



CrossOver Office™ Server Edition Evaluation Guide

Overview

This guide has been created to help potential customers plan and evaluate a pilot installation of CrossOver Office Server Edition. This checklist serves three functions. First, it acts as documentation on how to install and configure the evaluation software on a representative set of your client hardware. Second, it provides a framework for making an informed buying decision—if the software performs reasonably well in this controlled pilot, it should work well in production, too. Third, it serves as a roadmap that helps CodeWeavers give you informed support for your evaluation.

The complete evaluation process consists of nine steps, described below:

- Step One: Verify Test Platform**
- Step Two: Install and Run Preflight Tool**
- Step Three: Install Server Software**
- Step Four: Install Desired Windows Applications on Server**
- Step Five: Create Client Packages**
- Step Six: Copy and Install Client Packages**
- Step Seven: Test Client Software**
- Step Eight: Limited Rollout**
- Step Nine: Purchase Decision**

Each of these steps is discussed in more detail within the guide. Assuming that everything proceeds well, loading both the server and client software components should only take you a few hours. This will depend primarily on the number of Windows applications you want to run from the server, since each app must be installed normally, as you would on a desktop system. If you find it is taking longer than that to get Server Edition installed, ask CodeWeavers for help. Once installed, the length of your evaluation process will be driven largely by your end users, and how long they need to validate the performance of the Windows applications on their desktop(s). In most cases, a few days or a week will suffice.

Getting Help

CodeWeavers wants to ensure that your evaluation proceeds as smoothly as possible. Please feel free to make use of our automated email ticket support system, and the exclusive ticket list we have established for assisting Server Edition customers. You can access this ticket system by simply sending an email to server-support@codeweavers.com. Alternately, feel free to visit our support page, at <http://www.codeweavers.com/support/>.

Evaluation Steps

❑ Step One: Verify Test Platform

The first step is to select a test environment on your side and insure that it meets the minimum requirements. For a good test, you will have to have a server and several clients that are at least representative of the type of clients you wish to use in your organization. Ideally, you can start with one or two test clients and quickly migrate to testing with live customers.

- ❑ 1A. Verify Server Meets Minimum Requirements
For test purposes, any x86 PC, running a relatively modern Linux distribution should suffice. We test against Red Hat 7.2 and up, SuSE 8.0 and up, Mandrake 8.2 and up, and Debian.

The server must have X Windows installed, and must also have `ssh` installed and `sshd` started. We recommend `openssh 3.4` or above.

The server must have a minimum of 400Megabytes of storage available on the `/opt` partition. We recommend a minimum of 256 Megabytes of RAM and advise customers to allocate roughly 50 Megabytes of memory for each user that will be connected to the server.

- ❑ 1B. Verify Clients Meet Minimum Requirements
The Linux clients can be running any x86 based PC and pretty much any version of Linux. The Solaris clients must use the SPARC architecture and have either Solaris 8 or Solaris 9; Solaris 2.6 is not supported at this time.

All clients must have `ssh` installed; we recommend `openssh 3.4` or above.

The clients will need a minimal amount of storage (~2 Megabytes), must have X Windows installed, and will require about 1M of memory.

- ❑ 1C. Verify Network Configuration Meets Minimum Requirements
In order for CrossOver to function, we require that each user, when running on their client, have a `userid` on the server that is identical to that of the `userid` they are using when logged in to their client. We also recommend that clients have a method for sharing files on the network. Generally, our clients use NIS or LDAP to accomplish the former, and NFS or Samba to accomplish the latter.

- ❑ 1D. Verify Windows Software Availability and Licensing
Make sure that you have a copy of the software you wish to test available, preferably on CD. Please note that you are also responsible for insuring that you have proper licensing for the software you wish to use. We recommend using Microsoft Office 2000 as the test software; it is complex enough to permit a thorough evaluation, and it is well supported by CodeWeavers.

❑ Step Two: Install and Run Preflight Tool

The second step is to run our preflight tool which will insure that your server and clients meet our minimum requirements. This tool, named ‘preflight’ is a Perl script and should have been provided to you with your evaluation materials.

To run it, open a terminal window, and invoke the following command:

```
perl preflight --server
```

- ❑ 2A. Does the preflight tool report that ‘All tests passed’? If not, contact server-support@codeweavers.com

After you have selected a representative set of client machines, we request that you run the client side preflight tool on each representative machine. In other words, if you have only Linux clients in your environment, then one Linux test machine will be fine. If you have a mix of Solaris and Linux machines, then we ask that you run this on each of one Linux machine and one Solaris machine.

To run the client preflight, log in as a regular user, open a terminal window, and invoke the following command:

```
perl preflight --client
```

You will need to enter the name or ip address of the server.

- ❑ 2B. Does the preflight tool report that ‘All tests passed’? If not, contact server-support@codeweavers.com

❑ Step Three: Install Server Software

You should have been provided a file, named something like ‘install-crossover-office-se-1.3.1.sh’ as part of this evaluation. To install it, log in to the server as the root user, and invoke the installation shell script (a command such as the below should work):

```
sh install-crossover-office-se-1.3.1.sh
```

The installer should begin a graphical installation process. First, you will be provided with a license agreement. Note that with your package, you should have received an email based license grant permitting to use this software for the evaluation. Next, after you click on ‘Begin install’, it should start the installation process. Finally, after the files have been copied (and after a bit of a delay), a ‘Configure Now’ button should appear. This signals a successful installation.

- ❑ 3A. Did server software install correctly? If not, contact server-support@codeweavers.com

❑ Step Four: Install Desired Windows Application

For the next step, we need to run the OfficeSetup configuration tool, which is the primary tool used by CrossOver to configure our software. To begin this process, select the ‘Configure Now’ button. You will be asked a few preliminary questions about your proxy server settings, if you have any. Finally, you will see a screen which lists all supported applications.

Select the supported application you wish to test. **Please note that we strongly recommend against evaluating Server Edition with Windows software that is not on the CrossOver Office supported application list.** You can find this list of applications at:

(http://www.codeweavers.com/products/office/supported_applications.php)

We recommend first testing with a known good application so that you understand how the process works and can verify that the clients work properly. Once we have achieved that success, you can go back and try additional applications. After selecting your application, press the 'Add' button, insert the software CD, and begin the installation. Please note that as you install the software, you should simply accept default values (it is perfectly okay, for example, to agree to C:\ based installation paths; CrossOver translates these into meaningful values).

After the installation completes, you will be returned to the OfficeSetup configuration screen. You may have icons for the programs you installed on your server menu, but please note:

Important note:	Do not run Windows applications as the root user on the server because any changes you make as the root user will affect <i>all</i> users on the server.
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- 4A. Did Windows applications install correctly? If not, contact server-support@codeweavers.com

LTSP Note:	If you are using the Linux Terminal Server Program (LTSP), you can skip steps Five and Six.
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Step Five: Create Client Packages

The next step is to create client packages. To accomplish this, select the 'Client Packages' tab in OfficeSetup and click on the 'Make Packages' button. Note that you will be given a choice of three sets of client types to create. Select only the client packages you need. Your choices include packages for RPM based Linux, Packages for Solaris, and a self installing script for non RPM based Linux systems.

When you create the client packages, you will be prompted for a directory to place the packages into. If you have have NFS or Samba running on the server, we recommend that you write these packages directly to a commonly available mount point so that you will not need to copy the files further.

You need to make a choice: whether or not to require a passphrase for each client. CrossOver uses ssh as its fundamental transport system. In its default mode (with no passphrase) we create a pair of public/private keys which are used to enable the client to access the server without entering a password. We use the ssh tools to do this, and we believe it is quite secure. However, for those sites whose clients are outside of the company firewall, or those wishing extra security, may wish to require passphrases, which will require a passphrase prior to running any CrossOver application. If you desire this operation, select the 'require passphrase' checkbox.

After you request the client packages be created, CrossOver will process for a while, and eventually create a set of clients in the directory you have selected. The files created will be as follows (based upon client options chosen):

Package Selected	Files Created	Description
Linux RPM	cxclient-1.3.1-1.i386.rpm cxclient-profile-1.3.1-std.i386.rpm install-cxclient-rpms-1.3.1.pl	The cxclient rpm is the standard CodeWeavers client software package. The profile rpm includes icons and customizations for your specific environment. The Perl script is a simple Perl script that includes both of these RPMs and can be used as a self installing program to simplify installation.
Solaris Package	cxclient/ cxclientp/ install-cxclient-pkgs-1.3.1.pl	The cxclient/ directory is a standard Solaris package directory that contains the CrossOver client software. The cxclientp directory is a package that contains icons and customizations for your environment. The package directories are installed using the pkgadd command. The Perl script is a simple Perl script that includes both package directories and can be transferred and run as a self installing program.
Linux Installer	install-cxclient-1.3.1.sh	This shell script is a self installing program, similar to the server installer, which will install the client software onto a target client. It will be necessary to run the clientsetup program after installation in order to transfer icons and customizations to each client.

- 5A. Did the client packages get created properly? If not, contact server-support@codeweavers.com.

Step Six: Copy and Install Client Packages

Once the client packages are created, you will need to transfer and install them on the client. At this point, you have many choices. Any **ONE** of the following will work fine:

1. Install using the 'Install Packages' button in OfficeSetup **Recommended Trial Method** (requires `sshd` on the client and a Solaris or RPM based Linux client)

To perform this installation, simply select the 'Install Packages' button that appears on the final screen of the 'Make Packages' wizard in OfficeSetup. You will be prompted for the root password on the target client machine, and the software will be transferred and installed on that machine.

Note: this process will fail if you do not have `sshd` running on the target client machine, or if you cannot use `ssh` to connect to the target client machine.

- or**
2. Install using the self installing Perl script
(you must transfer the file manually, and this only applies to Solaris or RPM based Linux clients).

To perform this step, transfer the appropriate `install-cxclient-<type>-1.3.1.pl` file to your target client machine. Once you have transferred the file, you must log in as root and invoke it simply by running:

```
perl install-cxclient-<type>-1.3.1.pl
```

This should unpack either the RPMs or Package directories and perform either an `rpm -Uvh` to install the software on Linux, or a `pkgadd` to install the software on Solaris. This perl script is very simple and the top of it is human readable, so feel free to inspect it prior to running it.

- or**
3. Install manually using `rpm`, `pkgadd`, or other package installation tool. Alternately, it is easy to use standard Linux or Solaris tools to install the packages created by OfficeSetup. To that end, you can copy the RPMs created to a client machine and use the RPM management tool of your choice to install them. The RPMs are designed to be useable with tools such as Kickstart and Red Carpet. Similarly, the two package directories are suitable for transferring to a Solaris machine for use with `pkgadd`. To install the Solaris packages, assuming you have transferred the `cxclient` and `cxclientp` directories, simply type the following command in a console:

```
pkgadd -d . cxclient cxclientp
```

Note: you can also use `pkgtrans` to convert the Package directories into `.pkg` files; to do this, enter:

```
pkgtrans -s . cxclient.pkg cxclient
pkgtrans -s . cxclientp.pkg cxclientp
```

- or**
4. Install using the self installing Linux client program
(for non RPM based Linux installations)

To perform this step, transfer the `install-cxclient-1.3.1.sh` file to the target client machine. Start the installer as root, and invoke the following:

```
sh install-cxclient-1.3.1.sh
```

This should guide you through a graphical installation procedure similar to the server installation. At the end of this process, you will need to run the client setup program (selected by pressing 'Configure Now') to specify the server and to retrieve the icons and other configuration information from the server.

After package installation, you should log off of the client machine, and log back in again as a regular user. The user on the client machine should now have icons within their menu that represent the Windows programs installed in CrossOver Office on the server.

- 6A. Did client packages install correctly? If not, contact server-support@codeweavers.com

❑ Step Seven: Test Client Software

After the installation has completed, your client should now be ready to run Windows applications via the server software. The tests you can make are as follows:

- ❑ 7A. Test menus
After you log back in to the client, the KDE, Gnome, or CDE menus should be updated to reflect the Windows software you installed onto the server. If you do not see these icons, contact server-support@codeweavers.com.

- ❑ 7B. Test a single application
Select one of the icons and press it to invoke the application. If you do not have icons (perhaps because you use an alternate Window manager), you can find script aliases for many popular programs in `/opt/cxclient/bin`. So, for example, you can generally run `/opt/cxclient/bin/winword` to invoke Microsoft Word after installation.

Note: **The first time you run the software will behave differently than all subsequent runs. If you have never used ssh to connect to the server before, you will need to answer ‘yes’ to allow ssh to connect to that host. Further, you will need to enter your password for the user. Finally, a first time configuration will be run which will take some time. You should find that all subsequent runs are at much higher speed and with no interruptions.**

Did the single application load and run properly on the client? If not, contact server-support@codeweavers.com.

- ❑ 7C. Test MIME associations
Open a file manager and browse to a directory that contains a document that is associated with the Windows software you just installed. For example, if you just installed Microsoft Office, browse to a directory with a ‘.doc’ file or an ‘.xls’ file, and double click on the file. CrossOver should invoke the appropriate application on a read only copy of the document file.

If this fails, please report the failure, and your Window Manager to server-support@codeweavers.com.

- ❑ 7D. Test email association
Have someone send you an email with one of the Windows document types attached. Verify that within your email client (e.g. Kmail, Evolution), you can either double click (or right click and pick CrossOver) and have CrossOver open the appropriate application on the attached document.

If this fails, please report the failure, and your Window Manager to server-support@codeweavers.com.

❑ Step Eight: Limited Rollout

At this point, you should have a good working CrossOver configuration, suitable for an evaluation. You can use any of the methods discussed in Step Six, above, to distribute clients throughout your network.

The exact nature and number of clients is up to you. However, we ask that this portion of the evaluation last no longer than 30 days. We feel that time period is enough for you to reasonably assess whether or not the software works for you in your environment.

At this time, you may wish to install other Windows software. You can do this by running the OfficeSetup program as the root user on your Linux server. However, please note that you will have to recreate and reinstall the client packages in order for this to fully take effect on the clients. Further, you may find it necessary to remove the `~/ .cxoffice` directory, on the Linux server, for each client you are testing. (This latter directory can always be removed for any regular user; CrossOver recreates it on the fly).

- ❑ 8A. Report your status.
We very much appreciate hearing back from prospective customers at this point. We like to know both how the first seven steps went and that you are now starting a formal evaluation. This is also a good time to discuss problems and/or possible enhancements with your CodeWeavers sales representative.

❑ Step Nine: Purchase Decision

If all the above steps have been performed successfully, the software should be running well on the representative pilot desktops. Assuming you are satisfied with the performance of the applications, CodeWeavers would consider a purchase appropriate at this point.

- ❑ 9A. Please inform your CodeWeavers sales representative or authorized reseller about the state of your purchase decision. Even if you are not planning to proceed with a purchase at this time, we greatly appreciate understanding how the evaluation went for you, and what actions we can take that would lead to a purchase in the future.
- ❑ 9B. Server Edition is available for sale directly over the web at:
<http://secure.codeweavers.com/store/>

Alternately, please contact a reseller near you:
<http://www.codeweavers.com/about/partners.php>
- ❑ 9C. You can reach CodeWeavers at:

Phone: (USA) 651-523-9300
FAX: (USA) 651-523-9399
Email: sales@codeweavers.com
server-support@codeweavers.com