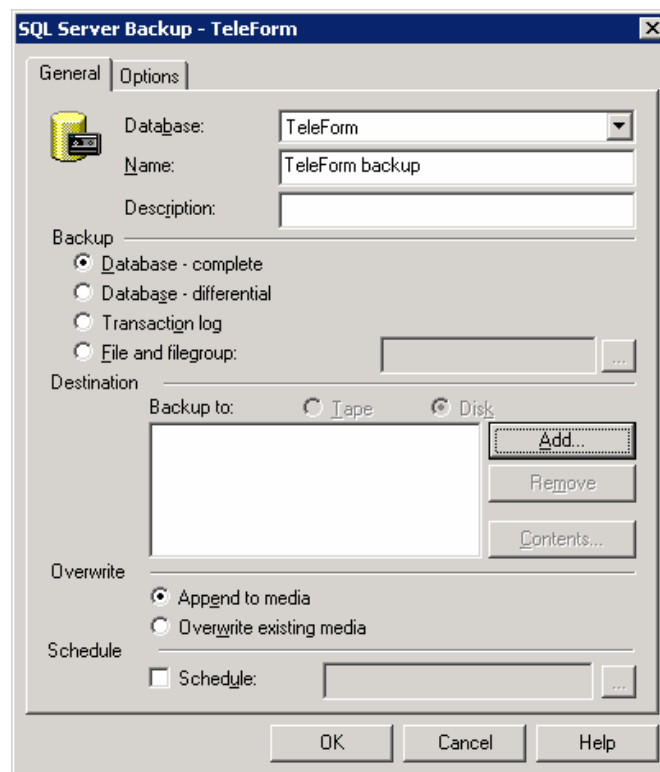
1. Open MS SQL Enterprise Manager.

TeleForm Installation Lab

2. Click SQL Server Group, Local to access your MS SQL Server (please note, your server group could be named differently).
3. Expand the Databases Folder.
4. On the TeleForm database, Right click and choose All Tasks->Backup Database.

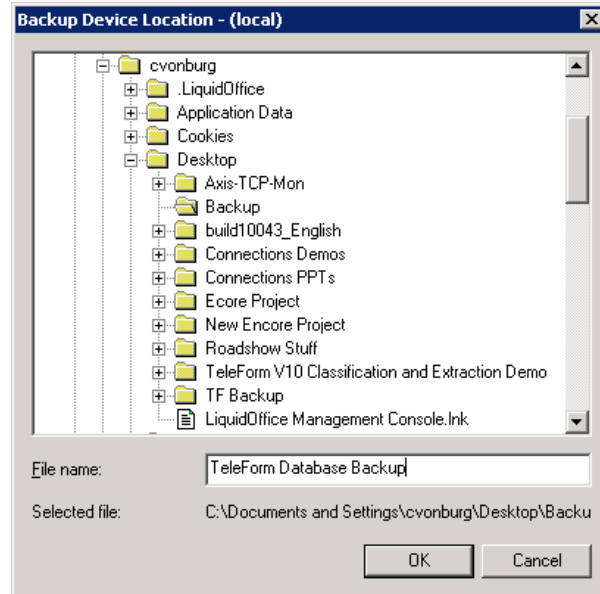


5. In the Database Backup Dialog, your TeleForm database should be selected.

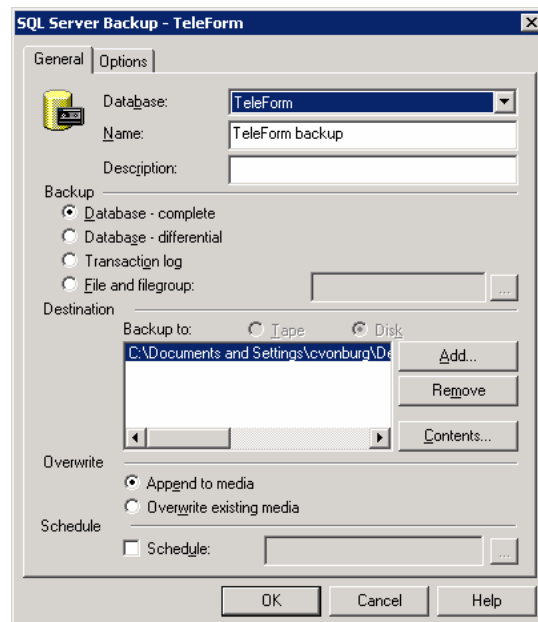


TeleForm Installation Lab

- Click the Add button in the destination section of the dialog.



- Browse to the TeleForm backup Directory (created earlier in this exercise). Name the File TeleForm Database Backup.
- Click Ok.
- Click Ok on the Database Backup Dialog. MS SQL will back the database up to the selected file.



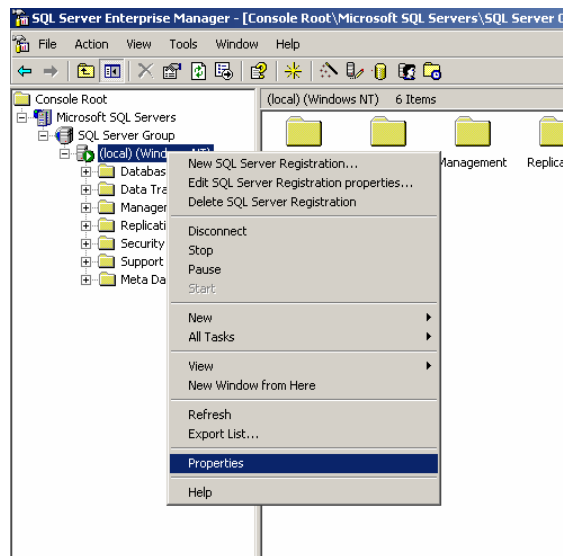
- Close Enterprise Manager.

TeleForm Installation Lab

Step 3 – Create TeleForm database

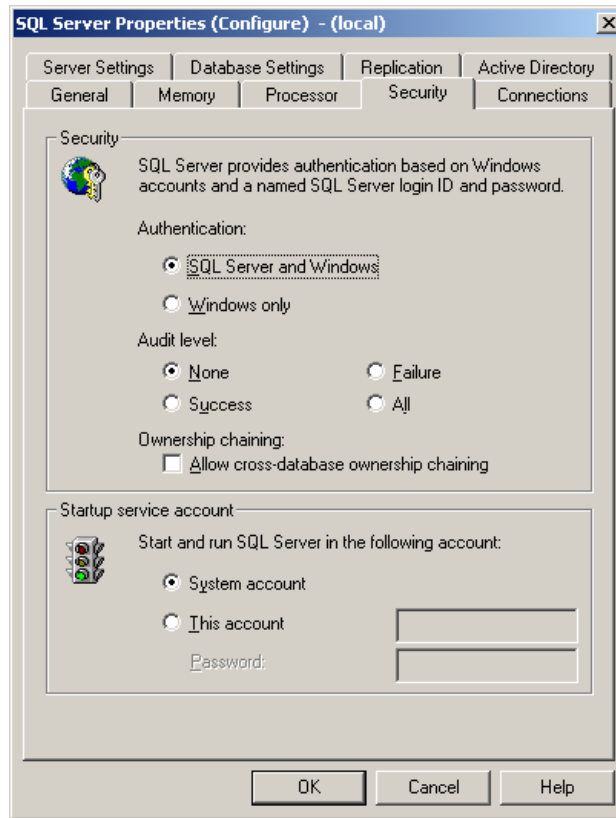
The following section outlines the steps needed to create a new MS SQL database and SQL user for TeleForm to use. If you are upgrading and already have a database or are planning on using MSDE (don't have MS SQL installed), please go to [Step 4 – Install TeleForm](#).

1. Open MS SQL Enterprise Manager.
2. Click SQL Server Group, Local to access your MS SQL Server (please note, your server group could be named differently).
3. Right click the MS SQL server and choose properties.

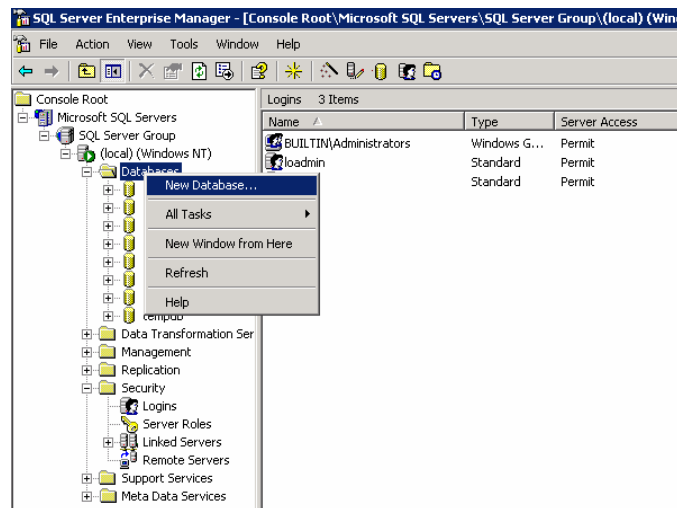


4. Select the Security tab. Ensure that "SQL Server and Windows" is selected for Authentication. If it is necessary to change this setting, you will have to restart your SQL server in order for these changes to take place.

TeleForm Installation Lab

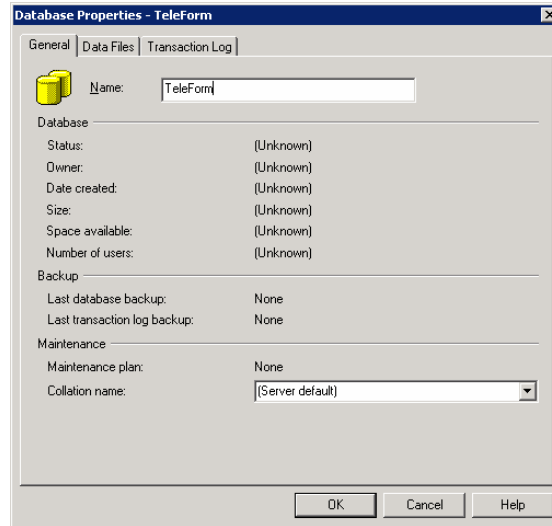


5. Click Ok to close the Properties Dialog.
6. Right click the Databases Folder and choose New Database.

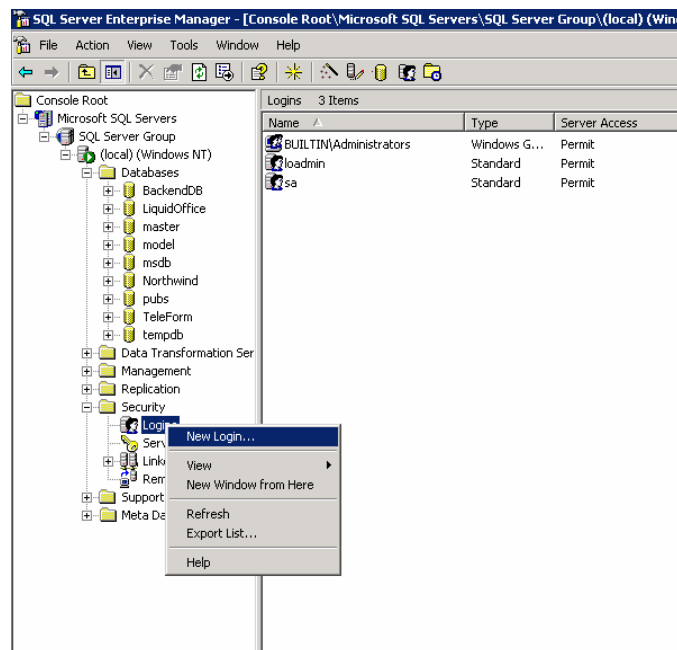


7. Name the database TeleForm.

TeleForm Installation Lab

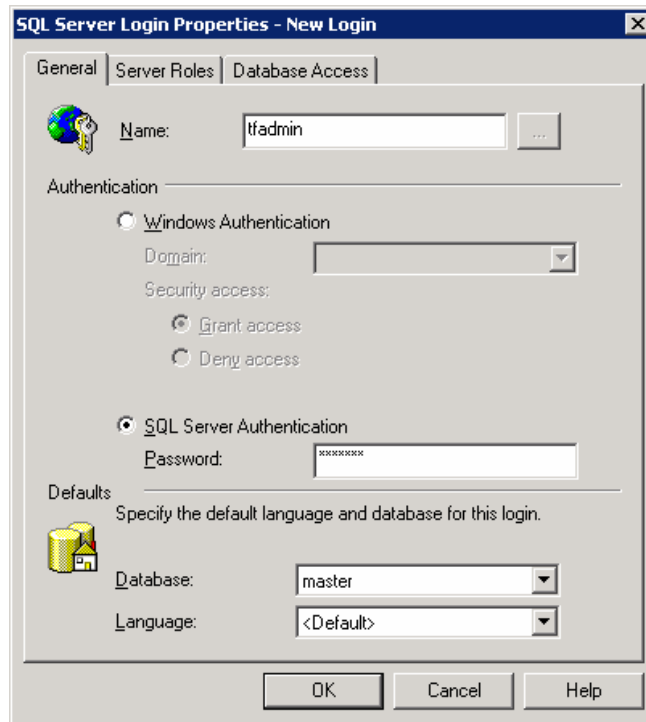


8. Click Ok to create the Database.
9. Expand the Security Folder and Right click Logons, Choose “New Logon”.

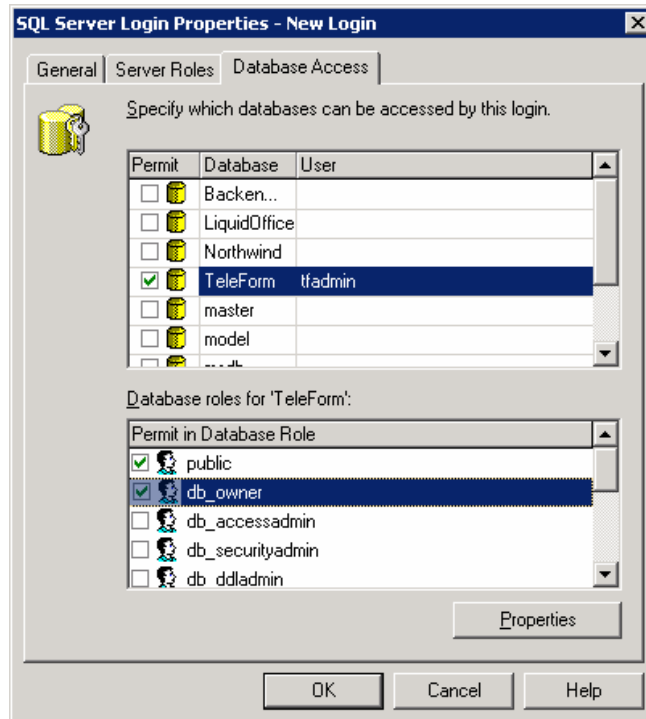


10. Name the user tfadmin.

TeleForm Installation Lab

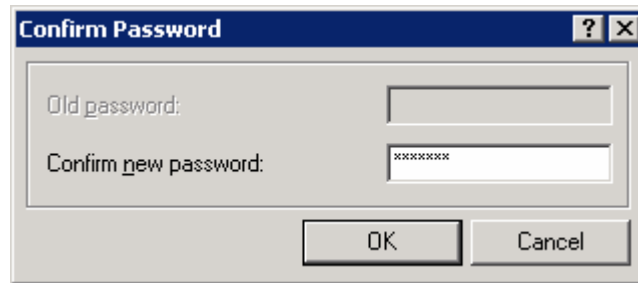


11. Select SQL Server Authentication. Set the users password (it is recommended for the exercise to set the password to match the username, i.e. tfadmin).
12. Click the Database Access tab.
13. Select the Newly created TeleForm database from the list of databases.
14. Select “db_owner” in the Permit in Database Role portion o the dialog.



TeleForm Installation Lab

15. Click ok to save the settings for the user.
16. Confirm the password.

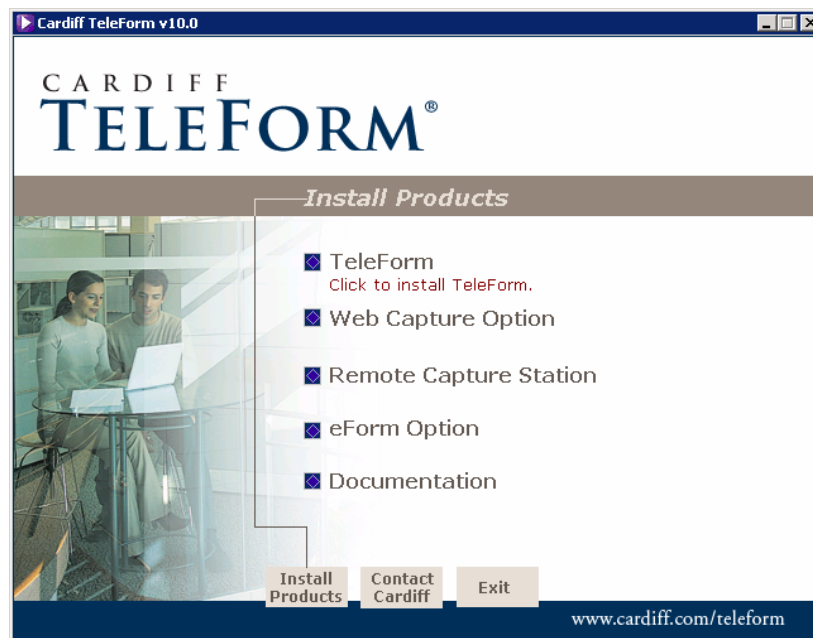


17. The database and user have now been correctly created. Close Enterprise Manager.

Step 4 – Install TeleForm

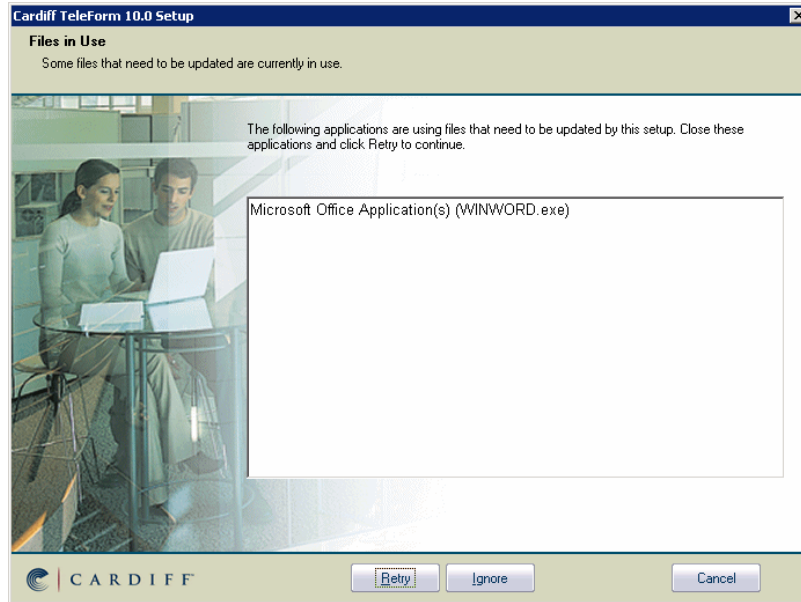
Now that we have properly performed all preparation for the TeleForm install or upgrade, we are ready to begin the installation of TeleForm V10.

1. Run the setup.exe for the TeleForm install.
2. When the Install billboard appears, select Install TeleForm.

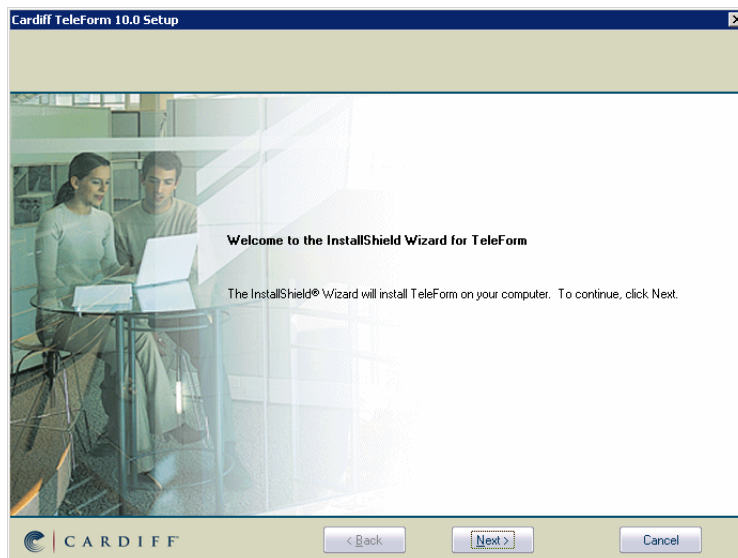


3. Please note, because of a macro that is installed by DocuCom, if any Microsoft Office Applications (Word, Outlook, etc) are running you will be asked to shut them down before proceeding.

TeleForm Installation Lab

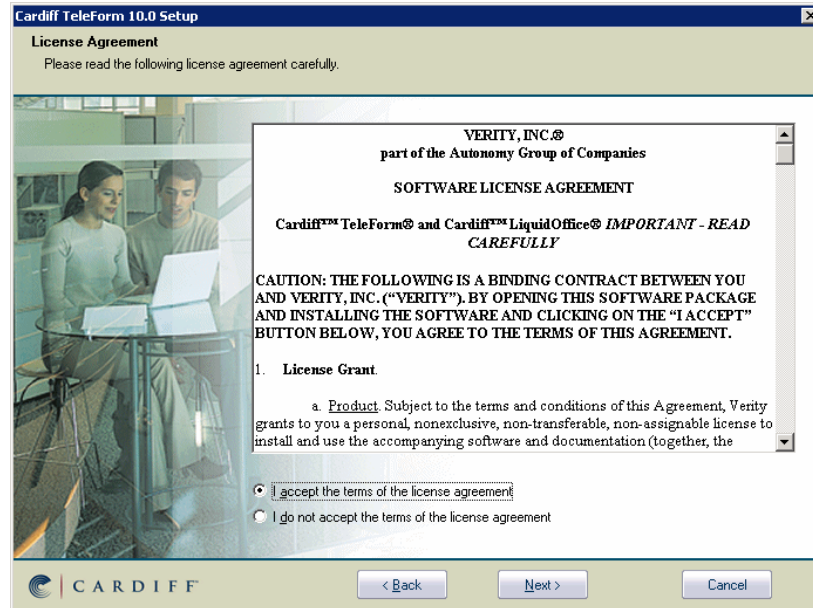


4. The Install shield Wizard begins. Click Next.



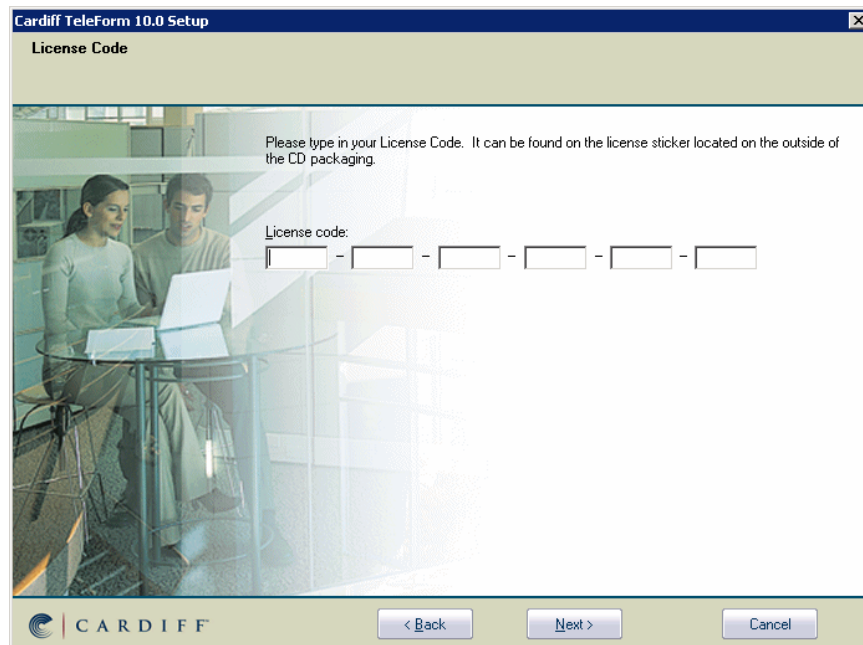
5. Read through and Accept the License Agreement. Click Next to continue.

TeleForm Installation Lab



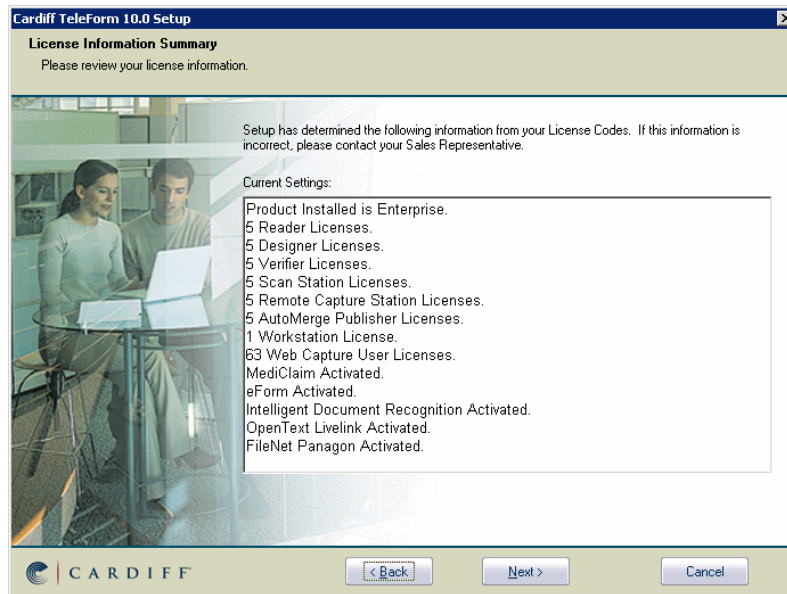
6. Enter your License Code.

***Note** - It is important to note that it is the license code that determines what type of install is actually performed. A single install is used for all tiers of the product (Desktop, Workgroup, Enterprise, and NFR), however the code that you enter here is what determines how the install will actually run.

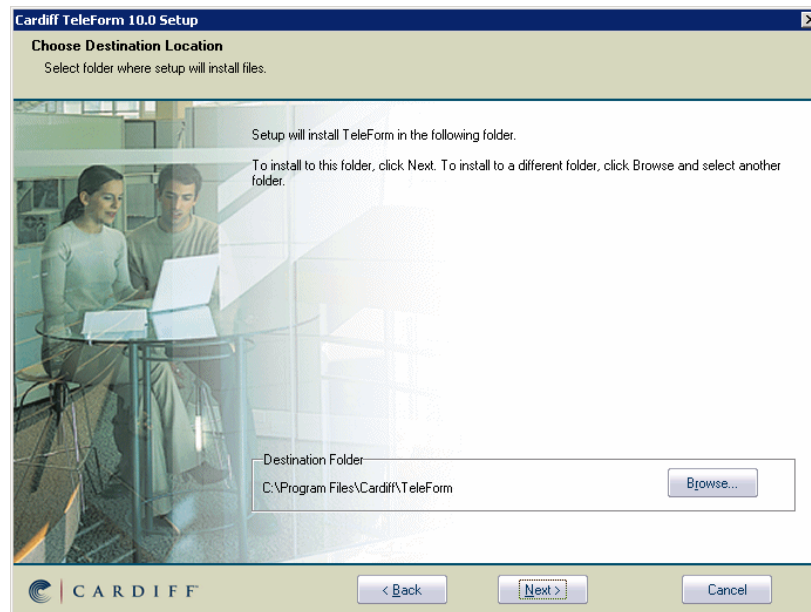


7. Click Next to continue.
8. The License Summary Screen is displayed. Review this and click next to continue.

TeleForm Installation Lab



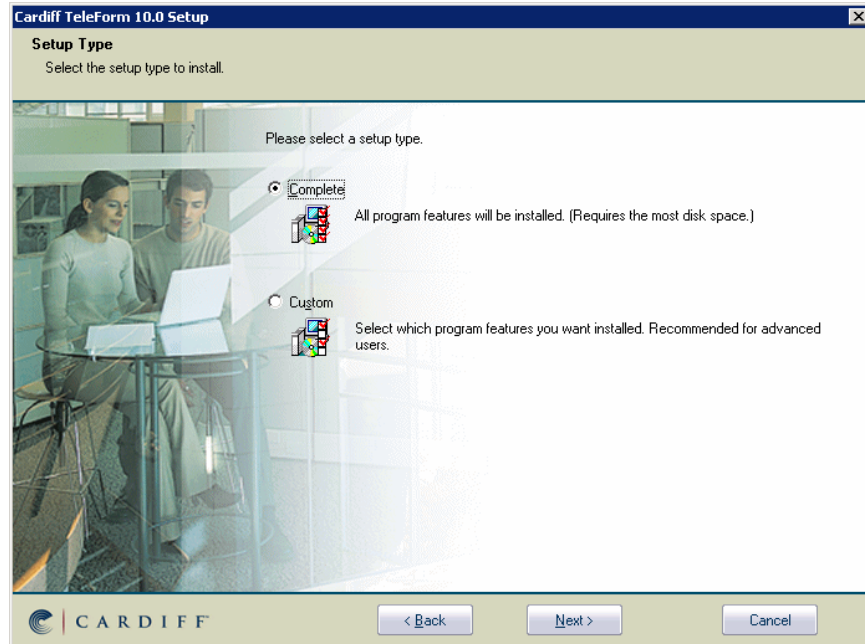
9. Choose the folder to install TeleForm to. On a fresh install this will default to C:\Program files\Cardiff\TeleForm, however upgrades will default to the previous installations directory. If upgrading, don't change this folder.



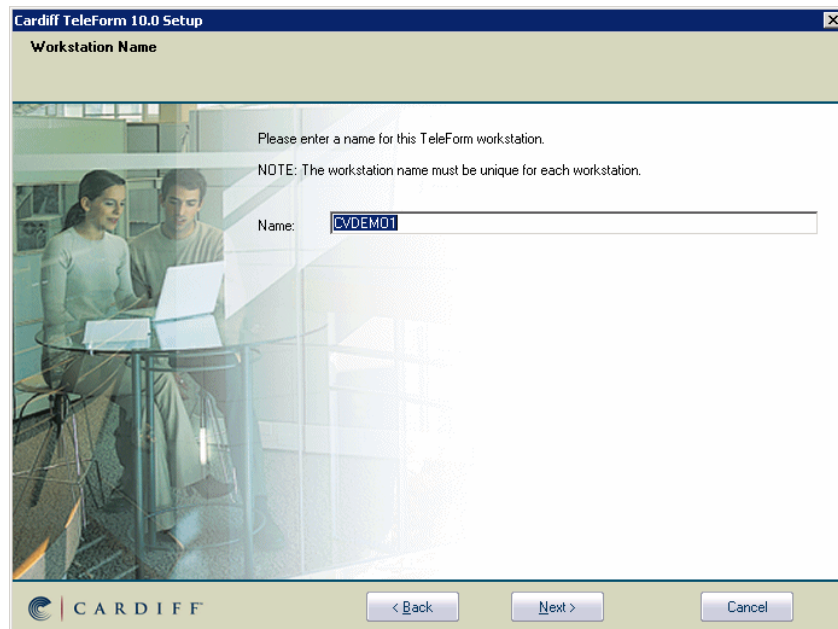
***Note** – Had we been performing a multi-user install on a server, we would be prompted for both the TeleForm Directory (Share directory, mapped drive or UNC) as well as the server's local workstation directory.

10. Select the type of install. For the purposes of this exercise choose Complete.

TeleForm Installation Lab



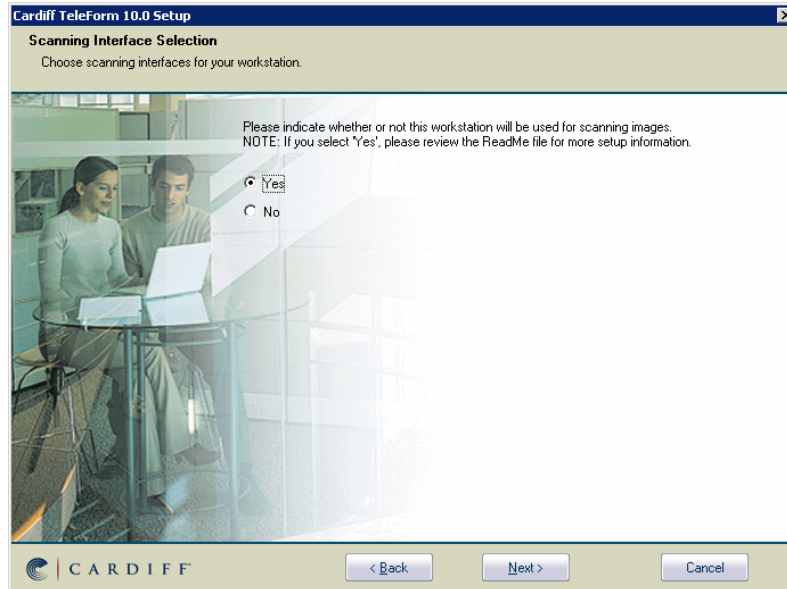
11. Provide a workstation name. This will default to the machine name for new installs or the name used previously on upgrades.



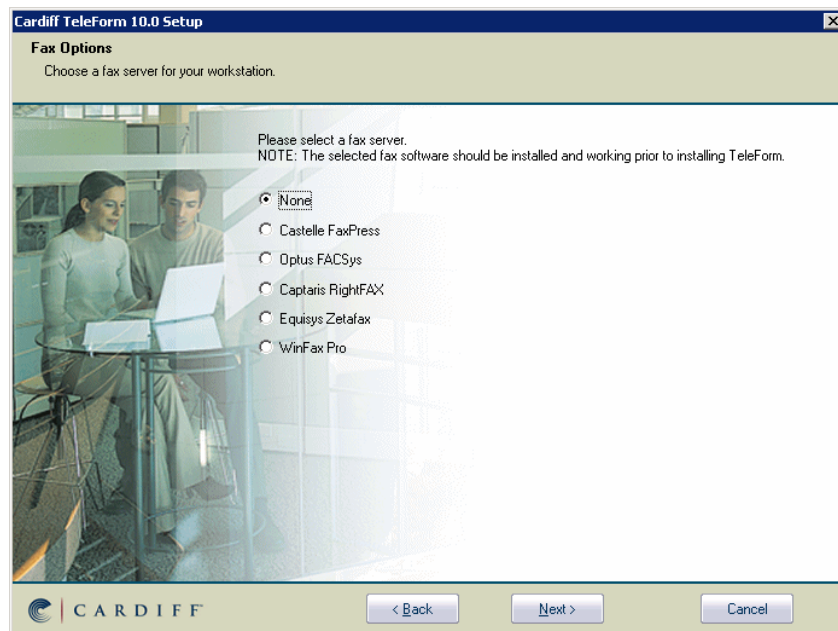
***Note** – The TeleForm Station name and the windows name do not have to match, although keeping them the same can help simplify things when looking at all TeleForm system names.

12. If you are planning on using a scanner with this machine, choose “Yes” for Scanner support.

TeleForm Installation Lab

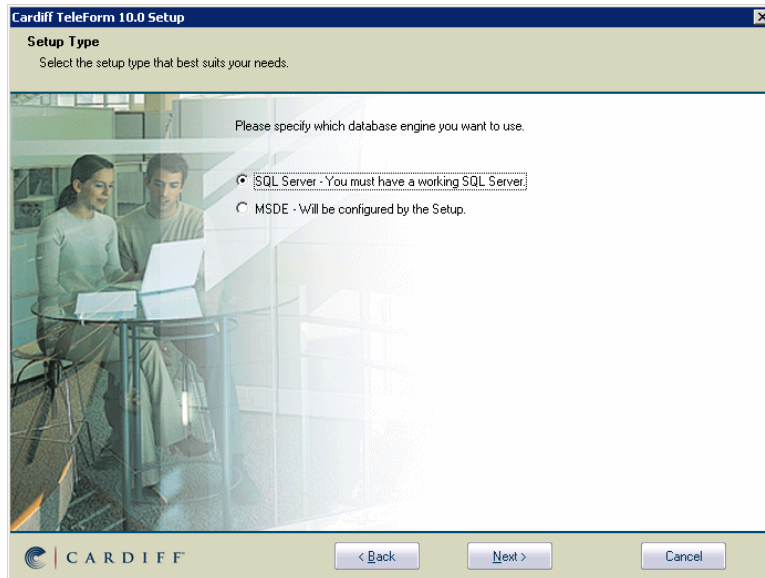


13. If you will be using TeleForm with a fax server, choose the Fax type from the list. Please note, this exercise will not go through configuring Fax, so you will have to configure the fax agent on your own after the installation.

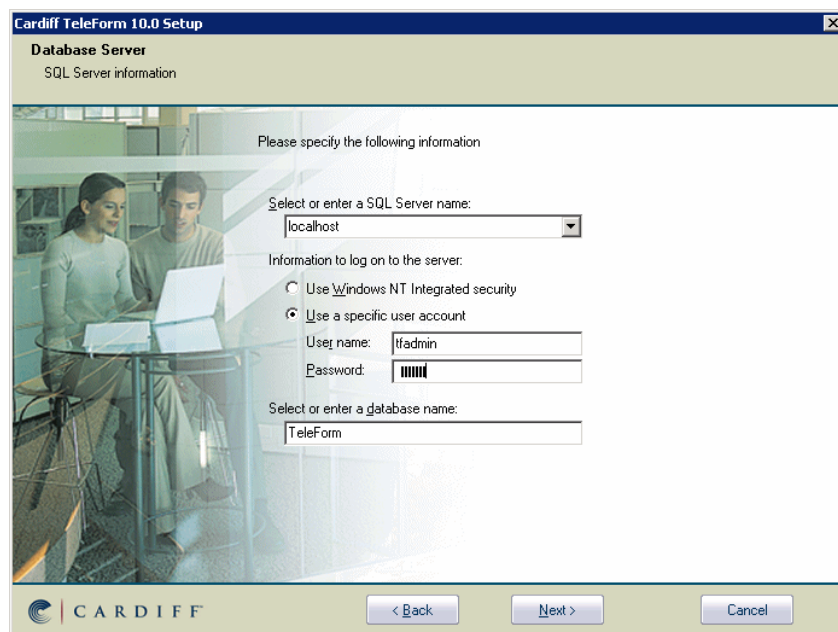


14. Click next to continue.
15. Choose SQL server or MSDE. If using MSDE go to step17.

TeleForm Installation Lab



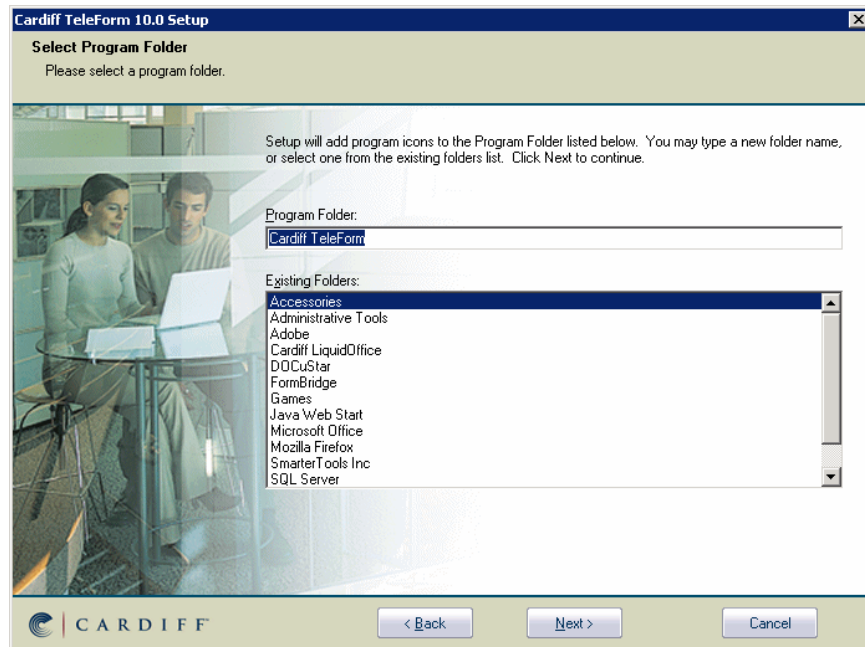
16. Type the SQL server connection information TeleForm will use. If this is an upgrade, TeleForm will default to the database information from the previous install.



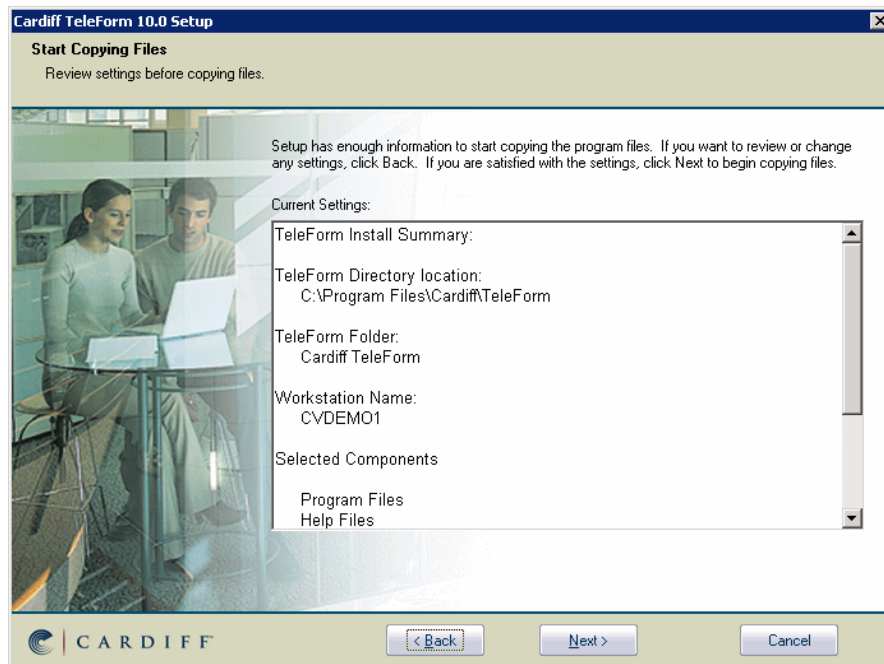
***Note** – TeleForm will attempt to connect to the specified database in the install. If no error message is displayed, the connection was successful. If an error message is displayed, ensure that you have provided the correct database information and that you have access to the specified server and database.

17. Choose the Start Menu program Group, click next to continue.

TeleForm Installation Lab

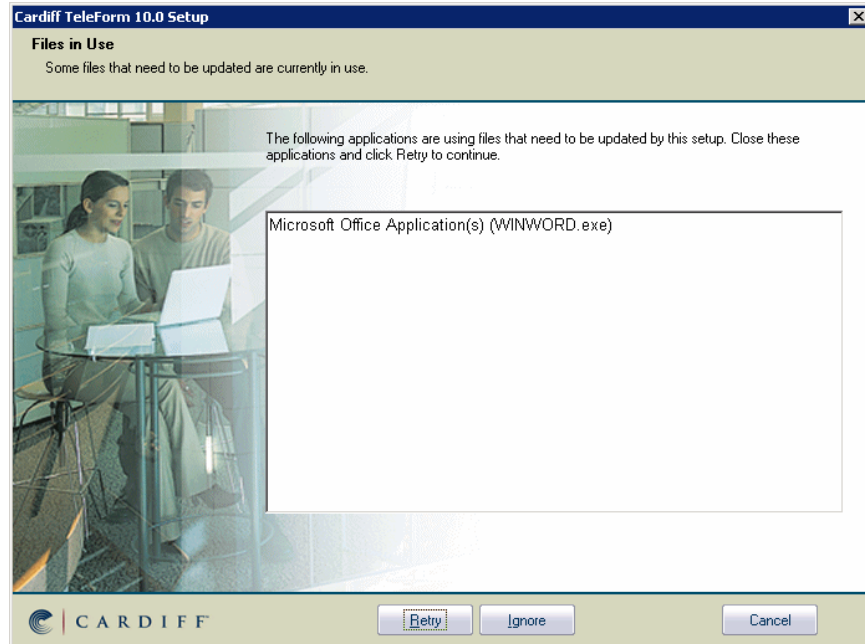


18. The installation summary screen is displayed. Verify all settings and click next to continue.

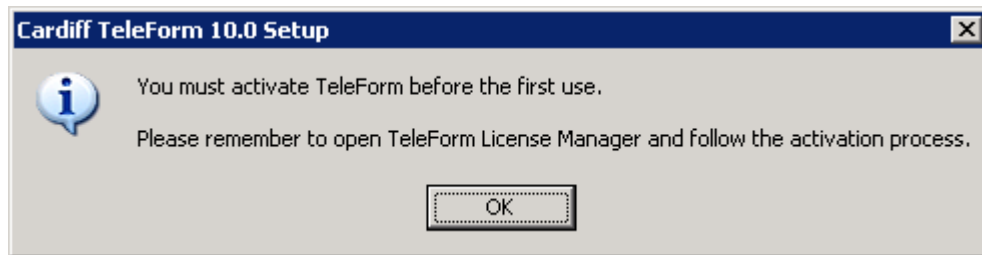


19. TeleForm will now begin to copy files. This will take several minutes depending on the speed of your machine.
20. Because the DocuCom driver installs some Office macros, you may be prompted to shut down any Microsoft Office Applications that are running (Word, Outlook, etc).

TeleForm Installation Lab



21. When the install has completed copying files, you will be reminded to Activate TeleForm before its first use. Click Ok to continue.



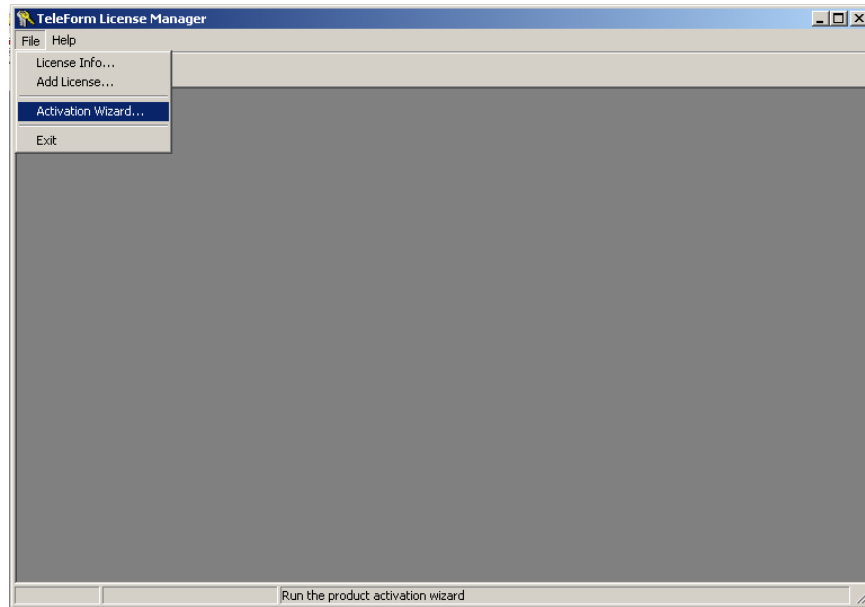
22. The install complete dialog is displayed. Click ok to complete the installation. You may be prompted to reboot your system.

Step 5 – Activate TeleForm

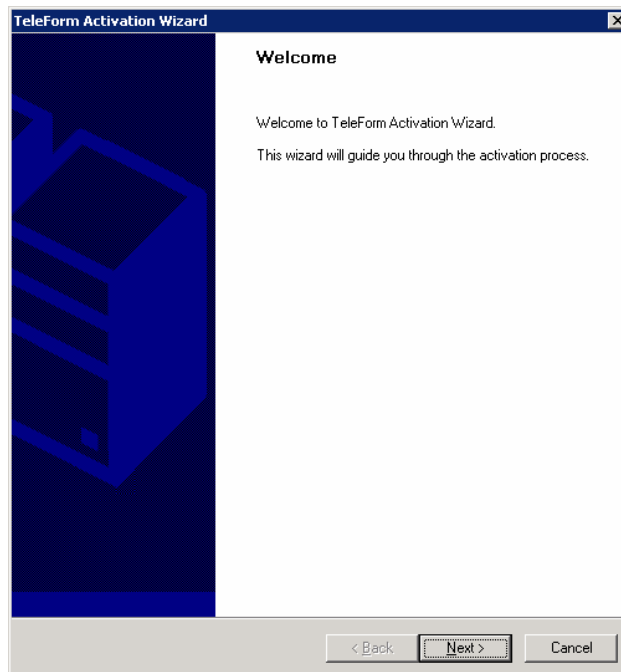
Normally prior to use, you would activate your TeleForm license. TeleForm now allows a two week grace period for activations. For the purposes of this exercise we will not activate and will use the grace period. Please familiarize your self with the steps below to activate a license.

1. Open the TeleForm License Manager (on the TeleForm Server for multi-user installs).
2. From the File Menu, choose Activation Wizard.

TeleForm Installation Lab

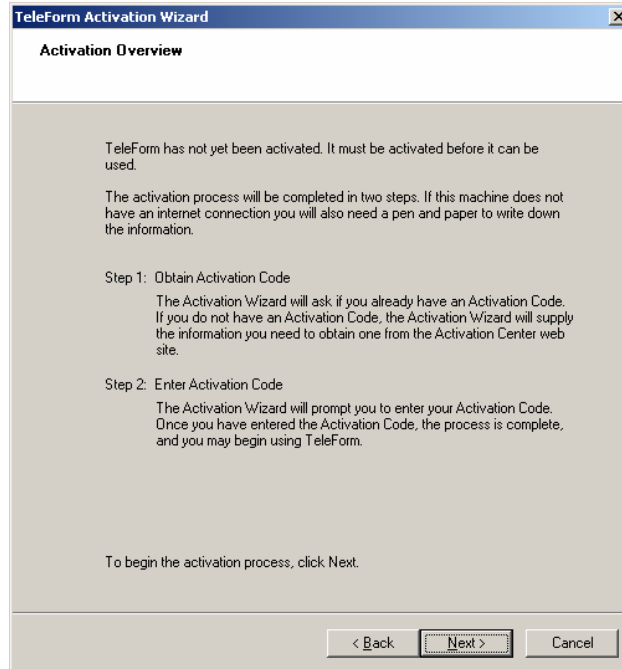


3. The Activation Wizard Starts. Click Next to continue.



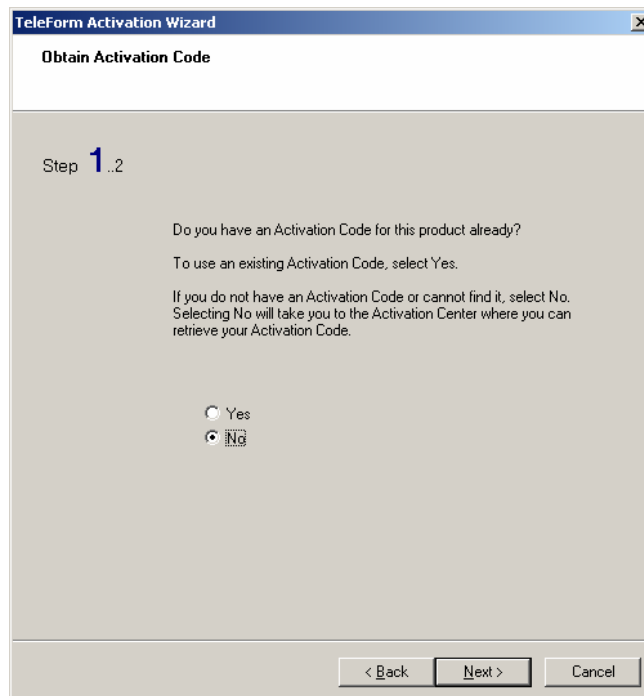
4. Read through the Activation overview, click Next to continue.

TeleForm Installation Lab



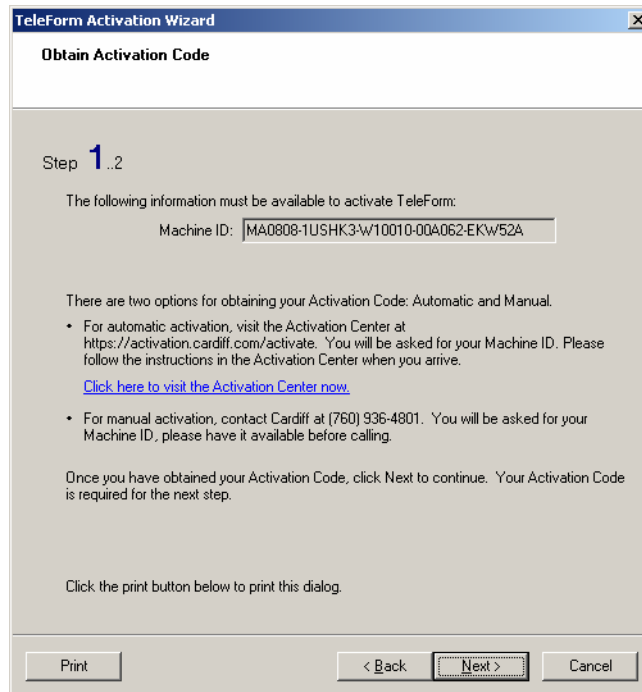
***Note** – Remember, for this exercise we are not activating. Please just read through these instructions.

5. If you already have an Activation code, chose Yes to enter it. If you don't have an Activation code, choose No to generate the code.

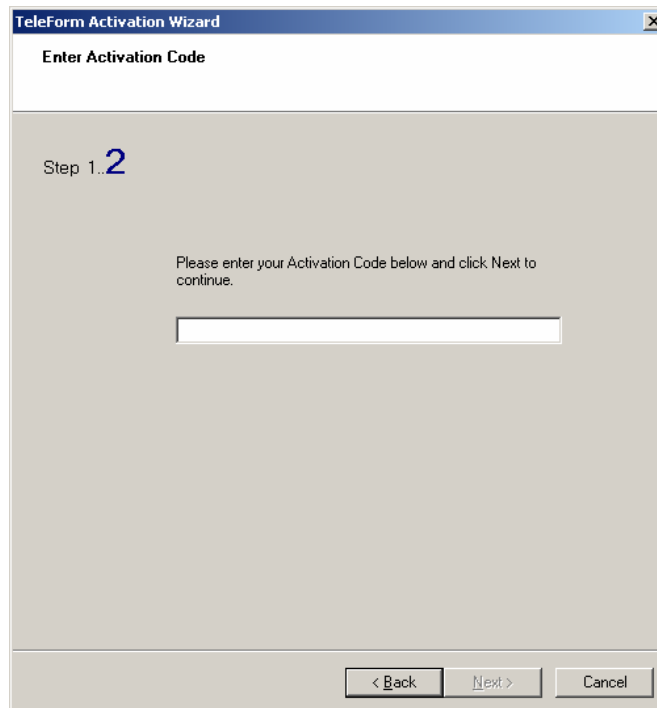


TeleForm Installation Lab

6. Follow the provide links to the online Activation Center. Once the Activation is completed online, you will receive an Activation Code. Enter this code in the Activation Wizard.



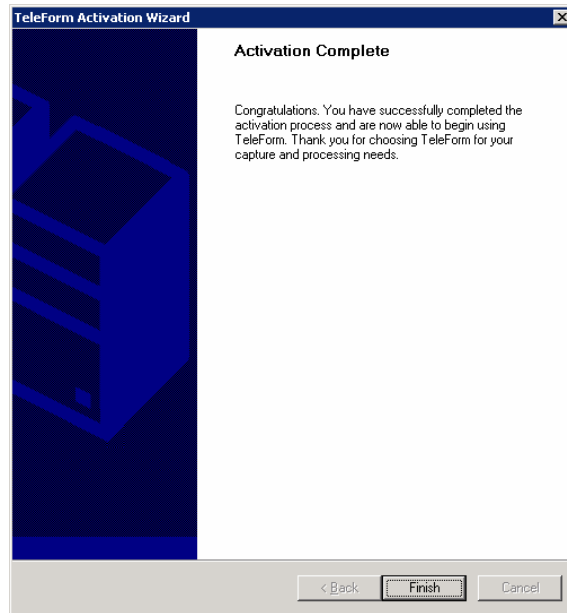
The screenshot shows the 'Obtain Activation Code' window of the TeleForm Activation Wizard. It is titled 'Step 1...2'. The text states: 'The following information must be available to activate TeleForm: Machine ID: MA0808-1USHK3-W10010-00A062-EKW52A'. Below this, it says: 'There are two options for obtaining your Activation Code: Automatic and Manual.' Two bullet points follow: the first describes automatic activation via the Cardiff Activation Center with a link to <https://activation.cardiff.com/activate>; the second describes manual activation by calling Cardiff at (760) 936-4801. A note at the bottom says: 'Once you have obtained your Activation Code, click Next to continue. Your Activation Code is required for the next step.' At the very bottom, it says: 'Click the print button below to print this dialog.' The window has a 'Print' button on the left and '< Back', 'Next >', and 'Cancel' buttons on the right.



The screenshot shows the 'Enter Activation Code' window of the TeleForm Activation Wizard. It is titled 'Step 1..2'. The text says: 'Please enter your Activation Code below and click Next to continue.' Below this text is a single-line text input field. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

7. Click next to continue.

TeleForm Installation Lab



8. The Activation is now complete. Click Finish and Close the License Manager.

Step 6 – Verify Installation

Now that the System has been installed and activated, you can verify the installation. You may want to open several of the TeleForm modules to verify they open. If this was an upgrade, verify that any forms, scripts, or other items are still accessible in the system.

Other Post install items

System backup

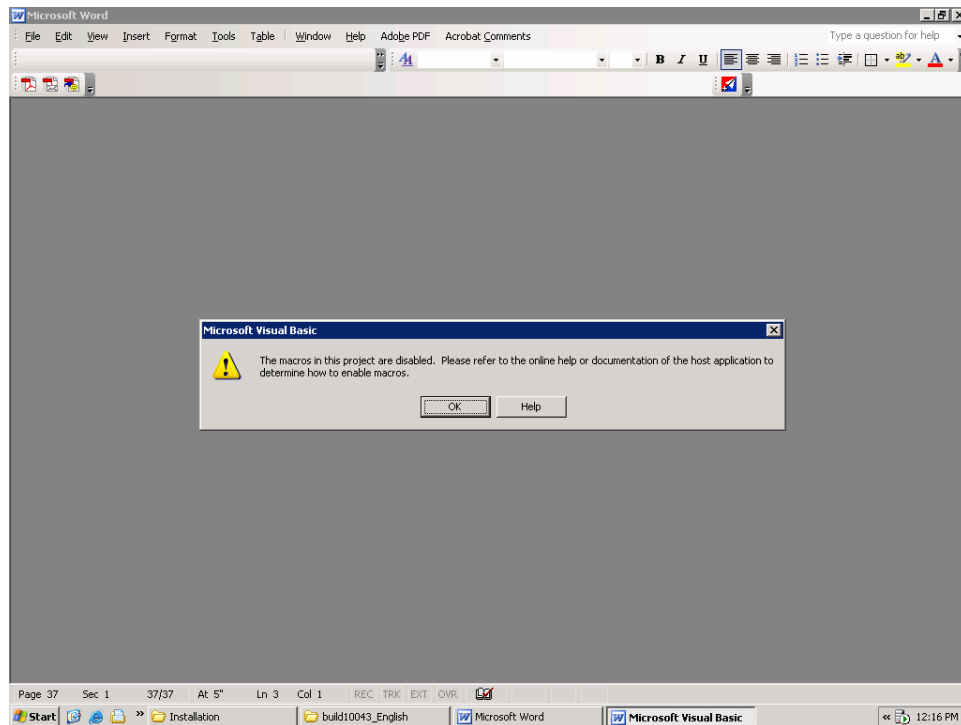
After the installation has been completed and verified it is a good idea to backup the new TeleForm system. In case something were to happen to the system, these backups could be extremely useful in that you could quickly restore the system to its current state. This would be very similar to the backup that was done prior to the installation:

- TeleForm server/machine and database backup
- Manually exporting forms and scripts
- System snapshot from Migration Wizard.

Macros Message in Office Applications

When the DocuCom PDF driver is installed, it adds a Macro to allow Microsoft Office Applications to create PDFs with it. When starting or closing Office Applications (Word, Outlook, etc), you may receive a message about Macros.

TeleForm Installation Lab



In order to stop this message from appearing, you can do one of several things.

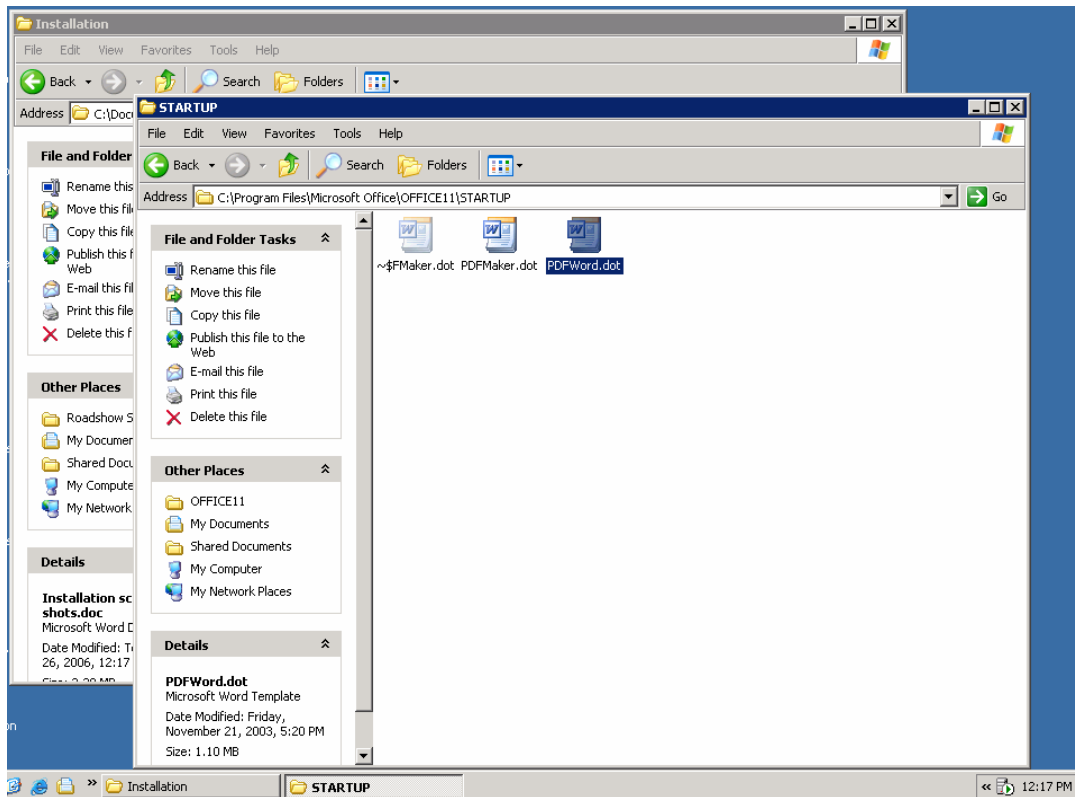
The Office Macro Security level can be decreased (not recommended).

The Macro can be added to the trusted list.

The Macro can be removed (steps below).

1. In Windows Explorer go to your Office Installation folder (by default c:\Program Files\Microsoft Office\).
2. Go to the Office11\Startup Folder.
3. Notice the PDFWord.dot file. This is the file that contains the DocuCom Macro. Removing the file will stop the message from appearing when Office applications are opened or closed.

TeleForm Installation Lab



*Note- Removing this file will remove the capabilities to create a PDF using the DocuCom driver from Office. This will not affect any other PDF capabilities you may have in office from other vendors such as Adobe.

4. Remove the PDFWord.dot.

Exercise Questions

1. What utility can be used to generate a System Snap Shot of a TeleForm system?
2. Name at least two items that can be saved in the System Snap Shot using this utility?
3. How many directory locations must be specified during a TeleForm Workgroup or Enterprise Server install? What is the purpose of each directory?
4. How long of a Grace Period is there before a TeleForm license must be activated?