

infoRouter V7.5 implementation Guide.



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infoRouter Implementation Guide - Version 7.5

<http://www.inforouter.com>

infoRouter V7.5 implementation Guide

This guide will take you through the step-by-step installation procedures required for a successful infoRouter install and implementation. Please print all relevant documentation before proceeding with this installation and make sure to follow these steps and perform them in the order in which they are described.

Step-by-step Installation

1) DOWNLOAD AND READ ALL DOCUMENTATION

Please make sure that you have downloaded the required reading material as indicated in the email you received from us.

Before you begin to run any setup program, please review the Server & Client Requirements document (infoRouter_V7.5_Requirements.pdf) to make sure that you have allocated resources that meet the minimum requirements for best performance.

Please make sure that your web server has the latest version of .NET framework installed. You must also make sure that your server has all the latest patches. For more on this topic, please review the Requirements document (InfoRouter_V7.5_Requirements.pdf).

IMPORTANT CHECK LIST PRIOR TO INSTALLATION

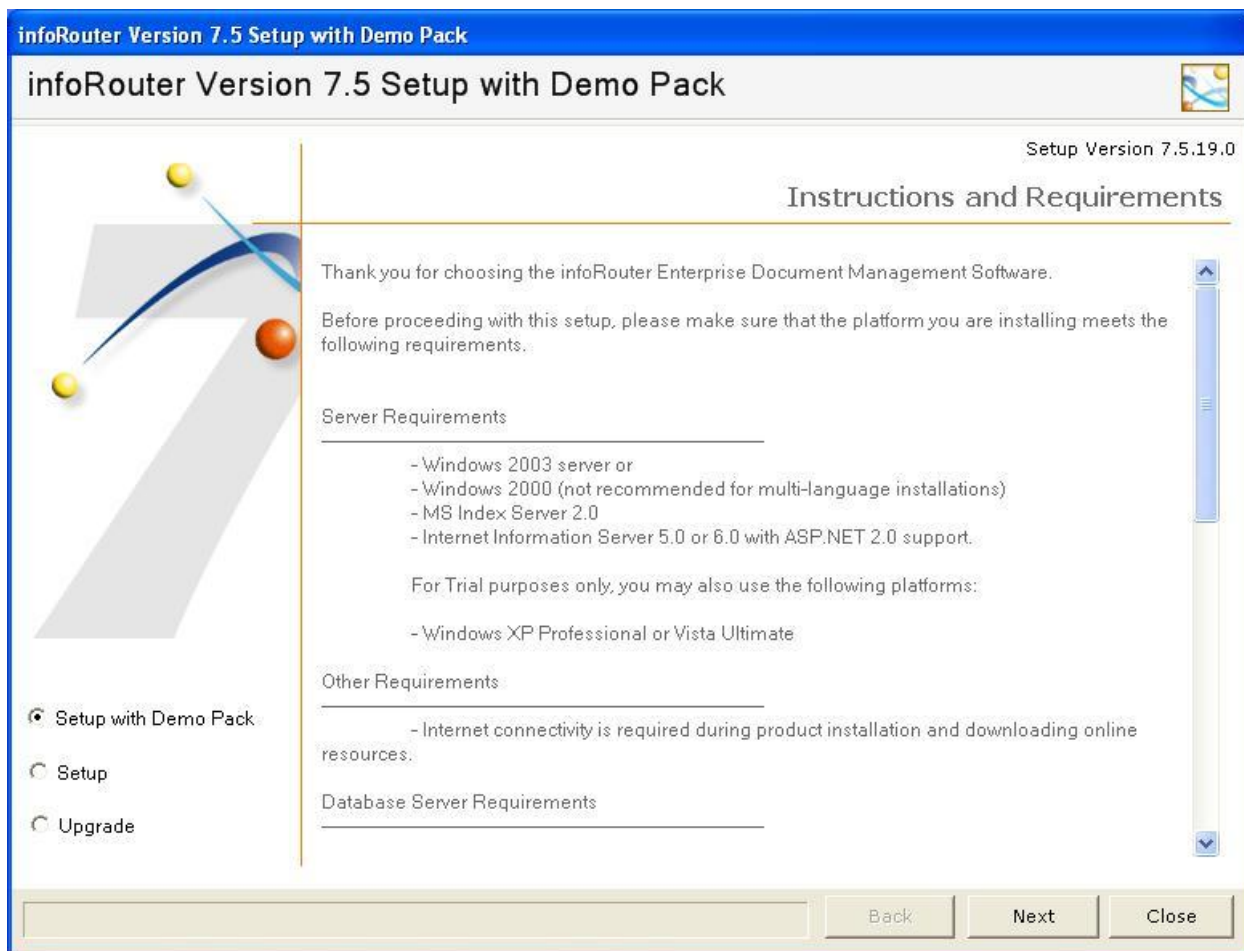
- 1) Logon to the web server (Windows 2000 or 2003) as “Administrator” or use an account that has full administration rights.
- 2) Make sure that IIS is installed and running
- 3) Make sure that ASP.NET has been enabled on your server
- 4) Download the setup program (IRSetup75.exe) and double click to begin the installation.
- 5) Follow the on-screen instructions

1) RUN THE SETUP PROGRAM

Logon to the web server (Windows 2000 or 2003) as “Administrator” or use an account that has full administration rights.

Make sure that IIS is running

Run the Setup program called “IRSetup75.exe”. This program can upgrade an existing Version 7.0 of infoRouter or create a new instance of infoRouter Version 7.5.

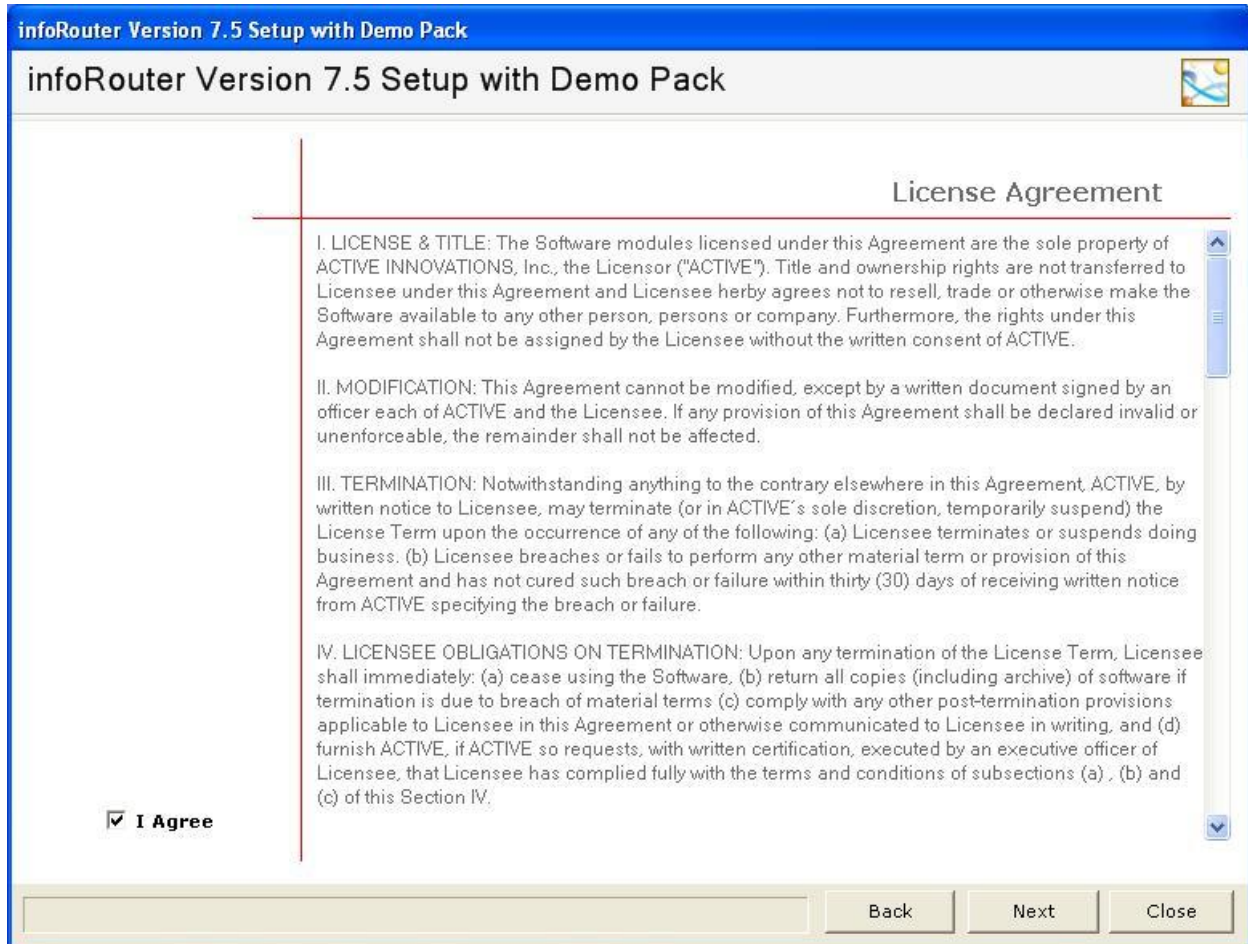


Make sure to select the “Setup with Demo Pack” option if you are a trial user. It may be a very good idea to use this option if you intend to use infoRouter with MySQL. This option provides a sample database and warehouse to demonstrate many features of infoRouter.

CLICK ON THE “NEXT” BUTTON TO PROCEED WITH THE INSTALLATION.

2) PLEASE READ THE LICENSE AGREEMENT

Please read the license agreement and check the “I Agree” checkbox to confirm that you have understood and accepted the license terms.



Click on the “Next” button to proceed.

3) REGISTER YOUR LICENSE

Select your license file, which was provided to you with the download instructions.

The screenshot shows a Windows-style dialog box titled "infoRouter Version 7.5 Setup with Demo Pack". The window is divided into two main sections. On the left, there is instructional text: "This program will now validate your license file." followed by "if you are installing the TRIAL edition and you wish to purchase infoRouter at a later date, updating this file located under infoRouter application path, will allow you to retain all work produced during the trial period." On the right, under the heading "License", there are two main sections. The first is "License File" with a text box containing "C:\Documents and Settings\Administrator\Desktop\License.lic" and a "Select" button. The second is "Product Licensed to" with several fields: "Company Name : Acme Corp.", "Email Address : info@acme.com", "Phone Number : (555) 555 3934", "Address : 123 Chery Lane st.", "Country : US", and "License Count : 50". Below these fields is a green-bordered box containing the text "Your license has been validated. Please click 'Next'". At the bottom of the window, there are three buttons: "Back", "Next", and "Close".

infoRouter Version 7.5 Setup with Demo Pack

License

This program will now validate your license file.

if you are installing the TRIAL edition and you wish to purchase infoRouter at a later date, updating this file located under infoRouter application path, will allow you to retain all work produced during the trial period.

License File: C:\Documents and Settings\Administrator\Desktop\License.lic

Product Licensed to:

Company Name : Acme Corp.
Email Address : info@acme.com
Phone Number : (555) 555 3934
Address : 123 Chery Lane st.
Country : US
License Count : 50

Your license has been validated. Please click "Next"

4) SPECIFY INSTALLATION PATHS

A series of default paths will be provided. Either confirm the default installation paths or choose new paths. We strongly recommend taking the default values. Remember, you will be able to change these later on.

infoRouter Version 7.5 Setup with Demo Pack

infoRouter Version 7.5 Setup with Demo Pack

Install Paths

infoRouter consists of multiple components that must be installed in various server locations. Please make sure to specify the appropriate locations.

In the simple infoRouter deployment model, all paths are located on the same server.

For more information on your installation options, please refer to the Implementation Guide provided with this setup.

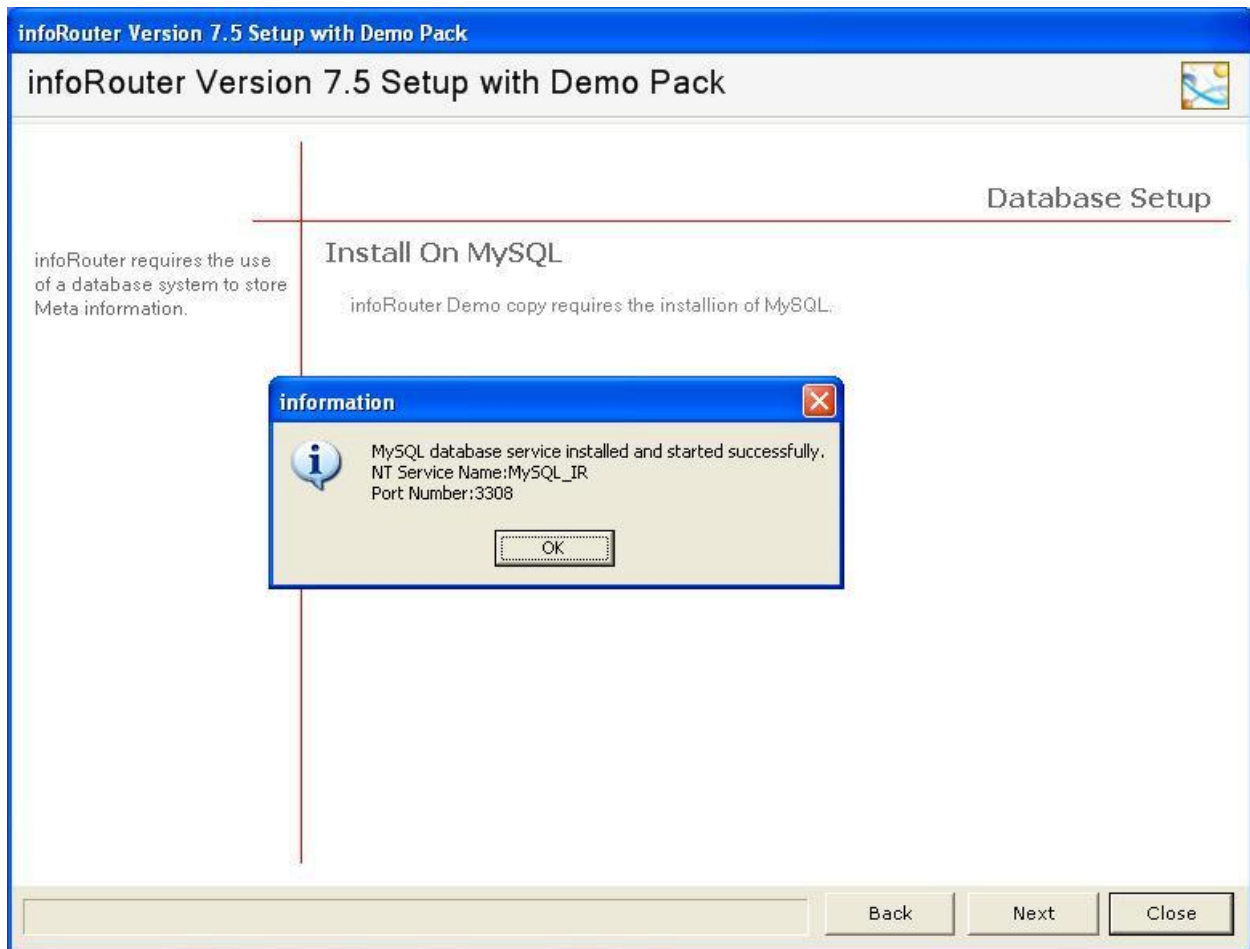
Application Path

Warehouse Path

Temporary Path

Index Server Catalog Path

5) DATABASE SETUP



The above screen demonstrates the setup of infoRouter with the DEMO PACK option chosen. Note that the DEMO PACK will always be installed with the MySQL database.

This screen demonstrates the setup when a clean MySQL install is chosen.

Now you must choose the database platform you wish to use with infoRouter. Make your selection by clicking on the appropriate radio button. In all cases (MySQL, Oracle or MS SQL Server), you must specify the following:

- Server name on which the database is located
- User ID and Password for an account with appropriate rights to create a database or update an existing database
- Name of the database to be created or used

The following screen describes the MySQL database selection

The screenshot shows the 'infoRouter Version 7.5 Setup' window. On the left, a text box states: 'infoRouter requires the use of a database system to store Meta information. Please choose one of the following database platforms.' Below this is a section titled 'Database Platforms' with three radio buttons: 'MS SQL Server', 'Oracle', and 'MySQL' (which is selected). On the right, under the heading 'Database Options', the 'Install On MySQL' section contains several input fields: 'Server Name' (localhost), 'Port Number' (3306), 'User Name' (root), 'Password' (masked with asterisks), and 'Database Name' (infoRouter). A note below these fields states 'infoRouter requires MySQL 5 or above.' At the bottom right of the setup area is a link labeled 'MySQL Download Page'. At the very bottom of the window are three buttons: 'Back', 'Next', and 'Close'.

Notice that if you choose to install infoRouter to use MySQL, this screen provides a link from where you can download and install MySQL. If you do not already have MySQL installed, click on the “MySQL Download page” link before proceeding with the setup.

The following screen describes the Oracle database selection

infoRouter Version 7.5 Setup

infoRouter Version 7.5 Setup

infoRouter requires the use of a database system to store Meta information.

Please choose one of the following database platforms.

Database Platforms

☐ MS SQL Server

☒ Oracle

☐ MySQL

Database Options

Install On Oracle

Service Name _____
infoRouter

User Name _____
iruser

Password _____

Please make sure that compatible Oracle Client software is installed on this server. infoRouter requires Oracle 8i or above.

Back Next Close

Using Oracle as your database platform requires a previously installed and working Oracle Database Server and an existing database allocated for use by infoRouter.

Enter the Oracle Service Name and User Name & Password combination for a user authorized to manage the previously created database.

The following screen describes the MS SQL database selection

The screenshot shows the 'infoRouter Version 7.5 Setup' window. The title bar reads 'infoRouter Version 7.5 Setup'. The main window has a header 'infoRouter Version 7.5 Setup' and a sub-header 'Database Options' on the right. On the left, a vertical red line separates the instructions from the input fields. The instructions on the left state: 'infoRouter requires the use of a database system to store Meta information. Please choose one of the following database platforms.' Below this is a section titled 'Database Platforms' with three radio buttons: 'MS SQL Server' (selected), 'Oracle', and 'MySQL'. The main area on the right is titled 'Install on MS SQL Server'. It contains four input fields: 'Server Name' with '(local)' entered, 'User Name' with 'sa' entered, 'Password' with '*****' entered, and 'Database Name' with 'infoRouter' entered. Below these fields, a note states: 'infoRouter requires MS SQL Server 7 or above. SQL Server user authentication type must be set to mixed.' At the bottom right, there are three buttons: 'Back', 'Next', and 'Close'.

Using MS SQL Server as your database platform requires a previously installed and working MS SQL Server instance.

Enter the server name or (local) and a User Name & Password combination for a user authorized to manage the previously created database. Then specify the database name (usually infoRouter).

6) SMTP CONFIGURATION

Change the “System Email Address” by changing the “[your domain]” with your company domain name. The system email address is a dummy email address that will be used by infoRouter to send SMTP email notifications to infoRouter users. Remember, this email address will not be able to receive emails from users.

The screenshot shows the 'infoRouter Version 7.5 Setup' window. The title bar says 'infoRouter Version 7 Setup'. The main window has a title bar 'infoRouter Version 7.5 Setup' and a small icon on the right. The main content area is titled 'Configure SMTP Parameters'. On the left, there is a vertical red line and a text box that reads: 'infoRouter uses an SMTP Server to send email notifications. Please specify the SMTP Server details to be used.' The main area contains several input fields and labels: 'SMTP Server Name' with a text box containing 'localhost', 'SMTP Port Number' with a text box containing '25', and 'Connection Timeout' with a text box containing '10' and the word 'Second' to its right. Below these are 'SMTP User Account Name' and 'SMTP User Account Password', each with a text box. Then 'System email address' with a text box containing 'inforouter@[yourdomain].com'. At the bottom, there is a 'Test SMTP Parameters' section with a text box containing 'testemail@[yourdomain].com' and a 'Send Test Email' button. At the very bottom of the window are three buttons: 'Back', 'Next', and 'Close'.

infoRouter Version 7 Setup

infoRouter Version 7.5 Setup

infoRouter uses an SMTP Server to send email notifications. Please specify the SMTP Server details to be used.

Configure SMTP Parameters

SMTP Server Name _____ SMTP Port Number _____ Connection Timeout _____

localhost 25 10 Second

SMTP User Account Name _____

SMTP User Account Password _____

System email address _____

inforouter@[yourdomain].com

Test SMTP Parameters

testemail@[yourdomain].com Send Test Email

Back Next Close

Use the “Send Test Email” button to make sure your SMTP settings are correct.

7) WEB SITE AND/OR VIRTUAL DIRECTORY SETTINGS

Make sure to supply a valid virtual directory name. The setup program to create the virtual directory will use this name. We recommend using the default name of infoRouter.

Make sure that the “Fully Qualified URL” is accurate and it reflects your server name.

If you would like to use a web site instead of a virtual directory, select the previously created web site name from the IIS Web Name drop-down and leave the IIS virtual directory Name prompt blank.

On Windows 2003 Server, select an application pool that supports ASP.NET 2.0 application. For VISTA and XP professional installs (trial only) selecting “Classic .Net AppPool” would be safer a choice.

Supply a new name or leave the “Index Server Catalog Name” unchanged. This parameter will be used to automatically create an MS Index Server catalog for full-text indexing.

The screenshot shows the 'infoRouter Version 7.5 Setup with Demo Pack' window. The title bar and a header bar both display 'infoRouter Version 7.5 Setup with Demo Pack'. The main content area is titled 'Virtual Directory Settings'. On the left side, there is instructional text: 'infoRouter requires MS Internet Information Server (IIS). if you would like infoRouter to run behind a Proxy Server or Firewall software you should specify a fully qualified URL such as http://inforouter.acme.com'. The right side contains four input fields: 'IIS Web Name' with a dropdown menu showing 'Default Web Site', 'IIS Virtual Directory Name' with a text box containing 'InfoRouter', 'Fully Qualified Application URL' with a text box containing 'http://utkuvmxp/inforouter', and 'Index Server Catalog Name' with a text box containing 'WHINDEX'. At the bottom right, there are three buttons: 'Back', 'Next', and 'Close'.

8) SPECIFY THE “SYSADMIN” ACCOUNT PASSWORD.

In this screen, you must specify a password for the “SYSADMIN” account. Please choose a password that is hard to guess but something you can remember. Make a record of your password in a safe place.

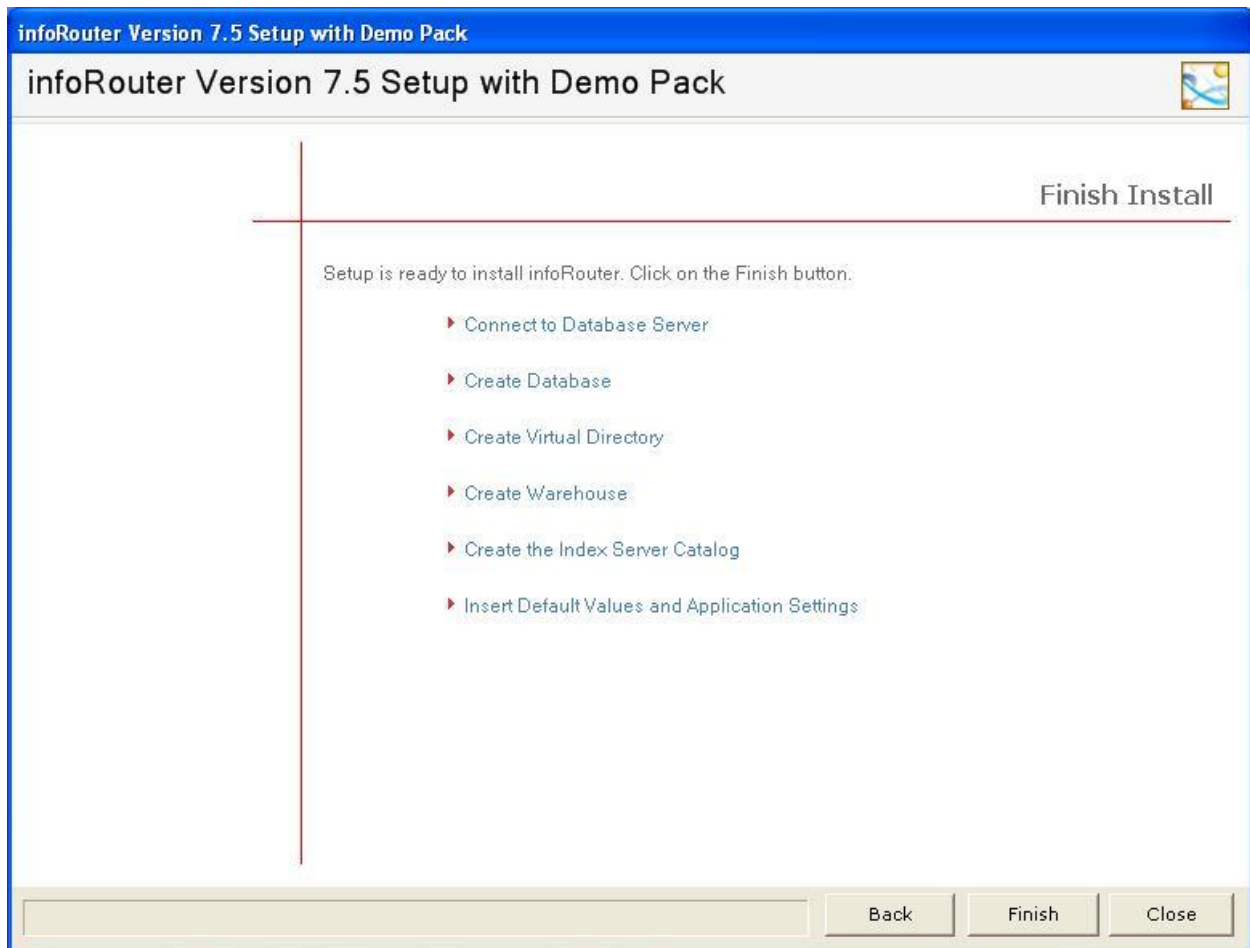
If you do forget your password, you may navigate to the HELP tab from any portal and click on the “Forgot Password” link. Enter your email address and infoRouter will send you your password to the specified email address. The “Forgot password” option is only available after a successful install of infoRouter. Therefore, it is important to specify a valid email address for the “SYSADMIN” account.

The screenshot shows the 'Final Settings' window of the 'infoRouter Version 7.5 Setup with Demo Pack'. On the left, a note states: '"sysadmin" is a predefined account name in infoRouter. It is used to administer the application. Please make sure that you choose a strong password for this account.' The main area contains three input fields: '"sysadmin" account password' (with 'pass' entered and a checked 'Display Password Characters' checkbox), 'Password confirmation' (with 'pass' entered), and 'sysadmin email address' (with 'iruser@acme.com' entered). At the bottom are 'Back', 'Next', and 'Close' buttons.

Note: The SYSADMIN password is set to “pass” (in lowercase) by default. If you are installing the DEMO PACK, all pre-defined user passwords are also “pass”.

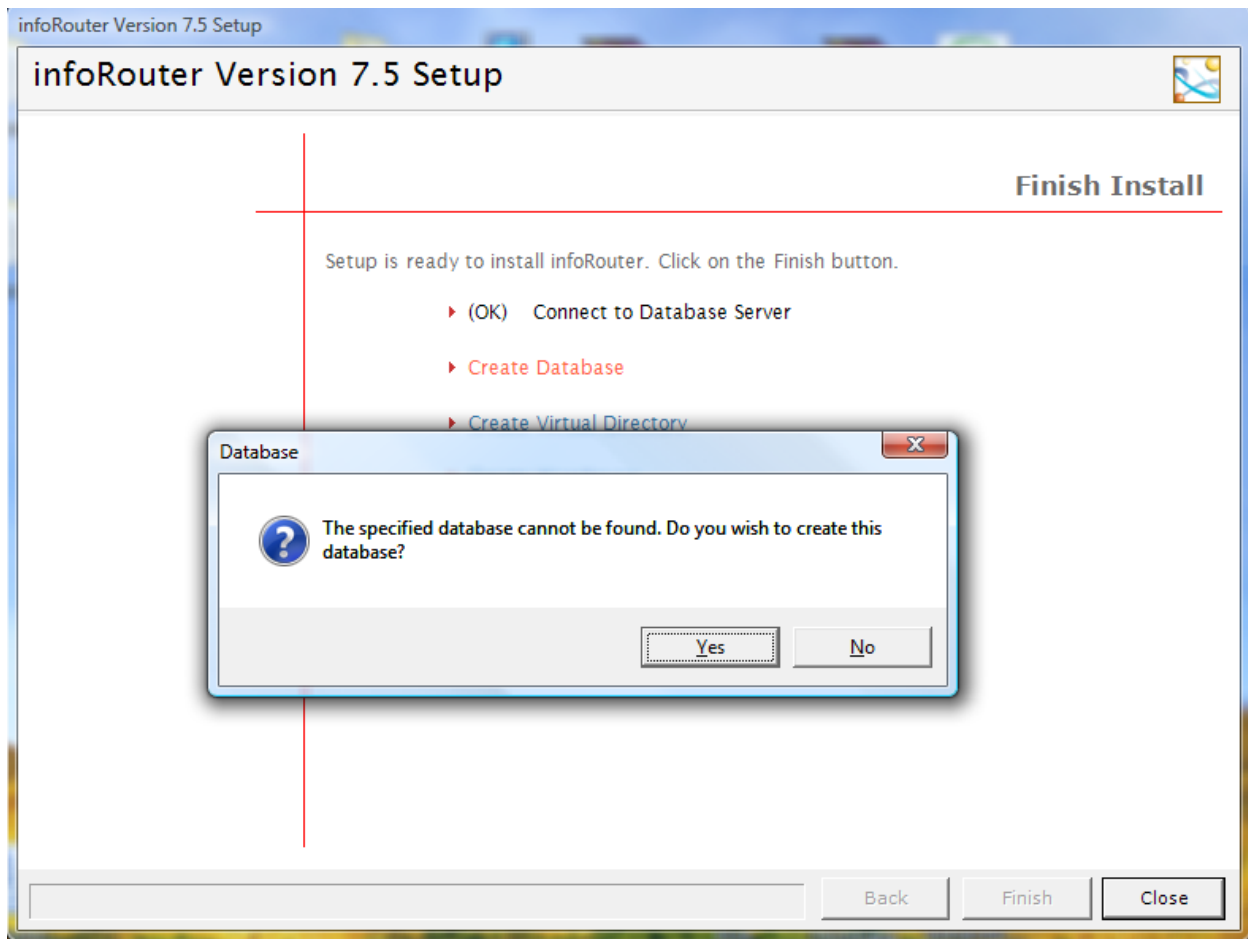
9) FINISHING INSTALL

Click the Finish Button to Install



At this stage of the installation, the setup program will need to access the database specified in the previous step.

If you have selected MS SQL Server or MySQL, the setup program will create the infoRouter database if one does not already exist. For Oracle, you must have an existing infoRouter database.

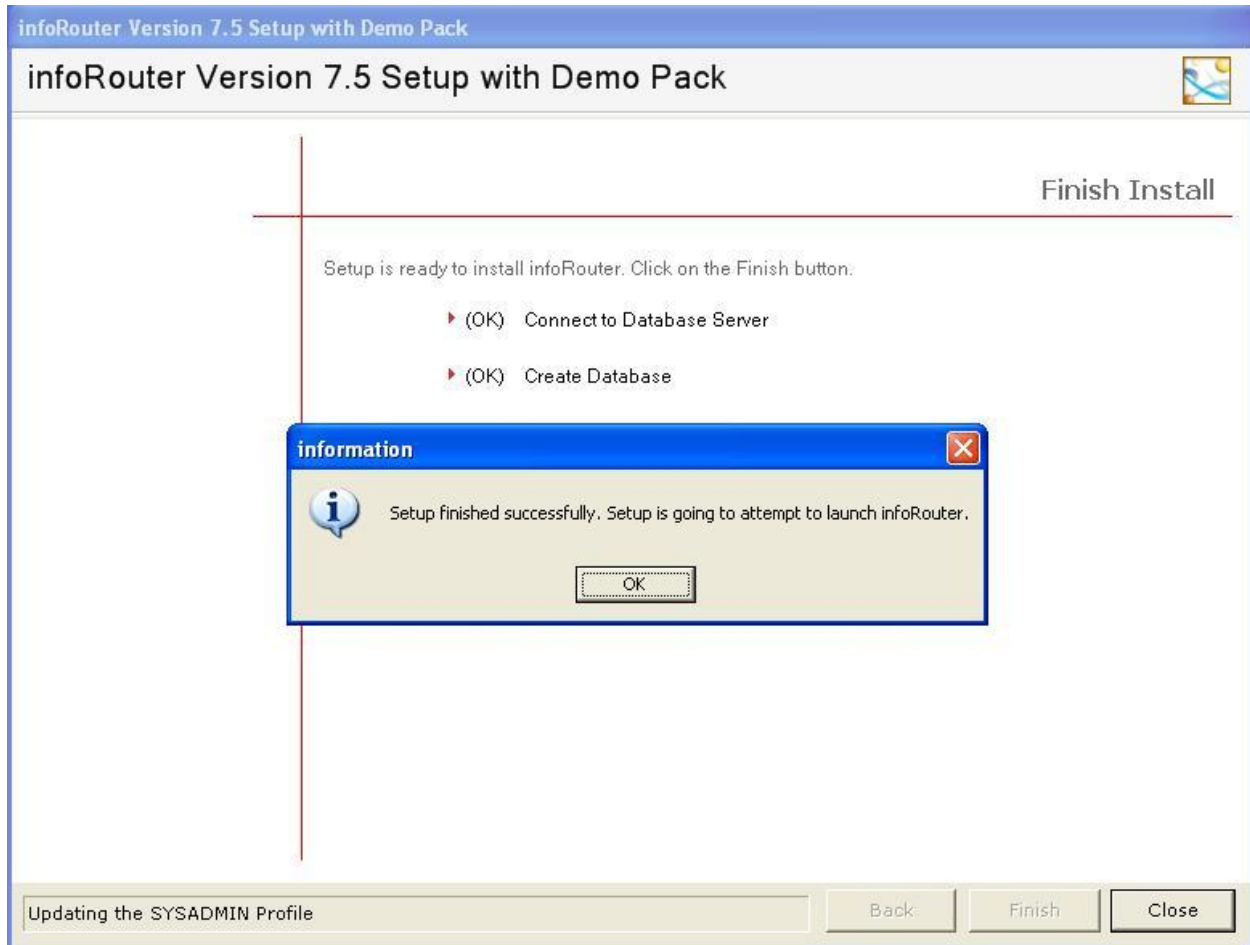


If the specified database does not exist, the setup program will confirm that a database does not exist and one is going to be created for you (MS SQL Server and MySQL only).

Note: The screen above will only appear if you are installing infoRouter without the DEMO PACK option.

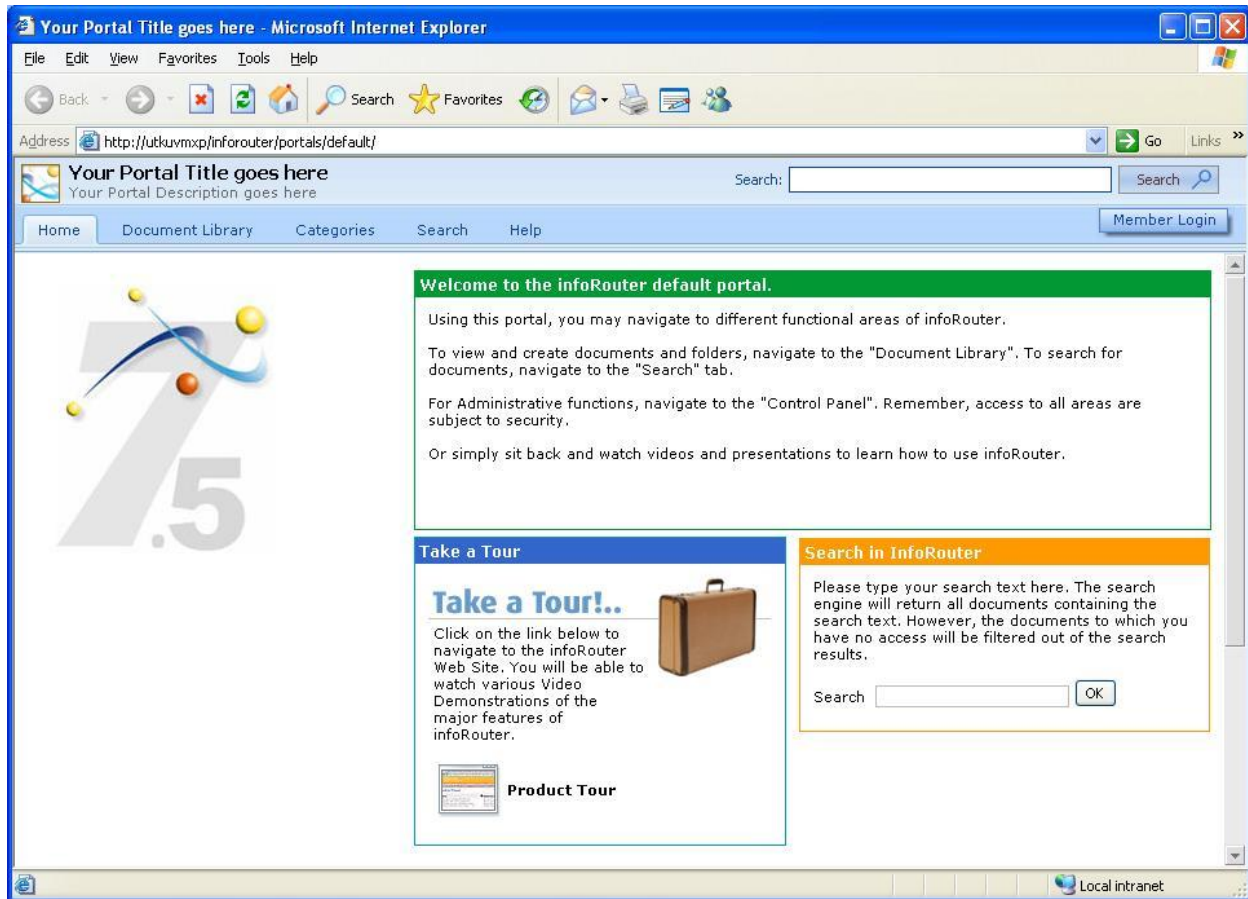
10) INSTALLATION IS COMPLETE

At this screen, the setup of infoRouter is complete and the setup program will attempt to launch infoRouter.



11) LOGGING ON TO INFOROUTER

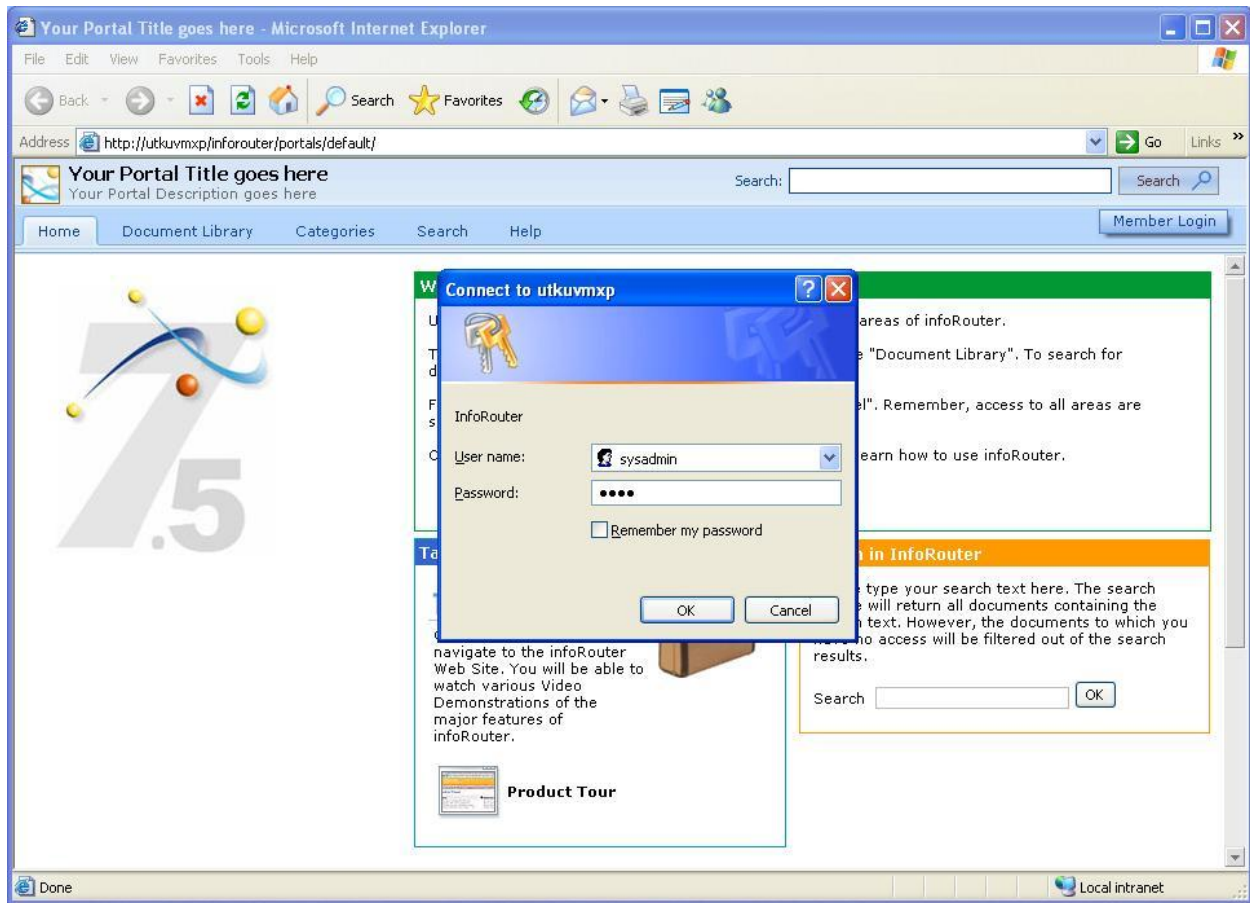
Once the setup is complete, the setup program will automatically launch infoRouter.



Click on the “Member Login” button located on the upper right corner of the browser window to log into infoRouter.

Remember, the SYSADMIN password is by default set to “pass”. Use “sysadmin” for the user id and “pass” and for the password.

Once again, the passwords for the pre-defined users are also “pass”



12) INSTALL ADDITIONAL IFILTERS

Now that the installation of infoRouter is complete, the only remaining task is to provide MS Index Server additional tools to help you find documents quickly and easily.

By default, MS Index Server is able to perform full-text searches on all documents produced using MS Office Products (MS Word, MS Excel, MS PowerPoint) and other text based document formats such as HTML, Text and XML.

If you would like to have MS Index Server perform full-text searches on additional document types and formats, you must install additional software called iFilters on your server. We have provided a selection of iFilters we know to be free. You can install these on your server to extend the power of MS Index Server beyond the indexing office products.

If you have not downloaded the entire infoRouter install directory, the iFilters can be found in a folder called “iFilters For Full Text Indexing”.

If you need iFilters for additional file formats, there are a number of third-party companies that develop them.

12) INSTALLATION IS COMPLETE

Congratulations, the setup is now complete.

Please refer to the “Administrator’s Getting Started Guide” to get started with the configuration of infoRouter for production use.

SECURITY REQUIREMENTS FOR SINGLE & DISTRIBUTED MODEL INSTALLATIONS

If you choose to use the Distributed Model, you must perform the following:

If you wish to place some or all of your warehouse on a machine other than the IIS machine, you must use a domain account as your IIS user. To do this, you must configure the Web.config file located in the installation directory (C:\infoRouter\Site).

To configure this file, open the "**Web.config**" file using Notepad.

Add the following line in <system.web> section.

```
<identity impersonate="true" userName="<DomainName>\<Username>"  
password="<password>" />
```

Specify the **DomainName**, **UserName** and the **Password** of the Domain User account.

Save the Web.config file.

Important Note: The domain account chosen for impersonation should be added to the "Users" user group for the local machine (IIS Machine)

Please note that changes to this file forces a reset of the IIS Application, in this case, infoRouter.

NT Level Security Requirements:

The domain account specified in the Web.config file must have the following access permissions to the following paths.

ASPNET (Windows 2000) or Network Services Account (Windows 2003) must have the same permissions

Warehouse Folder	Full Control
infoRouter installation directory (c:\inforouter by default)	Full Control
Windows Temp directory	Full Control
InfoRouter Temp directory (Specified in the application settings, by default c:\inforouter\temp)	Full Control

IMPORTANT NOTES ABOUT IMPERSONATION

This user account chosen must be able to access all the defined paths for your warehouse. These paths should not be shared. All changes to the documents must be made by infoRouter.

Do not limit access rights to the defined paths for the local user account.

Do not apply read/write permissions to directories in the warehouse paths.

If you wish to use remote paths (UNC paths) for storage, you must make sure to use a domain account and NOT a local account. Since local accounts are by definition only valid on the machine in which they are defined, these accounts cannot be assigned privileges on remote paths or servers.

If you choose to use the Simple Model, you must perform the following:

If your warehouse resides on the same server as the IIS machine, you do not need to use the Web.config file.

NT Level Security Requirements for Windows 2000 machines:

The ASPNET user should have the following access permissions to the following paths:

Warehouse Folder	Full Control
infoRouter installation directory (c:\inforouter by default)	Full Control
InfoRouter Temp directory (Specified in the application settings, by default c:\inforouter\temp)	Full Control

NT Level Security Requirements for Windows 2003 machines:

The NETWORK SERVICE should have the following access permissions to the following paths:

Warehouse Folder	Full Control
infoRouter installation directory (c:\inforouter by default)	Full Control
Windows Temp directory	Full Control
InfoRouter Temp directory (This is a parameter in the application settings window)	Full Control

OTHER IMPORTANT CONSIDERATIONS & RESTRICTIONS

In the “Distributed Mode”, you can split your warehouse entries among different drives on the network however; **you may NOT use mapped drives.**

Mapped drives are user specific.

Example:

You log into the server as “Joe”

You create a mapped drive called “Z” and point it to a network drive.

As long as you log into this server as “Joe”, the mapped drive will be available.

As soon as you log out and log in as someone else, the mapped drive will no longer be available.

Result:

If you create a mapped drive and reboot your server (and do not log in as “Joe”), the mapped drive will no longer be available to infoRouter therefore making part of or the entire warehouse inaccessible.

Use UNC Paths instead:

UNC paths are fully qualified paths that are system specific and do not depend on any logged in user.

A UNC path can be defined as follows:

//<NetworkServerName>/DriveName.

For more information on using infoRouter in the distributed mode, please refer to the “Distributed vs Simple Model.pdf” document.