

Kofax Customer Communications Manager

Installation Guide

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Preface

This guide includes the information you need to successfully install Kofax Customer Communications Manager.

Related Documentation

In addition to this guide, the Kofax Customer Communications Manager documentation set includes the following:

- ***Kofax Customer Communications Manager Release Notes 5.0.***
Contains information that is not available in your other Kofax Customer Communications Manager documentation.
- ***ITP/OnLine Customization Manual.***
Describes how to customize and style CCM ComposerUI for J2EE and CCM ComposerUI for ASP.NET.
- ***JavaScript API Manual for ComposerUI.***
Describes integration of ComposerUI for HTML5 into an application, using its JavaScript API.
- ***Installation Guide CCM ComposerUI ASP.NET 5.0.***
Installation instructions for CCM ComposerUI for ASP.NET.
- ***Calling ITP/Server from JSP CCM ComposerUI Server 5.0.***
Describes how to call into CCM Core using JSP tags defined by ComposerUI for J2EE.
- ***Installation Guide CCM ComposerUI J2EE 5.0.***
Installation instructions for CCM ComposerUI for J2EE.
- ***Manual CCM ComposerUI 5.0.***
Overview, installation and integration manual for CCM ComposerUI for ASP.NET.
- ***Hammer3 Manual for CCM Core.***
Manual for the document output regression test tool Hammer3.
- ***Manual CCM Core ITP.cfg settings 5.0.***
Describes less commonly used configuration options for CCM Core.
- ***Script Language Manual CCM Core 5.0.***
Manual on the CCM Core Processscript.
- ***Installation Guide CCM Core 5.0.***
Integration manual, explaining how to install various CCM Core APIs.
- ***Manual CCM Core 5.0.***

General manual on CCM Core, including overview and integration.

- ***Kofax Customer Communications Manager Designer for Web User's Guide.***
English and localized versions of the CCM Designer for Web User's Guide.
- ***ITP/SDK AS/400 Manual ITP/SDK AS/400.***
Describes DID development on an iSeries.
- ***ITP/MDK Repository API.***
Describes an API to create content in CCM Repository.
- ***Administrative Manual CCM Repository 5.0.***
Manual describing administrative and management tasks in CCM Repository and CCM Designer for Windows.
- ***Manual - Other settings CCM Repository 5.0.***
Describes little-used options to apply to Master Template Creation from within CCM Repository.
- ***Report Guide CCM Repository 5.0.***
Describes how to create reports on the content of CCM Repository.
- ***Developer's Guide CCM Repository 5.0.***
Describes various features and APIs to integrate with CCM Repository and CCM Designer for Windows.
- ***Manual CCM Repository 5.0.***
User's Guide for CCM Designer for Windows.
- ***ITP Model Developer Manual.***
Describes CCM Template Script, the scripting language used in Master Templates.
- ***CCM Manual.***
This document describes the main entry point to Kofax Customer Communications Manager.
- ***KTA_CCM_Distribution.***
Describes the KTA CCM Distribution contract type.
- ***KTA_CCM_Interactive.***
Describes the KTA CCM Interactive contract type.

Training

To learn more about Kofax Customer Communications Manager, visit our Knowledge Center located at ccmkc.kofax.com.

To ensure your best experience in working with Kofax Customer Communications Manager Designer for Web, complete our complimentary and interactive e-learning modules located at www.kofax.com.

Getting Help for Kofax Products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax support site to search for answers and messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com.

The Kofax support page provides:

- Product information and release news.
Click a product family, select a product, and select a version number
- Downloadable product documentation.
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases.
Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers).
Click **Account Management** and log in.
- Access to support tools.
Click **Tools** and select the tool to use.
- Information about the support commitment for Kofax products.
Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Note To optimize your use of the support portal, go to the Kofax Customer Portal login page and click the link to open the Guide to the Kofax Support Portal. This guide describes how to access the support site, what to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

Chapter 1

Introduction

This guide contains instructions on how to install Kofax Customer Communications Manager (CCM). You can use the CCM package to deploy a single instance of the software.

System Requirements

Deployment of CCM is supported on the following server platforms:

- Microsoft Windows Server 2008 R2
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012 R2

Note Deployment on a client version of Microsoft Windows is not supported.

Additionally, deployment of CCM requires the following:

- The Microsoft .Net Framework 4.0.
- Java Runtime Environment 8 and onwards (64-bit).
- Tomcat 7.0 or 8.0 (64-bit) with the manager function. It should be installed using the Windows installer. Also, the Service Startup option should not be checked during installation.
- Microsoft Word 64-bit including VBA support: Microsoft Word 2010, Microsoft Word 2013, or Microsoft Word 2016.
- Powershell V2 and onwards.
- A service account that has local administrator rights and "Logon as a service" rights. Click **Administrative Tools > Local Security Policy > Local Policies > User Rights Assignment > Logon as a service**.
- Access to SQL Server. See [Supported Databases](#).
- A number of SQL Server databases (see [Database](#)). SQL Server can be installed on any server.
- SQL Server Command Line Utilities (2008 or 2012). If SQL Server is installed locally, SQL Server Command Line Utilities are installed as part of the database setup. Otherwise, you should install these tools separately.

Ports

When deployed, Kofax Customer Communications Manager uses the following ports.

80	In use by the CCM Content Management API service
2587	In use by CCM Repository Server
3000-3003	In use by CCM Core

8007	In use by Tomcat. Shutdown port for CCM Designer instance
8009	In use by Tomcat for AJP connectivity
8080	In use by Tomcat for CCM ComposerUI for HTML5 and CCM ComposerUI for J2EE
8081	In use by Tomcat for the Contract Manager for runtime purposes
8082	In use by Tomcat for the Contract Manager for administrative purposes
8180	In use by Tomcat for the LogServer to retrieve logs
8280	In use by Tomcat for CCM Designer

Note Inbound TCP/IP Port 8081 should be opened in the firewall and available for use by Kofax Customer Communications Manager. All other ports mentioned above should not be exposed externally.

Note To prevent a Slow HTTP Denial of Service attack, you should set up your firewall to limit the amount of connections per host for ports 8081 and 8082. For example, you can limit the amount to 50 connections per host.

Hardware Specifications

The following specifications for the hardware are recommended:

- 4 CPUs
- 4 GB RAM
- 50 GB or more free hard disk space

Clients

The client components of Kofax Customer Communications Manager are Web applications.

Users

The following browsers are supported:

- Microsoft Internet Explorer 11
- Microsoft Edge
- Recent versions of Google Chrome
- Recent versions of Firefox

Note JavaScript and pop-ups must be enabled for the content served by the CCM server so CCM functions correctly.

Microsoft Word is required to work with word processor-based content such as Master Templates and Rich Text Blocks. The following versions are supported:

- Microsoft Word 2010 (both doc and docx)
- Microsoft Word 2013 (docx only)
- Microsoft Word 2016 (docs only)

Note The browser must support ActiveX controls. Permission to install ActiveX (or administrative deployment of the Kofax Customer Communications Manager ActiveX controls) is required.

Content Developers/Maintainers

The following browsers are supported:

- Microsoft Internet Explorer 11
- Microsoft Edge
- Recent versions of Google Chrome
- Recent versions of Firefox

To work with Content Wizards and Forms you should consider the following:

- .Net 3.5 and .Net 4 must be installed on the workstation
- The "XAML browser applications" setting in the browser must be enabled

Database

The deployment process uses two databases. The CCM package configures these databases during installation.

- One database for the Contract Manager (if installed)
- One database for CCM Repository

Note The installer does not create these databases automatically. You should create empty databases manually. Also, you should create the databases with a case-insensitive collation.

The same DMBS and database settings are used for the Contract Manager and CCM Repository.

The names of the databases are partly configurable by using a prefix. The prefix cannot contain the colon and semicolon.

The names should appear as shown below.

- Contract Manager: <Prefix>_CM_5.0
- CCM Repository: <Prefix>_01_5.0

Both databases must be accessible by the same SQL Server account. The SQL Server account must have owner rights for these databases and use "dbo" schema.

Note SQL Server must have both SQL Server and Windows Authentication mode enabled. Also, the TCP/IP protocol for SQL Server must be enabled.

Note The databases contain important production data and should be backed up on a regular basis.

Supported Databases

The following versions of SQL Server are supported:

- SQL Server 2008 R2
- SQL Server 2012
- SQL Server 2014

For initial setups and tryouts, you can also use Microsoft SQL Server Express.

Note When using Microsoft SQL Server Express, the English variant of the DBMS is preferred.

License

Use of the Kofax Customer Communications Manager package requires a valid license. The deployment process searches for a license file. The correct structure of the license file is shown in the following sample.

```
<?xml version="1.0" encoding="utf-8"?>
<aia:Licence Version="1" xmlns:aia="http://www.aia-itp.com/licence">
  <aia:Product Name="ITP Server">
    <aia:SubLicence Type="Base">
      <aia:CompanyName></aia:CompanyName>
      <aia:NumberOfDocumentProcessors></aia:NumberOfDocumentProcessors>
      <aia:ExpirationDate></aia:ExpirationDate>
      <aia:Certificate></aia:Certificate>
      <aia:Environment></aia:Environment>
      <aia:LicenceCode></aia:LicenceCode>
    </aia:SubLicence>
    <aia:SubLicence Type="OnLine">
      <aia:ExpirationDate></aia:ExpirationDate>
      <aia:Certificate></aia:Certificate>
      <aia:NumberOfUsers></aia:NumberOfUsers>
      <aia:LicenceCode></aia:LicenceCode>
    </aia:SubLicence>
  </aia:Product>
  <aia:Product Name="ITP MDK Repository">
    <aia:SubLicence Type="Base">
      <aia:CompanyName></aia:CompanyName>
      <aia:ExpirationDate></aia:ExpirationDate>
      <aia:Certificate></aia:Certificate>
      <aia:Environment></aia:Environment>
      <aia:LicenceCode></aia:LicenceCode>
      <aia:NumberOfUsers>1</aia:NumberOfUsers>
    </aia:SubLicence>
    <aia:SubLicence Type="Model Developer">
      <aia:CompanyName></aia:CompanyName>
      <aia:ExpirationDate></aia:ExpirationDate>
      <aia:Certificate></aia:Certificate>
      <aia:Environment></aia:Environment>
      <aia:LicenceCode></aia:LicenceCode>
      <aia:NumberOfUsers></aia:NumberOfUsers>
    </aia:SubLicence>
    <aia:SubLicence Type="Textblock Editor">
      <aia:CompanyName></aia:CompanyName>
      <aia:ExpirationDate></aia:ExpirationDate>
      <aia:Certificate></aia:Certificate>
      <aia:Environment></aia:Environment>
      <aia:LicenceCode></aia:LicenceCode>
      <aia:NumberOfUsers></aia:NumberOfUsers>
    </aia:SubLicence>
  </aia:Product>
</aia:Licence>
```

```
</aia:SubLicence>  
</aia:Product>  
</aia:Licence>
```

For MDK Repository Base license, the value for `NumberOfUsers` must be set to 1.

For development or test purposes, the value for ITP/Server Base license should be "Development and Test." For all other environment elements, the value should be "Development or Test".

Note The CCM package might not deploy the full number of Document Processors that are permitted by the license. The default configuration does not install more than four Document Processors. The `Instance!NumberOfDPs` parameter can be used during deployment to specify a different number of Document Processors. Then, the CCM Core Administrator can be used to add or remove Document Processors.

Chapter 2

Install Kofax Customer Communications Manager

The Kofax Customer Communications Manager package is installed and deployed in phases. In the first phase, prerequisites are checked. If the deployment fails in this phase, you can restart it after the cause of the failure is resolved. If it fails again, you can uninstall the software.

Note If you need to restart the installation, before doing so, stop the transcript to the log file. To stop the transcript, navigate to the **Powershell** window and execute the `Stop-Transcript` command or close the Powershell window.

1. To start the deployment, copy the package to the server.
2. On the server, extract the package contents to the root folder, where a new folder, `InstallServer`, is automatically created. The extracted files appear in the new folder, which is referred to as the "package root."
3. Set up a PowerShell command to start the installation. This command line should call `Install.ps1` with a list of parameters (see [Deployment Parameters](#)).
4. Click **Run as Administrator** to open a PowerShell window (64-bit) with elevated rights.
5. Navigate to the package root.
6. To run the prepared command, execute the **Set-ExecutionPolicy AllSigned** command.
7. If the following prompt appears, select **Always Run (A)**.

```
Do you want to run software from this untrusted publisher?  
File ...Install.ps1 is published by CN=Aia Software B.V., O=Aia Software B.V., L=Nijmegen,  
S=Gelderland, C=NL and is not trusted on your system. Only run scripts from trusted  
publishers.  
[V] Never run [D] Do not run [R] Run once [A] Always run [?] Help (default is "D"):  
Navigate to the package root.
```

8. Wait for the process to finish.

Note When the installation is finished, you can remove the package root folder.

Test the Installation

To test the installation, use the following web page: `http://<ccm server>:8081/start/home.html`.

The interactive composition of a document can be tested by clicking "Test" in the section "ComposerUI HTML5". Afterwards, you can fill in the forms and a document will be opened by the end of the run. The

first time you will do this test run, you will be asked to install an ActiveX component. This component will be used to open Microsoft Word when the composition run is completed.

After Installation

When the CCM package is installed, an example Web application is available to test the installation and to reference ComposerUI integration resources. For production and acceptance systems, this Web application is not required, and you should remove it.

To remove the web application, navigate to `<Tomcat installation folder>\instance-CCMRuntime-4.5.1\webapps-CM` and remove the `Start` folder.

Note You can configure CCM Contract Manager's Tomcat instances (TCP ports 8081 and 8082) to use HTTPS. You should not configure any other Tomcat instances to use HTTPS. Also, configure Tomcat instances to suppress extended error messages.

Uninstall the Product

Use this procedure to remove CCM 5.0 from the server.

1. To uninstall CCM 5.0, navigate to **<deploy root> > CCM > Programs > <version> > Management** and execute the following command: `.\CCM\Programs\5.0\Uninstall\Uninstall.ps1`. Place the command on a new line.

This command removes all Kofax Customer Communications Manager 5.0 related programs, files, services, and registry entries.

2. To clear the database for further reinstallation, add the switch `-clearContractManagerDatabase` to the uninstallation command.

You should execute this command outside of the CCM folder. To clear the database, the database password must be provided by adding `-databasePassword <password>` to the uninstallation command.

If the uninstallation script is not available in the Programs folder, navigate to the extracted folder (Example, `C:\InstallServer\Uninstall.ps1`).

Uninstall Version 4.4

The Kofax Customer Communications Manager package distributes a command to uninstall Kofax Customer Communications Manager 4.4. The command is not installed with the package, but it is available as `InstallServer\Uninstall-4.4\Uninstall-4.4.ps1`.

1. To uninstall Kofax Customer Communications Manager 4.4, navigate to **<deploy root> > CCM > Programs > <version> > Management** and execute the following command: `.\InstallServer\Uninstall-4.4\Uninstall-4.4.ps1`.

If the uninstallation script is not available in the Programs folder, navigate to the extracted folder (`C:\InstallServer\Uninstall-4.4\Uninstall-4.4.ps1`).

2. To clear the database for further reinstallation, add the switch `-clearContractManagerDatabase` to the uninstallation command.

To clear the database, the database password must be provided by adding `-databasePassword <password>` to the uninstallation command.

Chapter 3

Upgrade Your Installation

You can upgrade an existing installation of Kofax Customer Communications Manager 4.4 or newer to Kofax Customer Communications Manager 5.0. The upgrade installs Kofax Customer Communications Manager 5.0 alongside your existing installation, using the same configuration that the current Kofax Customer Communications Manager was installed with.

Prerequisites

To upgrade an installation, you will need the following:

- Create a new database for the contract manager called `<Database!Prefix>_CM_4.5.1`.
- Create a new database for the CCM instance called `<Database!Prefix>_01_4.5.1`.
- Enough disk space to accommodate repository content.

Note The new databases should be owned by the user who owns the existing databases.

Perform the Upgrade

To upgrade an installation, execute the following command `.\Upgrade.ps1 Database!Password=<password> Services!Password=<password> "License!File=C:\My License \license.xml"`.

Note Replace the preceding sample parameters with actual values that apply to your currently active Kofax Customer Communications Manager setup.

When the upgrade is completed, the 5.0 installation is active and available for testing. The previously active installation is disabled.

The CCM Repository content is now copied to the new database. Any changes in the repository content are not reflected in the older version.

Any specific Tomcat Server configuration applied to Tomcat instances should be reapplied to the instances installed for CCM 5.0.

Switch to an Older Installation

You can switch to an older installation if the new installation does not work properly.

Navigate to **<deploy root> > CCM > Programs > <version> > Management** and run `\Activate.ps1 -Version <version number>`.

After running this command, the older installation is active and the new installation is disabled. To switch back to 5.0, run the preceding command with 5.0 as a value for the `<version number>`.

Upgrade a Custom Setup

To upgrade a customized setup, perform a standard upgrade (see [Upgrade an Installation](#)) and customize the new deployment. After performing the upgrade, a standard setup of Kofax Customer Communications Manager 5.0 is available.

All custom configuration of the previous version must be deployed to the newer version. The work folder for the new deployment resides in `<deploy root>\ccm\work\4.5\instance_01`.

For custom configuration, consider the following:

- Modified CCM Core exit points
- Manually added CCM Core services
- Manually created files and folders within the CCM Work directory
- Changes made via the CCM Core Administrator
- Extra installed CCM components such as CCM ComposerUI for ASP.NET, CCM Core web services interface, and CCM Designer for Windows.

Chapter 4

Deployment Parameters

Database!Host	The host name of the database computer.
Database!Prefix	The prefix for the database that will be in use. The databases, such as <nn>, appear as <prefix>_<nn>. The database for the contract manager appears as <prefix>_CM. The prefix cannot contain a colon or a semicolon.
Database!User	The SQL Server user used to access all databases. At the deployment stage, the user must have owner rights to the database.
Database!Password	The password for the SQL Server user used to access all databases.
Services!User	The user account used for the installed services. This user must be a local administrator and must have the "Logon as a service" rights. When specifying a local user, place a period and backslash (.\) at the beginning of the parameter. Example: .\kccm
Services!Password	The password for the services user.
License!File	The location of the .xml file with the license information.
Host!IPAddress	Optional. If a server has multiple IP addresses, you can select a specific IP address for the Kofax Customer Communications Manager software to work with. If this argument is omitted, the package picks any IP address available.
Database!CmdClient	Optional. Location of sqlcmd.exe. The package tries to derive the location of sqlcmd.exe automatically. If it fails, it asks to provide the location using this parameter.
Database!ServerName	Optional. The name of the SQL Server instance that should be in use by the installer. Used only if SQL Server is not using the default instance name.
Database!Port	Optional. The port used by SQL Server. Used only if SQL Server is not listening to the default port 1433. Note When using dynamic ports, specify Database!ServerName, not the port number.
Deploy!RootPath	Optional. The root drive/directory where the software is deployed. If this argument is omitted, the package is deployed to C:\.
Deploy!PredefinedSetup	Optional. The name of a supported predefined setup, where not all components are installed. Supported values are Runtime-Designtime-NoContractManager and RuntimeOnDemand-NoContractManager. For a complete setup, omit this parameter. For details, see Predefined Setups .

Example Deployment Command

The following is an example deployment command.

```
.\Install.ps1 Database!Prefix=CCM Database!Host=CCMServer Database!User=itpuser  
Database!Password=pwd123 Services!User=.\kccm Services!Password=pwd456 "License!  
File=C:\My License\license.xml"
```

Note When a parameter contains spaces, it should be enclosed in double quotes.

Predefined Setups

The Installation package contains predefined setups. The complete installation consists of CCM Core, CCM Repository, CCM Designer, CCM ComposerUI for HTML5, and the Contract Manager.

- The Runtime-Designtime-NoContractManager setup performs a complete installation but omits the Contract Manager.
- The RuntimeOnDemand-NoContractManager setup installs CCM Core and CCM Repository only.

Chapter 5

Troubleshooting

This chapter gives troubleshooting tips that may be useful if you encounter an issue while using the product.

Package Cannot Connect to Database

If the package cannot connect to the database using a SQL Server, verify that SQL Server authentication is enabled, and that SQL Server has been restarted.

Also, the SQL Server user has a password policy that should be set to "never expire."

Services Cannot Be Created

If the package fails when creating a service, it may be unable to find the user. If a local user is used, verify that the value for the parameter `Services!User` starts with a period and backslash (`.\`).

Cannot Start CCM Core for Development or Test License

The license document and the XML file required for the package differ. The environment for CCM Core should be set to "Development and Test." Otherwise, the CCM Core service cannot be started due to an invalid license.

Upgrade Fails Because of Insufficient Disk Space

If the upgrade fails because it cannot create a dump of the repository database, follow these steps.

1. Navigate to the following folder:

```
<deploy root>\CCM\Programs\<<version number of the older version>  
\ITPMDKRepositoryServer.
```

2. Execute the following command:

```
repdump.exe <file> /cfg="<deploy root>\CCM\Work\<<previous version>  
\Instance_01\designer\Config\itprep.ini".
```

Note Verify that sufficient disk space exists to accommodate the repository database dump.

3. Execute the following command:

```
reupload.exe <file> /cfg="<deploy root>\CCM\Work\<version number of the older version>\Instance_01\designer\Config\itprep.ini"
```

4. Execute the following command:

```
cvc.exe /cfg="<deploy root>\CCM\Work\<version number of the older version>\Instance_01\designer\Config\itprep.ini"
```

Warning Messages

During the deployment, the CCM package may wait for a certain service to stop. This is indicated by warning messages similar to the following:

```
WARNING: Waiting for service '{serviceName}' to finish stopping
```

In this situation, you can manually terminate the corresponding service process.