

infoRouter V7 implementation Guide.



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infoRouter Implementation Guide - Version 7

<http://www.inforouter.com>

infoRouter V7 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 entire “Documentation” folder from our support site. This folder includes all the required documentation for a successful implementation. Before you begin to run any setup program, please review the Server & Client Requirements document (infoRouter_V7_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_Requirements.pdf).

2) CHOOSE THE RIGHT INFOROUTER MODEL.

Please read the Distributed versus the Simple model document located in the installation path (Distributed vs Simple Model.pdf) and make sure that you choose the best model for your installation and select the server(s) to install infoRouter.

Important Note:

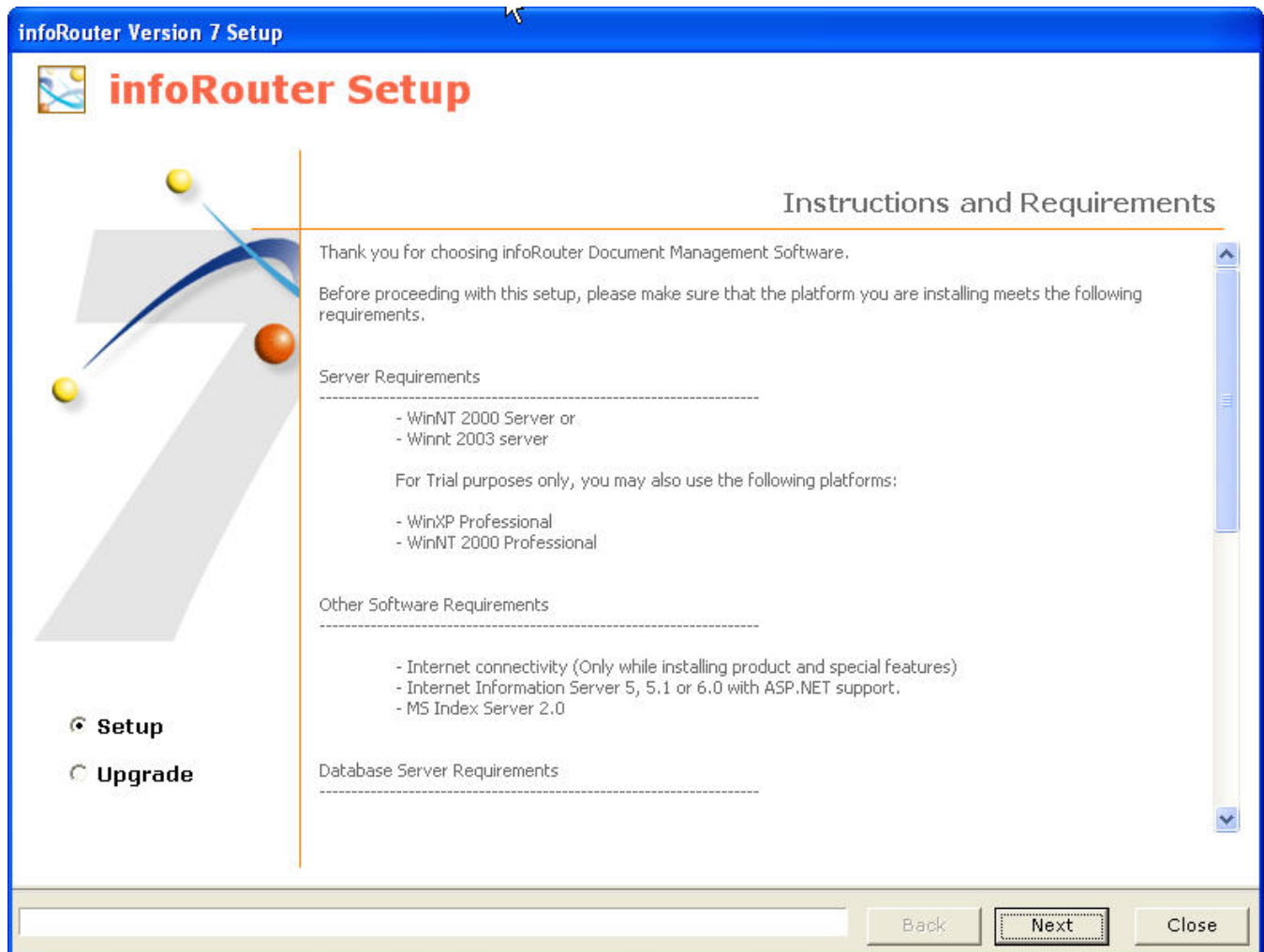
Read the “Security Requirements for single & distributed model installations” section before proceeding with the installation. Please apply the correct security permissions after Step 5 and before Step 6.

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

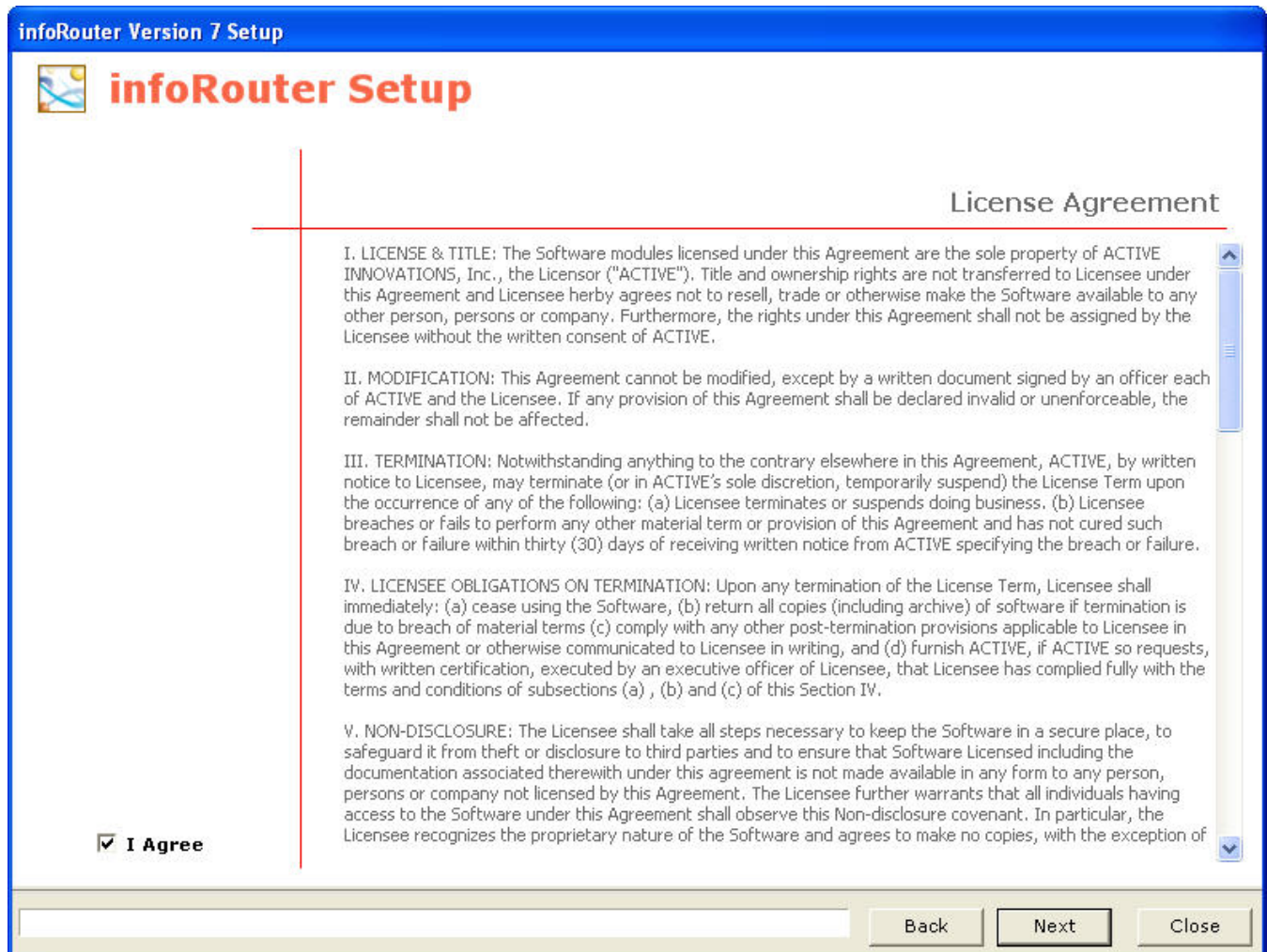
Run the Setup program called “IRSetup.exe”. This program can upgrade an existing Version 6.0 of infoRouter or create a new instance of infoRouter Version 7.0.



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 the license terms.



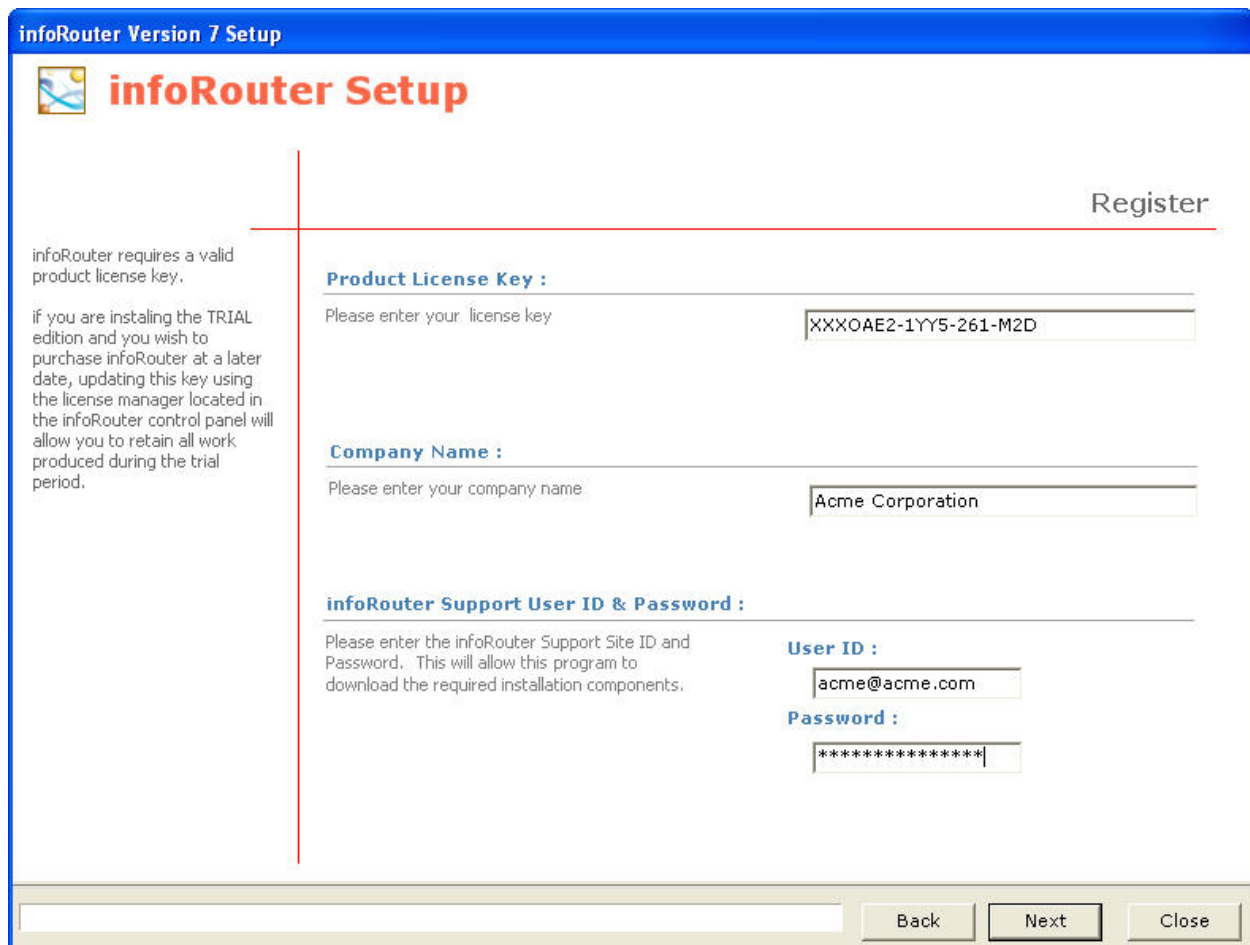
Click on the “Next” button to proceed.

3) REGISTER YOUR LICENSE KEY

Enter your license key (provided to you with the download instructions).

Enter a company name

Enter your login id and password for the infoRouter support site. This information has been provided to you with the download instructions. The setup program will use this information to connect to the infoRouter support server to download the latest versions of the setup components.



infoRouter Version 7 Setup

infoRouter Setup

Register

infoRouter requires a valid product license key.

if you are installing the TRIAL edition and you wish to purchase infoRouter at a later date, updating this key using the license manager located in the infoRouter control panel will allow you to retain all work produced during the trial period.

Product License Key :

Please enter your license key

XXX0AE2-1YY5-261-M2D

Company Name :

Please enter your company name

Acme Corporation

infoRouter Support User ID & Password :

Please enter the infoRouter Support Site ID and Password. This will allow this program to download the required installation components.

User ID :

acme@acme.com

Password :

Back Next Close

4) SPECIFY INSTALLATION PATHS

A series of default paths will be provided. Either confirm the default installation paths or choose new paths.

The screenshot shows the 'infoRouter Version 7 Setup' window. The title bar is blue with the text 'infoRouter Version 7 Setup'. The main window has a blue header with the 'infoRouter Setup' logo. On the left, there is a vertical red line separating the instructions from the path configuration fields. The instructions on the left state: 'infoRouter consists of multiple components that must be installed in various server locations. Please make sure to specify the appropriate locations.' and 'In the simple infoRouter deployment model, all paths are located in the same location. Example: "c:\infoRouter".' Below this, it says: 'For more information on your installation options, please refer to the Implementation Guide provided with this setup.' The right side of the window is titled 'Install Paths' and contains five sections, each with a label, a description, and a text input field:

- Application Path :** Enter a path to store various components of infoRouter such as Configuration files, Portal definitions, Logs etc. The input field contains 'C:\InfoRouter'.
- Publishing Path :** Enter a path to store Virtual directory files. The input field contains 'C:\InfoRouter\Site'.
- Warehouse Path :** Specify a path to store infoRouter documents. The input field contains 'C:\InfoRouter\WH'.
- Temporary Path :** Enter a path to store temporary files. The input field contains 'C:\InfoRouter\Temp'.
- Index Server Catalog Path :** Enter a path to store the Index Server Catalog. Please make sure that the specified path is large enough to support mass data. The input field contains 'C:\InfoRouter\Catalog'.

At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Close'.

Now click on the “Next” button to start the download process. At this point, the setup program will attempt to connect to the infoRouter support site and download the latest setup files required to install infoRouter on the specified paths.

5) DOWNLOAD THE SETUP FILES

The setup program will connect to the infoRouter support server and begin downloading the latest installation components and required files.



The required setup files are now downloaded onto your server. The installation will proceed using these files. Please refer to the “Security Requirements for single & distributed model installations” section before moving on to the next step.

6) CHOOSE THE DATABASE TYPE YOU WISH TO USE

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
- 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

infoRouter Version 7 Setup

infoRouter Setup

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

Please choose one of the following database platforms.

If you don't have any of the supported platforms, you may choose MySQL. This setup program will give you the option to download this platform.

Database Options

☐ MS SQL Server ☐ Oracle ☒ MySQL

Install On MySQL

if you do not have a working copy of MySQL, you may download it by clicking here.

Download & install MySQL

Server Name :

MySQL server name: localhost

Port Number : 3306

User Name :

Enter a User Name: root

Password : *****

Database Name :

Name of the database that will be crated or used: infoRouter

Back Next Close

Notice that the MySQL selection offers an option to download and install the MySQL Database platform. This is only the case with MySQL. If you do not already have MySQL installed, click on the “Download & Install MySQL” button before proceeding with the rest of the screen.

The following screen describes the Oracle database selection

infoRouter Version 7 Setup

infoRouter Setup

Database Options

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

Please choose one of the following database platforms.

If you don't have any of the supported platforms, you may choose MySQL. This setup program will give you the option to download this platform.

☐ MS SQL Server ☒ Oracle ☐ MySQL

Install On Oracle

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

Service Name :

Service name to be used when connecting to the Oracle database

infoRouter

User Name :

User name. This account must have adequate privileges to create a schema, add, drop tables

sys

Password :

Password of the specified Oracle user 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

infoRouter Version 7 Setup

infoRouter Setup

Database Options

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

Please choose one of the following database platforms.

If you don't have any of the supported platforms, you may choose MySQL. This setup program will give you the option to download this platform.

☒ **MS SQL Server** ☐ **Oracle** ☐ **MySQL**

Install on MS SQL Server infoRouter requires MS SQL server 7 or above. SQL Server user authentication type must be set to mixed.

Server Name :
The name of the server on which SQL Server is installed. (local)

User Name :
Enter a User Name. Either use "sa" or an account that has administrative rights on the selected server. sa

Password :
Password of the user specified above *****

Database Name :
Name of the database that will be created or used. infoRouter

Back Next 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).

7) VIRTUAL DIRECTORY SETTINGS

Enter the virtual directory settings.

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

Replace the default “acme_srv” with your server name to create a “Fully Qualified URL”

Change the “System Email Address” by changing the “acme.com” 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.

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.

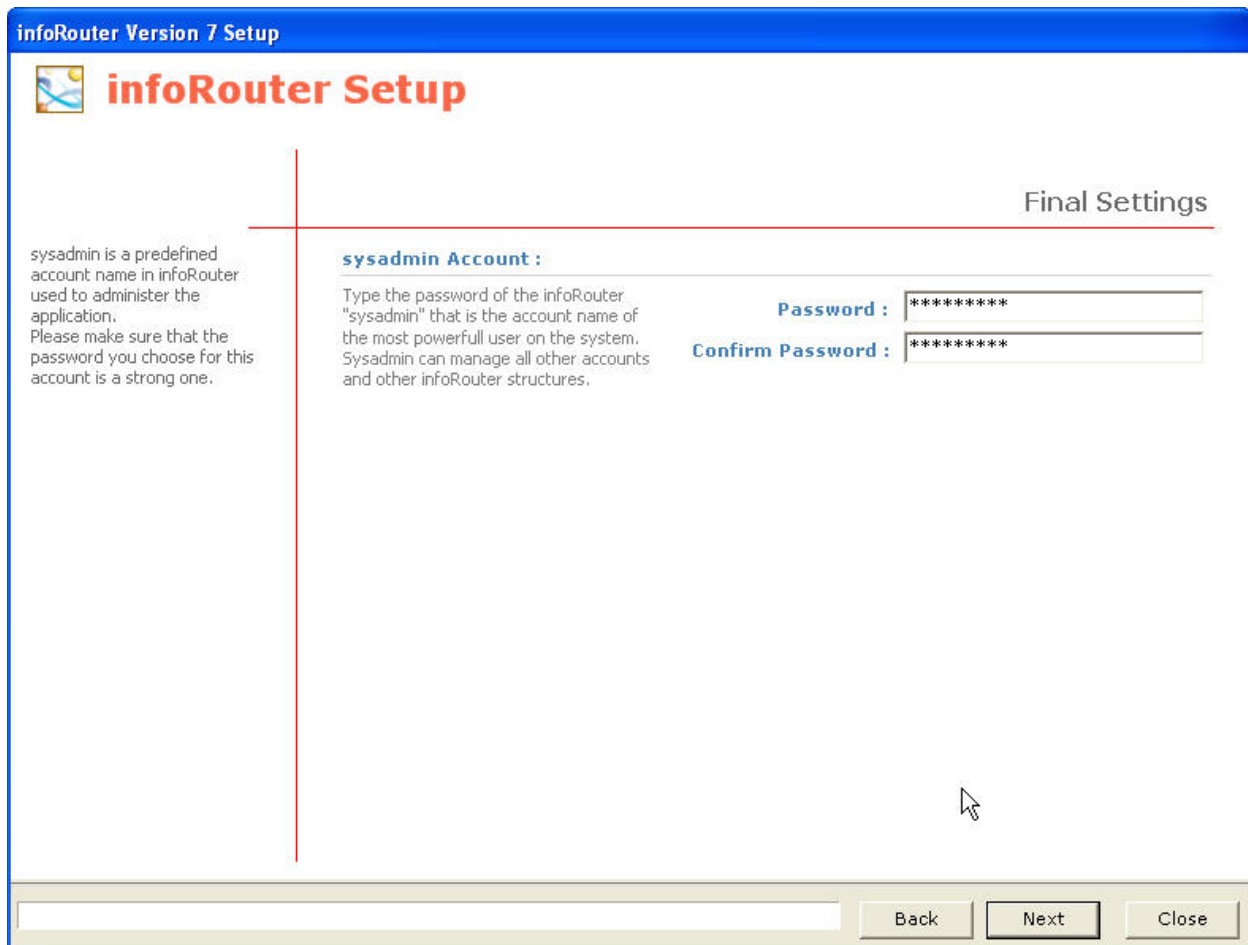
The screenshot shows the 'infoRouter Version 7 Setup' window with the 'Virtual Directory Settings' tab selected. On the left, a sidebar contains a logo and text: 'infoRouter requires MS Internet Information Server (IIS). if you would like infoRouter to run behind a Proxy Server or Firewall software you should specify a fully qualified URL such as http://inforouter.abccorp.com'. The main area contains five settings:

- IIS Web Name :** A dropdown menu showing 'Default Web Site'. Below it, text says: 'Select the web name. The virtual directory will be created under this web name.'
- IIS Virtual Directory Name :** A text box containing 'InfoRouter'. Below it, text says: 'Enter a Virtual Directory name. Leave blank if you wish to use the root directory.'
- Fully Qualified Application URL :** A text box containing 'http://acme_srv/inforouter'. Below it, text says: 'Enter a fully qualified application URL. This URL will be used in notification emails. Example: http://<servername>/inforouter'.
- System Email Address**: A text box containing 'inforouter@acme.com'. Below it, text says: 'Specify the email address that infoRouter notification service will use as a email sender.'
- Index Server Catalog Name**: A text box containing 'WHINDEX'. Below it, text says: 'The name of the Index Server Catalog.'

At the bottom, there are 'Back', 'Next', and 'Close' buttons.

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. So it is important to specify a valid email address for the "SYSADMIN" account.



The screenshot shows the 'infoRouter Version 7 Setup' window with the 'Final Settings' tab selected. The window title is 'infoRouter Version 7 Setup'. The main heading is 'infoRouter Setup'. On the left, a note states: 'sysadmin is a predefined account name in infoRouter used to administer the application. Please make sure that the password you choose for this account is a strong one.' The central section is titled 'sysadmin Account :'. It contains two text boxes for password entry, both filled with asterisks. The first is labeled 'Password :' and the second is labeled 'Confirm Password :'. Below the text boxes, a mouse cursor is visible. At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Close'.

infoRouter Version 7 Setup

infoRouter Setup

Final Settings

sysadmin is a predefined account name in infoRouter used to administer the application. Please make sure that the password you choose for this account is a strong one.

sysadmin Account :

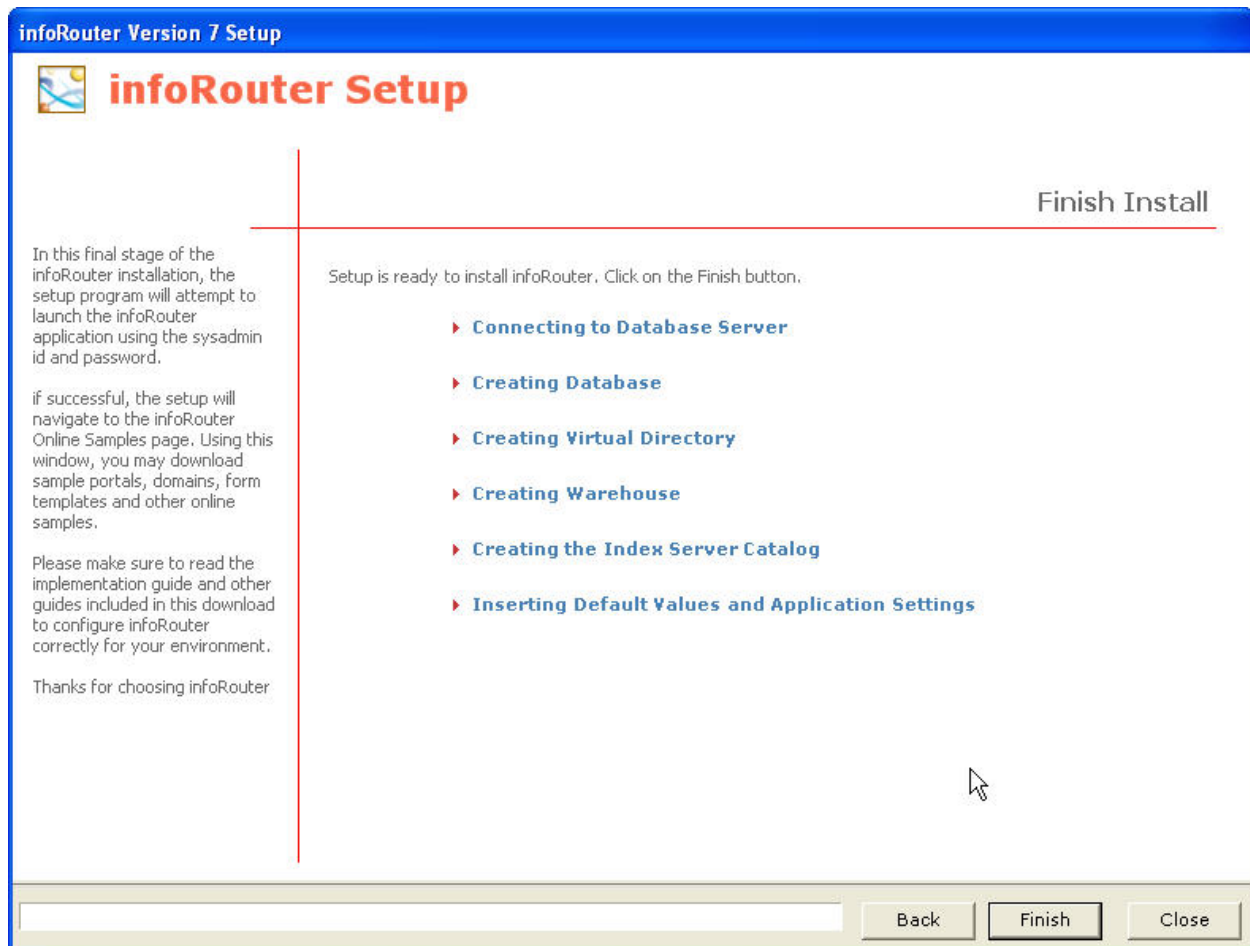
Type the password of the infoRouter "sysadmin" that is the account name of the most powerful user on the system. Sysadmin can manage all other accounts and other infoRouter structures.

Password : *****

Confirm Password : *****

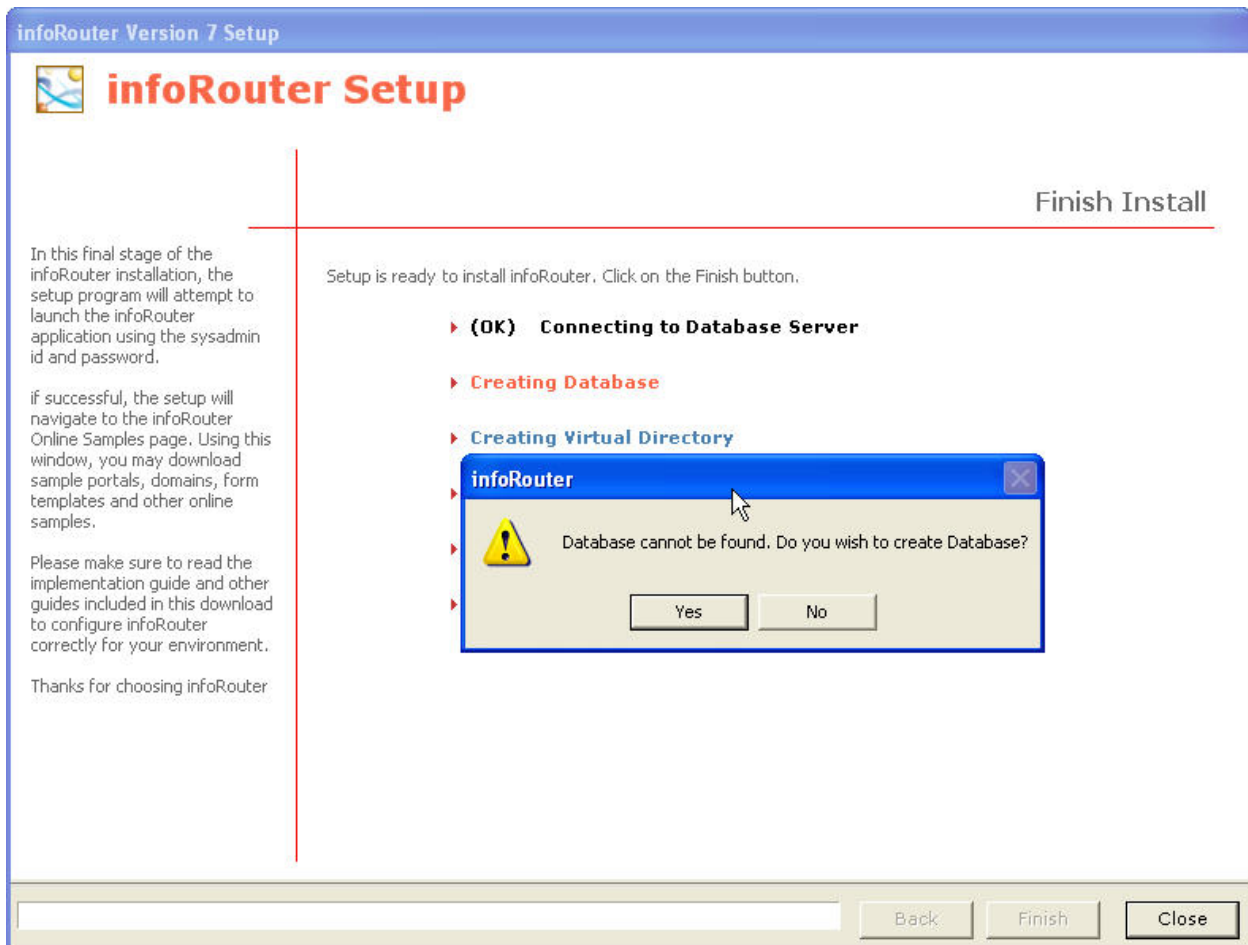
Back Next Close

Click the Finish Button to Install



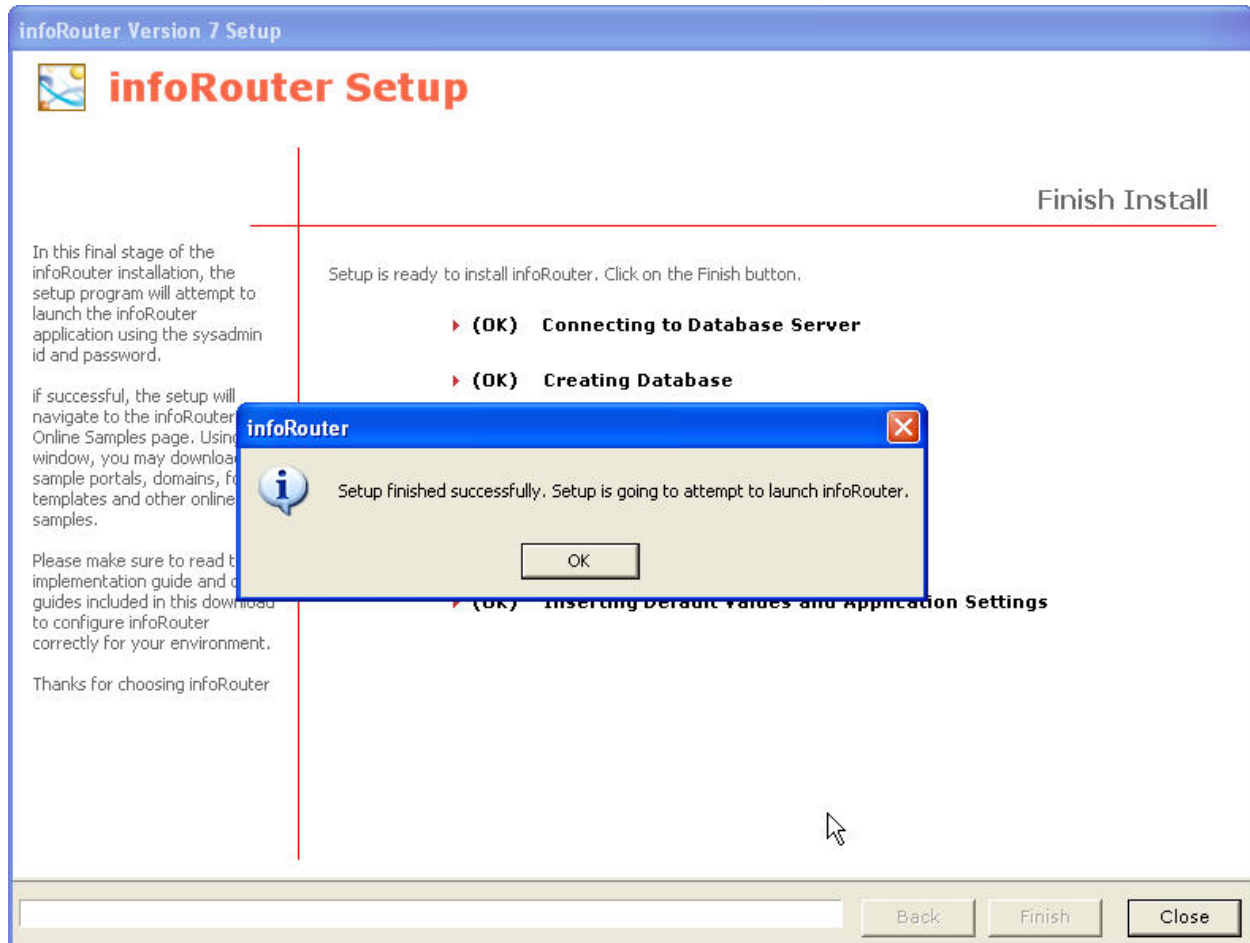
At this stage of the installation, the setup program will need to access the database specified in the previous step.

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.



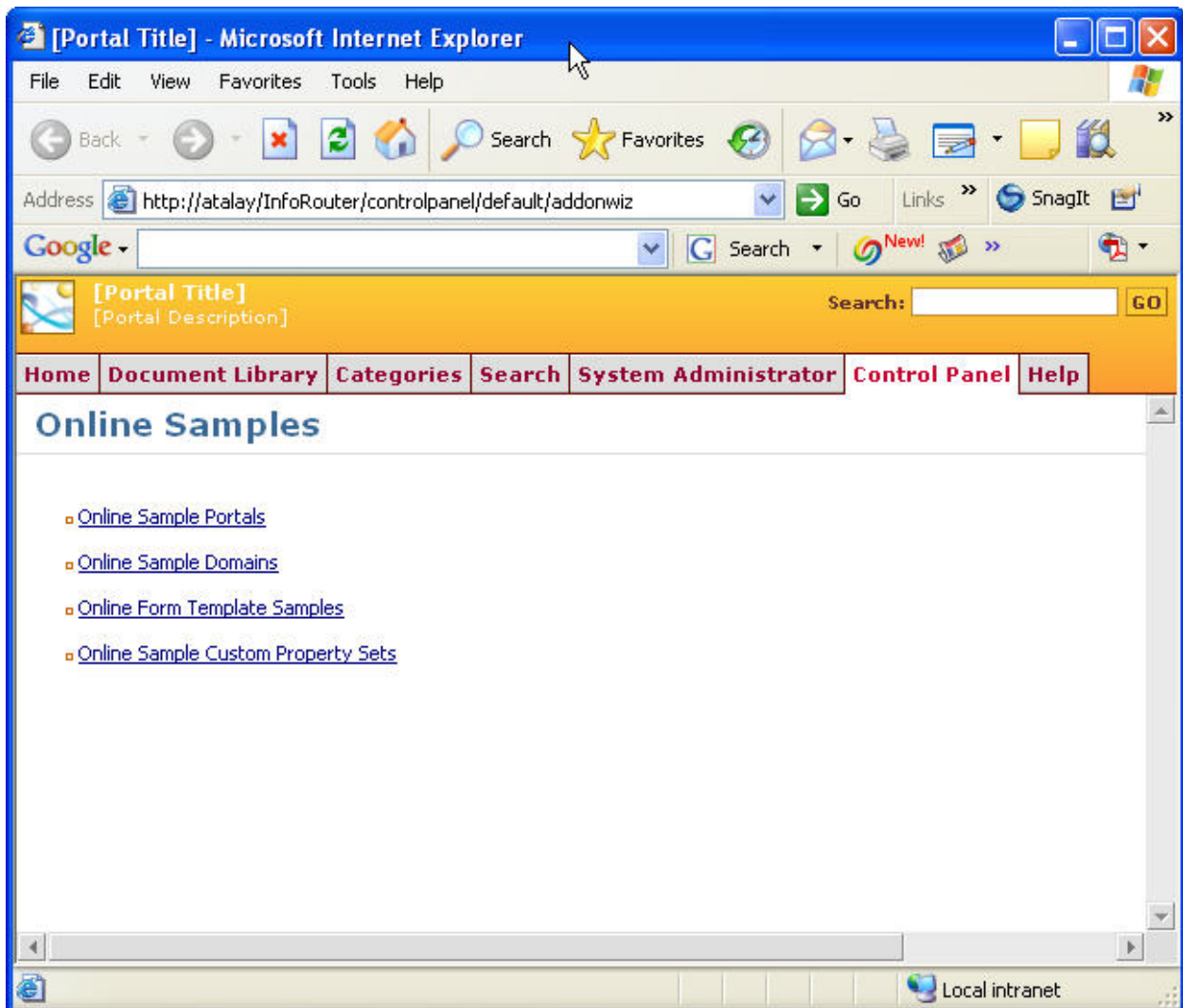
If the specified database does not exist, the setup program will confirm that a database does not exist and one is going to be created automatically.

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



If you see this screen come up, it will mean that the setup program has successfully installed and launched infoRouter. ***If you do NOT get this screen, please refer to the installation troubleshooting section of this document or follow the on-screen instructions.***

Click on the links in the “Online Samples” page to download various samples. It is also a good idea visit this page from time to time, and checks for new samples.



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.

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.

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

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

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.