



3

Installing WebBoard

Before you can install WebBoard, you need to collect some information about your hardware, software, connectivity, and other options, as described in Chapter 2, *Before You Start*. With that information and with a properly configured system and Internet or intranet connection, installing WebBoard is a simple job handled by the setup program.

The WebBoard setup main menu lists various install options. Depending on your requirements, you may install only the WebBoard program itself, or you may install all the options. Each item takes just a few minutes to install. After installation, you must test WebBoard. Testing is important to ensure that WebBoard is installed correctly and operating properly.

During installation, WebBoard uses the information you provide, as well as information from the Windows Registry and configuration files, to set the basic parameters for the program and establish the first board. Most of this information can be changed later, as described in Chapter 5, *Managing Your WebBoard Site*.

This chapter begins with a quick-start summary, followed by detailed installation instructions for a new or upgrade installation of WebBoard 5. There are also instructions for the secondary installations used when distributing WebBoard across several computers. Separate sections provide specific instructions for installing the NNTP (news) server, installing ActivePerl (required for NNTP support), and installing support for an external web server to use as a gateway to

WebBoard. Next, this chapter walks you through the tests used to be sure WebBoard is running properly. Finally, it tells you where to find help.

Note

You can upgrade to WebBoard 5 only from any version of WebBoard 4, Windows Edition for MSDE/SQL Server. If you want to upgrade from an older version of WebBoard, you must first upgrade to WebBoard 4.x. You cannot upgrade from WebBoard 4, Windows Edition for Oracle 8/8i.

Quick Start Summary

To install and test WebBoard, you must complete the following steps. These steps are listed briefly here and explained fully in the next sections. Figure 3-1 shows the main menu of WebBoard Setup.

Figure 3-1 WebBoard Setup main menu



1. Review the WebBoard installation requirements (see Chapter 2). You may need to ask your network administrator or ISP for some information.
2. If you are upgrading from a previous version of WebBoard, make backup copies of your WebBoard directory (and all subdirectories) and the WebBoard Registry key, located under HKEY_LOCAL_MACHINE\SOFTWARE\O'Reilly\WebBoard\3.0 in the Windows Registry.

3. If using MSDE for your database, install MSDE from the Setup men. If Setup detected an existing MSDE or SQL Server installation on your system, this menu item does not appear.
4. Install the basic WebBoard 5 program.

Note

If you are using a SQL Server database that is on another computer, the WebBoard installation may require you to create a database before it can complete. If so, it will display an error message that the database connection failed. Before continuing, you must create a database as described in “Creating a Database for WebBoard,” later in this chapter.

5. To provide NNTP support for distributing WebBoard conferences as newsgroups, do the following:
 - Install ActiveState Perl from the Setup menu if you do not already have the correct version of Perl.
 - Install the NNTP server from the Setup menu.
6. To use an external web server as a gateway to WebBoard, install the required DLL and provide setup information using the setup option for external server support on the Setup menu.
7. Test WebBoard’s operation.
8. Install any secondary WebBoard installations using Setup.
9. Test your complete WebBoard system.

Note

If you downloaded your copy of WebBoard 5, the MSDE and Perl components were not included due to their size. If you need to install these components, Setup downloads them as necessary during the installation process.

Creating a Database for WebBoard

WebBoard uses a database for storing information about your system configuration, boards, conferences, and users. You may need to create a database to complete WebBoard installation, depending on your environment:

- If you plan to use MSDE, you must first install it as described in this section.
- If you plan to use an existing SQL Server database and it is on the same system as WebBoard, you don’t need to do anything. Skip this section and go to “Installing the WebBoard Software.”

- If you plan to use an existing SQL Server database and it is on another computer in the network, WebBoard Setup will try to connect to it (see “Installing the WebBoard Software”). If the connection fails, you need to create a database as described in this section.
- If you are upgrading, you don’t need to do anything. Skip this section and go to “Performing an Upgrade Installation.”

Installing MSDE and Creating a Database

This section describes how to install MSDE and create an empty MSDE database and DSN for WebBoard. Note that you cannot install MSDE on a system where SQL Server is already installed. If Setup detects an existing MSDE or SQL Server installation on the system, you are not given the option to install MSDE.

Note

MSDE has a five-user limit, so in a redundant setting with more than five WebBoard installations, you must use SQL Server.

To install MSDE, follow these steps:

1. Shut down all Windows programs.
2. Verify that you have 150 MB of free space (30 MB for the program and 120 MB for the temporary files).
3. Execute the WebBoard setup program. The WebBoard Setup main menu appears (see Figure 3-1).
4. Click Install MSDE. If you downloaded your copy of WebBoard 5, Setup now downloads MSDE. You may cancel this operation if desired, but you will not be able to complete installation.
5. On the Welcome screen you are reminded to exit Windows programs. Click Next to continue.
6. Select a destination folder for MSDE. The default is *C:\Mssql7*, but you can install MSDE in another folder or on another drive. Click Next to accept the default, or click Browse to select another folder and then click Next to continue.
7. The MSDE setup program is now ready to install MSDE. During installation you will see no progress bar or indication of what is happening; the installation takes up to 15 minutes to complete. The MSDE Configuration screen appears after setup completes the installation.
8. On the MSDE Configuration screen, click Start MSDE Manager. The SQL Server Service Manager appears. Make sure Auto-start service when OS starts is

checked. The Start/Continue button should be dimmed (server is running). Click the dialog close box to return to setup. The MSDE Server icon appears in the tray. Click Next.

9. On the final screen, click Finish. During this step, setup does the following:
 - Creates an empty WebBoard database.
 - Creates a login account for the database with username `sa` and no password (Password field blank).
 - Creates a System DSN for the database named `WebBoardPrimary` in the ODBC Administrator.
 - Adds an MSDE folder to your Start menu.

Note

If the MSDE installation fails, the *sqlstp.log* in the `\Windows` or `\Winnt` folder may contain useful information for diagnosing the cause of the failure.

Preparing to Use a SQL Server Database

If WebBoard Setup is able to connect to an existing SQL Server database, it completes the necessary database setup and you can ignore this section. However, if WebBoard Setup is unable to connect to an existing SQL Server installation (for example, if it is on the network), you must manually create an empty database, a user account for WebBoard to use to gain access to the database, and a DSN for the database.

Note

Do not complete this procedure unless WebBoard Setup fails to connect to your existing SQL Server database.

Follow the instructions provided with your SQL Server for creating an empty database and login for the database. Note the following:

- Give the empty SQL Server 7.0 or 2000 database a recognizable name, such as *WebBoard*.
- Create a new login for the database for the WebBoard administrator. This user account will be used to access the database from WebBoard. Give full permissions to all aspects of the database.

Once you have the database and the database login, you are ready to create the DSN, which is what WebBoard needs in order to use the SQL Server database you created.

To create a DSN, follow these steps:

1. On the computer where you plan to install WebBoard, open the ODBC Data Source Administrator from the Control Panel.
2. Click System DSN and then click Add. (You must create a System DSN, not a User DSN, or WebBoard may not have access to the data source.) The Create New Data Source dialog box appears.
3. In the list of drivers, select SQL Server, and then click Finish. A wizard for creating a new SQL data source appears.
4. Enter a name for the data source, such as WebBoardSQL, and a description. Make a note of the name, as you will be required to provide it when installing WebBoard. Select or enter the server name where SQL Server resides. Click Next to go to the next screen and enter more configuration information.
5. On the second data source configuration screen, make these settings:
 - Under How should SQL Server verify the authenticity of the login ID, select With SQL Server authentication using a login ID and password entered by the user.
 - In the Login ID and Password fields, enter the username and password you chose when creating the user account for WebBoard to access the data source. Click Next.
6. On the third data source configuration screen, check Change the default database to, and choose the WebBoard database from the drop-down list. Click Next.
7. Click Finish. Review the configuration settings for the new ODBC data source and then click Test Data Source to verify that the settings will work correctly. Click OK to return to the ODBC Data Source Administrator. Your new DSN appears in the list of System Data Sources.

Installing the WebBoard Software

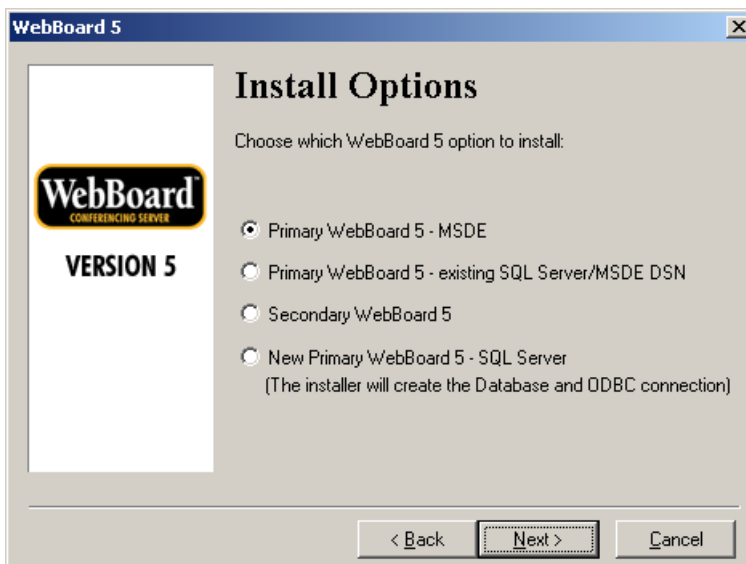
The core WebBoard program includes the WebBoard Server with built-in web server, the WebBoard chat server, the WebBoard Properties, and the WebBoard SMTP receiver. These components are installed by the WebBoard Setup program. This section gives instructions for a new primary installation or an upgrade from WebBoard 4.x. It also describes how to install WebBoard as a secondary installation for redundancy or load sharing.

Performing a New Primary Installation

The following procedures install the WebBoard software. Read each installation screen for instructions and information. To install WebBoard for the first time, complete the following steps:

1. Start the computer you are installing WebBoard on and log in to Windows 2000, Windows NT, or Windows Me/98/95. If you are installing WebBoard under Windows 2000 or Windows NT, you must be the administrator or have administrator privileges. Do not attempt to install WebBoard across a network.
2. To avoid conflicts, close all Windows applications.
3. Execute the WebBoard setup program. If you received WebBoard on a CD, insert the CD first. The Setup program main menu appears (see Figure 3-1).
4. Click Install WebBoard 5. The WebBoard Setup program displays the welcome screen. Click Next.
5. Read the license agreement and click Accept to proceed with the installation.
6. Read the release notes for late-breaking information and warnings. Click Next to continue.
7. On the Install Options screen (Figure 3-2), choose one of the following:

Figure 3-2 Choosing which WebBoard configuration to install



Primary WebBoard 5 - MSDE

Select this option if you have prepared an empty MSDE database to use with WebBoard on the *local* system. If you have installed MSDE on another

system, select the existing SQL Server option and follow the directions for using a SQL Server DSN. This is the default option if Setup detects MSDE on the local system. Click Next and go to Step 10.

Primary WebBoard 5 - existing SQL Server/MSDE DSN

Select this option if you have prepared an empty SQL Server database to use with WebBoard. (You also select this option if you are using an MSDE database that is not on the local system.) Click Next and go to Step 9.

Secondary WebBoard 5

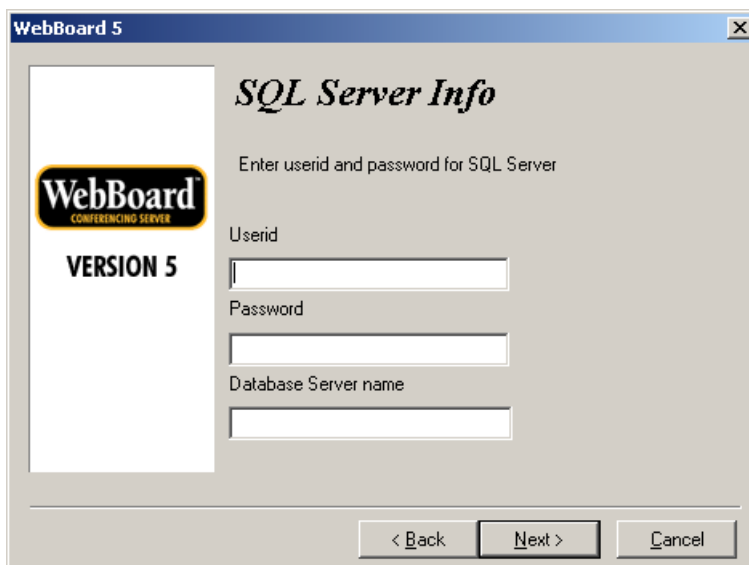
Select this option only for secondary installations. See “Performing a Secondary Installation.”

New Primary WebBoard 5 - SQL Server

Select this option if you have SQL Server installed but have not prepared a database. WebBoard will attempt to connect to SQL Server and create the database and ODBC connection. If this option fails, you must prepare a database as described in “Preparing to Use a SQL Server Database.” This is the default option if Setup does not detect MSDE on the local system. Click Next and go to Step 8.

8. If you chose New Primary WebBoard 5 - SQL Server in Step 7, you see the SQL Server Info screen shown in Figure 3-3 (otherwise, skip to Step 9). If you know the following information, enter it; otherwise accept the defaults and click Next.

Figure 3-3 Entering SQL Server Information



The screenshot shows a Windows-style dialog box titled "WebBoard 5". On the left side, there is a logo for "WebBoard" with "CONFERRING SERVER" underneath it, and "VERSION 5" below that. The main area of the dialog is titled "SQL Server Info" in a stylized font. Below the title, it says "Enter userid and password for SQL Server". There are three input fields: "Userid", "Password", and "Database Server name". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

Userid

If you are using SQL Server authentication (recommended), enter the SQL Login ID for the user account created for the WebBoard database.

Password

If you are using SQL Server authentication (recommended), enter the password for the SQL user account for the WebBoard database.

Database Server Name

If the database is on the local system, use *local*. Otherwise, supply the name of the networked computer where SQL Server resides.

Note

When you click Next, WebBoard attempts to connect to SQL Server. If it is successful, go to Step 10. If not, you see the Cannot Connect to Database error message. You must prepare a database as described in “Preparing to Use a SQL Server Database,” and repeat the installation selecting the Primary WebBoard 5 - existing SQL Server/MSDE DSN option.

9. If you chose Primary WebBoard 5 - existing SQL Server/MSDE DSN in Step 7, you see the Data Source screen (otherwise, continue with Step 10). If you know the required information, enter it and click Next. If you do not know the information or have not created a DSN, click Run ODBC Administrator. You must supply the:

DSN

For an MSDE database, enter WebBoardPrimary. For a SQL Server database, enter the System DSN listed in the ODBC Administrator for WebBoard's SQL database.

User

If you are using SQL Server authentication (recommended), enter the SQL Login ID for the user account created for the WebBoard database.

Password

If you are using SQL Server authentication (recommended), enter the password for the SQL user account for the WebBoard database.

Run ODBC Administrator

Click this button to open the ODBC Data Source Administrator. If you need to create a DSN, see “Preparing to Use a SQL Server Database,” earlier in the chapter. If the DSN already exists, click the System DSN tab and find the DSN for your empty SQL database. Select the DSN and click Configure to find the User/Password you established when creating a SQL login account for the SQL Server database. (Under How should SQL Server verify the authenticity of the login ID, check the option With SQL Server authentication to make the login ID and password visible.) Enter the information in

the setup Data Source screen as you find it (click Run ODBC Administrator to return to the SQL Server Configuration information).

10. Choose the destination folder for the WebBoard software. The default location is *C:\WebBoard*, but you can install the software in another folder. Click Next to accept the default, or click Browse to choose another location and click Next to continue.
11. Enter the WebBoard administrator account information:

Login name

The name by which the WebBoard administrator logs in to WebBoard.

Password

The password by which the WebBoard administrator logs in to WebBoard. Note that when you enter the password on this screen, it is shown as plain text. When you log in to WebBoard, the password is hidden. To maintain the security and integrity of your WebBoard, you should carefully protect the WebBoard administrator's login name and password.

First name

The real first name of the WebBoard administrator; this name is shown in the user profile for the WebBoard administrator and is used in searches.

Last name

The real last name of the WebBoard administrator; this name is shown in the user profile for the WebBoard administrator and is used in searches.

Email address

The email address for the WebBoard administrator. You may want to make this your real account or a generic WebBoard administration account. The WebBoard administrator's email address is used on a variety of WebBoard pages and error messages.

12. Enter the information WebBoard uses to send outbound mailing list messages as well as welcome and watched topics/conferences alert messages:

External SMTP mail server

The hostname or address of the external Simple Mail Transfer Protocol (SMTP) mail server to be used for sending email.

Server name

The Fully Qualified Domain Name (FQDN) by which your WebBoard is identified on the Internet (or intranet). This name is used throughout the WebBoard system. You can use *localhost* for demonstration purposes.

13. Enter the port setting for WebBoard's internal web server. By default, the port on which web servers listen for incoming requests is 80. If you are running another web server, it is probably using that port, and you need to assign a

different port number to WebBoard's internal server. Typically, port 8080 is the second port used for web servers. Note that if you use a port other than 80, you must include the port number in the WebBoard URL, for example, *http://your.server.name:8080/~boardalias*.

14. Setup next asks if you want backup copies made of all files replaced during installation. We recommend you answer yes, in case you need to recover the original files at any point. All actions taken by WebBoard's Setup program are recorded in the WebBoard installation log.
15. If you answered yes in Step 14, you must select the location for the backed-up files. Accept the default or use the Browse button to choose a folder.
16. Setup informs you that an Administrator account has been established and displays the WebBoard administrator login name and password you entered. Write down this information.
17. On the Ready to Install screen, click Next to install WebBoard with the settings you entered in the previous screens. (Click Cancel to exit without installing WebBoard.) Setup installs the software. The program displays a progress indicator and tells you which files are being installed. Setup also adds information to your Windows Registry, builds the Start menu folder, and creates the necessary database tables. During some installations under Windows 95, Setup may also install WinSock 2.0, an upgrade to WinSock from Microsoft.
18. Setup displays your Login Name and Password again. Make sure you write them down. If you forget the password or login name, you won't be able to log in to WebBoard! Setup also displays the URL you will use to log into WebBoard for the first time. Click Next to continue.
19. Setup then displays a Setup Complete screen. You must now register your software by connecting to the registration server at ChatSpace, obtaining a key, and installing the key.
20. Setup sends your administrator login name and password to the chat server on the local system and displays a browser page with a Register button. This information is *not* sent to ChatSpace. Click Register.
21. If you are connected to the Internet, the registration page at ChatSpace appears. Enter your WebBoard key (obtained when you purchased WebBoard) and any other information on this page and click Submit. If this page does not appear, click Back and resubmit the page.

Note

If you are not connected to the Internet or some other error occurs during registration, you can register later from WebBoard Properties, available from the WebBoard folder on the Start menu. Click the Register button on the About tab. If you continue to have trouble, contact WebBoard technical support at <http://www.webboard.com/>.

22. If registration is successful, a page with your key information and an Install Key button appears. Click Install Key. You should receive an installation successful page. You can now continue with WebBoard Setup.
23. If necessary, Setup informs you to restart Windows. In this case, WebBoard is not properly installed until Windows is restarted. Click OK to restart the system.

Note

By default, the chat server starts during installation. Before you can start the WebBoard server for the first time, you must stop the chat server. Choose Control from the context menu for the chat server's tray icon (the green chat bubble) and click Stop on the chat server's control panel.

You're now ready to add NNTP support or external server support or begin testing WebBoard as described later in this chapter.

Performing an Upgrade Installation

WebBoard Setup automatically detects an existing WebBoard installation and performs the upgrade. Before upgrading, review the considerations listed first in this section. To upgrade, follow the instructions later in this section.

Considerations for upgrading

If you are upgrading a previous WebBoard installation, note the following issues before you begin:

- WebBoard 5.0 can only upgrade WebBoard 4.x, Windows Edition for MSDE/SQL Server. If you are running WebBoard 3.x, you must first upgrade to WebBoard 4.x or start over. WebBoard 5 does not upgrade WebBoard 4.x, Windows Edition for Oracle 8/8i.
- If you previously had ConferenceRoom chat installed, WebBoard 5 leaves it alone but installs its own chat server instead.
- The new WebBoard chat server is fully integrated with WebBoard and must always be running for WebBoard to run.
- Existing chat rooms are created in the chat server's database. The new chat server requires room names to be unique across the WebBoard site. If Setup encounters duplicate room names, it will rename them, prepending the name of each with a # and a number. For example, two rooms named ChattingRoom will be renamed #ChattingRoom and #2ChattingRoom. Note that this change also means that conferences cannot share a single room.
- WebBoard 5 replaces all the HTML files installed in WebBoard 4.x. It is not feasible to upgrade any customizations you have made to the HTML files.

during the upgrade process. If you have a highly-customized WebBoard, you may want to add the updates to your existing files rather than your customizations to the new files. See Appendix B, *Upgrading Files from WebBoard 4.x* for a list of the changed files and follow these steps for updating your existing files:

1. Install 5.0 to backup all the old HTML templates and install the 5.0 templates.
 2. Make a copy of the 5.0 templates for reference.
 3. Move the user-facing 4.x templates back into the HTML folder(s).
 4. Modify the user-facing templates that have 5.0 changes in them per the tables in Appendix B.
- Before starting an upgrade installation, back up the Registry key HKEY_LOCAL_MACHINE\SOFTWARE\0'Reilly\WebBoard\3.0. To export or save this key and its subtrees, use the Registry editor (*regedt32.exe* or *regedit.exe*). These programs are usually installed in your \Windows directory. Save the keys under a new name.
 - Back up your entire WebBoard installation, including all subfolders (*Conf*s, *Html*, *System*, and so on). If something goes wrong with the update installation, you'll be glad you did this!
 - Backup your WebBoard database. If you are using MSDE, see the WebBoard Knowledge Base for instructions (<http://www.webboard.com/>).

Installing the WebBoard software

WebBoard Setup recognizes that you have an existing installation and skips some steps of a full installation. It also preserves or updates your current WebBoard settings, messages, and users. It does not upgrade any customizations you have made to HTML files. To perform an upgrade install, follow these steps:

1. Start the computer you are installing WebBoard on and log in to Windows 2000, Windows NT, or Windows Me/98/95. If you are installing WebBoard under Windows 2000 or Windows NT, you must be the administrator or have administrator privileges. Do not attempt to install WebBoard across a network.
2. To avoid conflicts, close all Windows applications.
3. Shutdown the WebBoard server, the WebBoard SMTP server, and any other WebBoard components that are running (including chat and NNTP).
4. Execute the WebBoard setup program. If you received WebBoard on a CD, insert the CD first. The Setup program main menu appears (see Figure 3-1).

5. Click Install WebBoard 5. The WebBoard Setup program displays the welcome screen. Click Next.
6. Read the license agreement and click Accept to proceed with the installation.
7. Read the release notes for late-breaking information and warnings. Click Next to continue.
8. Setup detects an existing installation and displays a message screen saying it will upgrade WebBoard. Click Next to continue.
9. On the Install Options screen (see Figure 3-2), choose one of the following:

Primary WebBoard 5 - MSDE

Select this option if you have prepared an empty MSDE database to use with WebBoard on the *local* system. If you have installed MSDE on another system, you actually use the SQL Server option and follow the directions for using a SQL Server DSN. This is the default option if Setup detects MSDE on the local system. Click Next and go to Step 12.

Primary WebBoard 5 - existing SQL Server/MSDE DSN

Select this option if WebBoard cannot locate the existing database. (You also select this option if you are using an MSDE database that is not on the local system.) Click Next and go to Step 11.

Secondary WebBoard 5

Select this option only for secondary installations. See “Performing a Secondary Installation.”

New Primary WebBoard 5 - SQL Server

Select this option if you use SQL Server with WebBoard. WebBoard will attempt to connect to SQL Server and create the database and ODBC connection. If this option fails, select Primary WebBoard 5 - existing SQL Server/MSDE DSN and supply the database connection information. Click Next and go to Step 10.

10. If you chose New Primary WebBoard 5 - SQL Server in Step 9, you see the SQL Server Info screen (otherwise, skip to Step 11). If you know the following information, enter it; otherwise accept the defaults and click Next.

Userid

If you are using SQL Server authentication (recommended), enter the SQL Login ID for the user account created for the WebBoard database.

Password

If you are using SQL Server authentication (recommended), enter the password for the SQL user account for the WebBoard database.

Database Server Name

If the database is on the local system, use *local*. Otherwise, supply the name of the networked computer where SQL Server resides.

Note

When you click Next, WebBoard attempts to connect to SQL Server. If it is successful, go to Step 12. If not, you see the Cannot Connect to Database error message. You must prepare a database as described in “Preparing to Use a SQL Server Database,” and repeat the installation selecting the Primary WebBoard 5 - existing SQL Server/MSDE DSN option.

11. If you chose Primary WebBoard 5 - existing SQL Server/MSDE DSN in Step 9, you see the Data Source screen (otherwise, continue with Step 12). If you know the required information, enter it and click Next. If you do not know the information or have not created a DSN, click Run ODBC Administrator. You must supply the:

DSN

For an MSDE database, enter WebBoardPrimary. For a SQL Server database, enter the System DSN listed in the ODBC Administrator for WebBoard's SQL database.

User

If you are using SQL Server authentication (recommended), enter the SQL Login ID for the user account created for the WebBoard database.

Password

If you are using SQL Server authentication (recommended), enter the password for the SQL user account for the WebBoard database.

Run ODBC Administrator

Click this button to open the ODBC Data Source Administrator. If you need to create a DSN, see “Preparing to Use a SQL Server Database,” earlier in the chapter. If the DSN already exists, click the System DSN tab and find the DSN for your empty SQL database. Select the DSN and click Configure to find the User/Password you established when creating a SQL login account for the SQL Server database. (Under How should SQL Server verify the authenticity of the login ID, check the option With SQL Server authentication to make the login ID and password visible.) Enter the information in the setup Data Source screen as you find it (click Run ODBC Administrator to return to the SQL Server Configuration information).

12. Setup next asks if you want backup copies made of all files replaced during installation. We recommend you answer yes, in case you need to recover the original files at any point. All actions taken by WebBoard's Setup program are recorded in the WebBoard installation log.

13. If you answered yes in Step 12, you must select the location for the backed-up files. Accept the default or use the Browse button to choose a folder.
14. Setup informs you that an Administrator account has been established and displays the WebBoard administrator login name and password you entered. Write down this information.
15. On the Ready to Install screen, click Next to install WebBoard with the settings you entered in the previous screens. (Click Cancel to exit without installing WebBoard.) Setup installs the software. The program displays a progress indicator and tells you which files are being installed. Setup also adds information to your Windows Registry, builds the Start menu folder, and creates the necessary database tables. During some installations under Windows 95, Setup may also install WinSock 2.0, an upgrade to WinSock from Microsoft.
16. After upgrading WebBoard, you must install the new chat server, based on chat technology from ChatSpace. The Welcome screen appears. Click Next to continue.
17. On the Registration Information screen, accept or change the contact name, contact email, and registered owner's name. This information is used to register your copy of WebBoard 5. Click Next to continue.
18. On the Administrator Signon Info screen, enter the WebBoard administrator's login name and password, as shown in Figure 3-4. This should be the primary WebBoard administrator's information. Click Next to continue.

Figure 3-4 Administrator's information for registration



Administrator Signon Info

Enter the nickname and password you will use when you signon to ChatSpace. You will have Administrator-level authority.

Administrator's Nickname

Administrator's Password

Confirm Password

☐ Require all users to be registered

< Back Next > Cancel

19. On the Email Server Info screen, accept or change the SMTP server name. This name should be the same one you use for WebBoard. Click Next to continue.
20. Setup displays your Login Name and Password again. Make sure you write them down. If you forget the password or login name, you won't be able to log in to WebBoard! Setup also displays the URL you will use to log into WebBoard for the first time. Click Next to continue.
21. Setup then displays a Setup Complete screen. You must now register your software by connecting to the registration server at ChatSpace, obtaining a key, and installing the key.
22. Setup sends your administrator login name and password to the chat server on the local system and displays a browser page with a Register button. This information is *not* sent to ChatSpace. Click Register.
23. If you are connected to the Internet, the registration page at ChatSpace appears. Enter your WebBoard key (obtained when you purchased WebBoard) and any other information on this page and click Submit. If this page does not appear, click Back and resubmit the page.

Note

If you are not connected to the Internet or some other error occurs during registration, you can register later from WebBoard Properties, available from the WebBoard folder on the Start menu. Click the Register button on the About tab. If you continue to have trouble, contact WebBoard technical support at <http://www.webboard.com/>.

24. If registration is successful, a page with your key information and an Install Key button appears. Click Install Key. You should receive an installation successful page. You can now continue with WebBoard Setup.
25. If necessary, Setup informs you to restart Windows. In this case, WebBoard is not properly installed until Windows is restarted. Click OK to restart the system.

Note

By default, the chat server starts during installation. Before you can start the WebBoard server for the first time, you must stop the chat server. Choose Control from the context menu for the chat server's tray icon (the green chat bubble) and click Stop on the chat server's control panel.

You're now ready to upgrade other WebBoard components, including NNTP support or external server support.

Performing a Secondary Installation

If you plan to run WebBoard in a redundant setup, after creating the primary installation, you will perform as many secondary installations as desired. We recommend that you get your primary installation up and running smoothly before adding the secondary installations. Read the relevant section in Chapter 5 to learn more about requirements for redundant setups. You will have to set all the paths for shared folders to UNC paths. You will also have to create a DSN, which requires the SQL ODBC driver. If you do not already have this on your system, you can find it on Service Pack 4 in the MDAC folder.

To create a secondary WebBoard installation, follow these steps:

1. Go to the WebBoard Site Management menu and, in the Misc. Web Server Settings section, make all the paths for shared files UNC paths. See Chapter 5 for details.
2. Start the computer where you want your secondary installation and log into Windows 2000, Windows NT, or Windows Me/98/95. If you are installing WebBoard under Windows 2000 or Windows NT, you must be the administrator or have administrator privileges.
3. To avoid conflicts, close all Windows applications.
4. Execute the WebBoard setup program. The Setup program main menu appears. You cannot install WebBoard across a network.
5. Click Install WebBoard 4. The WebBoard Setup program displays the welcome screen. Click Next.
6. Read the license agreement and click Accept to proceed with the installation.
7. On the Install Type screen, select Secondary WebBoard 5 installation and click Next.
8. On the data source screen, click Run ODBC Administrator to create a DSN for the same database that is used by the primary installation. For details on how to create a DSN, see “Preparing to Use a SQL Server Database” earlier in the chapter. The process is the same for creating a System DSN for a MSDE database; the driver for MSDE listed in the Create New Data Source dialog is SQL Server (if the driver doesn’t appear in the list, you will have to install it from Service Pack 4). After creating the DSN, enter the requested information:

DSN

Enter the System DSN you just created for the WebBoard database.

User

Enter the login ID for the SQL Server login account created for the WebBoard database. (The default user for the MSDE database created by Setup is sa.)

Password

Enter the password for the SQL Server login account for the WebBoard database. (The default password for the MSDE database created by Setup is no password).

9. Enter the IP address of the computer running the primary WebBoard installation. If the primary WebBoard is bound to an IP address, make sure you use that one.
10. Choose the destination folder for the WebBoard software. The default location is *C:\WebBoard*, but you can install the software in another folder. Click Next to accept the default, or click Browse to choose another location and click Next to continue.
11. Enter the port setting for WebBoard's internal web server. We recommend that you use the same port for this installation as on the primary installation.
12. Setup next asks if you want backup copies made of all files replaced during installation. We recommend you answer yes, in case you need to recover the original files at any point. All actions taken by WebBoard's Setup program are recorded in the WebBoard installation log.
13. If you answered yes in Step 12, you must select the location for the backed-up files. Accept the default or use the Browse button to choose a folder.
14. On the Ready to Install screen, click Next to install WebBoard with the settings you entered in the previous screens. (Click Cancel to exit without installing WebBoard.) Setup installs the software. The program displays a progress indicator and tells you which files are being installed. Setup also adds information to your Windows Registry and builds the Start menu folder. During some installations under Windows 95, Setup may also install WinSock 2.0, an upgrade to WinSock from Microsoft.
15. Read the release notes and click Next to continue.
16. Setup is complete. WebBoard may not be properly installed until Windows is restarted. Click Finish and then click OK, if prompted, to restart the system.

Installing NNTP Support

WebBoard comes with an NNTP server that allows you to distribute board conferences as newsgroups. Users can then read and post messages via their newsreaders. The NNTP server requires ActivePerl 5.005 Build 509 or later. If you have the correct version of ActivePerl, and it is on your System Path so that WebBoard can find it, you don't need to install the ActivePerl included with WebBoard 5. If you don't have ActivePerl on your system, or you have the wrong

version, you will need to install ActivePerl from the WebBoard setup program before installing the NNTP server.

Installing ActivePerl

Complete the following steps to install ActivePerl 5.005 Build 509:

1. Execute the WebBoard setup program. The WebBoard Setup program main menu appears.
2. Click Install ActivePerl. If you downloaded your copy of WebBoard 5, Setup now downloads ActivePerl. You may cancel this operation if you choose, but installation will not be complete.
3. On the Welcome screen, click Next.
4. On the License screen, click Yes to accept the terms of the license and proceed with installing ActivePerl.
5. The Installation Notes describe some of the settings you will need to make during setup. Click Yes after reading the notes.
6. Choose a destination location. Click Browse to find another folder.
7. On the Select Components screen (Figure 3-5), select at least the following:

Figure 3-5 Selecting Perl components



- Perl—Required for NNTP.
- PerlScript—Can be used with WebBoard Open Scripting.

8. Select the following required Perl options:

Add the Perl bin to your path

Adds the Perl *bin* directory to your system path and removes all other Perl directories

Associate .pl with Perl.exe in the Windows Explorer

Enables you to run a Perl script by double-clicking it in Windows Explorer.

9. Select the program folder where you want Perl setup to place the Perl program icons and click Next.
10. On the Start Copying Files screen, check your settings. Use Back to make any changes. Click Next to install Perl. The Perl setup program copies files and configures Perl.
11. On Windows 95/98/Me, click Yes to let setup modify the *AUTOEXEC.BAT* file and add the Perl *bin* directory to your system path.
12. To read the online Release Notes, Click Yes (you have to be online to view the notes).
13. When asked if you want to restart your system, do one of the following:
- On Windows NT or Windows 2000, leave No selected and click Finish.
 - On Windows 95/98/Me, select Yes and click Finish.

Installing the NNTP Server

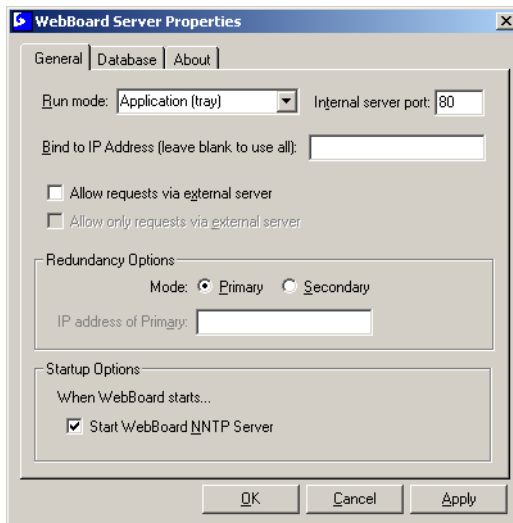
To install the NNTP server, follow these steps:

1. Start the WebBoard setup program.
2. Click Install NNTP Support. The Welcome screen appears. Click Next.
3. Setup installs the Perl modules for NNTP support. Before you can use the NNTP server from your boards, you need to configure WebBoard to start the server when WebBoard starts, as explained in the next section.

Configuring WebBoard to Run the NNTP Server

To configure WebBoard to start the NNTP server when WebBoard starts, follow these steps:

1. On the Start menu, open the WebBoard folder and click WebBoard Properties (Figure 3-6).
2. On the General tab, in the Startup Options area, check Start WebBoard NNTP Server and click Apply.
3. Click OK to exit Properties.

Figure 3-6 Configuring WebBoard to run the NNTP server

4. When you next start WebBoard, WebBoard automatically starts the NNTP server.

Installing External Server Support

You can use an external server as a gateway to WebBoard's internal web server to provide some benefits not available with WebBoard's internal server, as described in Chapter 2. WebBoard depends on a DLL to forward requests from the external server to WebBoard's web server and to pass information from WebBoard to the external server. This DLL must be on the same computer as the external server.

The DLL needs to know where to find WebBoard. The setup program creates a Registry key to hold WebBoard's IP address, FQDN, and the port on which WebBoard's web server is running. When running WebBoard's server and an external server on the same computer, each must run on a different port or each one must be bound to an IP address. Typically, the external server runs on port 80 and WebBoard on port 8080. If you need to change the port of the WebBoard internal server, see Chapter 5.

Installing the Web Server Support

To install what WebBoard requires to run an external web server, follow these steps (install WebBoard first):

1. Start the WebBoard setup program. The WebBoard Setup program main menu appears.

2. Click Install Web Server Support. The Welcome screen appears. Click Next.
3. Choose the web server to use as a gateway to WebBoard.
4. Select a destination folder for the WebBoard 5 external server support. Accept the default, or use the Browse button to choose a different folder. If you selected Other ISAPI Server on the previous screen, use the Browse button to select the folder where you normally place ISAPI scripts run on your web server.
5. If you selected Other ISAPI Server, you see the Select Document Root screen (otherwise, continue with step 6). The setup program will install the *images* folder with images used by WebBoard. Do one of the following:
 - Select the document root folder for your web server. The *images* folder will be installed as a subfolder of the document root.
 - You can choose a different folder (not the document root). In this case, after the setup completes, you will have to create a URL mapping for */wbimages* to the *images* folder.
6. The DLL needs to know how to find WebBoard. Enter the following information:

WebBoard Server Host Address

Enter either the FQDN of the computer running WebBoard or the IP address of the computer running WebBoard.

Port

Enter the port assigned to WebBoard's internal server. This is usually port 80. If you are running the external server or another web server on the same computer, it is often 8080.

7. The setup program is now ready to install the external server support. Click Next to proceed. Setup copies the DLL and the WebBoard images and creates mappings to the DLL and the *images* folder. It also adds information to the Windows Registry.
8. Setup provides a test URL for logging into the external server using the host-name *localhost*. You will later replace it with the server's real hostname. Note that the web server's port may or may not be included. Click Next.
9. Installation is now complete. Click Finish to exit the setup program.
10. Stop and restart the web server to update its configuration for use with WebBoard.
11. For Other ISAPI Server, if you did not select the document root folder in step 5, create a mapping for */wbimages/* to the folder containing the *images* folder.

Configuring WebBoard to Run with an External Server

You must tell WebBoard to accept requests from the external server. To configure WebBoard to run with an external web server, follow these steps:

1. On the Start menu, open the WebBoard folder and click WebBoard Properties (Figure 3-6).
2. On the General tab, check Allow requests via external server. (Do not check Allow only requests via an external server until you have tested WebBoard.)
3. Click OK to exit Properties.

You are now ready to test your WebBoard installation with external server support, as described in “Taking WebBoard for a Test Drive,” later in the chapter. After testing, you can configure WebBoard to accept requests only through the external server. For this and other important information on using WebBoard with an external server, see Chapter 5.

Taking WebBoard for a Test Drive

After finishing the installation, you must take WebBoard for a test drive to verify that it is installed and operating properly. The test drive has four parts:

- Making sure WebBoard starts properly
- Reaching WebBoard from the local computer
- Reaching WebBoard from a remote computer
- Verifying WebBoard’s mappings (external web servers only)

Is WebBoard Running?

The first part of any test drive is to make sure the engine starts and stays running. WebBoard was installed as a manual start application. To start WebBoard, you must start the WebBoard server, the SMTP receiver, and the chat server manually.

Note

Before starting WebBoard for the first time, make sure the chat server is not running in order to properly register the WebBoard server. After this initial instance, you can start the servers independently.

To start the WebBoard components, follow these steps:

1. From the WebBoard folder on the Start menu, click WebBoard Server. The server starts. The WebBoard icon—a small gold thumbtack—should appear in

the system Tray (in the Windows taskbar). To see the WebBoard server's status in a pop-up label, move the mouse cursor over the WebBoard icon in the Tray.

- 2. From the WebBoard folder on the Start menu, click WebBoard SMTP. The SMTP receiver starts and minimizes to the Tray. The SMTP receiver also puts an icon, an envelope, in the Tray.
- 3. From the WebBoard folder on the Start menu, click WebBoard Chat. The chat server control panel opens. Click Start to start the chat server. The server starts and places its icon—a small green chat bubble—in the Tray. Click Hide to hide the control panel.
- 4. If WebBoard does not start, check the error log (in the *WebBoard\logs* directory) for possible reasons. Also, verify that the chat server is not running (*chatspace.exe* in the Task Manager).

Note

You can change WebBoard's run mode to a service or to an application with the WebBoard icons in the Taskbar (see Chapter 5).

Can You Reach WebBoard from the Local Computer?

The next phase of the test drive is to reach WebBoard with a web browser. If you are using an external server, test both the direct requests and requests through the external server.

Table 3-1 shows which URL to use for sending requests directly to the WebBoard server and for sending requests to an external server acting as a gateway. In checking to see if you can reach WebBoard from a local computer, you will replace the server FQDN with *localhost*. The WebBoard URL must end in a specific board alias. If this is a new installation, WebBoard creates the first board and names it *admin*.

Table 3-1 WebBoard URLs by web server type

Web server	WebBoard URL
WebBoard's web server on port 80	<i>http://your.server.name/~admin</i>
WebBoard's web server not on port 80 (for example, on port 8080)	<i>http://your.server.name:port_number/~admin</i> (example: <i>http://myserver.com:8080/~admin</i>)
External server as gateway: WebSite or WebSite Professional	<i>http://website.server.name/webboard/wbpx.isa/~admin</i>

Table 3-1 WebBoard URLs by web server type (continued)

Web server	WebBoard URL
External server as gateway: IIS, Peer web server, Personal web server	<i>http://iis.server.name/webboard/wbpx.dll/~admin</i>
Other ISAPI web server as gateway	<i>http://your.server.name/webboard/wbpx.dll/~admin</i> (depends on your choices during installation)

With the appropriate URL for your web server from Table 3-1, complete the following steps:

1. Make sure WebBoard is running (as described in the preceding section).
2. Open your web browser and enter the URL for WebBoard from Table 3-1, substituting *localhost* for your server's name, as shown:

```
http://localhost/~admin
```

Localhost is a generic address that causes the browser to look for a web server on the local computer. If the web server is not on the default port, 80, make sure you include the port number. Note that some browsers may take several minutes to find *localhost*. For faster response, use the IP address for *localhost*, 127.0.0.1.

The WebBoard welcome page should appear in your browser, as shown in Figure 3-7. If this is an upgrade, and you had WebBoard remembering your password, you will likely bypass this page and go directly to the main WebBoard page.

3. Next, test WebBoard using the IP address of the WebBoard computer. In your browser, type in the WebBoard URL, substituting the IP address for the server's domain name, as shown:

```
http://123.123.234.234/~admin
```

The browser should display the page shown in Figure 3-7.

4. If your server's domain name is registered with DNS, test WebBoard using the domain name. In the browser, type in the WebBoard URL using the server's domain name, as shown:

```
http://your.server.name/~admin
```

where *your.server.name* is the FQDN of your server, such as *www.myserver.com*. The browser should display the document shown in Figure 3-7.

Figure 3-7 WebBoard welcome page

5. If you are using an external web server with WebBoard, test this setup next. First make sure the web server is running. Now enter the correct URL from Table 3-1. For example, with a WebSite Pro server, enter:

`http://website.server.name/webboard/wbpx.isa/~admin`

If you have problems with this step, see “Verifying Settings for an External Server,” later in this chapter.

Can You Reach WebBoard from Another Computer?

The next phase of the test drive is to reach WebBoard from a different computer, either one on your internal network or one connected to the Internet. This test is essentially the same as the previous one, only from a different location. It verifies that other people will be able to reach and participate in your web conferences. To complete this test, you must have access to another computer that has a working web browser.

To test WebBoard from another computer, make sure WebBoard is running as described in the previous section and follow these steps:

1. Start a web browser on the other computer.

2. Test WebBoard using the IP address of the WebBoard computer. In the browser, type in the WebBoard URL from Table 3-1, substituting the server's domain name with the IP address, as shown:

```
http://123.123.234.234/~admin
```

The browser should display the page shown in Figure 3-7.

3. If your server's domain name is registered with DNS, test WebBoard using the domain name. In the browser's location or address field, type in the WebBoard URL using the server's domain name, as shown:

```
http://your.server.name/~admin
```

where *your.server.name* is the FQDN of your server, such as *www.myserver.com*. The browser should display the document shown in Figure 3-7.

4. If you are using an external web server with WebBoard, test this setup next. First, make sure the external server is running. Then enter the correct URL from Table 3-1. For example, with a WebSite Pro server, enter:

```
http://website.server.name/wbpx.isa/~admin
```

If you performed this test from a computer on your local network, and it does not work, make sure WebBoard is running, as well any external web server, if appropriate. Next check the TCP/IP configuration of the computer and the network. If only the test in Step 4 failed, see “Verifying Settings for an External Server,” later in the chapter. If you continue to have difficulties, consult your network administrator.

If you conducted this test from a computer connected to the Internet and it failed, try again. Sometimes heavy traffic on the Internet can cause connections to time out. If after several tries you still can't reach the server, recheck the TCP/IP connections on both computers. Also make sure your server's name is an FQDN and that it is registered with DNS. If you continue to have difficulties, consult your ISP.

Verifying Settings for an External Server

If you are using an external server and were unable to reach WebBoard through the external server in the preceding tests, and you are sure your TCP/IP setup is correct, the problem was most likely an incorrect mapping for the ISAPI DLL. During external server support setup, WebBoard installs the DLL in the folder you specify and gives the DLL the correct name for the type of server. It then maps *WebBoard* to that folder. If the preceding tests worked, then all was successful. If they didn't work, you need to verify a couple of settings.

Document and program or script mappings are essential to how a web server finds information. In fact, every URL is an example of a mapped address: the path in the URL is probably completely different from the physical path of the source document for the URL.

For example, the home page URL for most web servers is *http://web.server.name/index.html*. The physical location for the *index.html* file may be much more complex, for example, *C:\WebSite\htdocs\index.html*. The same physical-to-URL space mapping is required for ISAPI scripts. Proper mapping is essential for the external web server to find the ISAPI DLL, which it needs to run in order to forward requests to WebBoard. In the previous tests, you entered a URL in the browser. For example, if you were using WebSite Pro, you entered *http://website.server.name/webboard/wbpx.isa/~admin*. The */webboard* URL must be mapped to the directory containing *wbpx.isa*, or Website Pro doesn't run the script and doesn't forward the request to WebBoard.

In addition to the mapping to the DLL, the installer creates a mapping to the *images* folder containing the images displayed on the HTML pages that make up the user interface. If your browser displays the login page, but images are missing, you need to verify the mapping to the *images* folder.

Table 3-2 shows the default directory in which the setup program installed the DLL (you may have chosen another drive or directory) and the mapping to that directory. It also shows the filename of the DLL. To change or review mappings for your particular web server, see its documentation.

Table 3-2 WebBoard ISAPI Proxy DLL default directory and filename

<i>Web server</i>	<i>Default mapping and filename</i>
WebSite and WebSite Pro	<i>/webboard/</i> mapped to <i>c:\WebBoard\wbisadll\</i> <i>/wbimages/</i> mapped to <i>c:\WebBoard\images\</i> Filename: <i>wbpx.isa</i>
IIS, Peer Web Server, Personal Web Server	<i>/webboard/</i> mapped to <i>c:\WebBoard\wbisadll\</i> <i>/wbimages/</i> mapped to <i>c:\WebBoard\images\</i> Filename: <i>wbpx.dll</i>
Other ISAPI Server	You select the proper folder for ISAPI scripts during setup. <i>/webboard/</i> mapped to <i>c:\WebBoard\<scriptfolder>\</i> <i>/wbimages/</i> mapped to <i>c:\<webserver>\<documentroot>\</i> <i>images</i> Filename: <i>wbpx.dll</i>

The external server support setup also creates a Registry key to hold the IP address and FQDN of the computer WebBoard is running on, and the port WebBoard's web server is using. To check that this information is correct, open the following Registry key with the Registry editor:

```
HKEY_LOCAL_MACHINE\SOFTWARE\O'Reilly\WebBoard\3.0\WebServer
```

This key should contain two values:

Port

The port WebBoard is running on.

Server Name

The FQDN or IP address of the computer WebBoard is running on.

Testing Multiple Installations of WebBoard

In testing multiple installations of WebBoard, test the primary installation first, as described above. After you are sure everything is working properly with the primary installation, test each secondary installation using the same procedures you used for the primary installation. Before beginning the test, check to be sure the paths to shared files are all UNC paths.

To check the paths, follow these steps:

1. Log in as WebBoard administrator to the *admin* board (or any board on an upgrade).
2. Click More on the menubar and then click Administrator.
3. Click Site Management and then scroll to the Misc. Server Settings section of the form. If you have not already changed the paths to UNC paths, do so now. See Chapter 5 for details.

If the paths are set properly, you should be able to successfully complete all the tests described in “Is WebBoard Running?,” “Can You Reach WebBoard from the Local Computer?,” and “Can You Reach WebBoard from Another Computer?”

For More Help

Several sources of help are available to WebBoard users, including the following:

- This book, *Conferencing with WebBoard 5*
- WebBoard Online Help
- WebBoard Central (<http://www.webboard.com/>)
- WebBoard Technical Support

Getting the Most out of This Book

Conferencing with WebBoard 5 provides comprehensive instructions for installing, administering, and using WebBoard. This book takes a task-oriented approach, presenting as much procedural material as possible in a real-life, hands-on manner.

In addition, we've included scenarios for how your WebBoard can be made practical and useful to others. Helpful hints, ideas for using WebBoard, and notes for avoiding difficulties are scattered throughout the book. And don't overlook the appendixes, which include valuable reference and troubleshooting material. For example, if you're having problems with WebBoard, first consult Appendix C, *Troubleshooting Tips*.

Using Online Help

WebBoard comes with online help for users and administrators available through either a menu item or a hyperlink. The WebBoard online help gives definitions and specific procedures regarding the current application. You can also modify WebBoard help (which are HTML files) to provide specific information to your users. Section III describes how to edit these files.

Checking Out Web Resources

You should also regularly consult the web-based resources for news and information on WebBoard. WebBoard Central (<http://www.webboard.com/>) is the official site dedicated to supporting WebBoard. WebBoard Central provides product information, troubleshooting help, a knowledge base, advice for particular implementations of WebBoard, ideas for new uses of WebBoard, sample HTML files, helpful utility programs, and opportunities to interact with the technical support staff and other WebBoard users through WebBoard conferences. In addition, WebBoard's Technical Support Conferences and Knowledge Base include answers to many questions you may have about WebBoard.

Contacting Technical Support

If you've thoroughly investigated all the other sources for help and still need assistance, WebBoard technical support offers additional support options. The WebBoard Support Forums and Live Help chat room are two resources you should try first. For more information, see the Support pages at WebBoard Central (<http://www.webboard.com/>) for details.

