

## Office for Children IRIS Project



# IRIS Installation Guide

**Version 1.14.0**

**Save Date: 18/06/2020**

This document details the installation of the Integrated Reports and Information System (IRIS) program.

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# 1 IRIS Installation Guide



## IRIS Installation Guide

**Release Version 1-14-0-0**



### **Internet Explorer Security Warning.**

If you see a yellow bar near the top or bottom of your browser warning about running scripts or ActiveX content, please click it now to **Allow Blocked Content.**

This guide will walk you through the installation and configuration of the database and IRIS. This also applies to upgrading an existing system.

**IMPORTANT: Please ensure you are logged in as Administrator (or otherwise have Administrator Privileges).**

Although you can navigate using the table of contents on the left, it is important that you follow the instructions and select the required **Next Topic Button** to step through each topic in the correct sequence. The User Guide is a separate document and is automatically installed with the main IRIS program. If you need assistance with this installation, please contact the Helpdesk.

## START HERE

**Is this a new installation or an upgrade of an existing installation of IRIS?**

**New Installation: 1. Installation Options**

**Upgrade: 1. Backup**

Helpdesk: (03) 9096 6919  
Email: [IRIS.helpdesk@dhhs.vic.gov.au](mailto:IRIS.helpdesk@dhhs.vic.gov.au)



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## 1.1 New Installation

### 1.1.1 1. Installation Option

There are two installation packages for IRIS:

- A. **Full Installation** - includes all IRIS software and server files as well as the Firebird SQL database server application.  
Install this package if you wish to:
- a) run IRIS in a stand-alone environment (such as a laptop that does not rely on a database server), or
  - b) prepare a server to host the database.
- Also select this option if you intend to run Microsoft SQL Server. Choosing either MS SQL or Firebird is a configuration option you will make later.

#### [New Installation: 2. Full Installation](#)

- B. **Client Installation** - includes the main IRIS software only.  
Install this package if you have already prepared the server and wish to set up IRIS on workstations on your network.

#### [New Installation: 4. Client Installation](#)

### 1.1.2 2. Full Installation

Click on the link below as indicated to download and install the IRIS software. Simply follow the steps and accept the default values that are presented. The location of IRIS and the database should be left unchanged unless otherwise instructed by your computer (IT) person. A question regarding the use of Firebird or MS SQL Server will be asked. See below for details.

Note: Internet browsers, such as Windows Explorer may show a dialog when you click on the link. Select **Open** or **Run this program from its current location** when prompted by the **File Download** window of your browser.

It will probably look something like this... or this...



If your browser prevents running an executable via a link, right-click the link and select "Save Target As..." to save the file to a temporary location on your computer (eg. Desktop) - and run the program from there.

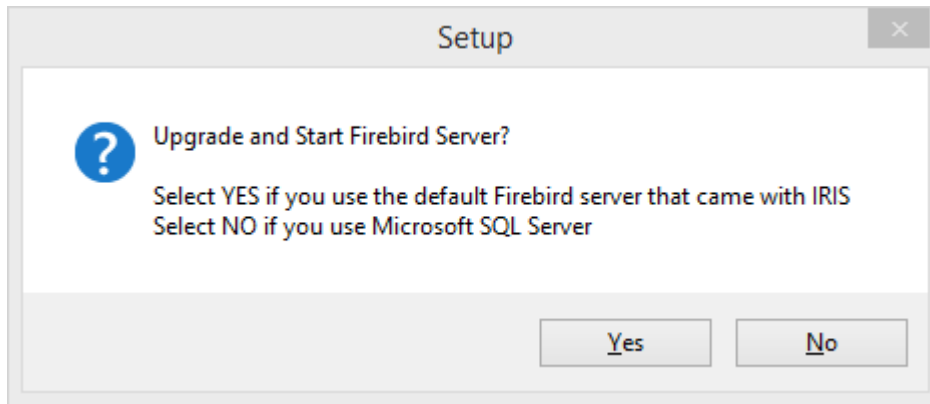
If you are prompted to restart Windows after the installation is complete, select **No**. You may wish to restart Windows when you have completed all the steps, but under normal circumstances this should not be necessary.

#### **Firebird or Microsoft SQL Server?**

Firebird and Microsoft (MS) SQL Server are the two database systems supported by IRIS. Firebird is a free database and is included with the IRIS setup package.

SQL Server is licensed by Microsoft. Your IT personnel will be able to advise what system IRIS should use.

During the installation step below, you will be asked whether to install and start the Firebird server.



If you plan to use Firebird, select YES.  
If your installation uses MS SQL Server, select NO.

Note to IT staff: If you have independently installed Firebird 2.x from [www.firebirdsql.org](http://www.firebirdsql.org), you may prefer to select NO.

Selecting YES will run a console script to register Firebird version 2.5.

### Install IRIS Software now...



[IRIS\\_Setup\\_1-14-0-0.exe](#)

When this has finished, two IRIS icons will be added to your desktop. We know you will be tempted to select them but **DO NOT START IRIS YET!**



---

### NEXT STEP

[New Installation: 3. Start Server](#)

### 1.1.3 3. Start Server

For an IRIS installation to operate the database server (Firebird or SQL Server) must be working. This section refers to Firebird.

SQL scripts are provided for creating Microsoft SQL Server database for IRIS. Please contact the IRIS Help desk for assistance.

#### **As of IRIS 1.10, Firebird should start automatically after installation.**

If the install process ran successfully, no further action is required. It will run a console script to register and start Firebird version 2.5 (**FirebirdUpgrade.bat**). The contents of this file can be reviewed in Notepad and executed one by one in a command window *with administrator privileges* if you have problems starting the Firebird service.

#### **A Note about the Database Server**

The full IRIS installation will have created two databases:

1. **IRIS.IB** contains a clean database. This is ready for production use once you have your Agency Registration details.  
**This must not be used for testing or training.**
2. **IRIS\_TEST.IB** contains a clean database *with* some basic data, ready for using as a testing and training environment.

The location of these files are nominated during the install (eg. **C:\IRIS\Data**).

In a stand-alone or server environment, your computer will host (contain and manage) the IRIS database. This management is performed by a database server program which will start by itself when the computer is turned on. If all is working normally, it will run quietly in the background without being noticed.

Firebird (v2.5) is installed as the default database server which uses TCP/IP port 3050 for communication with IRIS on each workstation. This means the database files do not have to be visible (shared) by the workstations. In fact it is probably better that users don't have the means to access them. Ensure any firewall in place on both the server and workstations has port 3050 open.

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#### **NEXT STEP**

#### **[New Installation: 4. Client Installation](#)**

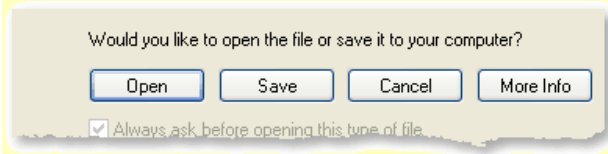
### 1.1.4 4. Client Installation

Complete this step for each computer (workstation) on your network attached to a server and only after the server has been installed.

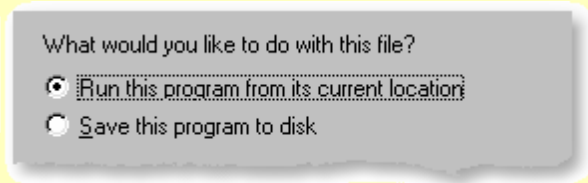
Click on the setup link below as indicated to download and install the IRIS client software. Simply follow the steps and accept the default values that are presented.

Note: Internet browsers, such as Windows Explorer may show a dialog when you click on the link. Select **Open** or **Run this program from its current location** when prompted by the **File Download** window of your browser.

It will probably look something like this...



or this...



If your browser prevents running an executable via a link, right-click the link and select "Save Target As..." to save the file to a temporary location on your computer (eg. Desktop) - and run the program from there.

If you are prompted to restart Windows after the installation is complete, select **No**. You may wish to restart Windows when you have completed all the steps, but under normal circumstances this should not be necessary.

### Install IRIS Client Software now...



[IRIS\\_Client\\_Setup\\_1-14-0-0.exe](#)

When this has finished, two IRIS icons will be added to your desktop. I know you will be tempted to select them but **DO NOT START IRIS YET!**



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### NEXT STEP

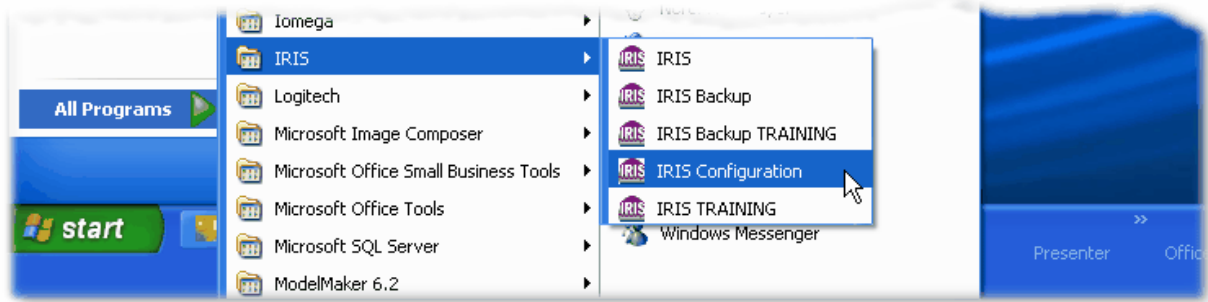
#### [New Installation: 5. Configuration](#)

### 1.1.5 5. Configuration

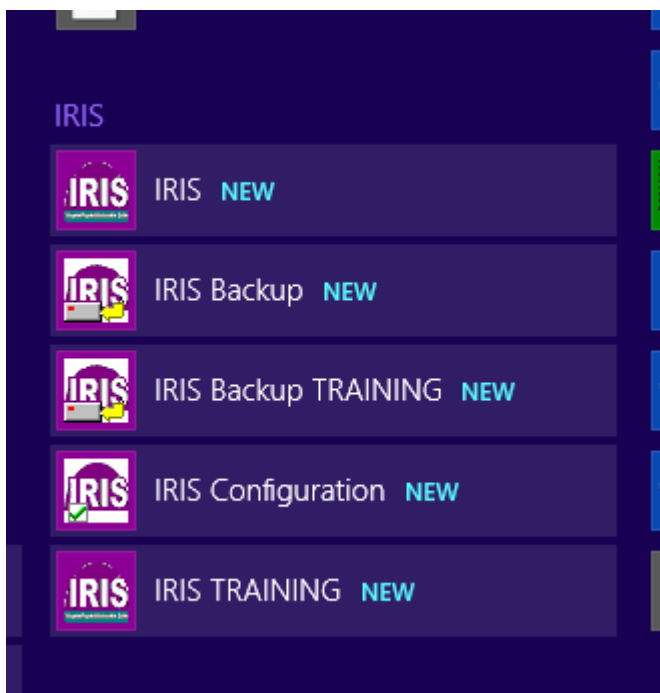
The configuration data is located in an **INI** file and instructs IRIS where to locate the database, which will either be local to this computer or on a server. A configuration program simplifies the maintenance of this data.

The configuration program is launched from within the **Start > Programs > IRIS** menu or the Application start page (Windows 8/10).

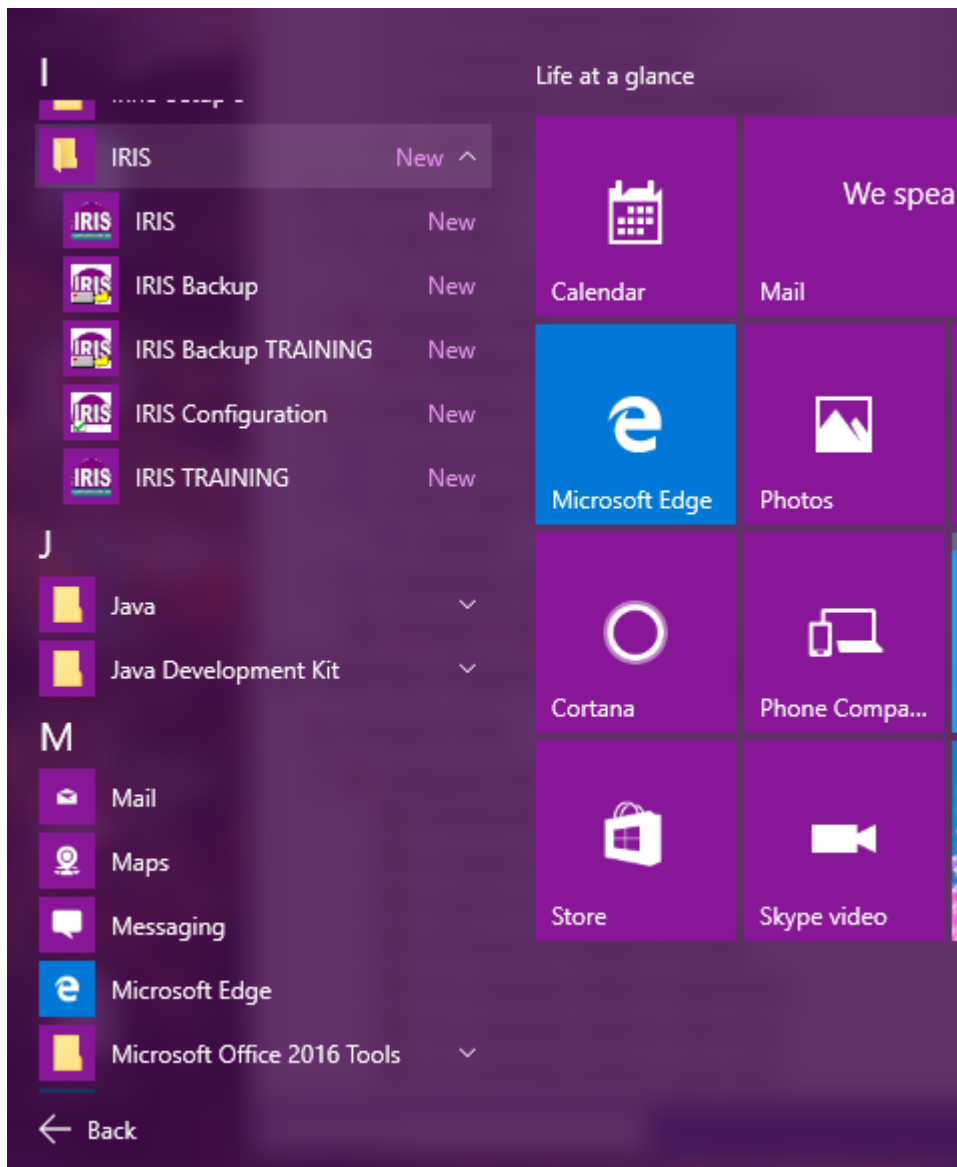
On Windows XP and Windows 7, it will look something like this...



On the Windows 8 Application start page, it will look something like this...



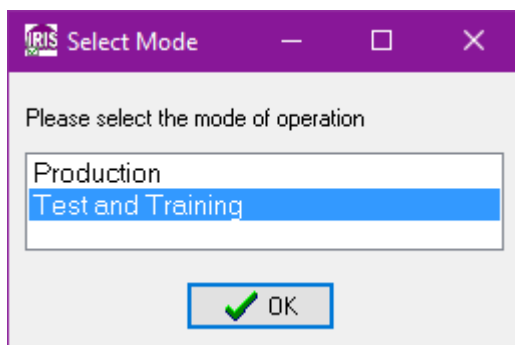
And on Windows 10...



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## IRIS Configuration Steps

- ▶1. Start the IRIS Configuration program from the Start menu.
- ▶2. On the **Select Mode** screen, select **Test and Training**, and press OK.



The main screen will be presented...

3. Ensure **Firebird** is selected as the database environment.

4. Specify where the server is located.

**Local** - The database resides on this computer (and you have installed the database server software here as well). The server is referred to as '**localhost**', which is a common computer term describing this same computer.

**Remote** - Signifies that this is a workstation computer and the database is located on a server. Enter the name (or IP address) of the server. In technical terms, this value must be able to be "pinged".

5. Specify the database path.

Enter the full path and name of the database. If you are working with a local connection, you can use the **Browse** button to help identify the name.

**Important:** The path is relative to the server itself, so if you are accessing a remote server (on another PC), you must still enter the local drive information (eg. C:\IRIS\...), NOT a shared network drive (eg. F:\IRIS\...). The **Browse** button is of no value in this situation.

Successful connection to the **IRIS\_TEST.IB** file will enable access to the **IRIS Training database**.

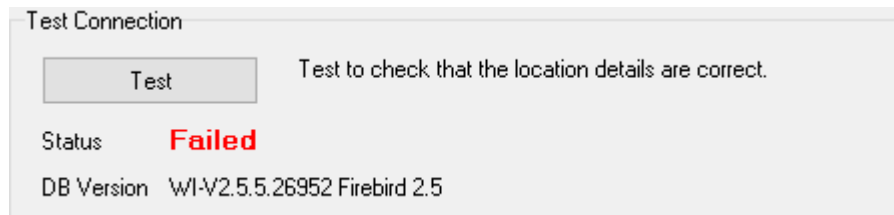
This database should only be used for training purposes, not real clients.

6. Test the connection.

Press the Test button to check whether:

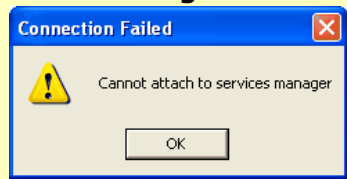
- a) the server program is running, *and*
- b) the database path and name are correct.

An error will be identified with a **Connection Failed** dialog along with a **Failed** status...



### Possible Problems

#### Error Message



#### Cause

The server is not running (in the background).

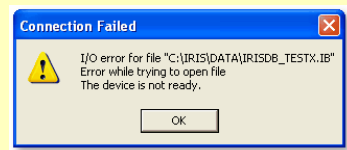
#### Solution

The server service may not have started automatically after a reboot, or manually from the Startup menu option.

Review topic [2.Start Server](#).

If the problem persists, contact the IRIS Help Desk. Check the path and filename are valid, and that the database exists.

Remember that the location is local to the server itself (not a mapped drive name).

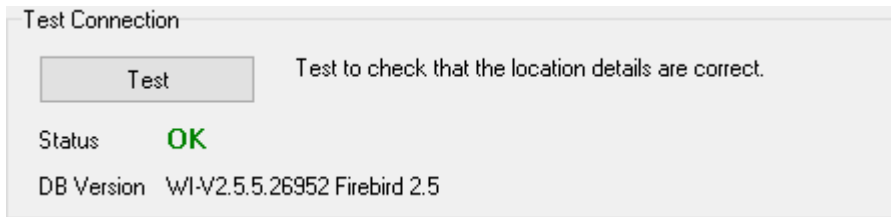


The database file could not be located.

Other connection errors may have to do with the TCP/IP communication between computers. Obtain the assistance of your computer technician if possible. Otherwise, if connection problems persist, please contact the IRIS help desk.

*Technical note: Database communication is via port 3050. Please ensure any firewall in place permits data on this port.*

If all is OK, the status will look like this...



## **CONGRATULATIONS! You have successfully installed the database and server.**

7. Press the **Save and Close** button
8. You should now be able to log into the IRIS Training Database. To configure your Production database, repeat this configuration program with changes explained in the following steps.
9. Start the Configuration program again and select 'Production' at step 2, navigate to the IRIS.IB file in the Database field.
10. Click the [Test] button. Status should be OK.
11. Save your agency IRIS Registration Key (obtained from IRIS Helpdesk) to the computer clipboard. For example, you can type the registration key into Notepad or Word document, highlight the key and then Copy (Ctrl+C).
12. Click [Open] button and login as an administrator (User ID: admin Password: admin).
13. Click [Register] in the Agency Registration screen.
14. Save and Close if registration is successful.

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### **NEXT STEP**

**[New Installation: 6. Start and Test IRIS](#)**

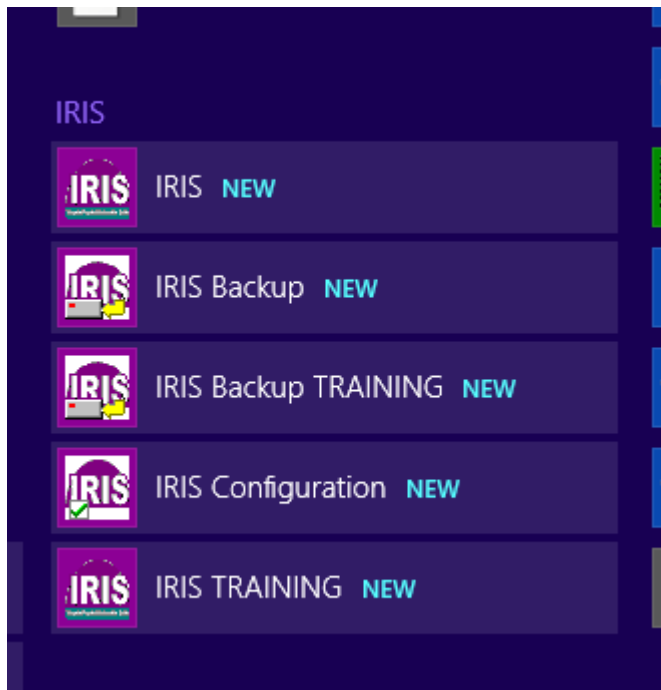
### 1.1.6 6. Start and Test IRIS

Once either the full or client IRIS setup has been installed, followed by a successful connection test, you are ready to test IRIS.

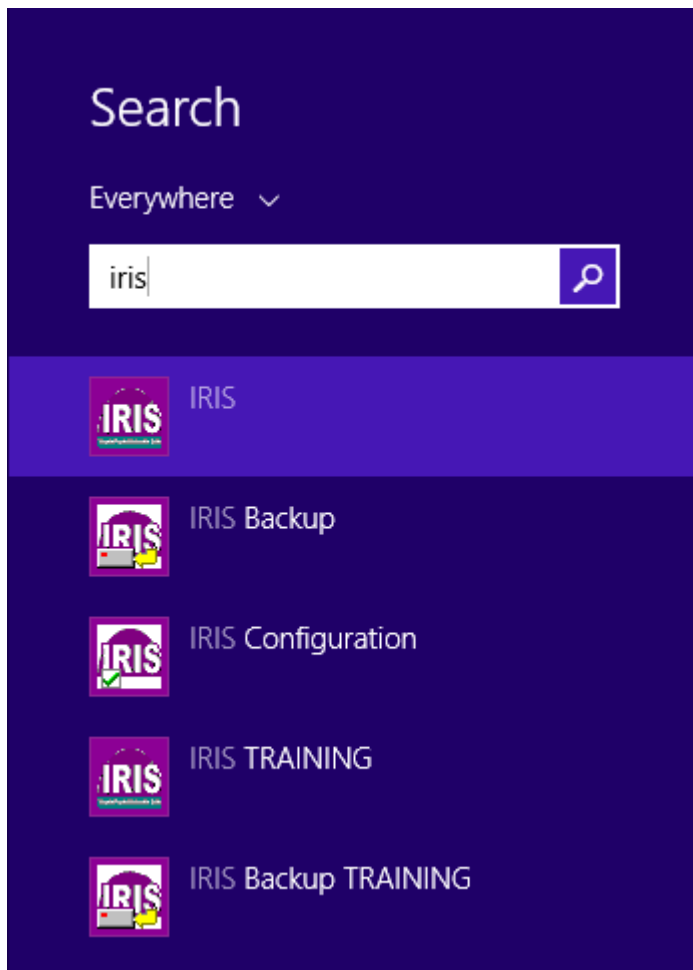
1. Double-click the **IRIS TRAINING** icon on your desktop, or select the **Start > Programs > IRIS > IRIS TRAINING** menu option.



On Windows 8, you can launch IRIS from the Apps start page:



Tip: On the Windows Start page, you can just start typing "iris" to locate the IRIS programs:



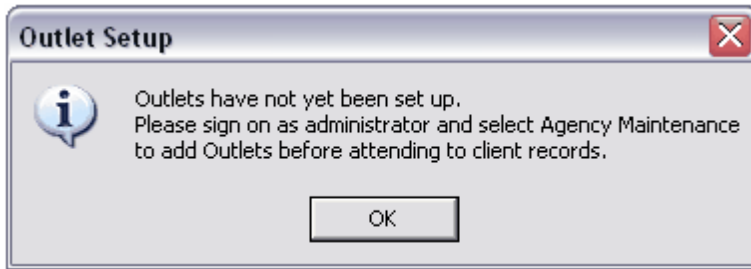
Windows 10...



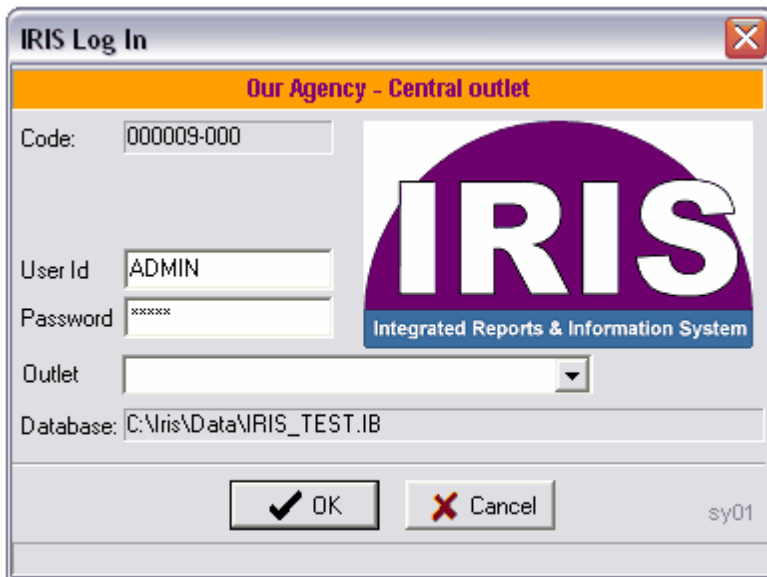
If you receive this message, you have attempted to open the production database.



2. On a new system you will see this message. Read and Press **OK**.



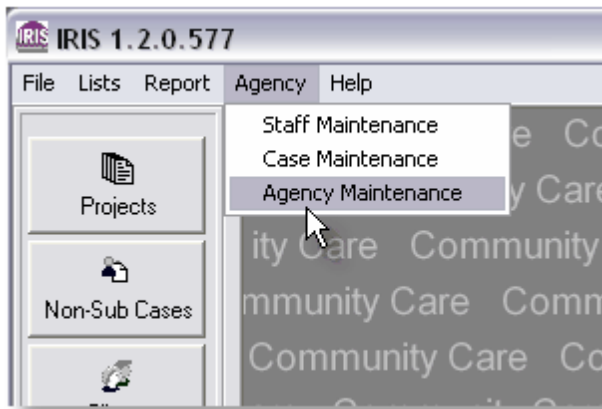
3. Signon with user Id **ADMIN**, password **admin**



Notice that the heading has an orange background. This serves as a reminder that you are operating in training mode (with Agency code = 000009-000).

- You will not have any outlets defined yet, so you are able to leave this field blank.
- You must sign on as ADMIN at this point. No other User Ids will work.
- After you have set up one or more outlets (see below), they will be available here for selection.

4. Select **Agency > Agency Maintenance**



5. Select the Outlet tab and create the suburb entries representing the location of your agency(s).

Press the help button for further information on outlets or contact Help Desk.

6. Other users should now be able to log on.

Please refer to the user manual (Press **F1** or select **Help | Table of Contents**) for operating assistance.

## **CONGRATULATIONS! You have successfully installed IRIS!**

**Continue to use this training environment until instructed otherwise.**

### **A brief note on Staff Profiles:**

You have been provided with five staff profiles to get you started.

<b>User Id</b>	<b>Password</b>	<b>Description</b>
ADMIN	admin	Can performs system functions, such as staff and agency maintenance.
SUPERVISOR	supervisor	Can view and maintain all client and case data.
STAFF	staff	Normal level of access for most staff. Access to specific case types can be permitted.
DATAENTRY	dataentry	Limited level of access to client and case information. Access to specific case types can be permitted.
GUEST	guest	Inquiry only access.

You are strongly advised to create individual profiles for all of your staff. Although this is not so critical in a testing environment, it will be critical for when the production database is activated. Use *ADMIN* for maintenance tasks only (eg. staff, case and agency maintenance).

If you are installing IRIS on more than one workstation, repeat this installation procedure (steps 5, 3 & 4) for each computer. Data created on one workstation (including new staff profiles) will be accessible from the other computers if the connection to a single database has been configured correctly.

**You can now close this Installation Guide.**

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## 1.2 Upgrade

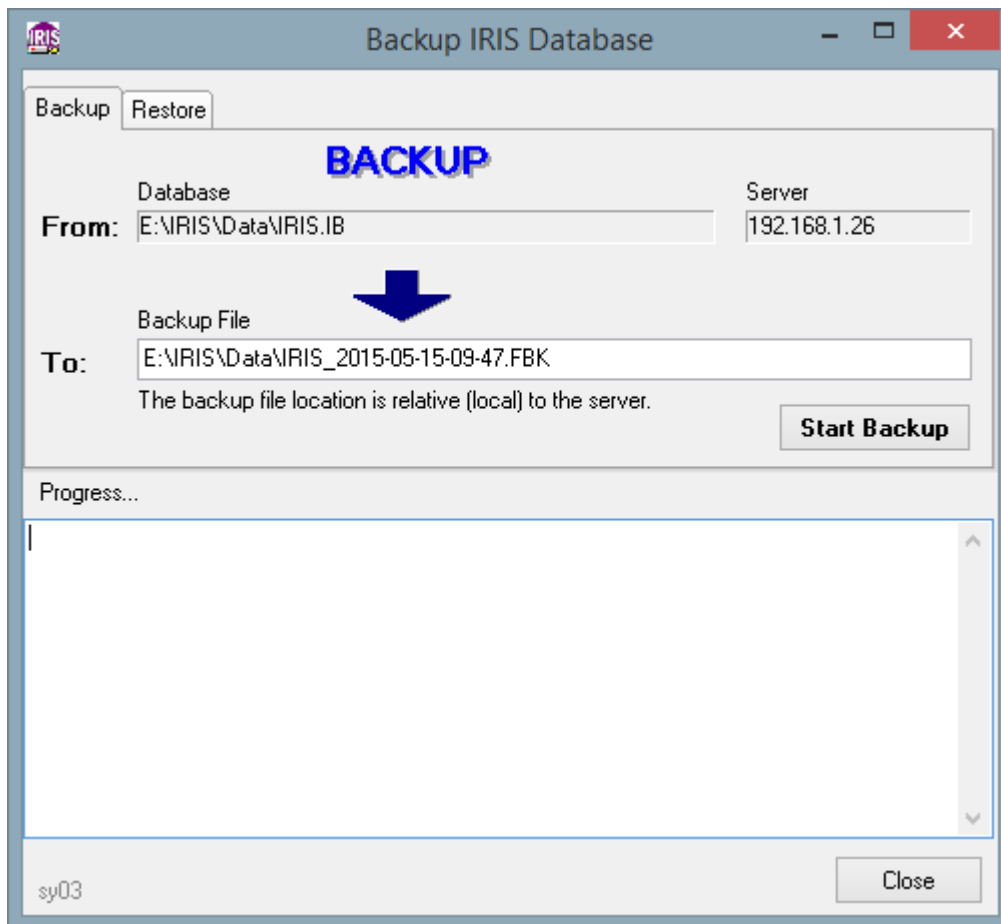
### 1.2.1 1. Backup

**It is most important that you backup your IRIS database(s) before performing the upgrade.**

*Note: The upgrade must be performed on physical IRIS installations and not via thin clients (Citrix, Terminal Sessions or Remote Desktops).*

The instructions here apply to the Firebird SQL database server. If you are using Microsoft SQL Server, perform the backup as per your usual procedures.

1. Close IRIS if active and ensure nobody else has IRIS running.
2. Select the backup option on the Windows application menu in the IRIS group. Alternatively, locate the IRISBackup.exe program in the IRIS folder on your system.
3. Click [Start Backup].
4. Repeat for every active IRIS database that you plan to upgrade.



Sample IRIS backup screen for a Firebird database.

---

## NEXT STEP

You are ready to perform the installation.

### [Upgrade: 2. Full Installation](#)

#### 1.2.2 2. Full Installation

Click on the link below as indicated to download and install the IRIS software. Simply follow the steps and accept the default values that are presented. The location of IRIS and the database should be left unchanged unless otherwise instructed by your computer (IT) person. A question regarding the use of Firebird or MS SQL Server will be asked. See below for details.

Note: Internet browsers, such as Windows Explorer may show a dialog when you click on the link. Select **Open** or **Run this program from its current location** when prompted by the **File Download** window of your browser. It will probably look something like this... or this...



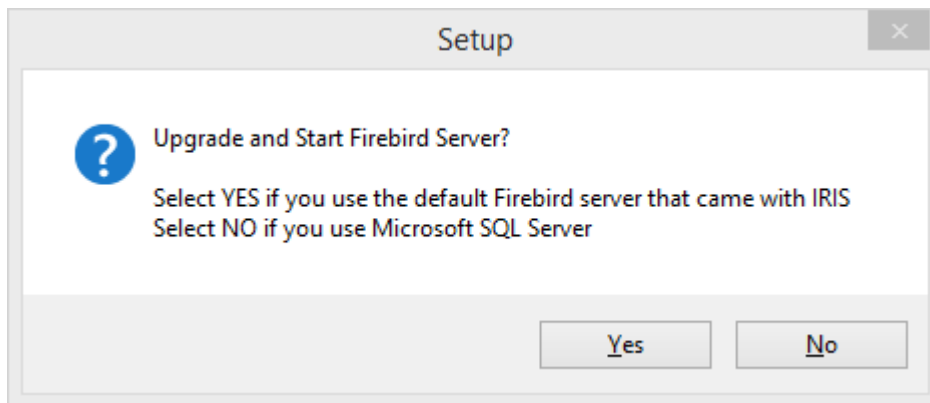
If your browser prevents running an executable via a link, right-click the link and select "Save Target As..." to save the file to a temporary location on your computer (eg. Desktop) - and run the program from there.

If you are prompted to restart Windows after the installation is complete, select **No**. You may wish to restart Windows when you have completed all the steps, but under normal circumstances this should not be necessary.

### Firebird or Microsoft SQL Server?

Firebird and Microsoft (MS) SQL Server are the two database systems supported by IRIS. Firebird is a free database and is included with the IRIS setup package. SQL Server is licensed by Microsoft. Your IT personnel will be able to advise what system IRIS should use.

During the installation step below, you will be asked whether to install and start the Firebird server.



If you currently use Firebird, select YES.  
If your installation uses MS SQL Server, select NO.

Note to IT staff: If you have independently installed Firebird 2.x from [www.firebirdsql.org](http://www.firebirdsql.org), you may prefer to select NO.

Selecting YES will run a console script to register Firebird version 2.5.

### Install IRIS Software now...



[IRIS Setup 1-14-0-0.exe](#)

---

### NEXT STEP

You are now ready to run IRIS.

## Upgrade: 3. Start and Test IRIS

### 1.2.3 3. Start and Test IRIS

1. Start IRIS.

Launch IRIS from the desktop icon or Start menu item. The first time this is done after the upgrade, IRIS will detect that the database version is less than the program version and automatically run the database upgrade script (IRU file). After a short delay you will see the login screen as normal.

This process applies to both Firebird and MS SQL Server systems.

2. The title bar of IRIS should reflect the new version number and the **Help > About IRIS** menu option should also indicate the database version (1-14-0-0). If not, contact the help desk.
3. Once complete, you should now be able to use IRIS.
4. At this point, we strongly advise to **create another backup of your database**. It is important to do this again after the upgrade in order to have a restore point with the database at the new version level.

---

#### NEXT STEP

If this is a server upgrade, proceed to the Network Upgrade section.

## Upgrade: 4. Network Upgrade

If you are using IRIS in a stand-alone environment (local database not connected to a network), skip to the Post-Upgrade Notes.

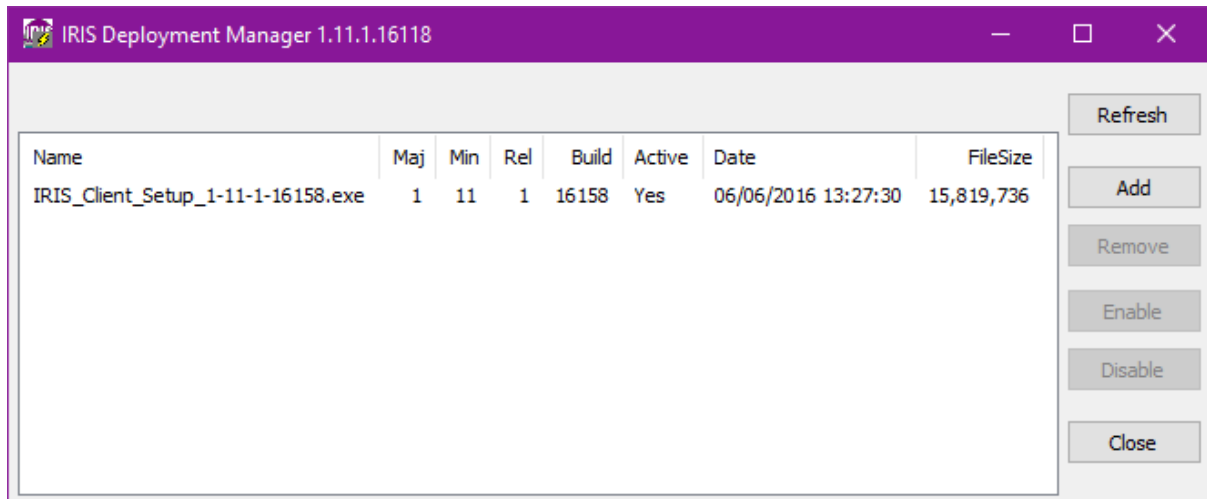
## Upgrade: 5. Post-Upgrade Notes

### 1.2.4 4. Network Upgrade

Once the server has been upgraded, both the IRIS software (on this computer) and database will now be at 1.14.0. If you are running IRIS on a network, the other workstations now require upgrading. The IRIS deploy facility simplifies this task by uploading the client setup file into the database which will trigger the upgrade on each workstation when they start IRIS.

#### A) On the Server - Configure the IRIS deploy facility:

1. Use Windows Explorer to navigate to the **\IRIS** folder.
2. Double-click the **IRISDeploy** (EXE) program. Detailed instructions in using the IRISDeploy program are available in the IRIS help system.
3. Click **[Add]** and browse to select the **IRIS\_Client\_Setup\_1-14-0-0.exe** package found in the **\IRIS** folder on this CD.
4. The program will take a few moments to load the EXE. Once added, verify the file details in the list and the entry is enabled. Any old entries found can be disabled or removed, provided all users are at least currently on version 1.13.



### 5. Close **IRISDeploy**.

What this facility does is store the upgrade executable inside the database itself. When IRIS is started at a workstation, it will detect that a new version is available from the database and extract it automatically.

### **B) At each Workstation still on a version prior to 1-14-0:**

1. Start IRIS.
2. The startup process will display a dialog indicating that an update is available.
3. When prompted, close IRIS and allow the update to complete.
4. Restart IRIS. You should now be on 1-14-0.

Note: The update file is 15+Mb in size and may take time to download, particularly for users on a remote network connection.

---

### **NEXT STEP**

### **[Upgrade: 5. Post-Upgrade Notes](#)**

#### **1.2.5 5. Post-Upgrade Notes**

##### **1. Multiple IRIS Environments**

If you use the **IRIS TEST** (training) system, or otherwise have multiple copies of IRIS (Ie. different databases) active on your network, the update script file must be applied for each environment.

For major releases, the **IRIS\_Update\_1-14.IRU** upgrade script will be run automatically each time a previous database version is found. No extra steps are required on your part.

For minor updates, the **IRIS\_Minor\_Update\_1-14.IRU** update script file **will be renamed** after it is applied.

Using the File Explorer, open the IRIS folder and you will see the IRU file renamed to this format:

**IRIS\_Minor\_Update\_1-14-0 APPLIED <timestamp>.IRU**

This rename is done after you ran IRIS in 3. Start and Test IRIS for the first time after the installation. Renaming the file prevents the SQL update to be unnecessarily repeated on the same system every time someone starts IRIS.

To upgrade additional IRIS databases, the original IRU file name must be reinstated:

1. Selecting the file, press **F2** or **right-click > Rename** to *carefully* rename this file back to the original name: **IRIS\_Minor\_Update\_1-14.IRU**
2. Alternatively, you can download a fresh copy of this file here: [IRIS\\_Minor\\_Update\\_1-14.IRU](#) ensuring it is saved to the IRIS folder.
3. Start IRIS in this alternative environment (that points to the additional database). For example: for the test system you would launch IRIS with the **IRIS TEST** icon.
4. Repeat these steps for each additional IRIS environment.

---

**2. IRIS User Guide**

A new version of the **IRIS\_UserGuide.pdf** is included in this update and will have been copied to your IRIS folder. Distribute this as required.

---

**The upgrade is complete!**  
**You can now close this Installation Guide.**

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