

Implementation Guide



XFRACAS

VERSION 2026

ReliaSoft

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TABLE OF CONTENTS

GETTING STARTED 1

INSTALL THE APPLICATION 7

PERFORM POST-INSTALLATION TASKS 22

CONFIGURE IIS FOR ENHANCED SECURITY 31

CONFIGURE XFRACAS 38

END USER LICENSE AGREEMENT 52

Getting Started

IN THIS CHAPTER

Introduction	1
XFRACAS Architecture and Requirements	2
Server Requirements	2
Client Requirements	3
Plan Your XFRACAS Implementation	3
System-wide Preferences	4
Entities	4
Users and Security Groups	5
Systems/Parts/Templates/BOM	5
Review Sample Data from Current FRACAS (if Applicable)	6
Contacts, Companies, Locations	6

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/xfracas26/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 2016 or newer
- .NET 4.8
- IIS with support for serving ASP.NET
- SQL Server 2014 (SP3) or newer

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

Client Requirements

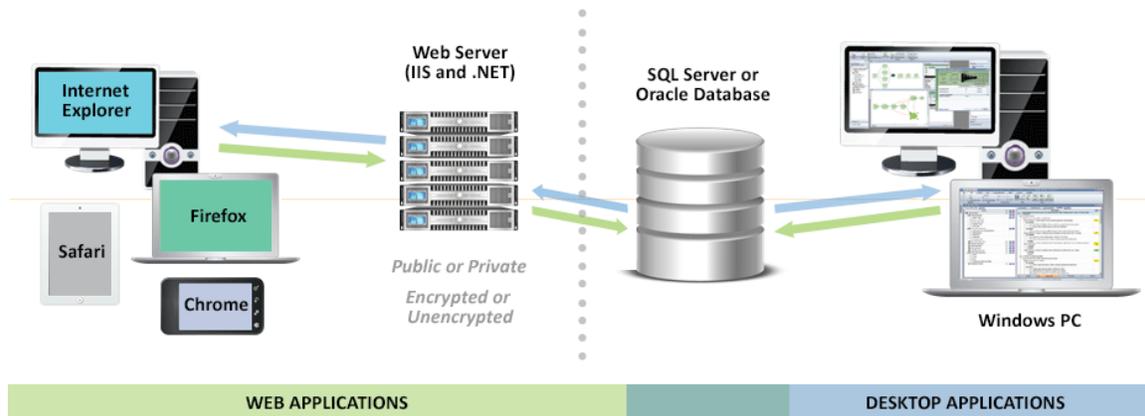
Once the website has been implemented, users can access it with any browser that supports the following doctype:

```
<!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

IN THIS CHAPTER

- Prepare the Database Server (SQL Server) 7**
- Setting up for SQL Server 8
- Replication and Backups 8
- Prepare the Web Server - IIS 8**
- IIS Roles and Features 9
- SSL Certificate 11
- Establish a Service Account for the Application 11**
- Install the Application and Activate the License 11**
- Problems Communicating with the ReliaSoft License Server 12
- Creating Custom Connection Strings 14**
- Setting Up a New Database 14
- Upgrade/Updating a Prior Version ReliaSoft Database 15
- Update XFRACAS Configuration File 16
- Create the ReliaSoft Database (if Applicable) 18**
- Plan for Your Implementation 18
- Create or Upgrade the Database 19
- Assign Roles in SQL Server for the Application Service Account 19
- Update the Configuration File 19**
- 1 - On the Connection Tab: 19
- 2 - On the Settings Tab: 20

Prepare the Database Server (SQL Server)

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

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

- **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).

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

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.

IMPORTANT: ReliaSoft web based software cannot be installed on a server that is being used as a domain controller (i.e., a server that has Active Directory or DNS services installed). Because

of security issues, domain controllers should have limited software and roles installed on them and they should not be used as a webserver.

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 2022, 2019 and 2016.*)

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

	WINDOWS 2022/2019	WINDOWS 2016
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 2022/2019	WINDOWS 2016
Windows Authentication	x	x
Application Development		
.NET Extensibility 4.7 or 4.8	x	
.NET Extensibility 4.5 or 4.6		x
Application Initialization	x	x
ASP.NET 4.7 or 4.8	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 **XFRACASService** (starting in Version 2024), **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.

If the server has an active Internet connection and your firewall allows the software to access the ReliaSoft secure external license server at <https://validate2.reliasoft.org>^{*1}, only a few simple steps are required for activation. (If the server does not have an Internet connection, see [Request an Activation Code](#)).

¹This license server is for Version 2022 and later. Previous versions will continue to use the license server at <https://validate.reliasoft.org>.

1. Run the XFRACAS setup (e.g., XFRACAS26.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 2026 Activation" then run the product activation tool and follow the steps to activate your license.
 - a. On the first page, specify that you want to activate a license.
 - b. On the next page, enter a valid e-mail address. The license will be registered to this 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.
 - **Name and Contact Info:** If this is the first time that you have registered XFRACAS on this computer with this e-mail address, the next page will request your name and basic contact information.
 - c. On the next page, enter the product license key provided to you. This will be a 32-digit alphanumeric code. *Tip: If you are able to copy the key from a product delivery e-mail, the Paste icon saves time by automatically entering each section into the appropriate input box.*



The image shows a screenshot of a software activation window. It features a label "Product License Key" followed by four empty input boxes separated by hyphens. To the right of the fourth box, there are two icons: a clipboard (Paste) and a pencil (Edit). A red circle is drawn around these two icons.

- **Confirmation Keys:** If your license type requires a confirmation key, the next page requires you to copy/paste a key that you will receive via e-mail. *Tip: If the e-mail does not appear in your Inbox within a few minutes, check your Junk mail or SPAM folders.*
- d. When you see the "Your product has been activated" message, click **Finish** to start using the software.

Problems Communicating with the ReliaSoft License Server

The activation process generally requires communication with the ReliaSoft license server. If the software is not able to communicate directly with the license server, there are alternative options. If all else fails, you can [contact us](#) via, phone, e-mail and/or fax.

Corporate Firewalls

Corporate firewalls can block communication with the license server. Possible solutions:

- Some firewall configurations block all new programs without any warning. To activate the software, it will be necessary to manually add the software name to the authorized list. Provide for unlimited access for the software.
- If this fails, try to deactivate the firewall temporarily until the software has been activated. The majority of firewalls have an option to suspend their action. If not, you will have to terminate the firewall. Activate the software and then reboot your machine to restore firewall action.
- You may need to ask the network manager to make the required settings to allow the software to communicate with the ReliaSoft license server and/or add this domain to a trusted list.

Proxy Settings

If you have an Internet connection (green check mark) but the software is unable to communicate with the ReliaSoft license server (red x), you can attempt to use alternative credentials by clicking **Proxy Settings**.



In the Proxy Settings window, enter the information required (you may need the assistance of your network administrator to complete this) and click **Test Settings**. The **OK** button will become enabled if the test is successful. If the proxy fails, you can click **Cancel** and try another method.

Request an Activation Code

To request an Activation Code using our web form, you can select **Use an Activation Code**, continue until you reach the screen requesting your product license key and activation code and click the **Get an Activation Code online** link, or you can go directly to <http://val->

in your web browser. Enter the required fields and click **E-mail Activation Code**.

If the server that is hosting XFRACAS does not have an internet connection, during the purchase process the purchaser should have requested an Activation Code to use with the License key for activating the License on this server. In addition, if the server is a Virtual Machine environment, we will also provide a Control Code that is tied to a specific e-mail address.

In the event that an Activation Code was not requested during purchase, you can [contact us](#) via, phone, e-mail and/or fax to obtain one, as well as a Control Code if required.

Creating Custom Connection Strings

Custom connection strings (available beginning in ReliaSoft Version 20.0.3 and Version 21.0.2) allow administrators to establish custom connections to databases that require a SQL Authentication method instead of using the traditional Active Directory approach in which you only specify the database and server name. We anticipate that most use cases for this scenario will be for users who are in a non-traditional network environment (e.g., a non-Windows based LDAP) or for cloud-hosted databases that are not integrated into the users' Active Directory environment.

The Custom Connection String option is enabled via the ReliaSoft XFRACAS Admin tool. To use this tool, your organization must have already established a database server with Microsoft SQL Server and you must have the permissions necessary to create databases on the server. Additionally, you must have already created the target database via a third party tool (e.g., Azure web interface, AWS, etc.); the database can be empty if desired.

There are three scenarios in which you might need to establish a custom connection string:

- [Setting up and connecting to a new, empty database](#)
- [Connecting to an existing database from the current version of ReliaSoft software](#)
- [Upgrading and connecting to a database from a prior version of ReliaSoft software](#)

Setting Up a New Database

Once you have created the empty database in your target MS SQL or Azure instance, you can establish the database tables and create your custom connection string in a single operation.

¹This URL is for Version 2022 and later. For previous versions, go to <http://validate2.reliasoft.org/UserManagement/ActivationCode.aspx>

1. Open the ReliaSoft XFRACAS Admin tool: From **Start**, choose **ReliaSoft XFRACAS [version] > XFRACAS [version] Admin** from the programs list. Alternatively, from **Start**, you can search for "XFRACAS [version] Admin."
2. In the ReliaSoft XFRACAS Admin tool, click **New Enterprise Database**.
3. Choose the **SQL Server (Custom)** option and enter the custom connection string that will be used to connect to the database.

Most connection string formats work with this dialog box. The connection string format that we did the most validation with for an external Azure server was:

```
Server=myserver,port;Initial Catalog=mydatabase;Persist  
Security Info=False;User ID=mylogin;Password=mypassword;  
MultipleActiveResultSets=False;Encrypt=True;  
TrustServerCertificate=False;Connection Timeout=30;
```

Note: This connection string is provided as an example and not as the specific method that ReliaSoft recommends.

4. If you plan to use a common custom connection string for all users, leave the **Use Windows identity impersonation** check box selected. This setting provides the application with a method to use the custom connection string to authenticate into the database with the supplied credentials contained within the string, but will then detect the local user for each user who is using the connection string and compare them against the list of approved users.
5. Click **OK** to begin database table creation. (For Azure or other cloud-hosted databases, this step can take a while due to the need to validate that each relational table has been established before creating the next dependent table).

After the database has been created please proceed to [Update XFRACAS Configuration File](#) to allow the XFRACAS website to use the same Custom Connection information. You will also now have a custom connection string file (*.rserp) established and saved in Documents\ReliaSoft\Files and the database tables will be complete. To add additional XFRACAS users, use the desktop URL link for XFRACAS website and go to the Admin tab, Security and User page. If you are also having ReliaSoft Desktop users using this database then to add additional desktop users from the ReliaSoft XFRACAS Admin tool, click **Manage Users**.

Upgrade/Updating a Prior Version ReliaSoft Database

If you have migrated a MS SQL Enterprise database from a prior major version of ReliaSoft software to an environment where a custom connection string is required, you need to upgrade

the database to the latest version and then update the XFRACAS tables. After that you will need to follow the steps in the [Update XFRACAS Configuration File](#) section to connect the XFRACAS website to the database.

1. Open the ReliaSoft XFRACAS Admin tool: From **Start**, choose **ReliaSoft XFRACAS [version] > XFRACAS [version] Admin** from the programs list. Alternatively, from **Start**, you can search for "XFRACAS [version] Admin."
2. In the ReliaSoft XFRACAS Admin tool, click **Upgrade Enterprise Database**.
3. Choose the **SQL Server (Custom)** option and enter the custom connection string that will be used to connect to the database.

Most connection string formats work with this dialog box. The connection string format that we did the most validation with for an external Azure server was:

```
Server=myserver,port;Initial Catalog=mydatabase;Persist
Security Info=False;User ID=mylogin;Password=mypassword;
MultipleActiveResultSets=False;Encrypt=True;
TrustServerCertificate=False;Connection Timeout=30;
```

Note: This connection string is provided as an example and not as the specific method that ReliaSoft recommends.

4. Click **OK** to begin the database upgrade. (For Azure or other cloud-hosted databases, this step can take a while due to the need to validate that each relational table has been established before creating the next dependent table).
5. Next click **Update XFRACAS Tables**.
6. Again choose the **SQL Server (Custom)** option as we did in step 3.
7. Click **OK** to begin the XFRACAS tables update. (For Azure or other cloud-hosted databases, this step can take a while due to the need to validate that each relational table has been established before creating the next dependent table).
8. Proceed to [Update XFRACAS Configuration File](#).

Update XFRACAS Configuration File

If you have migrated an existing ReliaSoft MS SQL Enterprise database to an environment where a custom connection string is required you can simply create an appropriate database connection without making any changes to the database.

1. Open the ReliaSoft XFRACAS Admin tool: From **Start**, choose **ReliaSoft XFRACAS [version] > XFRACAS [version] Admin** from the programs list. Alternatively, from **Start**, you can search for "XFRACAS [version] Admin."
2. In the ReliaSoft XFRACAS Admin tool, click **Update XFRACAS Configuration File**.
3. Choose the **SQL Server (Custom)** option and enter the custom connection string that will be used to connect to the database.

Most connection string formats work with this dialog box. The connection string format that we did the most validation with for an external Azure server was:

```
Server=myserver,port;Initial Catalog=mydatabase;Persist  
Security Info=False;User ID=mylogin;Password=mypassword;  
MultipleActiveResultSets=False;Encrypt=True;  
TrustServerCertificate=False;Connection Timeout=30;
```

Note: This connection string is provided as an example and not as the specific method that ReliaSoft recommends.

4. Fill out the Application Service Account. This is either a local account or domain account that has permissions to access local resources, like the registry settings, IIS files, and .Net Temporary folder.
5. Make any changes to the Settings tab if you want a setting to be different than default. Note that when using a Custom Connection string we recommend leaving **Encrypt Communication** checked and **Trust server certificate** unchecked. These settings assumes that the SQL instance has an SSL certificate installed to encrypt communication between the XFRACAS application and the SQL Server instance.
6. Click **OK**.

You have now setup XFRACAS to use a custom connection string. To add additional XFRACAS users, use the desktop URL link for XFRACAS website and go to the Admin tab, Security and User page. If you are also having ReliaSoft Desktop users using this database then to add additional desktop users from the ReliaSoft XFRACAS Admin tool, click **Manage Users**.

Note: You may need to manually add a new admin user account that matches the administrator who is doing the upgrade (or to add an account that matches the SQL Authentication account). For assistance with this, please contact ReliaSoft support.

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.

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 2026 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 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 "XFRACAS2026 Admin" and open the admin utility. Then click **Update XFRACAS Configuration File**.

IMPORTANT: Incorrect settings on either tab of this window can cause problems connecting to the database. If you encounter errors such as "There's a problem with the page you requested" when connecting to the website or errors stating that "an error occurred during the login process" when performing admin tasks, double-check all settings on both tabs.

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'`
- **DIU Service Name** defines the name of the DIU Service that your implementation of XFRACAS uses. This option is available starting in Version 2026.
- Select **Enable Bulk Editor** to enable the `EnableQueryInfoReportOutput` key in the Web.-config file with its value set to **True**. In addition the "Bulk Edit Encryption Key" system-wide preference is enabled. This option is available starting in Version 2026.
- For a SQL Server implementation,
 - a. Select **Encrypt communication** to encrypt the connection between the application and the database. Do not select this option if the database server does not support an encrypted connection. If you do so, you will not be able to connect to the database server and you will receive an error when trying to do so. Note that starting in Version 2024, this option is selected by default.
 - b. Select **Trust server certificate** if the server has a self-signed certificate.

Perform Post-installation Tasks

IN THIS CHAPTER

Set the .NET Temporary Folder Permission	23
Release and Recycle Memory	23
Limits for Uploads, Buffering and Requests	24
Prepare to Store and Use Files	24
Create a Folder for Storing Uploaded Files	25
Prepare to Use *.XLSX for Data Import	27
Enable HTTPS for Secure Communication	27
Enable HTTPS	27
Enable TLS 1.2 Protocol for HTTPS	27
Address SSO and ViewState Errors, if Necessary	29
SSO Authentication Blocks Print Preview or Export to XML	29
“ViewState” Errors When XFRACAS is Deployed on Multiple Web Servers	29
Configure History Logging	30

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**

Limits for Uploads, Buffering and Requests

You may need to modify some limits for uploads, buffering and requests to suit your needs for the website (e.g., if you are running very large reports and find that they do not respond, if you are unable to upload large files, etc.).

1. In the **Connections** pane of the IIS Manager, click the **XFRACAS** site. Under Management, double-click **Configuration Editor**.
2. In the Section drop-down list, choose **system.webServer/asp**. Under limits:
 - The **maxRequestEntityAllowed** value sets the maximum file size that can be uploaded to the server. This is set during installation to 10,485,760 bytes (or ~10 MB).
 - The **bufferingLimit** value sets the size of the buffer that holds the response sent back to the client. This is set during installation to 10,485,760 bytes (or ~10 MB).
3. In the Section drop-down list, choose **system.webServer/caching**.

The **maxResponseSize** value sets the maximum file size that can be returned to the client. This is set during installation to 262,144 bytes (or ~262 KB).

4. In the Section drop-down list, choose **system.web/httpRuntime**.

The **maxRequestLength** value specifies the limit for the input stream buffering threshold, in kilobytes. This is set to 10240 KB by default.

5. Return to the **Connections** pane, click the **XFRACAS** site. Under IIS, double-click **Request Filtering**.
6. In the Actions panel, click the **Edit Feature Settings** link.

The **Maximum allowed content length** value specifies the maximum length of content in a request, in bytes. This is set to 30000000 bytes (or ~30 MB) by default.

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

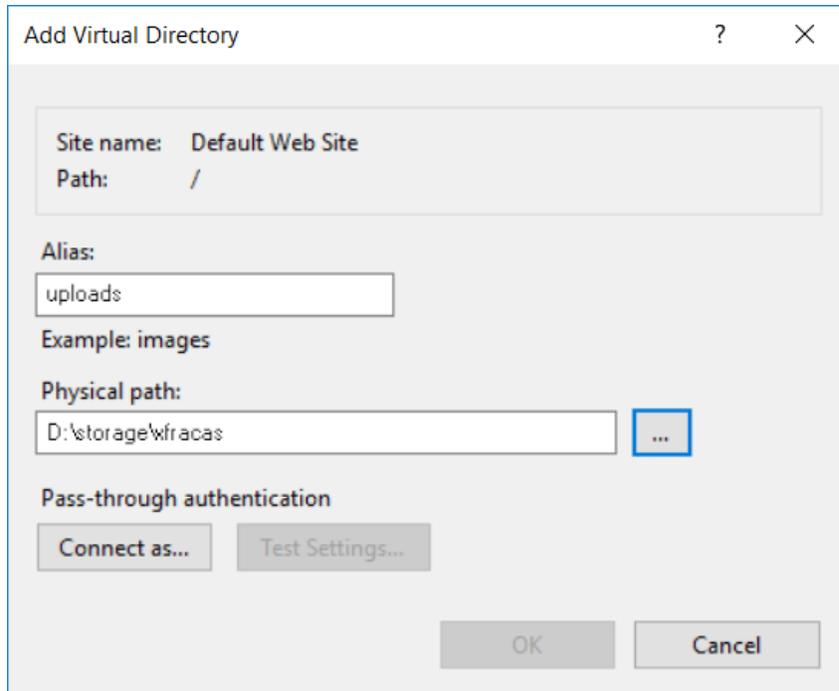
You can configure the website's Attachment window to store uploaded files on the web server (rather than in the database). If you plan to do this, you must prepare the folder where the files will be stored.

- **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

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 both servers are Windows 2022, then TLS 1.2 and 1.3 will be enabled by default. If TLS 1.2 is not working, check 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\SCH  
ANNEL\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\SCH
ANNEL\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

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 “XFRACAS2026 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

IN THIS CHAPTER

IIS Settings for OWASP	31
Web Server Default Welcome Page	32
Clickjacking: X-Frame-Options Header Missing	32
X Content-Type-Options Header Missing	32
OPTIONS Method Is Enabled	32
Microsoft IIS Version Disclosure	32
ASP .NET Version Disclosure	33
X-Powered-By Header	34
Cookie Missing HTTP Only and Secure Flags	35
Custom Errors	35
Allowable File Name Extensions	35
Default web.config Changes	36

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.*

X Content-Type-Options Header Missing

1. *In the IIS Manager Home page, double-click **HTTP Response Headers**.*
2. *In the **Actions** area, click **Add**. Enter **X-Content-Type-Options** as the name and **nosniff** 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.*
 - In the **Actions** area, click **Back to Rules** and then click **Add Rule(s)**.*
 - 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*

Cookie Missing HTTP Only and Secure Flags

Note: This setting is configured by adding the following entry to the site-level or application-level web.config file:

```
<system.web>
...
<httpCookies httpOnlyCookies="true" requireSSL="true" />
...
</system.web>
```

Important: This setting could cause errors in the application if the application is not running over an HTTPS connection. It is a recommended security practice to require the application to use an HTTPS connection. See [Enable HTTPS for Secure Communication](#) for details on configuring the application to use HTTPS. If you choose not to require HTTPS for the application, then you can use the setting below instead of the one above. However, you should be aware that using the setting below could cause security scanning tools to raise a warning about the use of insecure cookies:

```
<httpCookies httpOnlyCookies="true" requireSSL="false" />
```

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>
    <httpCookies httpOnlyCookies="true" requireSSL="true" />
  </system.web>
  <system.webServer>
    <httpProtocol>
    <customHeaders>
      <remove name="X-Powered-By" />
      <add name="X-Frame-Options" value="SAMEORIGIN" />
      <add name="X-Content-Type-Options" value="nosniff" />
    </customHeaders>
    </httpProtocol>
    <security>
      <requestFiltering>
        <verbs>
          <add verb="OPTIONS" allowed="false" />
        </verbs>
      </requestFiltering>
    </security>
  </system.webServer>
</configuration>
```

```
<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

IN THIS CHAPTER

Start the DIU Service	39
Preferences	40
System-wide Preferences	40
String Preferences	42
Users and Security Groups	42
Permissions and Categories	43
Individual User Accounts	43
Systems and Parts	44
Map and Import Existing Records (if Applicable)	44
Map Existing Records	44
Import Existing Records	45
Configure Detail, Criticality and List Fields	45
Detail Fields	45
Criticality Fields	46
Lists	46
Static Pages	47
Terms of Use Agreement Pages	47
Description Criteria Link Pages	47
Print Preview XSLT Files	47
General Error Page	48
What's New Page	48
Other Configuration Options	48
Action Categories	48
Contacts, Companies and Locations	48
Resource Editor	49
Reporting Tools	49

Public Links and Announcements	49
Stored Procedures	49
Time Metrics	49
Importing via External Process	50

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.

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.

Below is the SQL Server stored procedure that 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.
- 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;
```

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(i) Duration – this License shall continue for a period of 12 months (“Initial Period”) from the date of delivery of the Quotation (“the Delivery Date”) and, provided that You have paid all applicable renewal fees, from year to year thereafter unless terminated in accordance with any provision of clause 12 below or any other clause of this License Agreement.

(ii) Termination – You must give the Licensor 90 days’ written notice prior to the anniversary of the Delivery Date, such notice not to expire before such anniversary date.

(b) Perpetual License:

(i) Duration – this License shall continue for a period of 25 years from the Delivery Date unless terminated in accordance with any provision of clause 10 below or any other clause of this License Agreement.

(ii) Conversion – this License may be converted to a Token Based Annual License, upon application to either the Licensor or the Authorised Reseller (if You have purchased the Software Product from an Authorised Reseller), and payment of an additional fee to the Licensor or the Authorised Reseller (as applicable), which shall be additional to the fees paid or payable in respect of any maintenance and support services provided by either by the Licensor or the Authorised Reseller (if You have purchased the Software Product from an Authorised Reseller). You may reverse this conversion to the same terms as agreed in the Perpetual License at the anniversary of the conversion by giving the Licensor 90 days’ written notice prior to the anniversary of the Delivery Date, such notice not to expire before the anniversary of the Delivery Date.

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(ii) Duration – this License shall continue for the Initial Period and, provided that You have paid for the applicable Access Credits, from year to year thereafter unless terminated in accordance with any provision of clause 12 below or any other clause of this License Agreement.

(iii) Termination – You must give the Licensor 90 days’ written notice in advance of the expiration of the Initial Period of Your intention to discontinue the Token Based Annual License, such notice not to expire before the anniversary of the Delivery Date, and You must have submitted all reports required of You in clause 2.1(c)(iii) above. Failure to provide such notice and reports will mean that the License shall automatically continue on the same terms until terminated in accordance with this clause.

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- (e) loss of information;
- (f) loss of opportunity, goodwill or reputation;
- (g) loss of, damage to or corruption of data; or
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