

Quick Start Guide

Live Forms In-house Quick Start Installation Guide

Live Forms provides a downloadable version for local installations that runs Live Forms without further configuration on a Windows systems. This bundle includes an HSQL embedded database. Once you have downloaded Live Forms and obtained your trial license key, follow these steps to install Live Forms in your environment.

Installation Guides

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Live Forms™ in-house Quick Start Installation Guide:

The steps below describe the Live Forms Tomcat bundle installation on a Windows system.

Prerequisites

The following prerequisites must be satisfied in order to run Live Forms in-house.

- Ensure your system meets the recommended [hardware requirements and memory configuration](#) for your Live Forms in-house server.
- Review the [Supported Platforms](#) list.
- Follow the instructions on the [JDK Prerequisite](#) page to install the supported version of Java/JDK on your system **and** the set the Java Home Environment variable.

Return to this page and continue with [Download the Bundle](#) when the prerequisites are met.

Download the Bundle

1. Download the Tomcat Bundle from the [frevvo Software Downloads Directory](#).
2. Unzip the frevvo zip file into a location of your choice: e.g. c:\frevvo. We'll refer to this directory below as <frevvo-home>.

Start the Insight Server

Live Forms requires the Insight server for the Reporting feature. The Insight server is included in the tomcat bundle. You should start the Insight server first before starting Live Forms. Further configuration is not necessary for the trial period. Follow these steps:

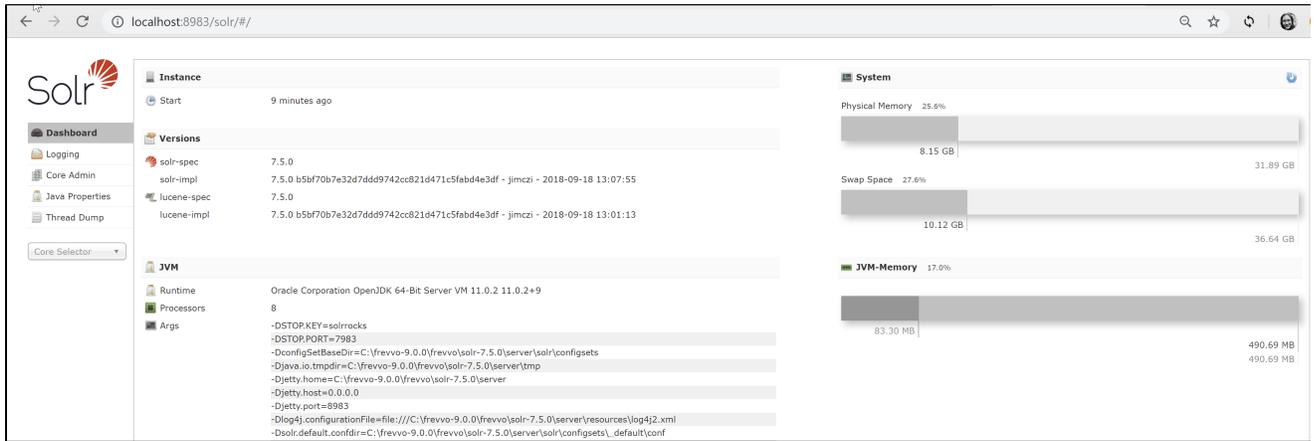
1. Ensure that you do not have another server running on ports 8082 or 8983
2. Open a command prompt. Navigate to <frevvo-home>\solr-x.x.x (replace "x.x.x" with your solr version number.)
3. Type bin\solr.cmd start to start the Insight server. This starts the Insight server in the background, listening on port 8983.

```
C:\frevvo-9.0.0\frevvo\solr-7.5.0>bin\solr.cmd start
```

You will see this message when the Insight server is running:

```
Started Solr server on port 8983. Happy searching!
```

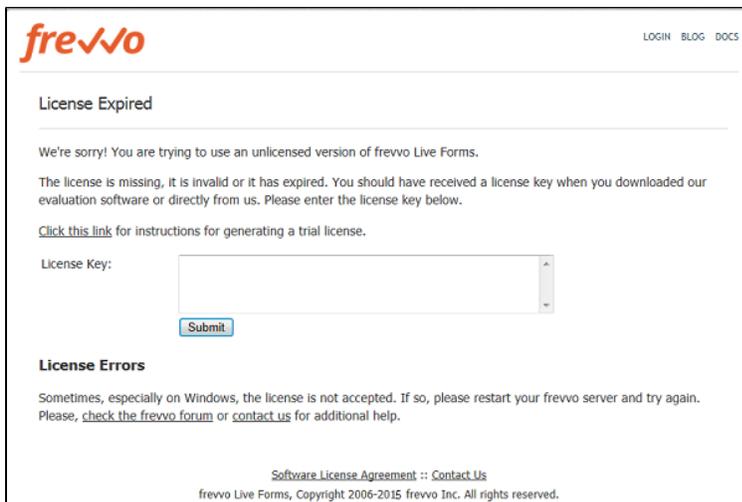
4. Browse <http://<your server>:<port>/solr> to verify the Insight server is running. The <server:port> default values are localhost:8983. Change <your server> to the server name and <your port> to the port the Insight server is running on if they are different than the defaults. Do not include the angle brackets <>. You will see the Insight server (Solr) dashboard with the current status:



If you close the Insight server (Solr) startup window, the server will stop running. Leave the window open or [set up Live Forms and the Insight Server to run as Windows services](#).

Start Live Forms

1. Navigate to <frevvo-home>\frevvo and double-click Start frevvo. This starts tomcat on port 8082 with Live Forms pre-configured.
2. Open the Live Forms home page in a new browser window. e.g. <http://localhost:8082/frevvo/web/login>.
3. Login to Live Forms with username **admin@d** and password **admin**.
4. Enter the license key from the confirmation email in the License Key box when prompted. Click **Submit**. The Live Forms login screen will display.



✓ [Click here if you see an error about Insight Server Configuration when you browse the login URL.](#)

If you start Live Forms before the Insight server, you will see this message when you browse the Live Forms login URL. Follow these steps to start the servers in the correct order:

Configuration Checklist

Your environment is not configured correctly. Please, fix any problems below and restart frevvo. For more information please consult the [installation instructions](#)

Status	Configuration	Help
✓	Database schema	?
✓	SMTP Configuration	?
!	Insight Server Configuration <small>The insight server was not properly configured and the dashboard will not function correctly. Make sure the server is running and the url is correctly set.</small>	?



1. Navigate to your <frevvo-home> directory.
2. Run the stop-frevvo batch file.
3. Open a command prompt. Navigate to <frevvo-home>\solr-x.x.x. (Replace "x.x.x" with your solr version number.)
4. Type bin\solr.cmd start to start the Insight server.
5. Browse <http://<your server:port>/solr> to verify the Insight server is running. The <server:port> default values are localhost:8983. Change <your server> **to the server name** and <your port> **to the port the Insight server is running on** if they are different than the defaults. Do not include the angle brackets <>.
6. Navigate to your <frevvo-home> directory.
7. Run the start-frevvo batch file.

Create a New Tenant

Your Live Forms server installation is complete. Next you must create your first tenant.

1. Browse this URL - <http://<server:port>/frevvo/web/login>. Use the <server:port> where you installed Live Forms. The default <server:port> is **localhost:8082**.
2. Login to Live Forms as user **admin@d** with the password **admin**.
3. Click the **Manage Tenants** link on the page that displays.
4. There is a single tenant named "d." This is the default tenant.
5. Click the



icon to [create a tenant](#). Fill in the form and submit it. The new tenant will be created.

We recommend that you do not use the admin user to create your own forms. Add a new user for that purpose.

Add a New User

1. Click the



icon, to administer the newly created tenant.

2. On the page that is displayed, click the **Manage Users** link.
3. There is a single user (the administrative user you defined when you created the tenant).
4. Click the



icon to create a new user. Fill in the form and submit it. Assign [Roles](#) to the user as desired. Note that you must assign the frevvo.Designer role to any users who wish to design forms.

5. Create as many users and assign them roles as needed.
6. Logout of the admin account.
7. **Congratulations!** Live Forms is installed and ready for use. You can start building forms and workflows right away.

Start building forms and workflows

1. Login as one of the newly created users with the frevvo.Designer role by filling in the user@<your tenant> ex: designer@mycompany and the password that you assigned to this user on the Login screen. The page that displays is called the Application Home Page.
2. If you are new to Live Forms and have not created any applications yet, you will see the following **Getting Started** message. Click the link to navigate to the Evaluation Guide for your version.

My Applications Applications New Link Upload

Spaces

Styles

My Tasks

Shared Items

Templates

You have no applications. Click on the New button above to create one.

Getting Started

If you are new to frevvo, we strongly recommend that you start with [the evaluation guide for your version.](#)

3. You can find examples on creating your own workflows on the [Tutorials](#) page. Refer to [Getting Started](#) for the next steps to follow to create forms/flows.

Security Managers

Trial tenants are configured to use the frevvo Default Security Manager by default. Once you have purchased a license for your Live Forms tenant, you can switch the [Security Manager](#) of your tenant and retain forms/flows, users, roles and submissions.

If you are planning to switch the Security Manager of your tenant to LDAP or SAML Security Managers in the future, make sure the users created in the default security manager tenant have the same user names as the users in your LDAP server or identity provider.

Detailed Installation Instructions

When you have completed the trial period and you are ready to customize your **Live Forms** server software, please see the detailed [In-house Installation Guide](#).

The Live Forms bundle includes an HSQL embedded database. If you use the HSQL database during your trial period, you cannot migrate the data (user, roles, applications) automatically from HSQL to your production database. Once your production database is in place, you must manually:

1. [Create your tenant](#).
2. Use [csv upload](#) feature to move your users/roles to the tenant.
3. [Download](#) and [upload](#) the applications from designer user accounts in the trial database to the designer users in the new database.