



CRM Academic Planner

Installation and Configuration Guide

**© 2012, Jenzabar, Inc.
101 Huntington Avenue, Suite 2205
Boston, MA 02199
617.492.9099
www.jenzabar.net**

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Introduction

The purpose of this guide is to provide instructions for the installation and configuration of CRM Academic Planner.

Installation and Setup Requirements

Introduction

To install CRM Academic Planner for CX, you must:

- Use the correct version of JICS
- Back up existing components
- Locate and use the appropriate installer

You must also have set up your JICS database.

JICS Version

CRM Academic Planner requires the use of JICS 7.4.4 or above.

Backing Up

Before installation, back up the following components:

- On the database server, the JICS database (usually called ISCS.NET).
- On the ADAM server, ADAM.

Also on the web server, back up the following:

- Drive: /Program Files/Jenzabar/ICS.NET/ICSFileServer
- Drive: /Program Files/Jenzabar/ICS.NET/Portal/ClientConfig
- Drive: /Program Files/Jenzabar/ICS.NET/ICSFileServer
- Any other content that was customized within the Portal directory

Locating the Installer

If your institution has purchased the Academic Planner software, you can access the installer as follows:

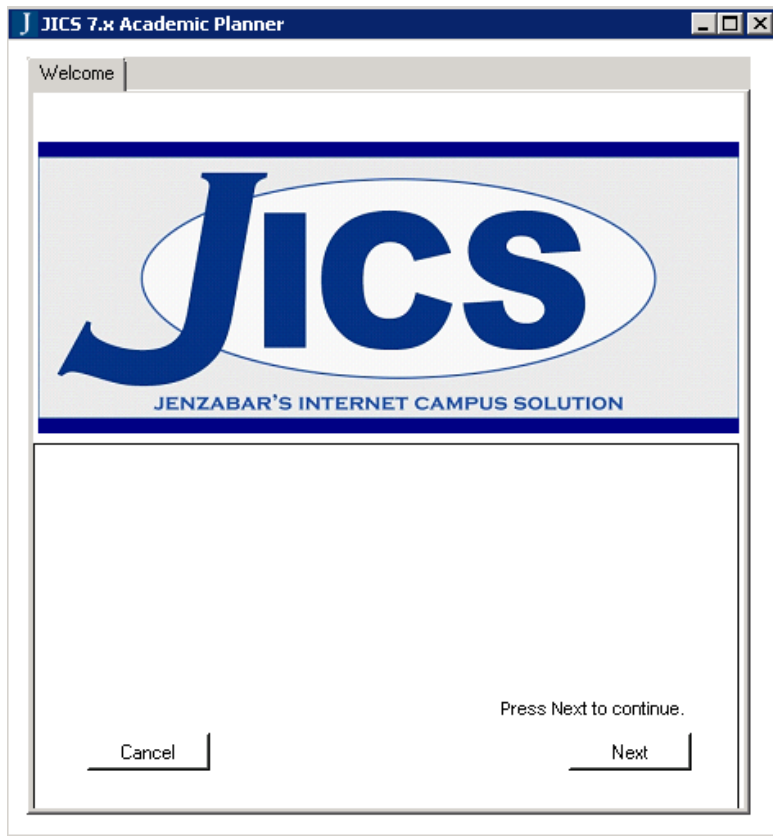
1. Log in to MyJenzabar.net (<http://www.myjenzabar.net/ics/>).
2. Choose Support > CX > Software Downloads > Academic Planner. The installer for CRM Academic Planner is located on this page.

Running the Installer

If your site uses multiple web servers in a load-balanced configuration, you must run the installer once on each web server.

This procedure automatically logs users off your system, so you should do this at a time when you expect usage to be light.

1. Log in to the web server as a user with administrative privileges.
2. Transfer the installer to the web server.
3. Double-click the installer executable. Using the WinZip Self-Extractor, the system begins transferring installation files. During this process, the system displays a status bar. When complete, the installer wizard launches, displaying a Welcome screen.



4. Click **Next**. The wizard displays a License tab.

The screenshot shows a window titled "JICS 7.x Academic Planner" with a "License" tab selected. Inside the tab, there are two main sections. The first section, "Installation Type", contains a radio button labeled "Upgrade" which is selected. The second section, "Update License Key", contains two radio buttons: "No" (selected) and "Yes". Below these sections is a text prompt "Please enter the License Key." followed by a text input field labeled "License Key:". At the bottom of the window are two buttons: "Cancel" on the left and "Next" on the right.

5. On the License tab, select **Upgrade**. The system updates the tab to include an area titled “Update License Key.”
6. Select **No**, and click **Next**. The wizard displays the ADAM/AD LDS tab.

The screenshot shows the 'JICS 7.x Academic Planner' window with the 'ADAM/AD LDS' tab selected. The title bar includes standard Windows window controls. The tab bar shows 'License', 'Location', and 'ADAM/AD LDS'. The main content area is titled 'Active Directory Application Mode (ADAM)' and contains the instruction 'Configure the ADAM options.' with a 'Set Defaults' button. Below this are input fields for 'ADAM Server' (placeholder: 'Name of your web server') and 'ADAM Port' (value: '389'). A section for password entry is titled 'Please enter the password you want to use for the ADAM User: Administrator', followed by two masked password fields. At the bottom are 'Cancel' and 'Next' buttons.

7. Enter the password for the Administrator user in the two fields provided. Make sure you enter the password correctly both times, because if you enter and confirm something else, the system will change the password.
8. For both first-time and repeats installation, the wizard displays the Database Info tab.

JICS 7.x Academic Planner

License | Location | ADAM/AD LDS | Database Info

Database Server

Database Server Name:
ICS

Main Database Name:
ICS_NET

Reporting Database Name:
ICS_NET_STAT

Database Authentication Type

☐ Use Windows authentication credentials of current user.

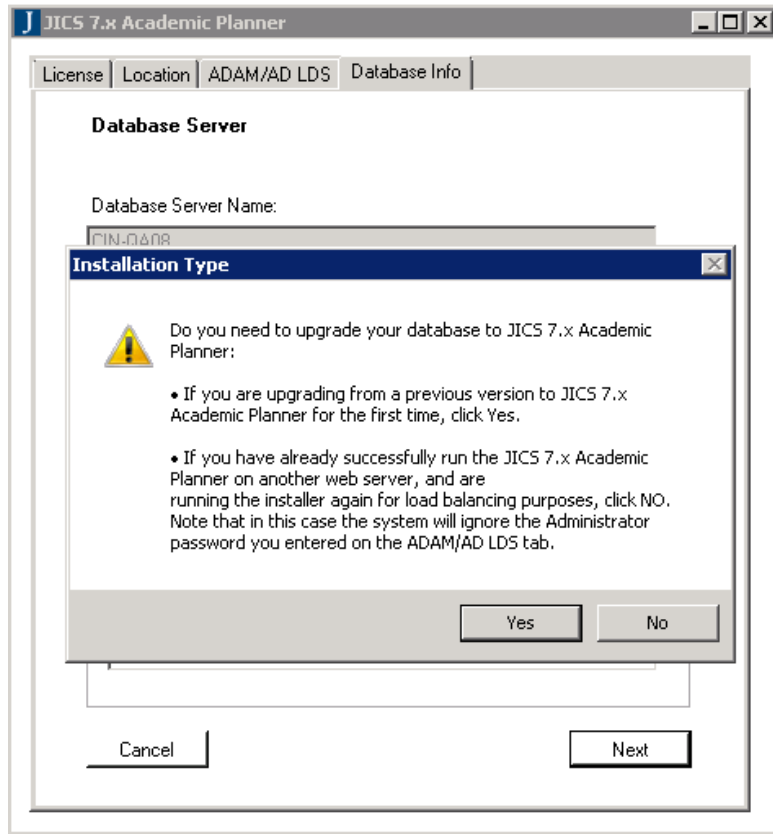
☒ Server authentication using the Login ID and Password below

sa

.....

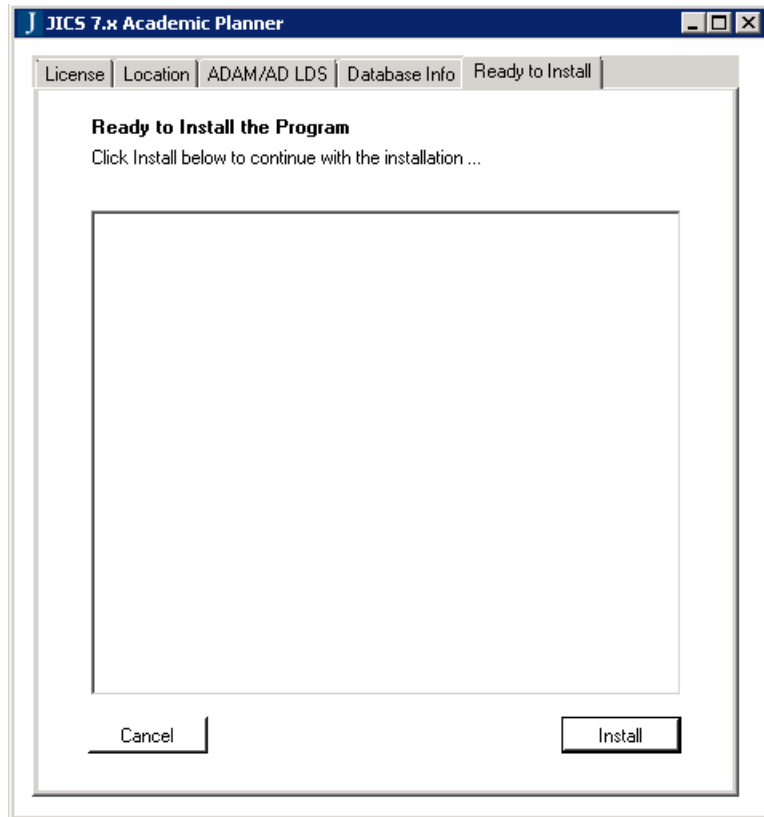
Cancel Next

9. In the “Database Authentication Type” portion of the screen, do one of the following:
 - If you have system administrator privileges on the database server and could log in using your Windows credentials, select **Use Windows authentication credentials of current user**.
 - Alternatively, select **Server authentication using the Login and Password below**, and then enter a valid user ID and password in the fields provided. Typically, the user ID is *sa*.
10. Click **Next**. The wizard displays a dialog box asking whether you are running the CRM Academic Planner installer for the first time, or whether you are running it on a second or other subsequent web server for load-balancing purposes. If the system displays this dialog box do one of the following:
 - If this is the first (or only) web server that you are upgrading to CRM Academic Planner, select **Yes**.
 - If you have successfully run the CRM Academic Planner installer on a previous web server, and are now running the installer again solely for load-balancing purposes, select **No**.



Note If you click **No**, the new information will not update in ADAM.

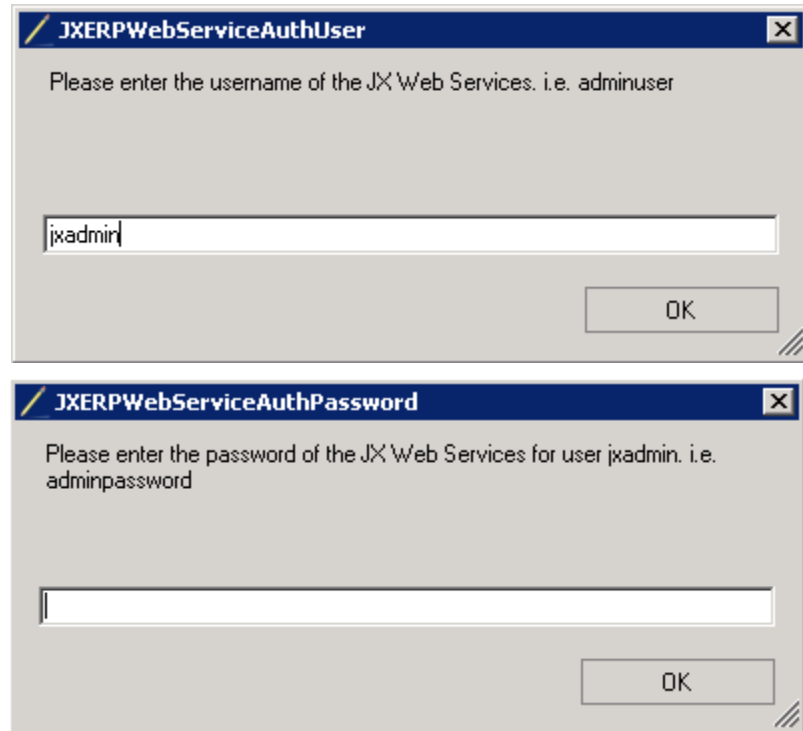
11. After you select either **Yes** or **No**, click **Next**. The Ready to Install tab in the wizard appears.



12. Click **Install.** Is this a first-time installation?

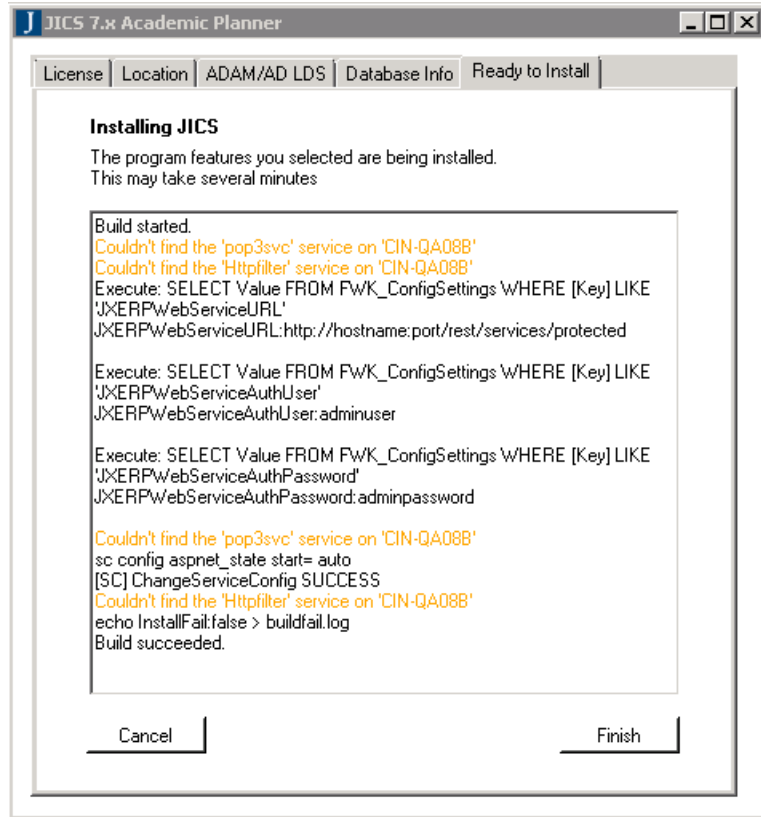
- If **yes**, the following windows open sequentially while the Ready to Install tab displays progress messages; your Java Administrator can provide the information needed to complete them.
- If **no**, go to step 13.



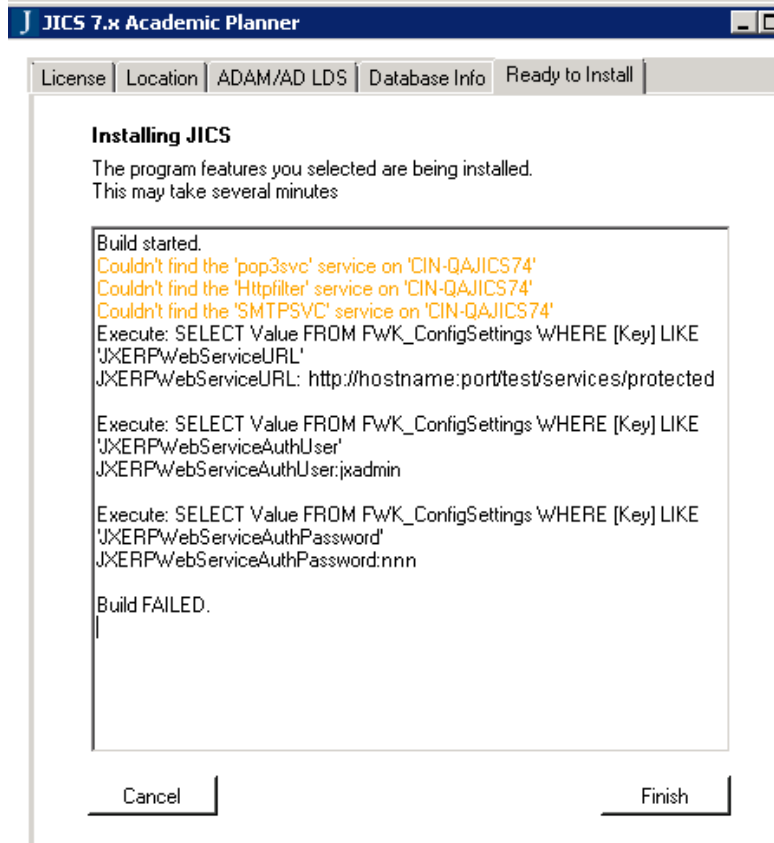


13. After you click **OK** (or if this is not the first time you have installed Academic Planner), the wizard begins installing the CRM, and the box on the wizard window displays progress messages as shown below. Note that this can take several minutes to run.

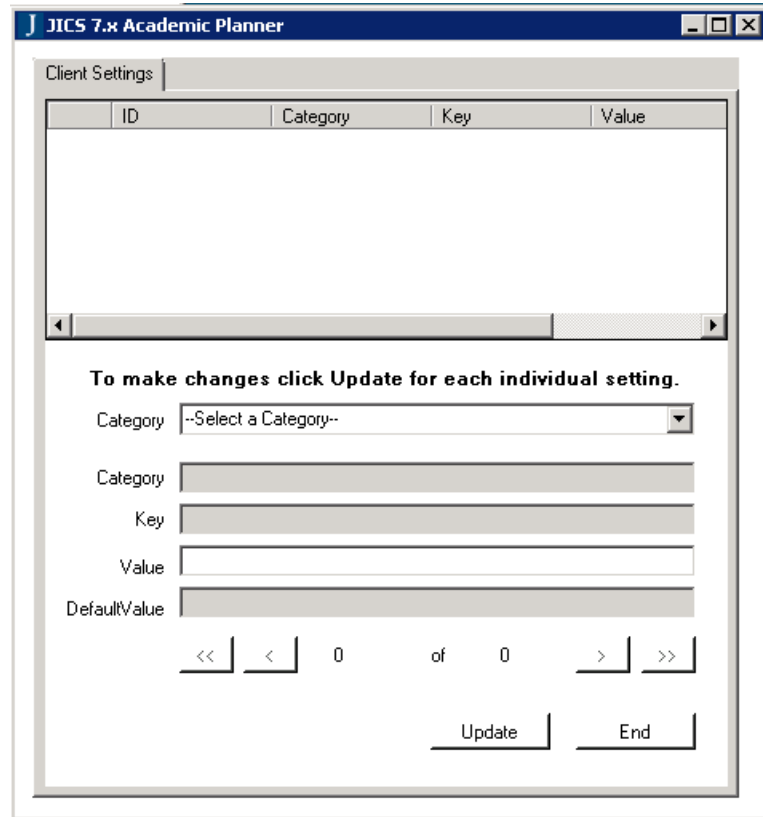
When the process is complete, the **Finish** button is enabled.



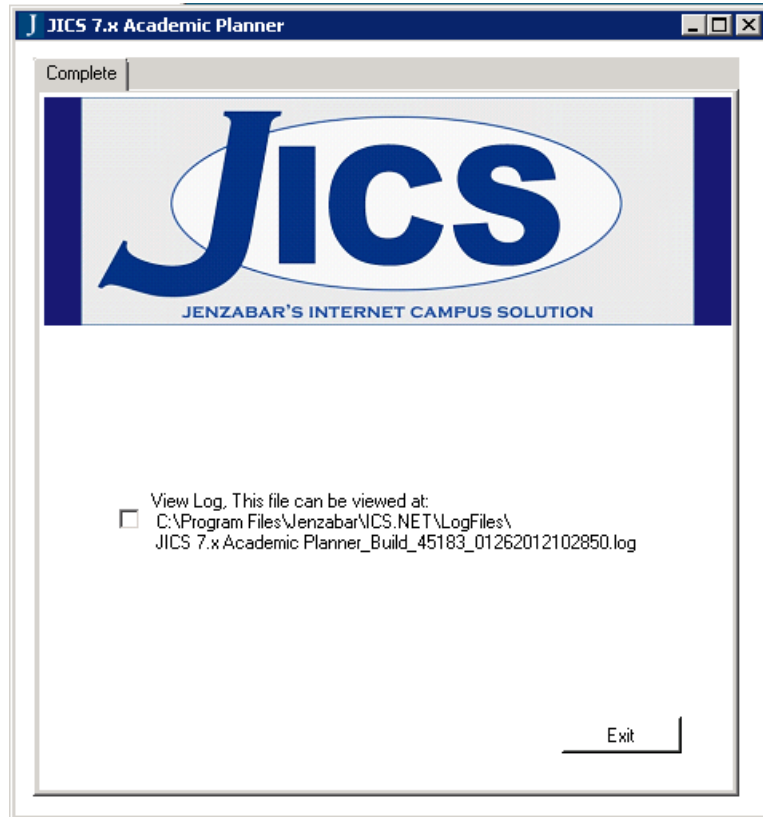
Note If the installer fails, the message “Build FAILED” will appear at the end of the messages in the box, as shown below. In the case of failure, click **Cancel** and review the log file for messages.



14. When the build ends successfully, the Client Settings tab opens. Do not enter any values on the tab; click **End**. The Complete tab of the installer opens.



15. If you want to view a log of the installation, select **View Log** on the following screen. Note that the log location is the same for every installation, whether it succeeds or fails (C:\Program Files\Jenzabar\ICS.NET\LogFiles).



16. Click Exit.

Introduction

After your installation is complete, you can:

- Add the name of your institution to the Academic Planner.
- Add a welcome or instructional message to the main page of the Academic Planner portlet to provide information to all users.

These two changes can be done at the same time because they involve updates to the same JICS table.

Adding your institution's name

To add the name of your institution to the Academic Planner, you must modify the FWK_Globalization table on your SQL Server.

Add your institution's name in the Text_Value field of the FWK_Globalization table where the Text_Key equals TXT_ACADEMICPLANNER_SCHOOL_NAME, as shown below.

Text_Key	Text_Value	Text_Custom_Value
TXT_ACADEMICPLANNER_SCHOOL_NAME	Jenzabar University	NULL

Adding a message to the main page

To add a “Welcome” or “Instructional” message to the main page of the Academic Planner portlet that will be seen by all users, you must modify the FWK_Globalization table on your SQL Server.

Add your personalized message in the Text_Value field of the FWK_Globalization table where Text_Key equals TXT_ACADEMICPLANNER_WELCOME_INSTRUCTIONS, as shown below. Note that you can use standard HTML to create your message.

Text_Key	Text_Value
TXT_ACADEMICPLANNER_WELCOME_IN...	<html><body><p>Sample Message:</p><h4>Instructions:</h4><table border="1"><tr><td>Complete a plan</td></tr><tr><td>Get it approved</td></tr></table></body></html>

The above table entry generates a page that resembles the following.

Academic Planner

Plan List

Edit Plan

Copy Plan

Edit Major/Program, etc

Print Plan

Start New Plan

Delete Plan

Refresh Plan List

Sample Message:

Instructions:

Complete a plan

Get it approved