

Implementation Guide



XFRACAS

VERSION 2023

ReliaSoft

XFRACAS IMPLEMENTATION GUIDE

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Getting Started

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Introduction

This guide provides instructions to implement ReliaSoft XFRACAS by Hottinger Bruel & Kjaer Inc. for your organization. This will require:

- IT support to prepare the database and web server(s) and install the website.
- Practical decisions from the individual(s) who will configure the site to meet your organization's particular needs.

To learn more about configuration options, see the [XFRACAS admin help](#).

Note: To view a web-based version of this implementation guide, go to <https://help.reliasoft.com/xfracas23/ig/> or access it from the Getting Started section of the admin help.

We recommend that you read each of these topics sequentially and follow the instructions. In general, you will need to perform the following steps:

1. Plan for your XFRACAS implementation. This will involve answering important questions about your organization's business needs so you can configure the application in a way that supports these needs.
2. Prepare your database and web servers for your implementation.
3. Install the website and activate your license.
4. Create a ReliaSoft database, if you don't already have one that you'd like to use.
5. Update the configuration file on the web server.
6. Perform various post-installation tasks, as necessary, to ensure that the application functions properly.
7. If desired, make configuration changes to IIS to improve security.
8. Complete some initial XFRACAS configuration tasks such as setting preferences, establishing user accounts, configuring fields and defining system templates and parts, among other tasks.

XFRACAS Architecture and Requirements

XFRACAS is a web-based application that serves the needs of engineering teams of any size. Based on the .NET Framework, it is designed to be n-tier, scalable, distributable, robust and able to be deployed across multiple servers or on a single computer.

Server Requirements

If you plan to host the database and website on the same server, you will need the following:

- Windows 2012 or newer
- .NET 4.8
- IIS with support for serving ASP.NET
- SQL Server 2012 or newer OR Oracle 12c or newer

If Microsoft Office is installed, it must be 64-bit.

Client Requirements

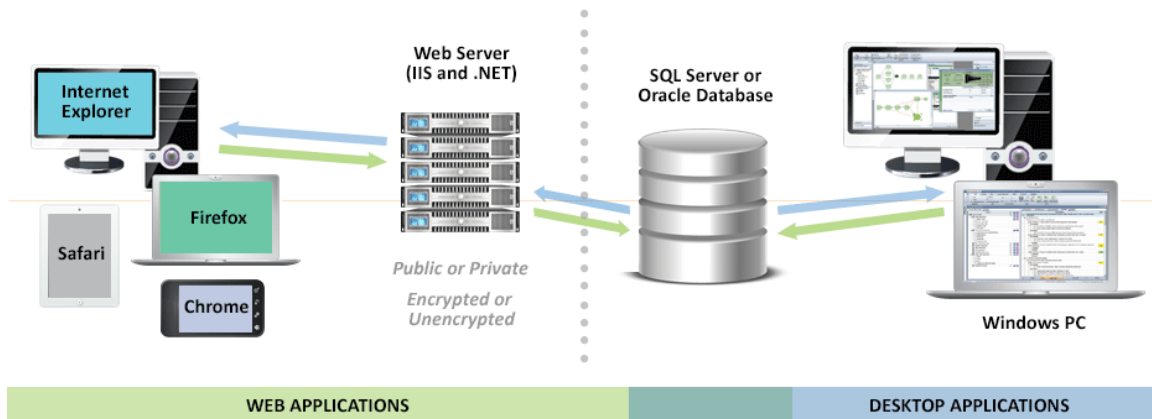
Once the website has been implemented, users can access it with any browser that supports the following doctype:

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
    "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
```

This includes most common browsers (such as Chrome, Safari and Firefox) that are available for Windows, Mac and tablet operating systems.

If the site is private (e.g., `http://InternalServer/XFRACAS`), an application administrator may need to provide instructions for accessing the site on the internal network from mobile devices (e.g., via VPN or some other method).

These are the same requirements as for SEP, which provides web-based access to a variety of metrics and analyses performed in ReliaSoft desktop applications (Weibull++, XFMEA, etc.). Both applications can be deployed together on the same database and web server(s).



IMPORTANT: Microsoft recommends that Dynamic Data Exchange (DDE) should be disabled by default in Excel.

Plan Your XFRACAS Implementation

Before you begin, the person who will be making practical decisions about how to configure XFRACAS for your organization will need to gather some information to prepare for the initial configuration after the website is installed. The specific configuration steps are discussed in [Ini-](#)

tial [XFRACAS Configuration](#). Minimum data requirements are summarized here to help you plan ahead.

System-wide Preferences

You will need to plan ahead for some of the system-wide preferences that are relevant for the initial configuration. Be prepared to answer the following questions:

- Does the website need to use Secure Socket Layer (SSL) support?
- Will the web server be configured for Single Sign-On (SSO) authentication? If so, will it use the default variable (Auth_User) or do you need to configure XFRACAS to recognize a different variable?
- Will you allow users to upload file attachments? If so, will the files be stored in the database or uploaded to the web server?
- What is the port and address for the SMTP server that will be used for e-mail notifications? Will TLS be used to secure SMTP?

For a comprehensive list of all preferences, see “[Managing Preferences](#)” in the admin help.

Entities

XFRACAS can be configured with a single entity (where all users share the same configuration settings and data) or with multiple entities (where each entity has its own separate user permissions, settings and data).

For example, you might choose to create separate entities within XFRACAS if your organization has different business units or functional teams that require the website to be configured for different needs, processes and/or terminology. You may also need separate entities if there’s a requirement to segregate some portion of the data.

- The system-wide preferences, companies, contacts and locations will be the same for all entities in the database.
- The user permissions, systems and most configuration options can be managed separately for each entity.

Your XFRACAS license determines the number of entities that you can create for your implementation.

Users and Security Groups

You will need to compile at least the minimum details for new user accounts. After XFRACAS is installed, you will be able to create user accounts via the website or import details from an XML file or Microsoft Active Directory. The minimum information required for each user includes:

- first name, last name
- domain\username (Windows login)
- e-mail address

You will also need to plan the security groups that new users will be assigned to (e.g., read-only, regular, admin). This is more efficient than assigning permissions individually to each user.

For a comprehensive list of all user categories and permissions, see “[Managing Users](#)” in the admin help.

Systems/Parts/Templates/BOM

You will need to decide how your organization will track incidents. After XFRACAS is installed, you will be able to define system configuration(s) via the website or import the data from an XML or Excel file or from XFMEA/RCM++.

Generic Template

If you plan to track by part number/version (not serial number) or by process/task, you only need to create generic template(s). This requires the following information:

- At least a number and name for each part (or process)
- An understanding of how the parts (or processes) are related hierarchically
- A list of users who are responsible for specific parts (or processes) — this is required for at least one item and recommended for all top-level items

Serial Numbers

If you plan to track by specific instances of a part or system (identified by serial number when applicable), you will need to create the following:

- A generic template that identifies the types of parts and responsible users (as described above)
- A serialized configuration for each individual system that you are tracking — this requires a unique serial number for at least each top-level system

Either approach can be used to gather data for analysis in Weibull++, RGA or XFMEA. Serialized systems allow you to track issues for specific customers and collect more accurate reliability data for further analysis. However, such systems can be considerably more complicated to set up and manage.

For more information, see [“Managing System Templates”](#) and [“Managing Serialized Systems”](#) in the admin help.

Review Sample Data from Current FRACAS (if Applicable)

If your organization has previously used any other FRACAS systems or processes, you will need to do the following:

- Assemble and review sample data to help identify the specific fields you wish to configure in XFRACAS (e.g., required fields you want to continue to capture, new fields that are currently lacking, etc.).
- Compile any “pick lists” that will be available throughout the site (e.g., modes of operation, fault codes, etc.). You will be able to create these lists via the website or import them from Excel or XML.

For more information, see [“Managing Details”](#) and [“Managing Lists”](#) in the admin help.

Contacts, Companies, Locations

If you plan to use the Customer Support interface, you will also need to gather details for any contacts, companies or locations that you want to predefine in the site.

For more information, see [“Managing Contacts,”](#) [“Managing Companies”](#) and [“Managing Locations”](#) in the admin help.

Install the Application

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Prepare the Database Server (SQL Server or Oracle)

The ReliaSoft desktop applications, XFRACAS and SEP are all designed to connect with the same database on either SQL Server or Oracle.

If you need to establish a new database, the following considerations apply for preparing the database server. Later, you will use the admin utility to either create the database or connect to an existing one. (See Create the ReliaSoft Database (if Applicable) and Update the Configuration File.)

Setting up for SQL Server or Oracle

SQL Server

- **Make sure you have the latest version of SQL Server running.** To do this, run the following query in Query Analyzer: “Select @@version”. This should return a value like “Microsoft SQL Server 2005 - 9.00.3042 (Intel X86)” or “Microsoft SQL Server 2008 R2 - 10.50.1617 (X64),” depending on which SQL Server service pack you have installed.
- **Make sure you know the SQL Server Name.** This is a local server name or IP address so the IIS machine with the .NET application can connect to the database. These instructions assume that you will use a default instance of SQL Server to host the ReliaSoft database (e.g., SERVERNAME). If not, you must specify the instance when you enter the server name (e.g., SERVERNAME\INSTANCENAME).

Oracle

For easier support, we recommend installing the SQL Worksheet (available with the Enterprise edition) or Oracle SQL Developer (free to download from the Oracle website).

Replication and Backups

XFRACAS, SEP and the ReliaSoft desktop applications cannot be deployed with bi-directional (peer-to-peer or merge) database replication. They are designed for use with a single back-end database and do not handle conflict detection and resolution. It may be possible to use a ReliaSoft database with uni-directional (transactional or snapshot) replication; however, this is likely to affect performance, and you must test to evaluate the impact in your particular situation. *This type of use is not recommended or supported by ReliaSoft.*

For the purpose of disaster recovery, we recommend establishing a regular schedule for database and transaction log backups and storing these backups in a location that is protected from potential failure of the application's database server. If an issue occurs, you can restore the most recent database backup (e.g., nightly) and then restore subsequent transaction logs up to the point right before the failure.

Prepare the Web Server - IIS

Note: XFRACAS cannot be installed on a server running Windows 2012 R2 if the server has Active Directory or DNS services installed.

To prepare the web server prior to installing XFRACAS, make sure the IIS Web Server role and services are installed. In addition, if applicable, prepare for SSL protection.

IIS Roles and Features

Install the Web Server (IIS) role (if it is not already installed) and make sure the following role services are also installed. (*Instructions follow this table for Windows 2019, 2016 and 2012.*)

To use the XFRACAS web service, you must also make sure **HTTP Activation** is enabled for the .NET Framework (under **Features**).

	WINDOWS 2019	WINDOWS 2016/2012
Web Server		
Common HTTP Features		
Default Document	x	x
Directory Browsing	x	x
HTTP Errors	x	x
Static Content	x	x
HTTP Redirection	x	
Health and Diagnostics		
HTTP Logging	x	x
Custom Logging	x	x
Logging Tools	x	x
Request Monitor		x
Performance		
Static Content Compression	x	x
Dynamic Content Compression	x	x
Security		
Request Filtering	x	x
IP and Domain Restrictions	x	x
Windows Authentication	x	x

	WINDOWS 2019	WINDOWS 2016/2012
Application Development		
.NET Extensibility 4.7	x	
.NET Extensibility 4.5 or 4.6		x
Application Initialization	x	x
ASP.NET 4.7	x	
ASP.NET 4.5 or 4.6		x
ISAPI Extensions	x	x
ISAPI Filters	x	x
Management Tools		
IIS Management Console	x	x

Note that if you do not already have the required version of the .NET Framework installed, you will need to have the operating system installation media available when you install the Web Server (IIS role). The required file is in the sources/sxs folder.

1. Open the Server Manager.
2. Click the **Manage** menu, choose **Add Roles and Features** and proceed through the wizard.
3. On the Server Roles page, select **Web Server (IIS)**.
 - a. If the role is already installed, expand the node, review the services that are already installed and select additional services if applicable.
 - b. If the role is not already installed, accept any prompts to install required features and proceed to the **Web Server (IIS) > Role Services** page, where you can select the services you need to install.
4. On the Features page, select **HTTP Activation** under **.NET Framework Features > WCF Services** for the version of .NET you are using.
5. At the end of the wizard, click **Install**.

SSL Certificate

If you want the website to use HTTPS for secure communication (SSL/TLS), you must have a digital certificate. Later, you will use this certificate to create the binding for the site. (See

Enable HTTPS for Secure Communication.)

If you don't purchase a third-party certificate, you can create your own via another method, such as by generating a self-signed certificate using IIS Manager or using the Active Directory Certificate Services role installed on the server.

Establish a Service Account for the Application

We recommend establishing a service account (e.g., "SVC_XFRACAS") that the XFRACAS website will run as on the web server (for IIS, accessing files on the server, the DIU service, etc.).

If the ReliaSoft database is on SQL Server, this account will also be used to connect to the database and must meet the following requirements:

- It must be an Active Directory account (if the application is running on a different machine from SQL Server).
- Ideally, it should have a password that does not expire (recommended).
- If the database is on SQL Server, a user should be assigned to a public server role, with at least the **db_datareader** and **db_datawriter** roles for the ReliaSoft database. *(If the database does not yet exist, you will need to add the roles via SQL Server after you create it. See [Create the ReliaSoft Database](#).)*

Install the Application and Activate the License

After you have prepared the database and web server(s), you can log in to the web server as an administrator and perform the following steps. User Account Control (UAC) can either be left on or turned off for this installation.

1. Run the XFRACAS setup (e.g., XFRACAS23.exe) and follow the steps in the wizard to create the website and install the activation and admin tools.
2. From **Start**, search for "XFRACAS 2023 Activation" then run the product activation tool and follow the steps to activate your license.

The license will be registered to a specific e-mail address, which will receive the notification required to activate it. This will be the same address for all stages of license usage from development/staging to production. Choose an address that can be accessed by someone who changes the hardware on the server. If the hardware changes for any reason, the license must be reactivated to get XFRACAS back up and running.

Create the ReliaSoft Database (if Applicable)

If you already have a database that the website will use, skip ahead to [Update the Configuration File](#).

Plan for Your Implementation

To create a new ReliaSoft database, you'll need to run the XFRACAS admin utility (which resides on the web server) from a Windows user account that has the following permissions:

- For SQL Server implementations, you must be able to create objects under the default database owner (dbo) schema. Be prepared to specify the server and database names.
- For Oracle implementations, you must be able to create a database. Be prepared to specify a port, host, service name or SID, schema and password.

Note: If you are using Oracle 19c with a pluggable database (PDB), the service name must be fully qualified — e.g., [PDBName].[db_domain].

Created Admin Accounts

During this process, the admin utility automatically creates two new user accounts for you — one for SEP and ReliaSoft desktop applications and another for XFRACAS — that use your Windows login and provide full admin permissions for those applications. The XFRACAS account is a special, IT/admin-only account for tasks such as updating database tables, rolling out new permissions to other admin users, performing bulk data imports (so imported records are not assigned to a specific user), etc. It is invisible to regular users and does not count against the number of users allowed by your XFRACAS license.

Future Upgrades and Ongoing IT / Maintenance Tasks

We recommend performing upgrades and ongoing IT/admin tasks from the same Windows account that you used to create the database (which, by default, has the database permissions required for all ReliaSoft applications). If you cannot identify a single person in your organization who will be available to perform these tasks — both now and in the future — we recommend establishing a shared service account for this purpose.

Note that, even if you created the database from a personal user account, you can still create a shared account to use for future upgrades:

- For SEP and desktop applications, use the admin utility to create additional accounts that are assigned to the “admin” security group.
- For XFRACAS, use the website’s **Admin** tools (**Admin > Configure > Security > Users**) to change the domain\username of the account that was created automatically.

Instructions for upgrading XFRACAS are provided in the Install Update guide that comes with your upgrade package.

Create or Upgrade the Database

1. Log in to Windows with an appropriate account for your implementation. (Alternatively, you can run the admin utility as that account in step 2).
2. From **Start**, search for “XFRACAS 2023 Admin” and open the admin utility.
3. Click either **New Enterprise Database** or **Upgrade Enterprise Database** and enter the details required to create or upgrade the database. For custom SQL Server or Oracle connections, you will need to provide a valid connection string.

Assign Roles in SQL Server for the Application Service Account

Finally, if you created a new database on SQL Server, you must make sure the application service account (i.e., the account that the application will use to connect to the database) has the required roles assigned in SQL Server. For requirements, see [Establish a Service Account for the Application](#).

Update the Configuration File

After you have installed the website, activated the license and established a database, the next step is to update the configuration file on the web server.

From **Start**, search for “XFRACAS2023 Admin” and open the admin utility. Then click **Update XFRACAS Configuration File**.

1 - On the Connection Tab:

- **Connection Info** - Enter the required details for the database that the application will connect to. If you used the admin utility to create the database, the connection information will appear in the fields automatically. If the default connection string doesn’t work for your implementation (e.g., you want to deploy XFRACAS on Azure, use SQL Authentication, etc.) you can enter a custom connection string.

Select **Encrypt Connection String** if you want to hide the connection string information within the web configuration file.

- **Application Service Account** - Enter the credentials for the service account that XFRACAS will run as on the web server (for IIS, accessing files on the server, the DIU service, etc.). If the ReliaSoft database is on SQL Server, this account will also be used to connect to the database. (See [Establish a Service Account for the Application](#).)

Select **Encrypt Impersonation Identity** if you want to hide the credentials within the web configuration file.

Note: If you choose to use encryption, the Authentication feature in IIS Manager will be unable to read the resulting web.config file. You may see an error such as “Error: Configuration section encryption is not supported.” If you need to use this feature in IIS Manager, you can temporarily remove the encryption.

2 - On the Settings Tab:

- **Command timeout** sets how long the application should wait for a command to finish. Typically, this will not need to be changed, but if you have custom SQL queries that run longer than the standard 120 seconds, you can increase this value.
- **Request timeout** sets how long IIS waits for a request to the application to finish processing. Typically, this will not need to be changed, but if you are importing large XML files into the system and they time out during import, you can extend this to a larger value.
- **Web Service Maximum File Size** sets the maximum size for files inserted into the import queue by the XFRACAS web service. This is set during installation to 10485760 bytes (or ~10 MB).
- **Upload Maximum File Size** sets the maximum file size that can be uploaded to the server. This is set during installation to 10485760 bytes (or ~10 MB).
- **Enable Temporal Tables** applies to SQL Server implementations (version 2016 and later) and is required if you plan to log user access to records. See [Configure History Logging](#) to learn more about this feature.
- **Content-Security-Policy Header** determines which types of dynamic resources are allowed to load on the site. This policy is required to detect and prevent cross-site scripting (XSS) and other code-injection attacks. Typically, it will not need to be changed; however, if you decide to modify this policy, you must include the following directives to ensure that the

site functions properly:

- `'unsafe-inline'`
- `'unsafe-eval'`
- For a SQL Server implementation,
 - a. Select **Encrypt communication** to encrypt the connection between the application and the database.
 - b. Select **Trust server certificate** if the server has a self-signed certificate.

Note: To encrypt the connection for an Oracle implementation, set the encryption type to either “requested” or “required” for the Oracle database. To learn more, consult the Oracle documentation (e.g., https://docs.oracle.com/cd/B19306_01/network.102/b14268/asoconfig.htm#i1007808).

Perform Post-installation Tasks

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After installation, you may need to configure additional settings to fit your particular implementation. The following sections provide instructions for these tasks.

In addition, Active Directory authentication should be configured to lock accounts if incorrect passwords are entered a certain number of times, in accordance with your organization's best practice for security settings.

Note: To make changes to address Open Web Application Security Project (OWASP) security concerns, see [IIS Setting for OWASP](#).

Set the .NET Temporary Folder Permission

If the .NET framework was pre-existing on the IIS server (i.e., if it was already installed and not installed via the XFRACAS installation), you may encounter a server error the first time you attempt to access the website (e.g., “Could not load file or assembly ‘DevExpress.Charts.v16.1.Core’ or one of its dependencies. Access is denied.”).

If this happens, you will need to give full permissions for the .NET temporary folder (C:\Windows\Microsoft.NET\Framework64\v4.0.30319\Temporary ASP.Net Files\) to the account that XFRACAS runs as (specified in the XFRACAS configuration file). You may need to take ownership of this folder before you are able to do this.

Release and Recycle Memory

For large systems or systems with a high transactional load, an “Out of Memory” error can occur when the request for pages exceeds the system’s capability to release and recycle the memory with the default IIS settings. The settings provided below will force IIS to recycle the memory usage and handle it better so that the “Out of Memory” error does not occur.

Note that overly aggressive settings can slow the response of the system. Typically, memory is recycled when the application pool and server are not busy. Forcing memory to recycle more often can consume processor cycle time when the application is still busy, thus slowing system performance. The following settings have been tested to prevent the error from occurring, while posing the minimum possible impact on performance.

1. In the **Connections** pane of the IIS Manager, click **Application Pools**.
2. Right-click the system’s application pool and choose **Recycling** on the shortcut menu.
3. In the Application Pool Recycling Settings window that appears, specify the following settings and then click **Next**:
 - In the **Fixed Intervals** area, select **Regular** time intervals and enter **1740**.
 - In the **Memory Based Maximums** area, select **Private memory usage** and enter **1,024,000**.
4. Select to log the following events and click **Finish**:
 - **Regular time intervals**
 - **Private memory usage**
 - **Unhealthy ISAPI**

Prepare to Store and Use Files

Note: When you upload or import an *.xlsx file to XFRACAS, the machine where the source file resides must have Microsoft Office installed. If it does not, you will receive an error notifying you that the content type is not supported.

Create a Folder for Storing Uploaded Files

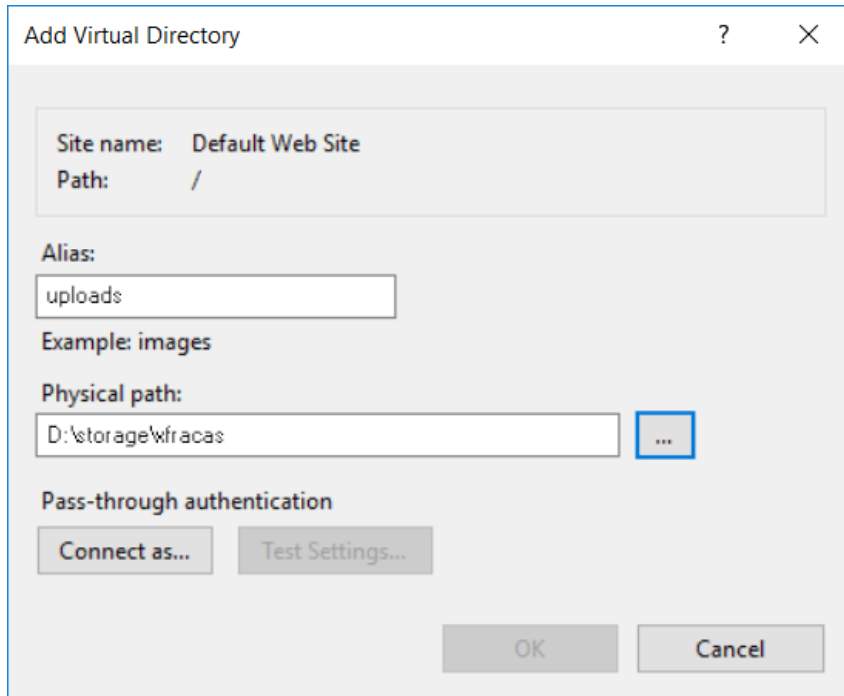
You can configure the website's Attachment window to store uploaded files on the web server (rather than in the database). If you plan to do this, you must prepare the folder where the files will be stored.

- **Option 1:** Create the folder directly within the website's IIS folder (e.g., C:\inetpub\wwwroot\XFRACAS\uploads).
- **Option 2:** Create the folder in another location on the web server (e.g., D:\storage\xfracas) and then create a virtual directory within IIS.

Create a Virtual Directory

To create the virtual directory for Option 2, do the following in the **Connections** pane of the IIS Manager:

1. Click **Application Pools** and either add a new pool or modify the default pool. Do not modify the "XFRACAS" application pool.
 - Leave the identity as **ApplicationPoolIdentity**.
 - Set the managed pipeline mode to **Classic**.
2. Right-click the **Default Web Site** node and choose **Add Virtual Directory**. This must be under the default web site node; do not create the virtual directory within the XFRACAS website.
 - Set the directory alias (e.g., "uploads" or "attachments").
 - Specify the physical path to the location where the files will be stored.



3. Click the virtual directory and double-click **Authentication**. Make sure **Forms Authentication** is disabled.
4. Right-click the virtual directory and choose **Convert to Application**. Select the appropriate application pool and click **OK**.

Test the Configuration

To test, you will need to set the appropriate preferences via the XFRACAS website (see [Preferences](#)), open a record that allows attachments (e.g., incident), upload a file and test the download.

For example, if you created an actual folder called “uploads” within the XFRACAS website, you would use:

Attachments - Uploaded Files Filesystem Prefix	c:\inetpub\wwwroot\XFRACAS\uploads
Attachments - Uploaded Files IIS Prefix	/XFRACAS/uploads

Alternatively, if you created a virtual folder called “uploads” that stores files in another location on the web server (e.g., D:\storage\xfracas), you would use:

Attachments - Uploaded Files Filesystem Prefix	D:\storage\XFRACAS
Attachments - Uploaded Files IIS Prefix	http://servername/uploads

Prepare to Use *.XLSX for Data Import

XFRACAS provides the option to use Excel templates (*.xlsx) to import some types of data, as an alternative to XML. To configure the web server to support this functionality, you must install a 64-bit version of Microsoft Office (2013 or newer) on the web server.

Enable HTTPS for Secure Communication

Enable HTTPS

If you want to use HTTPS for secure communication (SSL/TLS) and you already have a certificate for the website (see "[SSL Certificate](#)"), do the following:

1. In the **Connections** pane of the IIS Manager, open the **Sites** node under the server name. Click the **Default Web Site**.
2. In the **Actions** area on the right side of the window, click the **Bindings** link and then click the **Add** button in the Site Bindings window that appears.
3. Add a site binding of type `https` and specify your digital certificate. Close the Site Bindings window.
4. Return to the Connections pane and click the XFRACAS site.
5. Under IIS, double-click the **SSL Settings** icon. Select **Require SSL** and **Ignore**, then click **Apply**.

Enable TLS 1.2 Protocol for HTTPS (Windows 2012)

If you are using HTTPS for secure communication and you wish to enable TLS 1.2, the same protocol must be enabled for the database server, the web server and .NET on the web server. *(Also note that if you are using a digital certificate, it must be SHA-256 or higher.)*

If your web server and database server are both Windows 2016 or 2019, the TLS 1.2 protocol will be enabled by default. If either server is Windows 2012, add the following registry keys:

```
Windows Registry Editor Version 5.00
```

```
[HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCHANNEL\Protocols]
```

```
[HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCHANNEL\Protocols\SSL 2.0]
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\SSL 2.0\Client]
```

```
"DisabledByDefault"=dword:00000001
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.0]
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.0\Client]
```

```
"Enabled"=dword:00000000
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.0\Server]
```

```
"Enabled"=dword:00000000
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.1]
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.1\Client]
```

```
"DisabledByDefault"=dword:00000000
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.1\Server]
```

```
"DisabledByDefault"=dword:00000000
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.2]
```

```
[HKEY_LOCAL_
MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCH
ANNEL\Protocols\TLS 1.2\Client]
```

```
"DisabledByDefault"=dword:00000000
```

```
[HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\SecurityProviders\SCHANNEL\Protocols\TLS 1.2\Server]
```

```
"DisabledByDefault"=dword:00000000
```

Address SSO and ViewState Errors, if Necessary

SSO Authentication Blocks Print Preview or Export to XML

XFRACAS's "Print Preview" and "Export to XML" features require DTD files that are installed on the web server. If you have implemented SSO authentication, it may block the website from accessing the DTD files and these features will not respond or will return a blank page.

To address this issue, modify the hosts file on the web server (e.g., C:\windows\system32\drivers\etc\hosts) so the loopback/localhost IP address (127.0.0.1) matches the **XFRACAS Server - IIS Prefix** preference in XFRACAS. For example, if the prefix is "xfracas.servername.com," then you would add the following line in the host file:

```
127.0.0.1 xfracas.servername.com
```

"ViewState" Errors When XFRACAS is Deployed on Multiple Web Servers

The XFRACAS Configuration File utility enables ViewState encryption and generates a unique machineKey for encryption. If you deploy XFRACAS on multiple web servers that have different machineKeys, it will result in broken images on some chart and dashboard pages, as well as "viewstate" errors in the XFRACAS diagnostic log.

If you are using a load balancer, you may be able to address the issue by setting up server affinity at the load balancer such that once a user's web request is tied to a particular server, all requests from that user will continue going to that server.

Alternatively, you can copy/paste the same web.config file onto each of the XFRACAS web servers. You will need to repeat this whenever you change the website configuration.

1. On the primary web server, use the XFRACAS Configuration File utility to set the connection settings and other preferences (see [Update the Configuration File](#)).
2. After you click **OK** to save the changes, copy the entire file (e.g., C:\inetpub\wwwroot\XFRACAS\web.config) and paste it to replace the file(s) on the other web server(s).

If you prefer using Notepad (or another application) to manually update the web.config, make sure the machineKey, validationKey and decryptionKey are the same in all files. For example:

```
<machineKey
validationKey="5FC44A043D987BDC849282A0506084F7A3D0952EE5F260D
3277F018DFBABD424"
decryptionKey="F0522BACBD1E791191F243B08C785B63DBB6E91C5480FE2
114793C97BDD8DFA5" validation="AES" decryption="AES" />
```

Configure History Logging

Starting in Version 2021, if you are using a SQL Server or custom SQL Server database (version 2016 or higher), you can configure XFRACAS to log each time a record is changed. This allows users to generate reports that show a historical “snapshot” of data for a specified data and time. (See [Viewing Historical Data](#) in the user help for more information.)

To implement history logging, you’ll need to make some modifications to the configuration file:

1. Open the XFRACAS Admin Utility (search for “XFRACAS2021 Admin” in the **Start** menu).
2. Click **Update XFRACAS Configuration File** and then click the **Settings** tab.
3. In the **SQL Server Options** section, enable the **Enable Temporal Tables** option. This allows time-stamp information to be captured and stored in the database.
4. From the **Retention Period** drop-down list, select an option to specify how long you want data to be available, and then click **OK**. Any records that are older than this period will be deleted from the database and cannot be recovered.

Note: By default, this is set to 1 year; however, you must have sufficient disk space to store data for the specified period. Exceeding the available space will result in a loss of data. Keep in mind that you can export report results if you need to retain data for longer periods.

You can disable the **Enable Temporal Tables** option at any time. This will not delete any data that is within your specified retention period; instead, XFRACAS will simply stop collecting and storing this information.

Configure IIS for Enhanced Security

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IIS Settings for OWASP

This section provides recommendations to address issues that may be identified if you choose to scan your web server for Open Web Application Security Project (OWASP) security concerns.

For some of the issues listed here, you will need to install the URL Rewrite tool, available at <http://www.iis.net/downloads/microsoft/url-rewrite>.

- The tasks performed in the IIS Manager should be done at the default website level (i.e., in the Connections pane, open the **Sites** node under the server name and click **Default Web Site**).
- Alternatively, the model web.config code summarizes the changes made in the IIS Manager (see [Default web.config Changes](#)).

Note: If you make these changes directly in the web.config file in the root folder for your SEP website, you can skip the steps shown below in italics.

Web Server Default Welcome Page

From the wwwroot directory, remove iisstart.htm, welcome.png and the asp_client folder.

Clickjacking: X-Frame-Options Header Missing

1. In the IIS Manager Home page, double-click **HTTP Response Headers**.
2. In the **Actions** area, click **Add**. Enter **X-Frame-Options** as the name and **SAMEORIGIN** as the value.

OPTIONS Method Is Enabled

1. In the IIS Manager Home page, double-click **Request Filtering**.
2. On the **HTTP Verbs** tab, click **Allow Verb** in the **Actions** area and enter **Options** in the **Deny Verb** window.

Microsoft IIS Version Disclosure

1. In the following Registry key, create a dWORD entry, DisableServerHeader, and set its value to 1: HKLM\SYSTEM\CurrentControlSet\Services\HTTP\Parameters
2. In the IIS Manager Home page, double-click **URL Rewrite**.
3. In the **Actions** area, click **View Server Variables**, then click **Add** and enter **RESPONSE_SERVER** in the text box.
4. Add an outbound rule to rewrite the **RESPONSE_SERVER** server variable as blank.
 - a. In the **Actions** area, click **Back to Rules** and then click **Add Rule(s)**.
 - b. In the **Add Rule(s)** window, click **Blank rule** in the **Outbound rules** category and click **OK**.
 - c. Create the outbound rule using the following settings:
 - *Name: Response Server*
 - *Precondition: None*
 - *Matching scope: Server Variable*
 - *Variable name: RESPONSE_SERVER*
 - *Variable value: Matches the Pattern*

- *Using: Regular Expressions*
- *Pattern: .+*
- *Action type: Rewrite*
- *Action Properties:*
 - *Value: <leave this field empty>*
 - *Replace existing server variable value: Selected*

ASP .NET Version Disclosure

1. In the IIS Manager Home page, double-click **URL Rewrite**.
2. In the **Actions** area, click **View Server Variables**, then click **Add** and enter **RESPONSE_X-ASPNET-VERSION** in the text box.
3. *Add an outbound rule to rewrite the RESPONSE_X-ASPNET-VERSION server variable as blank.*
 - a. *In the **Actions** area, click **Back to Rules** and then click **Add Rule(s)**.*
 - b. *In the Add Rule(s) window, click **Blank rule** in the **Outbound rules** category and click **OK**.*
 - c. *Create the outbound rule using the following settings:*
 - *Name: x-ASPNet*
 - *Precondition: None*
 - *Matching scope: Server Variable*
 - *Variable name: RESPONSE_X-ASPNET-VERSION*
 - *Variable value: Matches the Pattern*
 - *Using: Regular Expressions*
 - *Pattern: .+*
 - *Action type: Rewrite*

- *Action Properties:*
 - *Value: <leave this field empty>*
 - *Replace existing server variable value: Selected*

X-Powered-By Header

1. In the IIS Manager Home page, double-click **HTTP Response Headers**.
2. Select the **X-Powered-By** header and click **Remove**.
3. In the IIS Manager Home page, double-click **URL Rewrite**.
4. In the **Actions** area, click **View Server Variables**, then click **Add** and enter **RESPONSE_X-POWERED-BY** in the text box.
5. *Add an outbound rule to rewrite the RESPONSE_X-POWERED-BY server variable as blank.*
 - a. *In the Actions area, click **Back to Rules** and then click **Add Rule(s)**.*
 - b. *In the Add Rule(s) window, click **Blank rule** in the **Outbound rules** category and click **OK**.*
 - c. *Create the outbound rule using the following settings:*
 - *Name: X-Powered*
 - *Precondition: None*
 - *Matching scope: Server Variable*
 - *Variable name: RESPONSE_X-POWERED-BY*
 - *Variable value: Matches the Pattern*
 - *Using: Regular Expressions*
 - *Pattern: .+*
 - *Action type: Rewrite*
 - *Action Properties:*
 - *Value: <leave this field empty>*
 - *Replace existing server variable value: Selected*

Custom Errors

1. In the IIS Manager, open the Configuration Editor.
2. In the **Section** drop-down list, choose **system.web/customErrors**.
3. Set **Mode** to **RemoteOnly**.

Allowable File Name Extensions

If you have chosen to lock down your IIS by removing the default **Allow unlisted file name extensions** setting, then you must add certain extensions to the allowable list by doing the following:

1. In the **Connections** pane, open the **Sites** node under the server name. Click the XFRACAS site.
2. In the Home page, double-click **Request Filtering**.
3. For each of the following extensions, in the **Actions** area, click **Allow File Name Extension** and enter the extension:

.asax	.dtd	.js
.ashx	.gif	.png
.aspx	.htm	.xml
.axd	.html	.xslt
.css	.ico	

Default web.config Changes

```
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
  <system.web>
    <customErrors mode="RemoteOnly">
    </customErrors>
  </system.web>
  <system.webServer>
    <httpProtocol>
    <customHeaders>
      <remove name="X-Powered-By" />
    </customHeaders>
  </system.webServer>
</configuration>
```

```
        <add name="X-Frame-Options" value="SAMEORIGIN" />
    </customHeaders>
</httpProtocol>
<security>
    <requestFiltering>
        <verbs>
            <add verb="OPTIONS" allowed="false" />
        </verbs>
    </requestFiltering>
</security>
<rewrite>
    <outboundRules>
        <rule name="Response Server">
            <match serverVariable="RESPONSE_SERVER" pattern=".+" />
            <action type="Rewrite" />
        </rule>
        <rule name="X-Powered">
            <match serverVariable="RESPONSE_X-POWERED-BY" pattern=".+" />
            <action type="Rewrite" />
        </rule>
        <rule name="x-ASPNet">
            <match serverVariable="RESPONSE_X-ASPNET-VERSION" pattern=".+" />
            <action type="Rewrite" />
        </rule>
    </outboundRules>
</rewrite>
</system.webServer>
</configuration>
```

Configure XFRACAS

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Start the DIU Service

The XFRACAS Data Import Utility (DIU) is a service that must run on the web server in order to use any of the following features:

- E-mail notifications that are triggered based on calendar date (e.g., E-mail - Incident Action Due Date, etc.).
- Data imports that have been scheduled to run via the Data Import page in the website.

Starting in Version 2021, the DIU must also be running to support two additional features:

- **E-mail notifications about account access.** These e-mails warn users that their account access will be suspended if they fail to log in within a specified number of days. (See "[Disabling Account Access Due to Inactivity](#)" in the admin help.)
- **Daily e-mail digests.** This digest contains a list of records that have changed within the past 24 hours. It is subscription based. (See "[Getting Notified when Records Are Updated](#)" in the user help.)

IMPORTANT: If you have a load-balanced environment with multiple web servers, the DIU service should run on only one server.

1. From **Start**, search for "Services" and open the Services window.
 2. In the list of local services, right-click **XFRACAS DIU** and select **Properties**.
 3. On the Log On page, enter the credentials for the account that XFRACAS runs as on the web server (see [Establish a Service Account for the Application](#)).
 4. On the General page, set the **Startup type** to either **Automatic** or **Automatic (Delayed Start)**. Then click **Start** to start the service.
-

The current status of the DIU service will appear at the top of the Data Import page.

If you need to modify the settings for the DIU service, you can edit Service.xml on the web server. By default, this file is installed in the bin folder for the XFRACAS website (e.g., C:\inetpub\wwwroot\XFRACAS\bin). Typically, this will not be necessary unless you receive specific instructions from ReliaSoft Support.

After XFRACAS has been installed, you will need to configure it to meet your organization's needs. This section identifies the initial configuration options we recommend to get the site up and running. You can then review the behavior of the system and adjust the settings to achieve the desired behavior for your organization. This may take several iterations to determine the settings that meet your particular needs.

Tip: If you plan to configure XFRACAS with more than one “entity,” (where each entity has its own separate user permissions, settings and data), it is important to consider the needs of all entities before you configure the first one. The first entity is typically used as a template for standard operating procedures (SOPs) that need to be the same across all entities.

- [Preferences](#)
- [Users and Security Groups](#)
- [Systems and Parts](#)
- [Map or Import Existing Records \(if Applicable\)](#)
- [Detail, Criticality and List Fields](#)
- [Static Pages](#)
- [Other Configuration Options](#)
- [Stored Procedures](#)

Preferences

For the initial configuration, we recommend to set at least the following preferences. For a comprehensive list of all preferences, see “[Managing Preferences](#)” in the admin help.

System-wide Preferences

HTTPS for Links

SSL Server Mode Required: If True, the website will use https (rather than http) when building links. Before you enable this option, make sure the IIS web server is configured properly for

SSL/TLS (see [Enable HTTPS for Secure Communication](#)).

SSO Authentication

XFRACAS uses Windows authentication by default. Alternatively, if your web server is set up to support SSO authentication, XFRACAS will check for the **Auth_User** variable by default. If your SSO method has been configured to use a different variable, set the following preferences:

- **Single Sign-On (SSO) Authentication Enabled:** If True, your web server is set up for SSO authentication and uses a variable other than **Auth_User**.
- **Single Sign-On (SSO) Server Variable:** This is the alternative variable that XFRACAS needs to check for SSO authentication.

The admin/TESTSSO.aspx page on the website provides additional details to help with troubleshooting this configuration.

Location of the XFRACAS Website

XFRACAS Server - Filesystem Prefix: The absolute path on the web server where the website's IIS folder is installed (e.g., C:\inetpub\wwwroot\XFRACAS\).

XFRACAS Server - IIS Prefix: The path that can be used to build links to pages within the XFRACAS website (e.g., servername/XFRACAS or 10.0.0.2/xfracas).

Link to SEP (if Applicable)

Display SEP Command: If True, the XFRACAS ribbon will include a link to your organization's SEP web portal.

SEP Server - IIS Prefix: The path that can be used to build the link to the SEP web portal (e.g., servername/SEP).

Upload Files for Attachments

Attachments - Allow Uploaded Files: If True, the Attachments window will include the option for users to upload files. The files may be stored in the database or uploaded to a designated folder on the web server, depending on how you configure the related preferences.

Attachments - Store Uploaded Files in Database: If True, files will be stored in the database. If False, files will be stored in a designated folder on the web server.

Attachments - Uploaded Files Filesystem Prefix: If applicable, this is the absolute path to the folder on the web server where uploaded attachments will be stored (e.g., C:\inetpub\wwwroot\XFRACAS\uploads\ or D:\storage\xfracas). For requirements and instructions to prepare this folder, see [Prepare to Store and Use Files](#).

Attachments - Uploaded Files IIS Prefix: If applicable, this is the path that will be used to build links to download files that were saved on the web server.

- If you are using an actual folder within the website, enter a relative path (e.g., XFRACAS/uploads).
- If you are using a virtual directory created in IIS, enter an absolute path (e.g., http://server-name/uploads).

SMTP Server for E-mail Notifications

- **SMTP Server:** The address of the mail server that will be used for sending e-mails.
- **SMTP Port:** The port used to connect to the SMTP server.
- **SMTP Connection Timeout:** The amount of time, in seconds, before the connection to the SMTP server times out when sending e-mails.
- **SMTP Enable TLS Support:** If True, XFRACAS will support the use of Transport Layer Security (TLS) to encrypt traffic to SMTP.
- **SMTP User ID:** The account, including domain, for SMTP. Used in conjunction with the **SMTP Password** preference (which is shown as ***** when populated). Used (but not required) when TLS support is enabled.

The admin/testtls.aspx page on the website allows you to test your e-mail configuration.

String Preferences

Verify that the date formats (**XFRACAS - Date Format - Long** and **XFRACAS - Date Format - Short**) match the culture setting within IIS so dates shown in charts can be displayed correctly.

Users and Security Groups

You will need to create security group(s) and individual accounts for XFRACAS users.

Remember that the user who created the ReliaSoft database will have a special IT/admin-only account that will have full admin permissions within the website (see [Create the ReliaSoft Database](#)), but you may also choose to provide full permissions for at least one regular website user

as well. You cannot assign an admin permission to other user(s) unless you already have that permission yourself.

For more information, see “[Managing Users](#)” and “[Managing Security Groups](#)” in the admin help.

Permissions and Categories

Use the Security Groups page to create sets of permissions and categories that can be assigned to individual users. A user can be assigned to more than one group if needed. The following groups are created by default in a new database, but you can replace or modify them to meet your particular needs:

- **USER** - contains basic permissions to use the site (e.g., create incidents, access reports, etc.).
- **SUPERUSER** - contains basic permissions as well as some more advanced functionality (e.g., close problems, make reports public, etc.)
- **ADMIN** - contains just the administrative permissions (e.g., add/modify users, work with system configurations, add/remove detail fields, etc.)

Individual User Accounts

Use any of the following methods to create individual user accounts:

- Use the Users page to create one account at a time. To save time, you may wish to create new accounts by duplicating a similar existing account.
- Use the Active Directory page to import users from Microsoft Active Directory.
- Use the Data Import page to import user account details via XML.
 - Download a sample template: XFRACASXMLTemplate_UserExample.xml
 - Consult the full Document Type Definition (DTD) installed on the web server (e.g., C:\inetpub\wwwroot\XFRACAS\DTD): User.dtd

Confirm that users are able to log in to the website (i.e., they can access the main XFRACAS page).

Systems and Parts

You can use any of the following methods to define the systems/parts that will be used for tracking.

For more information, see “[Managing System Templates](#)” and “[Managing Serialized Systems](#)” in the admin help.

- Use the Template page or the Serialized page to create one system or part at a time.
- Use the Data Import page to import part details via XML or Excel.
 - Download a sample template/example: [XFRACASXMLTemplate_PartsExample.xml](#), [XFRACASImportTemplate_Parts.xlsx](#) and [XFRACASImportTemplate_Parts_Example.xlsx](#)
 - Consult the full Document Type Definition installed on the web server (e.g., C:\inetpub\wwwroot\XFRACAS\DTD\): **System.dtd**
- Choose **System > Template > XFMEA Import** to import an existing system hierarchy created in ReliaSoft XFMEA or RCM++. If you want to import failure modes from any existing FMEAs, select **Import failure modes with template**.

Map and Import Existing Records (if Applicable)

Map Existing Records

If you need to import records from an existing system, you must first identify how the data will be mapped to available record types in XFRACAS. For example, “trouble tickets” in your previous system might be mapped to “incidents” in XFRACAS.

Note that within XFRACAS:

- Each project can contain multiple problems.
 - Each problem can contain multiple incidents.
 - Each incident can contain multiple failure analysis reports.

Projects, problems and incidents can be created independently of each other and relationships can be created between them later.

A failure analysis report can only be created from an existing incident.

Customer support records (CSIs) are applicable only if you are tracking serialized systems. Each CSI can have multiple associated incidents.

Import Existing Records

If you need to import records from an existing system, make sure you have mapped the data to relevant XFRACAS records and data fields (see "[Map Existing Records](#)" and "[Detail Fields](#)").

Then you can use the Data Import page to import the records via XML. There are two ways to get an appropriate XML template:

- Go to the page in XFRACAS and export a sample XML file.
- Consult the full DTDs installed on the web server (e.g., C:\inetpub\wwwroot\XFRACAS\DTD): Incident.dtd, Problem.dtd, Project.dtd FailureAnalysis.dtd and UnitCommissioning.dtd.

For parts and issues, you can also import records via Excel templates.

For more information, see "[Data Import Page](#)" in the admin help.

If your XML import is not working properly, double check that the "XFRACAS Server – IIS Prefix" and "XFRACAS Server – Filesystem Prefix" preferences are set correctly. In addition, if you are using SSL/https, the "SSL Server Mode Required" preference must be set to True for the XML process to fetch the DTD file properly. Before you enable this option, make sure the IIS web server is configured properly for SSL/TLS (see [Enable HTTPS for Secure Communication](#)).

Configure Detail, Criticality and List Fields

Detail Fields

You can use the Details page to manage most of the configurable fields for XFRACAS records. Select which fields you want to capture for each record type (incidents, problems, etc.) and configure them to meet your organization's needs.

If you will need to import records from an existing system, make sure all relevant fields from your existing records can be mapped to fields in XFRACAS. You can add new details if needed. For example, if the original "trouble ticket" record captured the number of people affected, you could add a numeric detail called "People Affected" to the XFRACAS Incident page.

For more information, see "[Managing Details](#)" in the admin help.

Criticality Fields

If you want to use calculated criticalities in incident and/or problem records, use the Criticality page to configure the fields. Then use the Preferences page to choose which fields to display and to configure the calculation formulas.

Boolean Preferences (choose which fields to display)

- Incident - Display Actual Criticality
- Incident - Display Potential Criticality
- Problem - Display Criticality

String Preferences (define the formulas)

- Criticality - Incident Actual
- Criticality - Incident Potential
- Criticality - Problem Base CIN
- Criticality - Problem Current CIN

For more information, see “[Configuring Criticality Metrics](#)” in the admin help.

Lists

You can use the following methods to review and populate the “pick lists” that are used throughout the website.

- Use the Lists page to manage standard lists, as well as any custom lists that you added via the Details page.
- Use the Data Import page to import list data via XML or Excel.
 - Download a sample template: [XFRACASImportTemplate_Issues.xlsx](#) and [XFRACASImportTemplate_Issues_Example.xlsx](#)
 - Consult the full Document Type Definition installed on the web server (e.g., C:\inet-pub\wwwroot\XFRACAS\DTD\): Issue.dtd

For more information, see “[Managing Lists](#)” in the admin help.

Static Pages

Your XFRACAS installation includes various “static” web pages that you can customize to suit your organization’s needs by editing them directly on the web server.

See the "[Managing Preferences](#)" topics in the admin help for more information about the preferences noted below.

Terms of Use Agreement Pages

These pages can be configured to display whenever a user visits any page (user or admin).

Note: This page is typically used for ITAR compliance and can be customized with your ITAR warning.

- **File name:** Agreement.aspx | **Location:** main folder
- **File name:** AdminAgreement.aspx | **Location:** Admin folder
- **Preferences info:** To enable this feature, set “Terms of Use Agreement Page Required” to True

Description Criteria Link Pages

These “tip” pages allow you to provide information to help users create / edit records in accordance with your organization’s requirements. The CSS for these pages is contained in a file called Tips.css, which resides in the Tips folder (e.g., C:\inetpub\wwwroot\XFRACAS\Tips).

- **File names:** Various | **Location:** Tips folder (e.g., C:\inetpub\wwwroot\XFRACAS\Tips)
- **Preferences info:** To use a file stored in a different location, edit the relevant link in the URL Preferences section (e.g., “Incident - Actual Criticality Tips,” etc.).

Print Preview XSLT Files

These files configure the “Print Preview” (printer-ready output) for incidents, failure analyses, problems, projects and CSIs.

- **File names:** Various | **Location:** XSLT folder (e.g., C:\inetpub\wwwroot\XFRACAS\XSLT).

- **Preferences info:** To use a file stored in a different location, edit the relevant link in the URL Preferences section (e.g., “Incident - Print Preview Style Sheet,” etc.).
-

Tip: If the record has an Attachments Table detail (also called "Associated Files"), the default XSLT templates installed with XFRACAS will display any attached image files (e.g., *.jpg, *).

General Error Page

This page appears when the system encounters a server error. It should not be edited.

File name: GeneralError.aspx | **Location:** main folder

What’s New Page

This page (popup) appears the first time a user opens XFRACAS after the data specified in the “Portal - What’s New Modify Date” preference.

- **File name:** Whatsnew.html | **Location:** main folder
- **Preferences info:** “Portal - What’s New Modify Date” (Date Preferences section) defines the date of the most recent modification to the page.

Other Configuration Options

Action Categories

You can use the Action Management page to review and modify the sub-categories that will be available for different kinds of actions throughout the website. For example, when a user creates an action from within the Incident page, the main category is “Incident Action.” If you want to organize those actions into smaller groups, you can define additional subcategories (e.g., “Investigation,” “Repair,” etc.). Sub-categories are optional and can be added at any time.

Contacts, Companies and Locations

If applicable, you can use either of the following methods to define the contacts, companies and locations that are referenced in Customer Support (CSI) records.

- Use the Contacts, Companies and Locations pages to create one record at a time.
 - Use the Data Import page to import data via XML. Consult the full Document Type Definitions installed on the web server (e.g., C:\inetpub\wwwroot\XFRACAS\DTD\): Company.dtd and Address.dtd
-

For more information, see “[Managing Contacts](#),” “[Managing Companies](#),” and “[Managing Locations](#),” in the admin help.

Resource Editor

Use the Resource Editor page to change any text values in XFRACAS that don’t match your organization’s needs.

Reporting Tools

Use the Report Viewer page to modify the sort orders and hide/display attributes of specialized queries.

Use the Report Builder and Dashboard Designer pages to create and deploy to users (i.e., make public) custom queries, custom standard reports, custom charts or custom dashboard layouts, if needed.

Public Links and Announcements

Use the Create Link and Create Announcement pages to create any public links or system-wide announcements that are needed.

Stored Procedures

Time Metrics

When creating a serialized incident, users can click the **Operational History** link to select from previously entered time metrics (values) for that serial number. By default, this list consists of time values contained within XFRACAS for the serial number. If desired, you can instead pull time value data from another database for use during incident creation. XFRACAS supports this by attempting to call a stored procedure in the XFRACAS database on the fly.

Note: If you want to use this procedure for your XFRACAS implementation, please request assistance from ReliaSoft Support to enable the “XFRACAS - Run Stored Procedure for System Time Metrics” preference.

The procedure is named **XFRACASGetTimeMetrics** and has four arguments. The first is an incoming argument for the serial number (a string) and the second through fourth are return arguments (numbers) to store the data for the three time metrics. In the default XFRACAS system, the three time metrics are set to 0. Once the stored procedure is modified, the **return_value** variable must be set to 1 in order for the values to be used.

As an example, below is a very simple Oracle stored procedure that returns values from tables named SYSTEM_HOURS, SYSTEM_STARTS and SYSTEM_KWRUNHRS:

```
Create OR Replace PROCEDURE XFRACASGetTimeMetrics
(
  Sn IN NVARCHAR2;
  tm1 OUT NUMBER,
  tm2 OUT NUMBER,
  tm3 OUT NUMBER
  RETURN_VALUE OUT NUMBER)
AS
BEGIN
  tm1 := SELECT hours FROM SYSTEM_HOURS WHERE serial_num = SN;
  tm2 := SELECT starts FROM SYSTEM_STARTS WHERE serial_num = SN;
  tm3 := SELECT kwrunchrs FROM SYSTEM_KWRUNHRS WHERE serial_num =
  SN;
  RETURN_VALUE := 1;
END;
```

Below is the SQL Server stored procedure that does the same (i.e., returns values from tables named SYSTEM_HOURS, SYSTEM_STARTS, and SYSTEM_KWRUNHRS):

```
CREATE PROC XFRACASGetTimeMetrics
(
  @SN NVARCHAR(100),
  @TM1 FLOAT OUTPUT,
  @TM2 INT OUTPUT,
  @TM3 FLOAT OUTPUT,
```

```
@RETURN_VALUE INT OUTPUT
)
AS
BEGIN
SET @TM1 = SELECT hours FROM SYSTEM_HOURS WHERE serial_num =
@SN;
SET @TM2 = SELECT starts FROM SYSTEM_STARTS WHERE serial_num =
@SN;
SET @TM3 = SELECT kwrunchrs FROM SYSTEM_KWRUNHRS WHERE serial_
num = @SN;
SET @RETURN_VALUE = 1
END;
```

When using this functionality, if the stored procedure called succeeds and returns data, the user will see rows fetched from XFRACASGetTimeMetrics. This row can be selected like any other to use the listed time values in the incident.

Importing via External Process

As discussed in [Map and Import Existing Records](#), importing existing data is typically handled from within the XFRACAS interface by means of XML imports. If, however, you are using an external process to bring data into the system, you will use a stored procedure to increment the unique table ID assigned to each record and the entity display ID for each transactional record. For example, you can use a stored procedure to import data from a Distributed Control System (DCS) or a Supervisory Control and Data Acquisition (SCADA) system.

The procedure is named **RS_GetIDValue** and has three arguments, as follows:

- The first is an incoming argument for the table name. In Oracle, this must be entered in ALL CAPITAL LETTERS.
- The second is an incoming argument for the entity ID. If there is no entity ID, you must enter NULL for this argument.
- The third is a return argument that stores the value to a specified variable.

SQL Server Templates

The following template calls the stored procedure *with* an entity ID. Note that you will replace TABLENAME with the actual table name and XX with the actual entity ID.

```
DECLARE @NextID int

BEGIN

--table_name, entity_id, @NextID OUTPUT is the variable for
the id_num output

EXECUTE RS_GetIDValue 'TABLENAME',XX, @NextID OUTPUT;

PRINT @NextID;

END;
```

The following template calls the stored procedure *without* an entity ID. Note that you will replace TABLENAME with the actual table name.

```
DECLARE @NextID int

BEGIN

--table_name, @NextID OUTPUT is the variable for the id_num
output

EXECUTE RS_GetIDValue 'TABLENAME', NULL, @NextID OUTPUT;

PRINT @NextID;

END;
```

Oracle Templates

The following template calls the stored procedure *with* an entity ID. Note that you will replace XXX with the table name in ALL CAPS, and replace x with the entity ID.

```
SET SERVEROUTPUT ON;VARIABLE NEWID NUMBER;

EXEC RS_GetIDValue('XXX',x, :NEWID);

BEGIN

DBMS_OUTPUT.PUT_LINE (:NEWID);
```

```
END;
```

The following template calls the stored procedure *without* an entity ID. Note that you will replace XXX with the table name in ALL CAPS.

```
SET SERVEROUTPUT ON;
```

```
VARIABLE NEWID NUMBER;
```

```
EXEC RS_GetIDValue('XXX',NULL, :NEWID);
```

```
BEGIN
```

```
DBMS_OUTPUT.PUT_LINE (:NEWID);
```

```
END;
```

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- (d) loss of the use of money or anticipated savings;
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