Windows Installation Guide

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InterSystems Corporation 1 Memorial Drive Cambridge MA 02142 www.intersystems.com

Windows Installation Guide
InterSystems IRIS Data Platform Version 2023.3 2024-05-16
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For Support questions about any InterSystems products, contact:

InterSystems Worldwide Response Center (WRC)
Tel: +1-617-621-0700
Tel: +44 (0) 844 854 2917
Email: support@InterSystems.com

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1

Windows Installation Overview

The Windows Installation Guide provides guidance on installing kit-based deployments of InterSystems IRIS on Microsoft Windows.

1.1 How to Use This Guide

For all installations, you should begin with the Pre-Installation steps. You can then follow the steps for either an attended or unattended installation. The attended installation process is different depending on the setup type you choose. After following the steps for attended installations, use the documentation for the setup type you've chosen to continue the installation process. After completing the installation, refer to the Post-Installation section for additional tasks that should be completed.

This guide breaks steps into sections titled *Default* and *More*. *Default* includes basic information for a given step, details on what actions need to be taken, and recommendations on which options to choose. *More* includes additional details and other options that can be chosen.

In general, the *Default* sections are sufficient for quickly getting started with InterSystems IRIS. If you are unsure about a particular step or about which option to select, it is recommended you follow the guidance in the *Default* sections.

1.2 Deploying for Production Systems

Deploying for a live production system is a more involved procedure than deploying for development. In particular, you should carefully consider the resources at your disposal and plan your configuration and deployment accordingly. Before beginning the installation process, you should review the following sections that give detailed guidance on planning and managing your resources:

- System Resource Planning and Management
- Memory and Startup Settings

You can still follow the procedures outlined in this guide, however the procedures outlined in the *Default* sections may not be sufficient for your system. Review each step thoroughly, including the *More* sections, and select the configuration options appropriate for your system.

Additionally, you should consider the following when installing for a production system:

- Unattended installations are recommended for production systems. This method allows you to easily save your configuration and redeploy with the same settings.
- You should install with “Locked Down” security settings. This allows for the strongest initial security for your deployment. See Initial InterSystems Security Settings for more details.
- If you are performing an attended installation, the custom installation is recommended. This allows you to only install the components necessary for your deployment.

2

Windows Pre-Installation

This page details the pre-installation steps for InterSystems IRIS Windows installations.

Before beginning, make sure you review the Windows Installation Overview, including:

- How to Use This Guide
- Deploying for Production Systems

2.1 Step 1: Review Supported Platforms

Default:

- Review InterSystems Supported Platforms before installing to make sure the technologies you intend on using are supported.

2.2 Step 2: Choose Your Windows User Account

Default:

- Use a defined Window domain administrator account.
- You can also use the default SYSTEM account, however this is not recommended.

More:

- Review details on Windows User Accounts.

2.3 Step 3: Install a Web Server

Default:

- Enable Microsoft Internet Information Services (IIS). Make sure you also enable **HTTP Redirection** and **WebSocket Protocol**.

More:

- Install another supported web server (you will have to manually configure this web server).
- Proceed with Microsoft IIS turned off (you will have to manually configure a web server).
- Some installations will fail unless IIS auto-configuration is successful or skipped. To skip auto-configuration, execute the installation file from the command line and specify the `CSPSKIPIISCONFIG=1` flag. See Installing a Web Server for details.

2.4 Step 4: Install the VS Code ObjectScript Development Environment

Default:

- Install InterSystems ObjectScript extensions for Visual Studio Code.
- This can be done before or after installing InterSystems IRIS.
- The development environment enables you to use VS Code to connect to an InterSystems IRIS server and develop code in ObjectScript.

More:

- Studio is an alternative to VS Code - ObjectScript. It installs alongside InterSystems IRIS on Windows-based operating systems.

2.5 Step 5: Acquire an InterSystems IRIS Kit

Default:

- Acquire an installation kit from the WRC InterSystems IRIS kit download site.

2.6 Step 6: Choose Your Installation Strategy

Default:

- Perform an Attended Installation using the Installer Wizard.

More:

- Perform an Unattended Installation.
- Use an Installation Manifest.

3

Windows Attended Installation

This page details the initial steps for attended installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation

3.1 Step 1: Execute the Installation File

Default:

- Double click on your installation file to launch the Installer Wizard.

More:

- Launch your installation file from the command line. This allows you to use command line properties to modify the installation. For example, the following would prevent InterSystems IRIS from starting immediately after installation:

  ```
  C:\Users\Public\Downloads\IRIS-<version_number>-win_x64.exe ISCSTARTIRIS=0 ISCSTARTLAUNCHER=0
  ```

- You can change the Installer Wizard's language by changing the Windows **language for non-Unicode programs** setting.

3.2 Step 2: Begin Installation

Default:

- Choose **New Instance** and click **OK**.
- Use **Next** to continue to the next dialog box, **Back** to return to the previous dialog box, and **Cancel** to stop the installation.
- Review the terms of the **License Agreement**. Click **I accept the terms in the license agreement** to confirm that you accept the license agreement.

More:

- Click on an existing instance to upgrade the instance.

3.3 Step 3: Name the Instance

Default:

- Click **Next** to use the default name.

More:

- Give your instance a unique name, using only alphanumeric characters, underscores, and dashes.
- The default name is IRIS (or, if other instances exist, IRIS*n*, where *n* is the number of InterSystems IRIS instances already installed—the second instance will be IRIS1).

3.4 Step 4: Choose the Installation Directory

Default:

- Click **Next** to use the default installation directory:

  C:\InterSystems\<*name-of-instance*>

More:

- Click **Change** to specify a different destination directory. Review Installation Directory for details on where InterSystems IRIS can be installed.
- If the specified directory doesn't exist, the Installer Wizard will automatically create it.

3.5 Step 5: Choose a Setup Type

Default:

- Select the **Development** setup type and click **Next** to continue.
- Continue reading the documentation for a Development setup type.

More:

- Choose any setup type. Review Choosing a Setup Type for details on the different setup types.
- Continue reading the documentation for the setup type you choose:
  - Development
  - Server
  - Client
  - Web Server
  - Custom

- If the CSP Gateway is already installed on your system when you install the Web Gateway, the installer automatically upgrades the CSP Gateway to the Web Gateway. For details, see Preexisting CSP Gateway.

4

Windows Development Installation

This page details the steps for attended development installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation
- Windows Attended Installation (initial steps)

4.1 Development Installation Overview

Default:

- A development installation installs only the components of InterSystems IRIS that are required on a development system.

More:

- Development installations include the following component groups:
  - InterSystems IRIS Database Engine (including user database, Language Gateways, and Server Monitoring Tools)
  - InterSystems IRIS launcher
  - Studio
  - Database drivers
  - InterSystems IRIS Application Development (including language bindings)
  - Web Gateway
- For details on these component groups, see Choosing a Setup Type.

4.2 Step 1: Configure Web Server

Default:

- Make sure the installer says "Local IIS web server detected" and choose the option **Configure local IIS web server for this instance**.
- If the installer says "No local web server found", choose **Abort the installation**. Review Installing a Web Server and ensure that Microsoft Internet Information Services (IIS) is on, then start the installation process over by executing the installation file.

More:

- InterSystems recommends that you use the IIS web server and allow the Installer Wizard to automatically configure it. You should review the automatic configuration behavior.
- It is possible to manually configure your web server after installation. This requires additional steps after finishing the installation process. If you choose this option, continue the installation process selecting the option to continue without configuring the web server.

4.3 Step 2: Install Unicode Support

Default:

- Select **Unicode**.

More:

- See Character Width Setting for details on **8–bit** and **Unicode** systems and choosing one for you system.

4.4 Step 3: Choose Initial Security

Default:

- Select **Normal**.

More:

- See Initial InterSystems Security Settings for details on the different security settings and choosing one for your system.

4.5 Step 4: Enter Credentials

Default:

- Choose to **Run InterSystems IRIS under default SYSTEM account**.

More:

- The SYSTEM account is not always appropriate. See Windows User Accounts for details on which account you should use.
- Specify a defined Username account. The installer will verify that the account exists on the domain and the password is correct.

4.6 Step 5: Configure Users

Default:

- Enter a password that will be used by all predefined InterSystems IRIS user accounts.
- After selecting **Next**, enter a password for the CSPSystem account.
- Both passwords must be between 3 and 32 characters (8 and 32 if you chose a Locked Down installation).

More:

- Review Initial InterSystems Security Settings for details on password criteria.
- Review Predefined User Accounts for details on the predefined accounts that are created during this step.

4.7 Step 6: Review Installation

Default:

- Review the installation options you specified.
- (Optional) Select the **License** button to navigate to the directory where your InterSystems IRIS key is located. If the key is valid it will be activated automatically and the **License Key** setting in **Summary of installation options** will update to say **Valid**.
- Once you have reviewed the installation options and, optionally, added a license key, select **Install**.

More:

- If you activate a license key during this step it is automatically copied to *install-dir*/mgr during installation and renamed `iris.key`.
- If you *don't* activate a license key during this step, you can activate one following installation. See Activating a License Key, for details.

4.8 Step 7: Complete Installation

Default:

- Once the installation process completes, continue to Windows Post-Installation.

More:

- By default, InterSystems IRIS starts automatically after installation is complete and the InterSystems IRIS launcher icon is added to the system tray area of the Windows tool bar. An **InterSystems IRIS** item is also added to the Windows **Programs** menu.

5

Windows Server Installation

This page details the steps for attended server installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation
- Windows Attended Installation (initial steps)

5.1 Server Installation Overview

Default:

- A server installation installs only the components of InterSystems IRIS that are required on a server system.

More:

- Server installations include the following component groups:
  - InterSystems IRIS Database Engine (including user database, Language Gateways, and Server Monitoring Tools)
  - InterSystems IRIS launcher
  - Web Gateway
- For details on these component groups, see Choosing a Setup Type.

5.2 Step 1: Configure Web Server

Default:

- Make sure the installer says "Local IIS web server detected" and choose the option **Configure local IIS web server for this instance**.
- If the installer says "No local web server found", choose **Abort the installation**. Review Installing a Web Server and ensure that Microsoft Internet Information Services (IIS) is on, then start the installation process over by executing the installation file.

More:

- It is highly recommended that you use the IIS web server and allow the Installer Wizard to automatically configure it. You should review the automatic configuration behavior.
- It is possible to manually configure your web server after installation. This requires additional steps after finishing the installation process. If you choose this option, continue the installation process selecting the option to continue without configuring the web server.

5.3 Step 2: Install Unicode Support

Default:

- Select **Unicode**.

More:

- See Character Width Setting for details on **8–bit** and **Unicode** systems and choosing one for you system.

5.4 Step 3: Choose Initial Security

Default:

- Select **Normal**.

More:

- See Initial InterSystems Security Settings for details on the different security settings and choosing one for your system.

5.5 Step 4: Enter Credentials

Default:

- Choose to **Run InterSystems IRIS under default SYSTEM account**.

More:

- The SYSTEM account is not always appropriate. See Windows User Accounts for details on which account you should use.
- Specify a defined Username account. The installer will verify that the account exists on the domain and the password is correct.

5.6 Step 5: Configure Users

Default:

- Enter a password that will be used by all predefined InterSystems IRIS user accounts.
- After selecting **Next**, enter a password for the CSPSystem account.
- Both passwords must be between 3 and 32 characters (8 and 32 if you chose a Locked Down installation).

More:

- Review Initial InterSystems Security Settings for details on password criteria.
- Review Predefined User Accounts for details on the predefined accounts that are created during this step.

5.7 Step 6: Review Installation

Default:

- Review the installation options you specified.
- (Optional) Select the **License** button to navigate to the directory where your InterSystems IRIS key is located. If the key is valid it will be activated automatically and the **License Key** setting in **Summary of installation options** will update to say **Valid**.
- Once you have reviewed the installation options and, optionally, added a license key, select **Install**.

More:

- If you activate a license key during this step it is automatically copied to *install-dir*/mgr during installation and renamed `iris.key`.
- If you *don't* activate a license key during this step, you can activate one following installation. See Activating a License Key, for details.

5.8 Step 7: Complete Installation

Default:

- Once the installation process completes, continue to Windows Post-Installation.

More:

- By default, InterSystems IRIS starts automatically after installation is complete and the InterSystems IRIS launcher icon is added to the system tray area of the Windows tool bar. An **InterSystems IRIS** item is also added to the Windows **Programs** menu.

6

Windows Client Installation

This page details the steps for attended client installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation
- Windows Attended Installation (initial steps)

6.1 Client Installation Overview

Default:

- A client installation installs only the components of InterSystems IRIS that are required on a client system.

More:

- Client installations include the following component groups:
  - InterSystems IRIS launcher
  - Studio
  - Database drivers
  - InterSystems IRIS Application Development (including language bindings)
- For details on these component groups, see Choosing a Setup Type.

6.2 Step 1: Review Installation

Default:

- Review the installation options you specified.
- Once you have reviewed the installation options, select **Install**.

6.3 Step 2: Complete Installation

Default:

- Before you can use the client, you must specify the preferred server for this client. See Define a Remote Server Connection for details.
- Once the installation process completes, continue to Windows Post-Installation.

More:

- By default, the InterSystems IRIS launcher icon is added to the system tray area of the Windows tool bar. It appears dimmed because there is no InterSystems IRIS server running.

7

Windows Web Server Installation

This page details the steps for attended web server installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation
- Windows Attended Installation (initial steps)

7.1 Web Server Installation Overview

Default:

- A web server installation installs only the components of InterSystems IRIS that are required for the Web Gateway.

More:

- Web server installations include the following component groups:
  - Web Gateway
- For details on these component groups, see Choosing a Setup Type.

7.2 Step 1: External Web Server Configuration

Default:

- The installer will automatically configure the Microsoft Internet Information Services (IIS) web server. Make sure you installed the web server prior to beginning the installation.

More:

- Review details on automatic configuration behavior for IIS web servers.
- If a local web server is *not* detected, you will have to manually connect your web server after the installation finishes.
- The Web Gateway configures the following application paths pointing to the server configured for the instance:
  - /

  - /csp
  - */instance-name* (by default, /IRIS)

- You can change the configurations manually after installation using the Web Gateway application.

7.3 Step 2: Review Installation

Default:

- Review the installation options you specified.
- Once you have reviewed the installation options, select **Install**.

7.4 Step 3: Complete Installation

Default:

- Once the installation process completes, continue to Windows Post-Installation.

8

Windows Custom Installation

This page details the steps for attended custom installations using the installer wizard.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation
- Windows Attended Installation (initial steps)

8.1 Custom Installation Overview

Default:

- A custom installation allows you to select specific InterSystems IRIS components to install on the system. Some selections require that you install other components.

8.2 Step 1: Select Components

Default:

- Select the components you want to install. Some components include sub-items; to view these, select the **+** icon.
- Clicking on a component displays a short **Feature Description**.
- Use the drop-down next to a component to choose whether or not it should be installed. Selecting the **X** icon corresponding to **This feature will not be available** will prevent that component and any sub-items from being installed.
- Before continuing, review the next step for details on web server configuration for custom installations.

More:

- Review the table of available components.
- Click **Space** to ensure that there is enough space on the disk for the selected components.

8.3 Step 2: Web Server Configuration

Default:

- If you are including the web gateway components (**Web Server Gateway)**, make sure the **CSP for IIS** sub-item is included and that the Microsoft Internet Information Services (IIS) web server is installed before beginning the installation. The installer will automatically configure the IIS web server for the Web Gateway.

More:

- If the **Web Server Gateway** and **CSP for IIS** components are both selected, but an IIS web server is not detected the web server the installation will fail unless IIS configuration is skipped.
  - To skip IIS configuration, execute the installation file from the command line and specify `CSPSKIPIISCONFIG=1`. This will skip automatic web server configuration and install the IIS CSP binary files necessary for manual configuration in the C:\inetpub\CSPGateway\ directory. You will have to manually configure your web server after the installation finishes.
- If you only select the **Web Server Gateway** component and do *not* select the **CSP for IIS** component, the installation will be successful, but the IIS CSP binary files will not be installed. This options allows you to manually configure a different supported web server.
- If you do not intend on using a web server at any point you can choose to not include either of these components. Without a web server, you will not have access to web applications including the Management Portal.

8.4 Step 3: Install Unicode Support

Default:

- Select **Unicode**.

More:

- See Character Width Setting for details on **8–bit** and **Unicode** systems and choosing one for you system.

8.5 Step 4: Set Port Numbers

Default:

- Use the default SuperServer port number.

More:

- The default port number is `1972`. If taken, the default is `51773` or the first available subsequent number.
- See Port Numbers for more details.

8.6 Step 5: Choose Initial Security

Default:

- Select **Normal**.

More:

- See Initial InterSystems Security Settings for details on the different security settings and choosing one for your system.

8.7 Step 6: Enter Credentials

Default:

- Choose to **Run InterSystems IRIS under default SYSTEM account**.

More:

- The SYSTEM account is not always appropriate. See Windows User Accounts for details on which account you should use.
- Specify a defined Username account. The installer will verify that the account exists on the domain and the password is correct.

8.8 Step 7: Configure Users

Default:

- Enter a password that will be used by all predefined InterSystems IRIS user accounts.
- After selecting **Next**, enter a password for the CSPSystem account.
- Both passwords must be between 3 and 32 characters (8 and 32 if you chose a Locked Down installation).

More:

- Review Initial InterSystems Security Settings for details on password criteria.
- Review Predefined User Accounts for details on the predefined accounts that are created during this step.

8.9 Step 8: Review Installation

Default:

- Review the installation options you specified.

- (Optional) Select the **License** button to navigate to the directory where your InterSystems IRIS key is located. If the key is valid it will be activated automatically and the **License Key** setting in **Summary of installation options** will update to say **Valid**.
- Once you have reviewed the installation options and, optionally, added a license key, select **Install**.

More:

- If you activate a license key during this step it is automatically copied to *install-dir*/mgr during installation and renamed `iris.key`.
- If you *don't* activate a license key during this step, you can activate one following installation. See Activating a License Key, for details.

8.10 Step 9: Complete Installation

Default:

- Once the installation process completes, continue to Windows Post-Installation.

More:

- By default, InterSystems IRIS starts automatically after installation is complete and the InterSystems IRIS launcher icon is added to the system tray area of the Windows tool bar. An **InterSystems IRIS** item is also added to the Windows **Programs** menu.

9

Windows Unattended Installation

This page details the steps for unattended installations.

Make sure you have completed the following before performing the steps on this page:

- Windows Pre-Installation

9.1 Unattended Installation Overview

Default:

- An unattended operation does not prompt the user for input; instead, it gets input from properties passed to the InterSystems IRIS installation file on the command line.
- These properties are described in the Command Line Reference.
- No messages are displayed during unattended installation, upgrade, reinstallation, or uninstallation.

9.2 Step 1: Before Beginning

Default:

- Before beginning your installation, perform the necessary pre-installation steps.
- Determine your strategy for installing an external web server:
  - The easiest option is to install Microsoft Internet Information Services (IIS) before beginning the installation. The installer can auto-configure this web server.
  - If you intend on using a different web server or manually configuring the IIS web server, review Installing a Web Server for necessary steps that must be performed prior to the installation.

9.3 Step 2: Determine Properties to Specify

Default:

- You do not need to include any additional properties to perform a basic unattended installation. The installer will use the default options.

More:

- Review details on using command-line properties.
  - Use the form: `PROPERTYNAME=argument`.
  - Properties must be upper-case.
  - Arguments are not case-sensitive.
  - Each property must be separated by one or more spaces.
- Refer to the table of Command-Line Properties available for unattended installations.
- Make a note of any properties you will use for your unattended installation.

9.4 Step 3: Determine Features to Install

Default:

- The `ADDLOCAL` property is used to determine which features to install.
- If it is left blank, it defaults to `ADDLOCAL=ALL` which installs all features.
- For a basic development environment, there is no need to include this property. All features will be installed.

More:

- Review details on specifying custom-installable features.
  - Use the `ADDLOCAL` property to specify which features to include.
  - Specify the *featurename* of a component group, followed by the *featurename* components within that group separated by a comma. Repeat this for each component group to create a comma-separated list.
- Refer to the table of Custom-Installable Features available for installation.

9.5 Step 4: Create Installation Command

Default:

- Use the following command:

```
<path>\<installer>.exe /instance <instancename> /q{b|n} <properties>
```

- Specify the following:

Variable	Description
<path>	The path to the InterSystems IRIS installation file.
<installer>.exe	The name of the InterSystems IRIS installation file.
<instancename>	The name for the new InterSystems IRIS instance. If omitted, the default value is IRIS, but you must specify a different value if there are one or more instances already installed on the machine.
/qb or **/qn**	Whether to display a progress bar during the installation (**/qb**) or to perform a fully silent installation (**/qn**).
<properties>	The properties to passing to the installer (see the Command-Line Properties table).

More:

- Replace `<properties>` with any properties you would like to include in the installation.
- Use the `ADDLOCAL` property to specify which features you would like to install.

Examples:

- Install an instance of InterSystems IRIS with the default instance name in an installation directory named C:\InterSystems\MyIris on a 64–bit windows system:

  ```
  C:\downloads\IRIS-<version_number>-win_x64.exe /qn INSTALLDIR=C:\InterSystems\MyIris
  ```

- Install an instance of InterSystems IRIS with the instance name IrisA:

  ```
  C:\downloads\IRIS-<version_number>-win_x64.exe /instance IrisA /qn
  ```

- Install a subset of features using the `ADDLOCAL` property:

  ```
  C:\downloads\IRIS-<version_number>-win_x64.exe /qn ADDLOCAL=cube, server, server_user
  ```

9.6 Step 5: Install the Instance

Default:

- Execute the command, including any properties, using a command-line interface.
- Once the Installation finishes, proceed to Windows Post-Installation.

10

Windows Post-Installation

This page details the post-installation tasks for InterSystems IRIS Windows installations.

Make sure you have completed the following before performing the tasks on this page:

- Windows Pre-Installation
- Successfully performed an attended or unattended installation.

10.1 Post-Installation Tasks

Get started:

- Use the Management Portal to manage your InterSystems IRIS instance.
- Prevent your instance from starting automatically.

Web Server Setup:

- If you did not configure your web server automatically during the installation process, you will need to connect it manually.
- In order for your web server to implement any configuration changes, you should restart your web server after the installation finishes.

Advanced Setup:

- If you plan to connect remotely to other instances of InterSystems IRIS, follow the procedure described in Define a Remote Server Connection.
- If you will be performing memory intensive activities, allocate system memory accordingly.
- Review details on how InterSystems IRIS interacts with third-party software.
- Migrate data from a different database to your newly installed InterSystems IRIS instance.

Special Considerations:

- If you are running multiple InterSystems IRIS instances, review Configuring Multiple InterSystems IRIS Instances.
- Change the InterSystems IRIS language.
- Verify the Windows write-cache buffer is correctly enabled.