onfinity

Installation & Setup Guide

Jan-2025

Objective

The main objective of this document is to let the user understand the Onfinity installation process and the hosting configuration in a system. The Onfinity hosting configuration process is just like any normal software application installation in the system

Pre-requisites

This guide is intended for anyone interested in installing Onfinity.

To use this document, you need the following

- A supported Microsoft Windows operating system installed and tested on your computer system or network.
- Administrative privileges on the computer where you will be installing the application & database.
- Knowledge of Installing & Managing RDBMS i.e., Oracle or PostgreSQL.

Topics

Topics covered in this guide.

- Onfinity installation process and hosting configuration.
- Webserver configuration for Onfinity
- Database installation & Restore
- Post-installation tasks for Onfinity.

Installation Checklist

Use checklists to review system requirements, and to plan and carry out the installation. We recommend you use checklists as part of your installation planning process. Using a checklist ensures that your server hardware and configuration meets minimum requirements for this release and enables you to carry out a successful installation.

Server Hardware Checklist for the Installation

Use this checklist to check hardware requirements for installing Onfinity & Database.

Operating System Checklist for Installation

Use this checklist to check Windows OS requirements for installing Onfinity & Database.

Features & Database Checklist for Installation

Use this checklist to check additional software's, features & Database requirements for installation

Server Hardware Checklist

Table 1-1 Server Hardware Checklist for Onfinity installation

Check	Task
Server Make	Onfinity can be installed on any machine running Windows OS. The Server can be a Physical Server or Virtual machine running on any cloud or VMWare environment
System Architecture	Processor: AMD64 and Intel EM64T
Minimum RAM	8 Gb or above
Minimum CPU/vCPU	On Physical Server i5 or above On VM 4 vCPU or above
Storage	At least 100Gb
Network connectivity	The Server connects with the internet to register the Application. Network access to the application link is required if connection to Onfinity are to be made

Operating System Checklist

Table 1-2 Operating System Checklist for Onfinity installation

Item	Task
Operating System & General Requirements	Onfinity App is supported on the following operating system versions: • Windows 10 x64 - Pro, Enterprise, and Education editions • Windows 11 x64 - Pro, Enterprise, and Education editions • Windows Server 2012 R2 x64 - Standard, Datacenter, Essentials, and Foundation editions • Windows Server 2016 x64 - Standard, Datacenter, and Essentials editions • Windows Server 2019 x64 - Standard, Datacenter, and Essentials editions • Windows Server 2022 x64 - Standard, Datacenter, and Essentials editions

Features & DB Checklist

Table 1-3 OS Features & Database Checklist for Onfinity installation

Check	Task
Web Browser	Google Chrome browser (Latest Version)
.NET framework	Microsoft .Net framework 4.8
Web Server	IIS version 7.0 or higher
Database (RDBMS)	Onfinity supports Oracle or PostgreSQL • Oracle Supported Version 19c. • PostgreSQL Supported Version 15.

Required IIS Web Server Components/Role

Web Server

- ✓ Common HTTP Features
  - Default Document
  - Directory Browsing
  - HTTP errors
  - Static Content
- ✓ Security
  - Request Filtering
  - Windows Authentication
  - Basic Authentication
- ✓ Performance
  - Static content compression
  - Dynamic content compression
- ✓ Application Development
  - NET Extensibility 3.5
  - .NET Extensibility 4.7
  - Application Initialization
  - ASP.NET 3.5
  - ASP.NET 4.7
  - ASP.NET
  - ISAPI Extensions
  - ISAPI Filters
  - Server Side includes
  - WebSocket Protocol
- ✓ Management Tools
  - IIS Management Console
  - Management Service

Note: Please make sure that all the mentioned components/role selected during IIS installation

Database Installation

Onfinity framework supports 2 different RDBMS, and you can choose either Oracle or PostgreSQL

Oracle.

- Oracle 12cR2 & 19c database versions are supported.
- Make sure Character set is AL32UTF8
- Make sure Database deferred segmentation is False before creating new user in database to import database file.
  (alter system set DEFERRED_SEGMENT_CREATION = false;)

Reference Link:
https://www.oracletutorial.com/getting-started/install-oracle/

PostgreSQL.

- Postgres 15 database versions are supported.
- Make sure Character set is UTF8 before creating new database
- Create new database and grant user permission on this database.

Reference Link:
https://neon.tech/postgresql/postgresql-getting-started/install-postgresql

Download & Extract Onfinity Package

1. Download the Onfinity Zip package from this link provided in email onto the machine where IIS is installed and where the Onfinity Application will be hosted.
2. Unzip the package to extract the files. Upon Unzip you will find below contents -
    a. Onfinity-App (Application Files)
    b. Onfinity-DB (Database Export Dump along with a Readme file).
    c. Onfinity Login Credential files (Onfinity_App_Credentials.txt)

Onfinity Data Import - Oracle

- **Prerequisites**
  1. Ensure Oracle 19c is installed and running.
  2. User must have DBA privileges or the necessary permissions to perform schema import.
  3. Onfinity provided Oracle DB dump created using data pump (expdp) utility.

- **Copy Dump File to Oracle Server**

  Identify the Oracle Directory: Ensure that the Oracle directory (where you can place the dump file) is created and accessible.

  SQL> SELECT directory_name, directory_path FROM dba_directories;

  If no directory exists, create one:

  SQL> CREATE OR REPLACE DIRECTORY expdp_dir AS **'Path of Directory;**

  Grant necessary permissions to the user:

  SQL> GRANT READ, WRITE ON DIRECTORY expdp_dir TO your_user;

Onfinity Data Import – Oracle Continue

- **Prepare Database for Import**

  Create New User for Schema Import (if necessary):

  If the schema/user does not exist, please create it:

  SQL> CREATE USER your_schema IDENTIFIED BY your_password;

  SQL> GRANT CONNECT, RESOURCE, DBA , Create View TO your_schema;

- **Import the Dump File using Data Pump (IMPDP)**

  Run the Import Command: Once the dump file is in the correct directory, run the impdp command to import the schema.

  Example command:

  impdp your_schema/your_password DIRECTORY=expdp_dir DUMPFILE=your_dumpfile.dmp LOGFILE=import.log remap_schema=onfinitydb:your_schema

  Note: Please change the schema name, dumpfile name etc as per your setup

Onfinity Data Import - Postgres

Please follow below steps if you are going to use PostgreSQL Version 12 only and not Oracle DB.

1. Create VA User in PostgreSQL, Connect to DB via PSQL or PGAdmin4 with postgresuser and execute below commands.

   postgres=# CREATE DATABASE DBNAME;
   Result: CREATE DATABASE
   postgres=# CREATE USER USERNAMEWITH ENCRYPTED PASSWORD PASSWORD';
   Result: CREATE ROLE
   postgres=# GRANT ALL PRIVILEGES ON DATABASE DBNAME TO USERNAME;
   Result: GRANT
   postgres=# Exit

2. **Import Data in created database**
   Open command prompt in administrator mode and execute below command to import VA Data in database

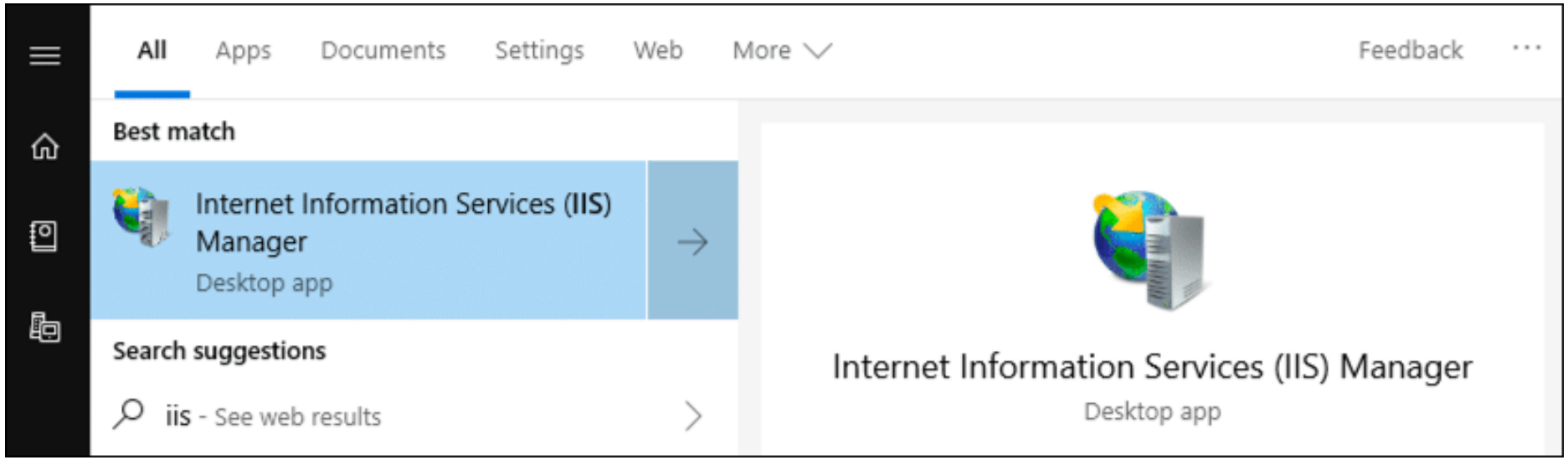
   postgres=# psql -U USERNAME DBNAME< "DB-Dump-File-Path.sql"

Note: Please change DBNAME, USERNAME & Password in above commands as per your requirement

Onfinity Website Hosting in IIS

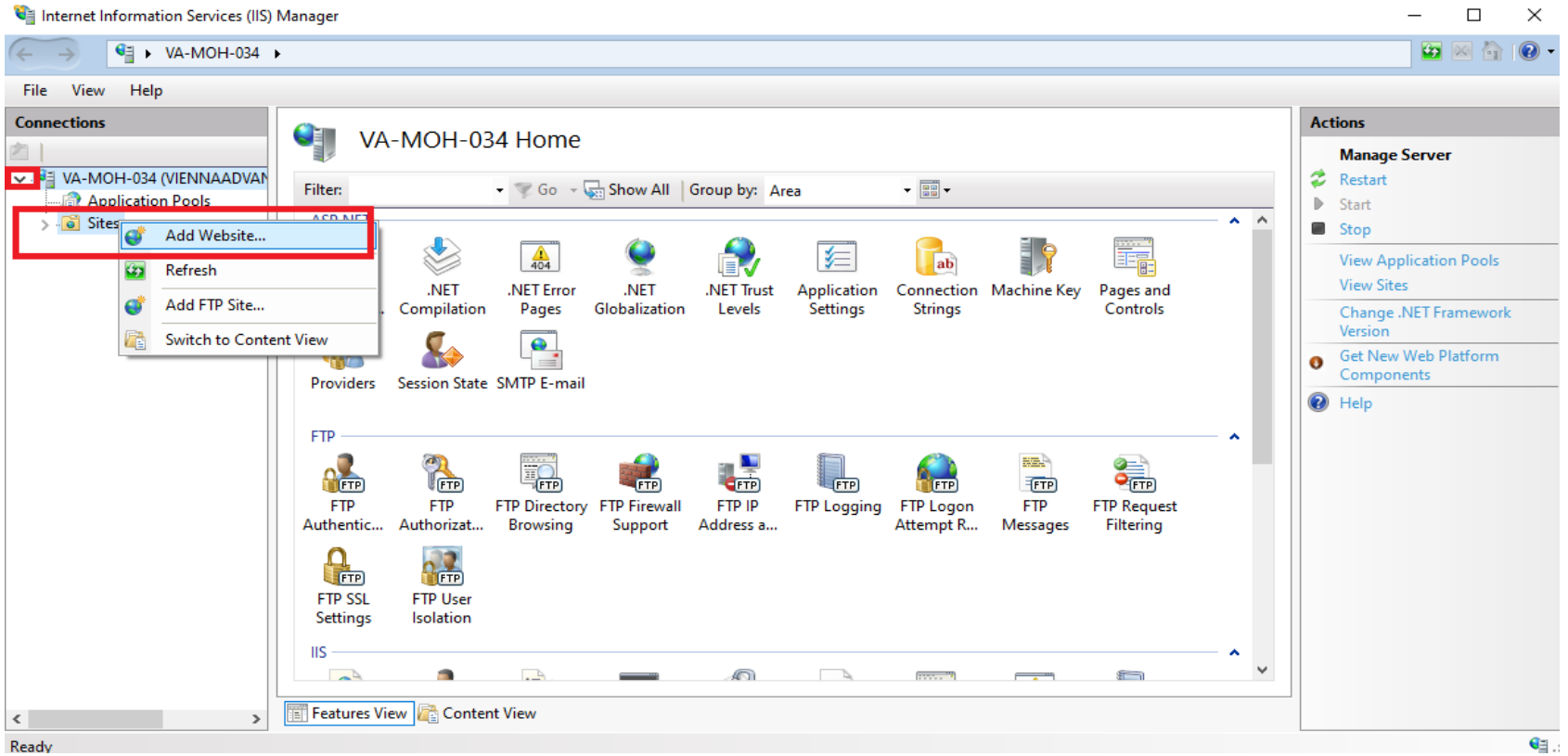
Open IIS Manager to host Onfinity files in IIS server

Go to Start >> Windows Administrative Tools >> Internet Information Service (IIS)



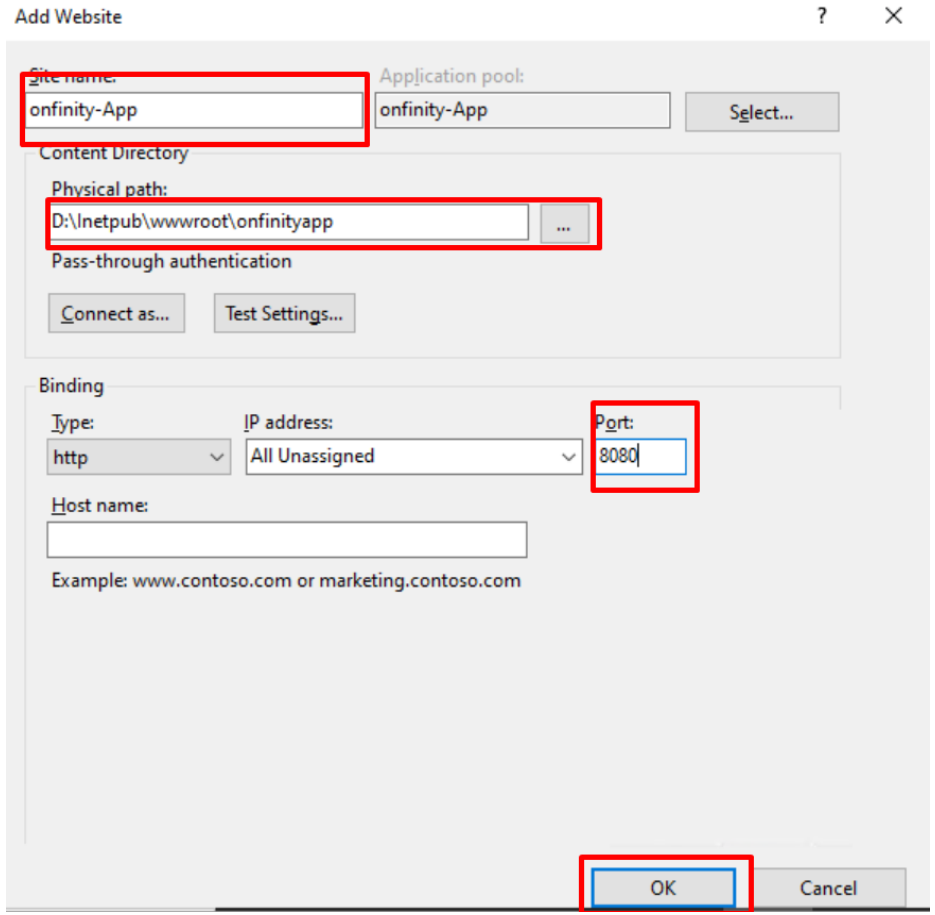
Adding Onfinity Website in IIS

Right click on “Sites” and Select “Add Website”



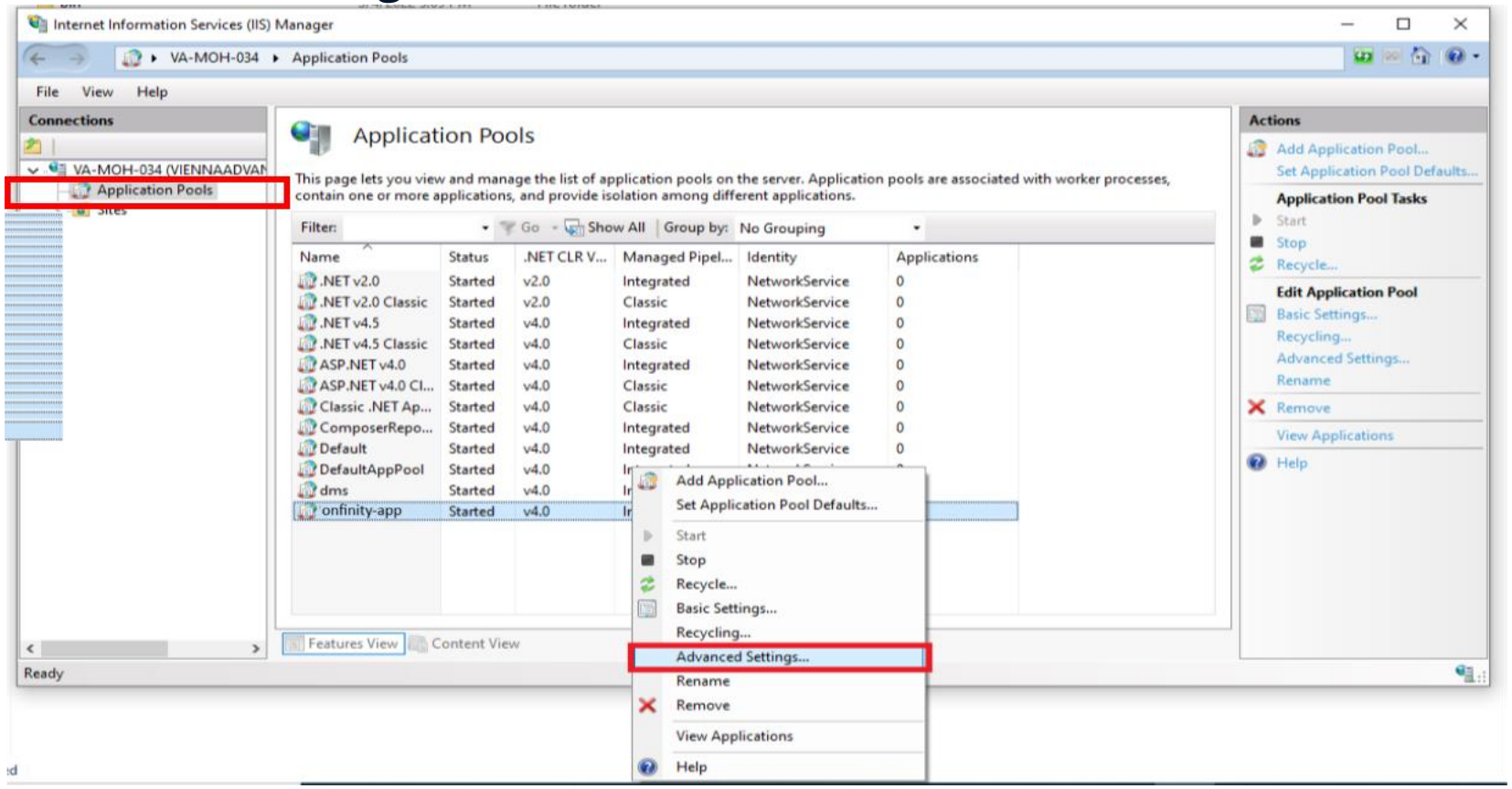
Website Name & Physical Path

- **Site Name:** Enter Name as “Onfinity" (you can enter any name)
- **Physical Path**: Browse the location where Onfinity downloaded application files are extracted.
- **Binding:** Select type as http, and Port where you want run this website. Please make sure that port is open on firewall and accessible via internet.
- Check/Enable Start Website Immediately box.
- Please refer screenshot for more details and click OK



Setup IIS Application Pool

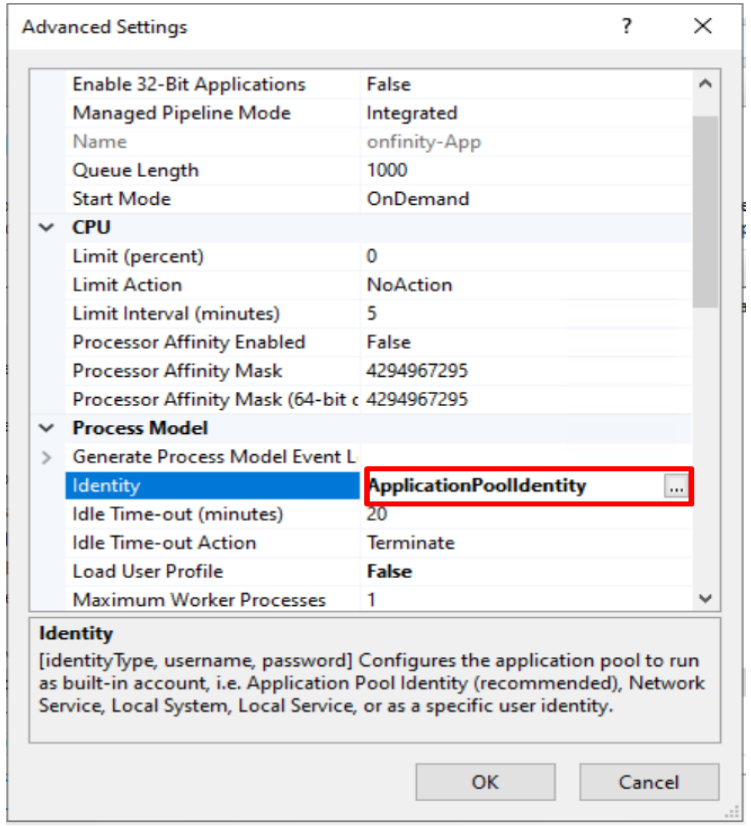
Click on **Application Pool** then Right click on corresponding application pool *(same name as website name)* and select **Advance settings.**

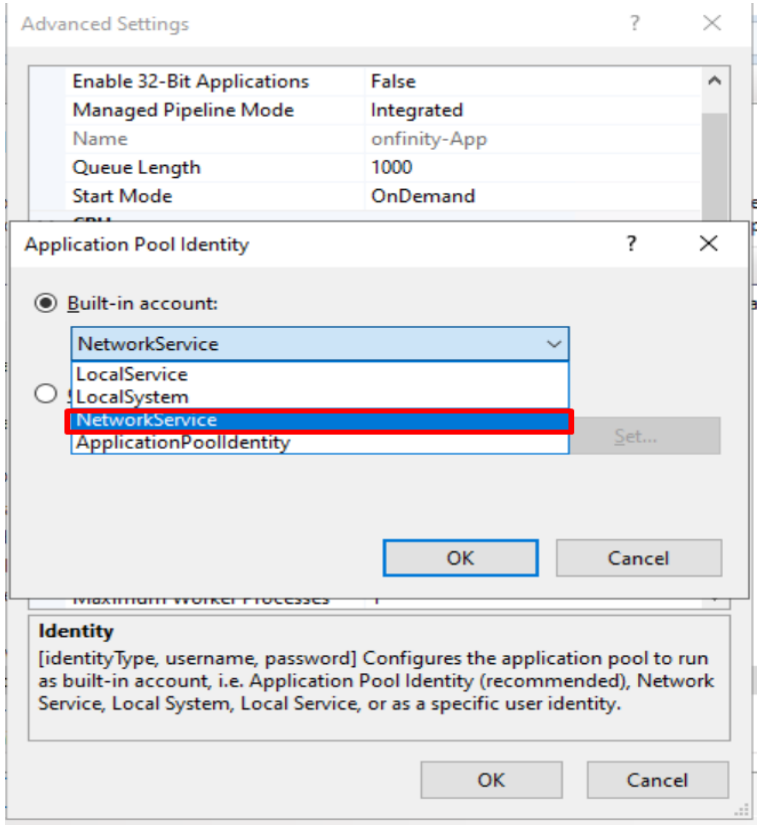


Update Identity Settings

Update Identity settings by clicking button(**...**)

select **Network Services** under Build-in Account and click **OK.**

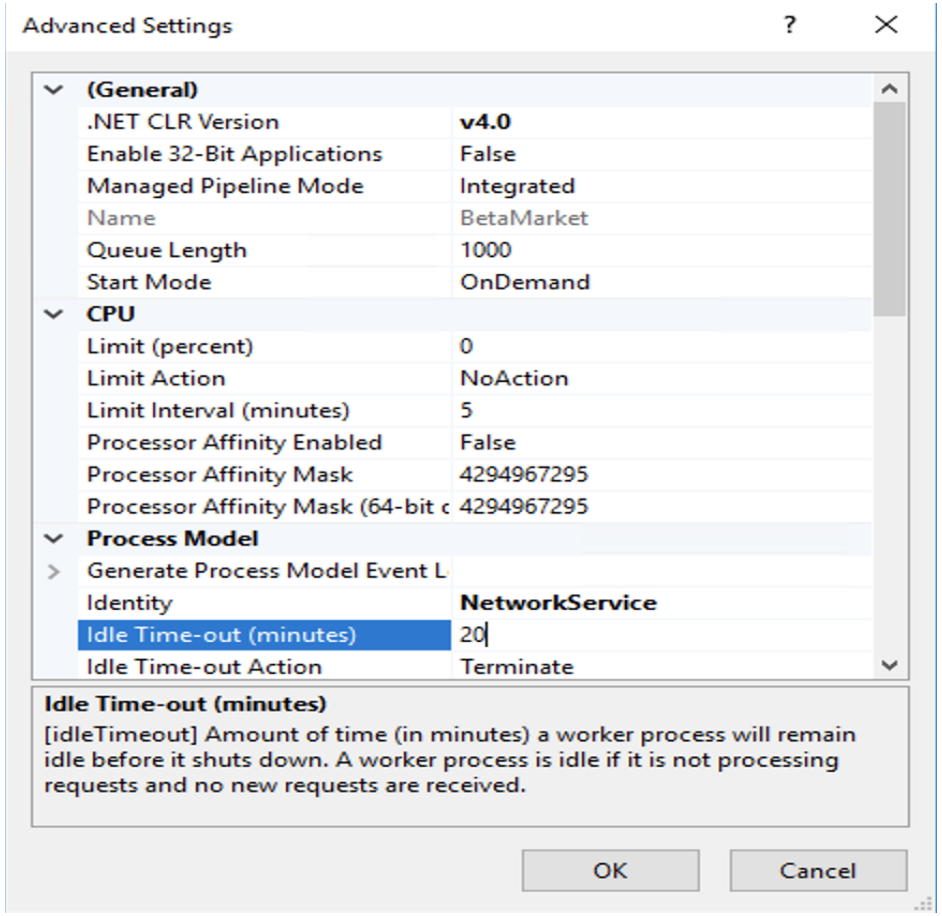




Advanced Setting Changes

Please verify and update below settings under Advance Setting window.

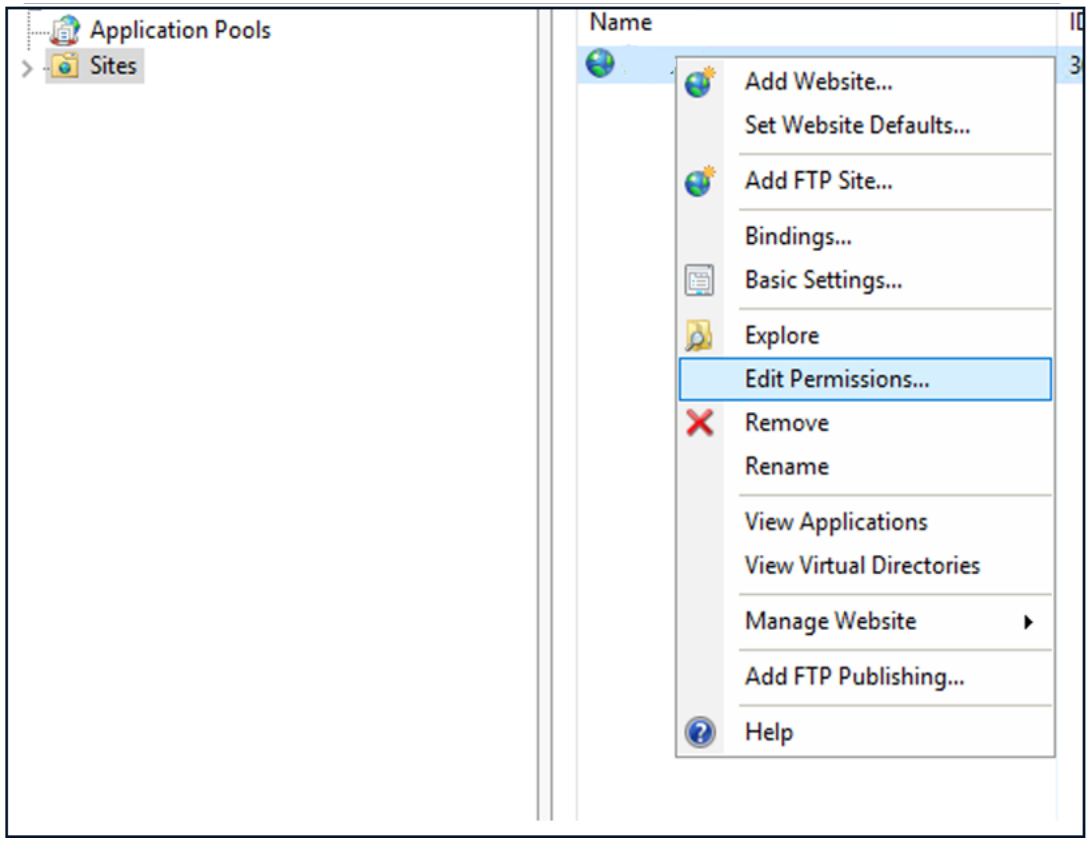
- Set .NET CLR Version to Framework base version to v4.0.
- Set idle time out >= 20
- Click OK



Edit Website Permissions

Please verify and update below settings under Advance Setting window.

- Go to Sites on left pane
- Right click on the website and choose 'Edit Permissions'.
- Give Full Control access to 'Network Service' and 'IUSR'.
- Click OK



Update web.config file

Go to the physical location where Onfinity application is located and Open web.Config file in notepad for edit database connection string.

Update below highlighted entries in web.config as per your environment and Database information

Oracle DB web.config Changes

<add key="oracleConnectionString" value="Data Source=(DESCRIPTION=(ADDRESS_LIST=(ADDRESS=(PROTOCOL=TCP)(HOST=localhost)(PORT=1521)))(CONNECT_DATA=(SERVER=DEDICATED)(SERVICE_NAME=orcl));User Id=USERNAME;Password=PASSWORD" />

PostgreSQL DB web.config Changes

<add key="postgresqlConnectionString" value ="Server=localhost;Port=5432;MaxPoolSize=100;SearchPath=public;User Id=USERNAME;Password=PASSWORD;Database=DBNAME" />

Note: In the above example we have used default Port, and Service_Name or Server as per Oracle & PostgreSQL, Please update these values according to DB configuration in your environment.

Access Onfinity App locally

1. **Access Onfinity Application locally**
   - Open Google Chrome Browser.
   - Type IP address with port# in browser as below http://ipaddress:port/

2. **Onfinity Application Login Details**
   - Please refer text document file “Onfinity_App_Credentials.txt” provided within package.

Access Onfinity App Globally

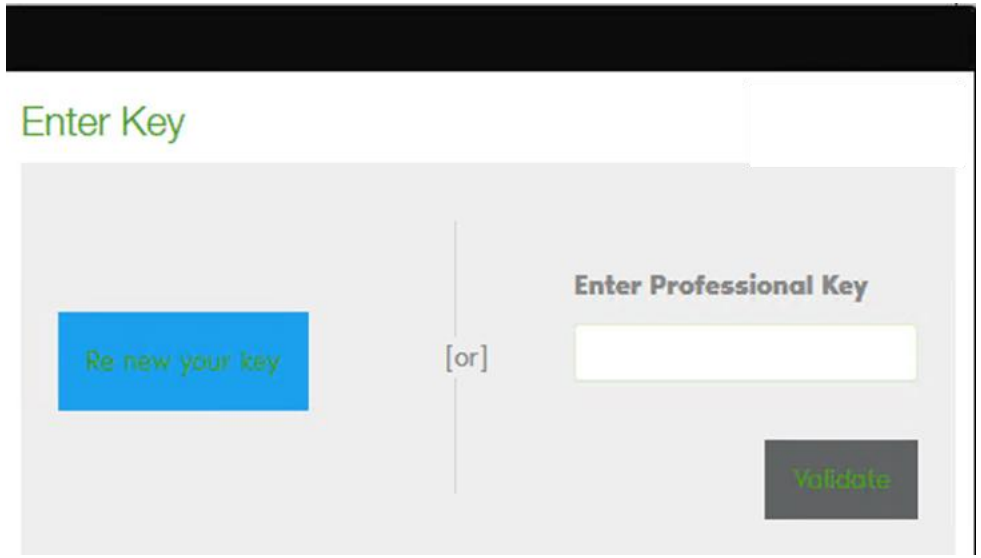
Onfinity application can access externally using Public IP and port. To open a port in the Windows Firewall using PowerShell, follow these steps:

1. Open the PowerShell console with administrative privileges by typing "powershell" in the Start menu search bar. right-click on the PowerShell icon and select "Run as administrator."
2. Run the following command to list all the available firewall rules: Get-NetFirewallRule
3. To create a new firewall rule to open a specific port, run the following command: New-NetFirewallRule -Name "RuleName" -Protocol TCP -LocalPort "PortNumber" -Action Allow Replace "RuleName" with the desired name for the firewall rule and "PortNumber" with the desired port number.
4. To enable the firewall rule, run the following command: Enable-NetFirewallRule -Name "RuleName" Replace "RuleName" with the name of the firewall rule you just created.
5. To access Onfinity Application internally please open Google Chrome Browser.
6. Type Public IP address with port# in browser as below http://publicipaddress:port/

Register Onfinity

After Successful login into Onfinity application, System will be prompted to enter Key.

Please enter the product license key provided to you or contact Onfinity support team for same.



Thanks

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