Spreadsheet Live Installation Notes

Contents

Compatibility and System minimum requirements

Compatibility: 32bit & 64bit

System minimum requirements:

Server: .NET 4.5 – default features

Client: Dataflow Client Version 9.002-B
Excel 2010 and above
.NET 4.5
Adobe Acrobat Reader (Scanned Documents)

Client Configuration and the Password control system

In order for a site to be able to use Spreadsheet Live they will have to start using the new password control system. The client does not need to be aware of this, but Dataflow Accounts will have to be configured for it.
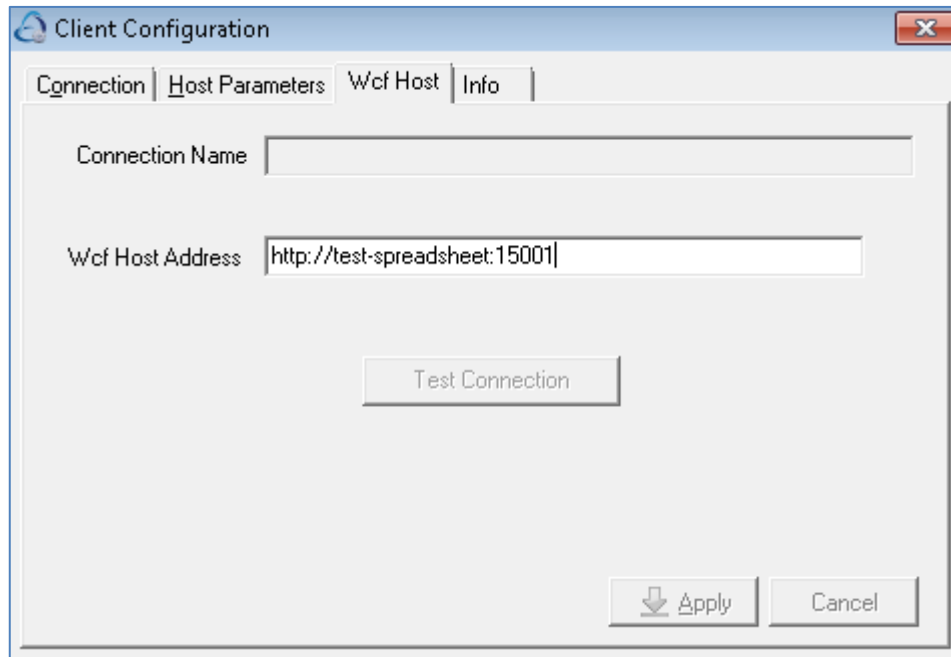
The latest version of the Client Configuration program now has an additional tab for the Wcf Host parameter. For Spreadsheet Live, this is the "DataflowHostAddress" parameter in the Web.config.appSettings file as indicated in the section Spreadsheet Live Server configuration, below.

SMTP

Relays (Exchange) or an SMTP Server (Office 365) will need to be configured to allow password emails to be sent out to users. This would usually be done by the client or their IT company.

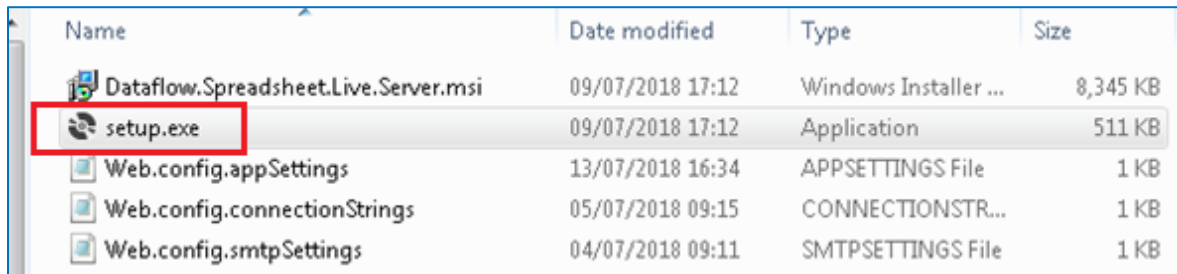Password emails are only relevant if the client wants the "Enforce password change policy" option.

To enable the "Enforce password change policy" option, run this SQL statement:

    insert into ACOOPTS values (202,1,null,null)

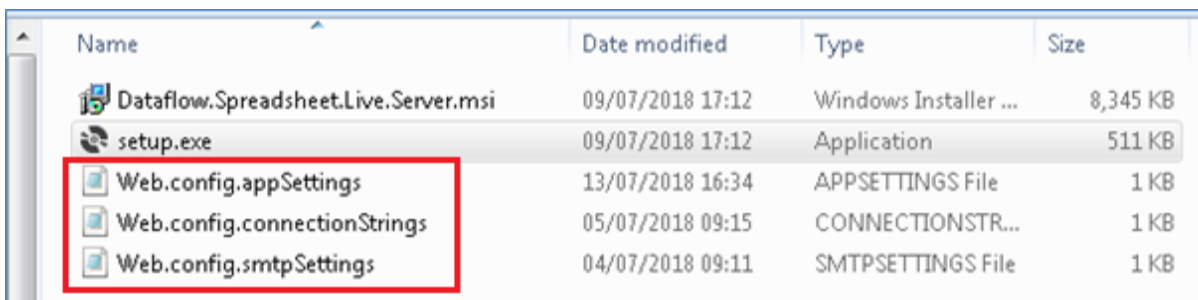## Installing Spreadsheet Live

Server

Run the .msi setup program:

This installs into:

C:\Program Files (x86)\Dataflow (UK) Limited\Dataflow Spreadsheet Live Server

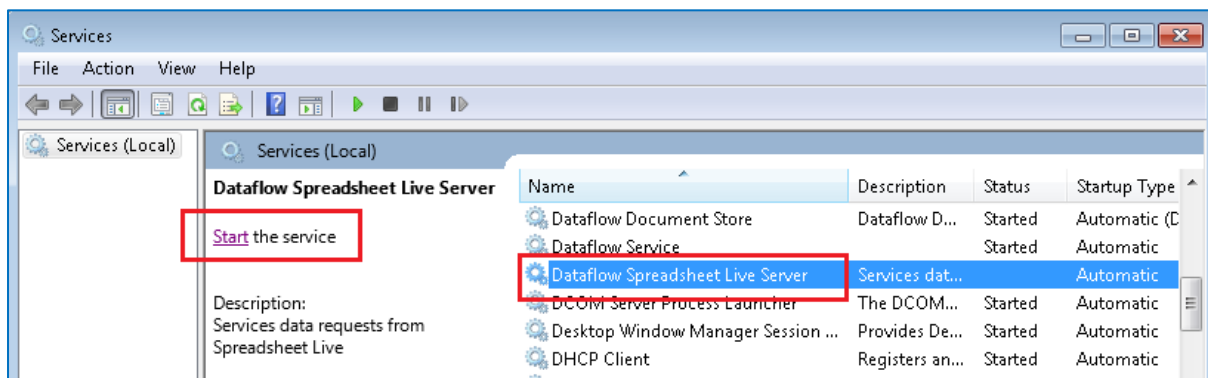**Copy the three config files into the install folder**:

Edit the config files as indicated in the section:

- Spreadsheet Live Server configuration, below.

Open the Service console from Control Panel and start the Dataflow Spreadsheet Live Server service.

You may need to add an entry to the firewall on the server for the ports specified on the two Host Address entries in the file: Web.config.appSettings, below.
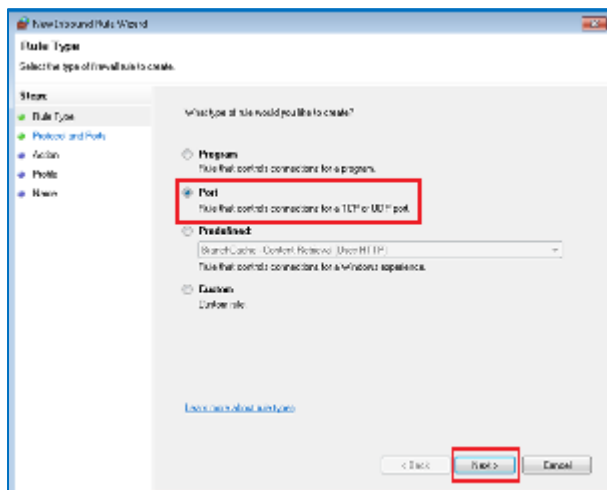
Firewall entries

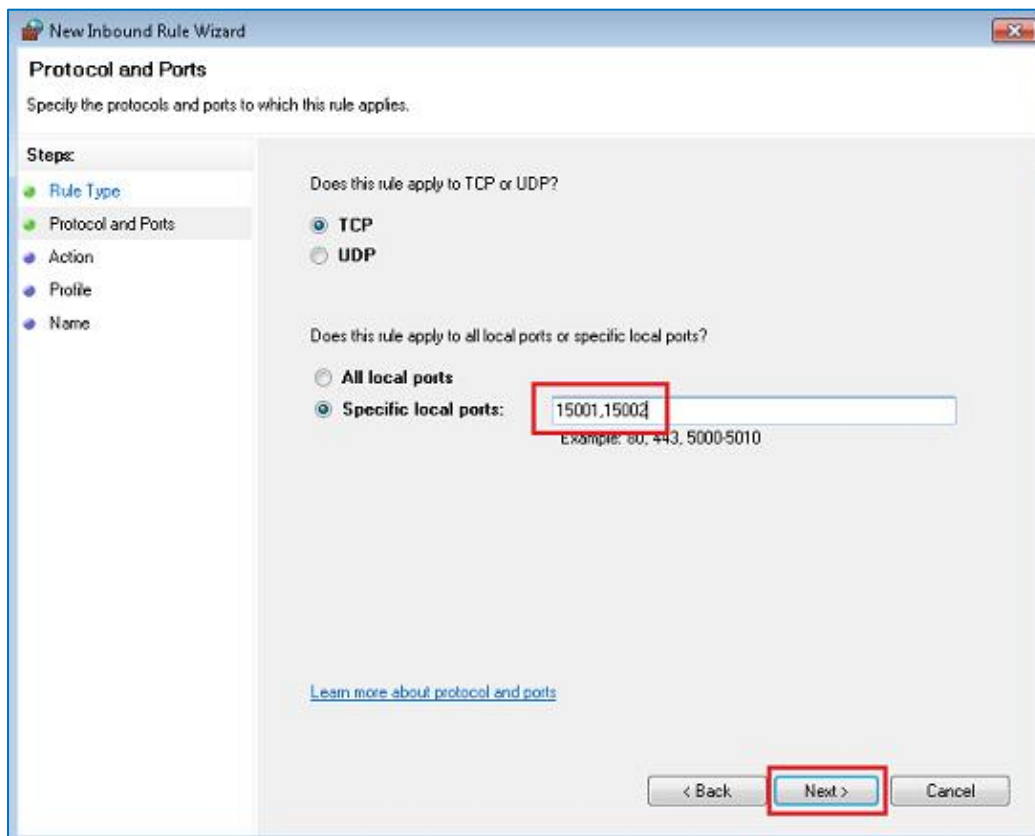**Click on "Advanced settings"**

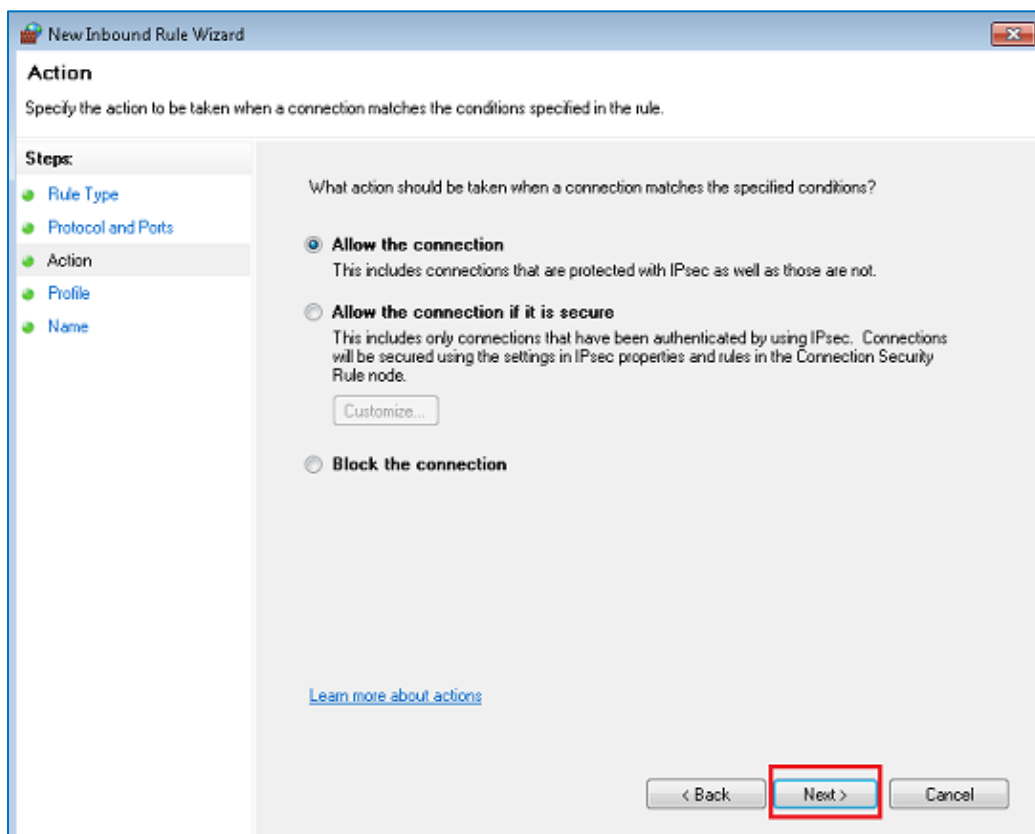**Highlight and right-click on "Inbound Rules" and select "New Rule"**

Select "Port" and click "Next"

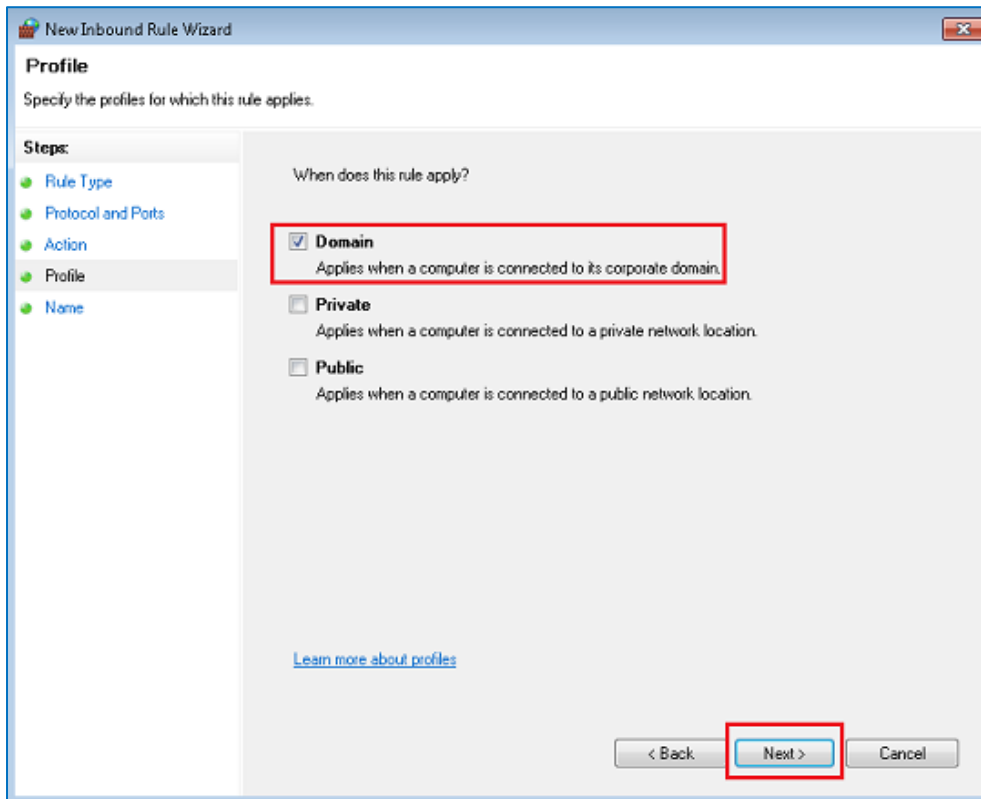**Enter the two port numbers, separated by a comma, and click "Next"**

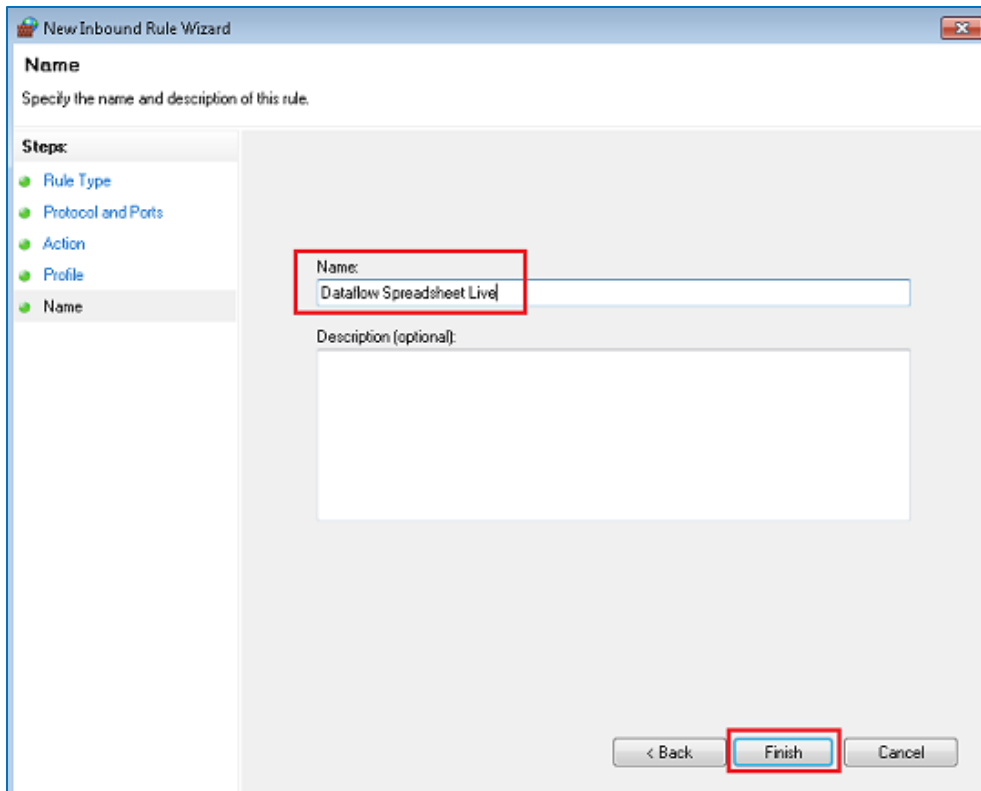**The defaults are fine…. Click "Next"**

Just "Domain" will normally be good enough. (It may need "Public" for external HTTPS access – haven't tested this.)
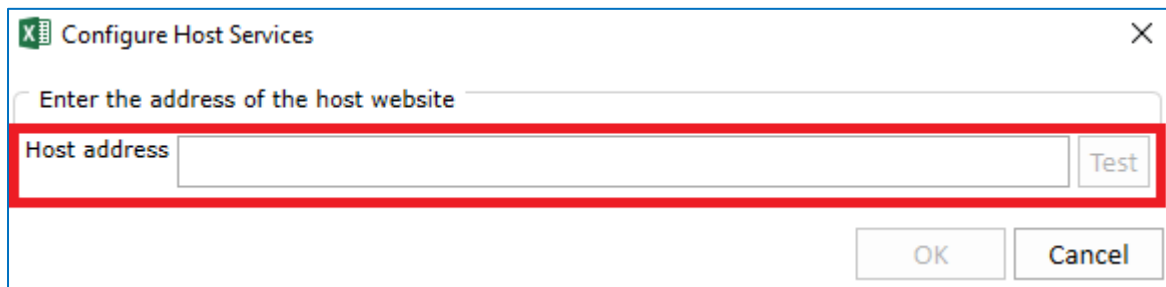
Click "Next"

Enter a good name, and click "Finish"

Configuring the client in Excel

To configure Spreadsheet Live in Excel, enter the Host Address of the server:

The first time Spreadsheet Live is used this window will be displayed automatically. Otherwise, you can open this dialog by clicking here:

The host address is the address of the machine, followed by the port number. This can take the form of an IP address:

http://192.168.77.89:15001

or it can be the host machine name:

http://IISTEST-SERVER:15001

or it can be an FQDN (Fully Qualified Domain Name):

http://spreadsheetlive.mydomain.co.uk:15001

Where only HTTP access is required over a local network (including VPN) then IP address or host machine name should be sufficient.

A FQDN is required for HTTPS. If external access is required then this must be done using HTTPS, and requires more configuration not dealt with here.

NB. You will almost certainly have to open the port in the firewall on the host serve

Spreadsheet Live Service configuration

If necessary, change the port number (Eg, :15001) of the Host Address entries. You should only have to do this if there is a conflict with another service or if you are setting up a second instance of the service on the same server.

Web.config.appSettings

```
<?xml version="1.0"?>
<appSettings>
 <clear/>
 <add key="ExcelHostAddress" value="http://localhost:15001" />    <!-- Default value 15001 -->
 <add key="DataflowHostAddress" value="http://localhost:15002" /> <!-- Default value 15002 -->
 <add key="IsTesting" value="false"/>
 <add key="ServerDelay" value="0"/>
 <add key="SupportMail" value="support@dataflow.co.uk" />          <!—Set this value to blank if not enforcing password change policy -->
</appSettings>
```

Web.config.connectionStrings

```
<?xml version="1.0"?>
<connectionStrings>
 <clear/>
 <add name="Dataflow" connectionString="MultipleActiveResultSets=True; Server=DFS-2-SQLSERVER\SQL2017; Database=DF32_P2P_Demo;
              User id=SYSDBA; Password=masterkey; Application name=Dataflow.Wcf"/>
</connectionStrings>1
```

Web.config.smtpSettings

```
<?xml version="1.0"?>
<smtp from="Dataflow Notifications &lt;accounts@dataflow.co.uk&gt;">
 <network host="dfs-ex1" port="25" password="" userName="" />        <!—Set "host" to blank if not enforcing password change policy -->
</smtp
```

HTTPS

There must be a valid SSL certificate installed on the server (installed from a .pfx - .crt didn't seem to work). Wild-card certificates can be used.

To bind the port number to the SSL certificate:

Get the "thumb print" of the SSL certificate and strip out all the spaces. There will probably be a dodgy character that you can't see at the beginning of the string – delete that too.

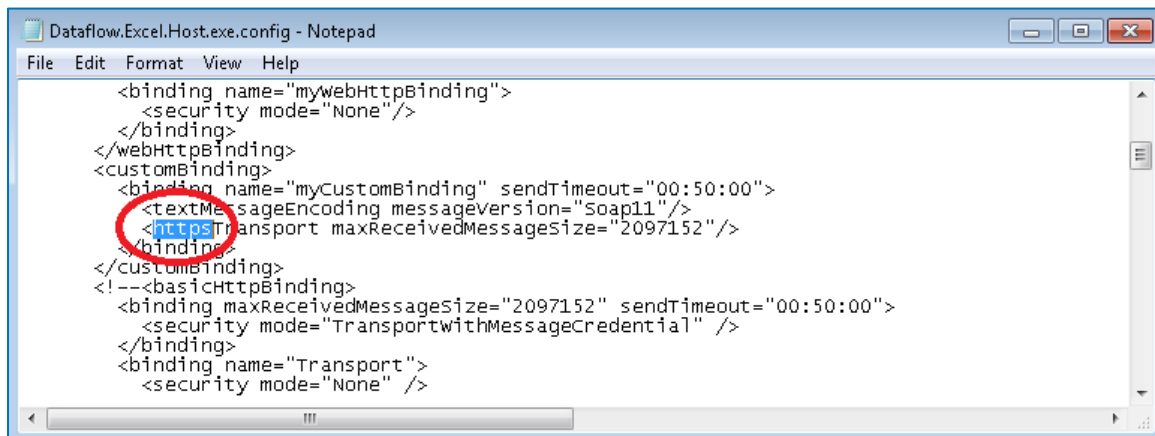Open a command window with Administrator rights and run the following replacing "certhash" value with the thumb print string:

```
netsh http add sslcert ipport=0.0.0.0:15001
        certhash=92db8031de988ae2b91a0c4a9ed69cf7fa87c576
        appid={D06B8F96-35C4-4708-9494-3D524F552A83}
```

Use the following command to display bound certificates if you want:
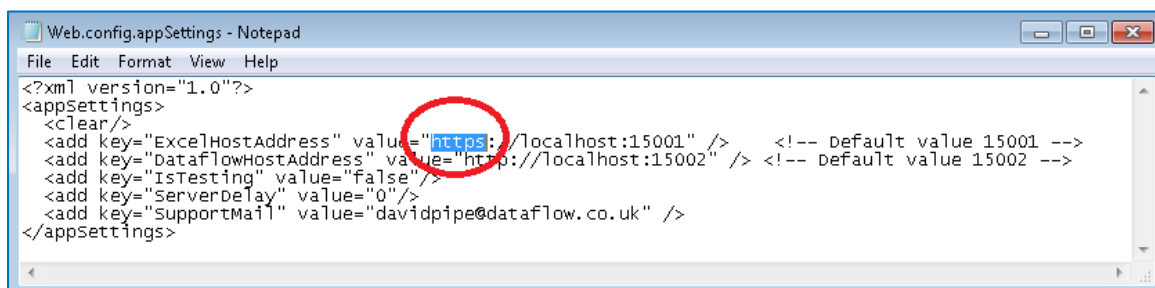
```
netsh http show sslcert
```

An entry for the FQDN must be in the DNS pointing at the host server.

Edit the Dataflow.Excel.Host.exe.config file:

Edit the Web.config.appSettings file:

Restart the Spreadsheet Live service.