

# infoRouter V8.0 Administrator's Guide



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# 1) How to create Users

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There are two types of users in infoRouter.

- Global Users
- Local Users

Global users can be given membership to any infoRouter library, whereas local users are created locally within a library. Local users cannot be given membership to any other library other than the one in which they are created. Local users cannot access any other library in infoRouter except for anonymous libraries.

Only the System Administrator can create global users, while the system administrator and library managers can create local users.

“User Managers” is a special system user group that allows its members to create and manage users. Members of this special user group can create global and local users. This has been done to reduce the workload of the “SYSADMIN” and distribute the work evenly across different users of infoRouter.

## *To create a global user, perform the following:*

Log into infoRouter as SYSADMIN or as a member of the “User Managers” user group.

Navigate to the infoRouter Control Panel

Click on the “Users” link

Click on the “New User” link on the “users” screen

Enter the user information

Click on the Global User Groups link to add the user to a global user group

Follow the on-screen instructions of the “New User Wizard”

To create a local user, perform the following:

Log into infoRouter as SYSADMIN or Library Manager

Navigate to the infoRouter Control Panel

Click on the “Libraries” link

Select a library from the library list.

Click on the Local Users menu link

Click on the “New User” menu link.

Follow the on-screen instructions of the “New User Wizard”

*For detailed help on “Local Users,” refer to the infoRouter online help system.*

## 2) How to Import Users

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infoRouter allows you to import and synchronize users from the Active Directory.

If you have 50 or more licensed users for infoRouter, it may be a good idea to implement LDAP Authentication. When you implement LDAP Authentication, your infoRouter users will be able to use their network user IDs and passwords to gain access to infoRouter.

In environments with high employee turnover, LDAP Synchronization is a good idea. Using the synchronization manager tool, LDAP and infoRouter are constantly synched up. When you remove a user from LDAP, the synchronization manager will remove the same user from infoRouter. User additions are handled in the same manner.

Specific HELP about this document is now contained in separate documents. Please refer to the following documents for further help:

[LDAP Synchronization Manager](#)

[infoRouter LDAP Authentication](#)

## 3) How to create Global User Groups

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A Global User Group is an object that is used to group global users with similar access and permission levels. It simplifies the administration of library membership and security. A global user group may be assigned library membership. It is a good idea to create global user groups and assign each new infoRouter to a global user group.

### *Advantages of Global User Groups:*

Assign Global User Groups to libraries as members instead of adding each individual user. New users who are added to the global user group automatically become members to libraries that the global user group has membership.

New users inherit the security settings of the global user group.

### *To create a Global User Group, perform the following:*

Log into infoRouter as SYSADMIN or as a member of the “User Managers” user group.

Navigate to the infoRouter Control Panel

Click on the Global User Groups link.

Click on the New User Group button.

Enter a name for the global user group.

Select the new global user group by clicking on the row.

Click on the “Add Member” link to assign users to the global user group.

## 4) How to create root-level folders (Libraries)

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Root-level folders in infoRouter are called Libraries. To access a library, an infoRouter user must be a member. Libraries are not visible to non-members. Libraries marked as “Anonymous” will appear to all users even if they are not logged in.

### Library Types:

#### Anonymous Libraries

Anonymous Libraries appear to everyone, and all folders and documents allow anonymous read access.

#### Regular Libraries

Regular Libraries are members based and access to folders and documents is subject to specific security assigned to Library members.

#### Archive Libraries

Archive Libraries contain archived folders and documents.

### To create a Library, perform the following:

Log into infoRouter as SYSADMIN.

Navigate to the infoRouter Control Panel.

Click on the Libraries link.

Click on the New Library button.

Follow the on-screen instructions in the “New Library Wizard”.

*For detailed information and help on this topic, please navigate to the infoRouter help system.*

## 5) How to create Library Members

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Libraries are isolated work areas for library members. In order to access library resources, an infoRouter user must be a member of the library.

### *To add global user groups to libraries, perform the following:*

Log into infoRouter as SYSADMIN.  
Navigate to the infoRouter Control Panel.  
Click on the Libraries link.  
Select a Library by clicking on a library from the list.  
Click on the “Members” button.  
Click on the “Add Member (User Group)” button.

### *To add users to libraries, perform the following:*

Log into infoRouter as SYSADMIN.  
Navigate to the infoRouter Control Panel.  
Click on the Libraries link.  
Select a Library by clicking on a library from the list.  
Click on the “Members” button.  
Click on the “Add Member (User)” button.

## 6) How to create Local User Groups

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A Local User Group is an object that is used to group users within a library. It simplifies the administration of document and folder security. Local User Groups are local to the library in which they are created.

Local User Group members can only be assigned from within library members.

*To create a Local User Group, perform the following:*

Log into infoRouter as SYSADMIN.

Navigate to the infoRouter Control Panel.

Click on the Libraries link.

Select a library by clicking on the library thumbnail.

Click on the Local User Groups link from the menu.

Click on the “New User Group” link.

Enter a name for the new Local User Group.

Click “OK” to create the Local User Group.

Click on the Local User Group from the list.

Click on the “Add Member” menu item to add members to the local user group.

# 7) How to Import documents into infoRouter

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To import your existing documents into infoRouter, you may use either the built-in Import Tool or the WebDAV tool.

## *Using the infoRouter Import Tool:*

This tool is used to import documents from the server on which infoRouter is installed or valid paths defined in the AccessPaths.xml file.

The AccessPaths.xml file can be found in a sub-folder called “config” under the application directory. By default, this file allows access to the “C:\” drive of the server. However, you must edit this file at installation to define valid paths where importing is allowed. You may use UNC paths (“//server\_name/drive\_letter”).

To launch the “Import Tool”, navigate to any folder in infoRouter and click on the tools menu. Select the “New Import” option.

## *Using the infoRouter WebDAV Tool:*

Using the infoRouter WebDAV tools is easy and flexible.

To upload documents into infoRouter using WebDAV, perform the following:

Go to any server or workstation and launch a browser to access infoRouter.

Navigate to the folder to which you wish to import documents.

Click on the folder name on the right-hand panel to launch infoRouter WebDAV.

A Windows Explorer window will launch, showing you the contents of the infoRouter libraries and folders.

Simply drag and drop files into infoRouter.

*For detailed information on WebDAV setup and use, refer to the online help system.*

## 8) How to assign Security

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Making Global User Groups or individual infoRouter users members of libraries does not alone give them access. It only means that they are members of the library, and they can be given specific permissions. Until individual users or global user groups are assigned specific security permissions, they will not be able to access the library, its sub-folders, and documents. Choosing the right security model for your organization is important, so come up with a plan that will suit your needs in the long run.

### *Setting security at the folder and document level:*

A common strategy is to give all library members “List” right at the root folder level and to give individuals or local group members specific rights at the sub-folder and document level.

To do this, perform the following:

- Click on the library folder on the folder tree.
- Click on the Tools Menu.
- Choose “Folder Properties”.
- Click on the “Security” link in the folder properties window.
- Select the “Library Members” user group (built-in group) and choose “List” in the drop-down box, click on the “Add” button.
- This will allow all library members to list the library's folder contents. Now, go to each individual folder and assign folder-specific permissions to individual users or groups.
- You may wish to use security inheritance or individual folder and document security for sub-folder and document-level security.

*For more on this topic, please refer to the online help system.*

# 9) How to create Portals

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At install, infoRouter comes with a default portal, which is used mainly as a welcome screen. You may change this portal to reflect your logo, specific messages etc. When users navigate to infoRouter, they are greeted with this default portal. You may create as many portals as you wish.

## Employee Portals:

You may wish to create multiple portals for different groups of employees. Each portal you set up may provide useful information and links to commonly used forms, templates, Human Resources forms and documents, Corporate Brochures and Documents, etc.

## Partner Portals:

You may create Partner Portals to communicate with vendors and other business partners.

## Project Portals:

You may create Project Portals to collaborate with project members. These portals can be equipped with static and dynamic gadgets that automatically display project-related information.

## Customer Portals:

You may create Customer Portals to communicate with customers. Customized portals for each customer may be a good idea. You can include their logos and provide customer-specific information on each portal. Use gadgets to display the contents of infoRouter folders. This way, your customers can quickly access the information they need without having to learn the advanced functions and features of infoRouter.

To create portals, perform the following:

- Log into infoRouter as SYSADMIN.
- Navigate to the infoRouter Control Panel.
- Click on the Portals link.
- Click on the “New Portal” button.
- Leave the “Model Portal” blank if you would like to start creating a portal from scratch; otherwise, select an existing portal (default) and specify a name for the new portal.
- The new portal will be created.

*For more information on how to edit/customize portals, please refer to the online help system*

# 10) How to create Categories

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Create categories to simplify the task of searching for documents.

Categories are pre-defined search queries that return a dynamic result set. All users have to do is click on a specific category to display search results.

## *To create categories, perform the following:*

Navigate to the Categories Tab.

Click on the “Add New Category” link.

Note: This link only appears to the SYSADMIN and Category Administrators

Enter specific search criteria in the search screen.

Enter a Category Name.

Enter a Category Description.

Click on the “Save” button to save the category.

The new category will now appear in the “Categories” window.

Notice that when you click on the category, the search will immediately fire and display results.

## *Advantages of creating categories:*

Pre-defined search criteria make searching for and finding documents easy

Categories are dynamic. When documents matching the specified search are added, they automatically appear under the search results.

Simple screens can be generated for users with little experience. Complex search criteria can be defined, shielding the user from having to specify complex queries repeatedly.

# 11) How to create Saved Searches

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Create saved search screens to simplify the task of searching for documents. Saved searches are partially pre-defined and structured search query screens that allow users to generate search queries quickly.

Unlike categories, saved search screens are invoked from the “Advanced Search” screens and users are prompted for specific information.

## *To create Saved Search screens, perform the following:*

Navigate to the “Search” screen by clicking on the search tab.

Select “New Search Page” from the search pages drop-down prompt.

Note: This link only appears to the SYSADMIN and Category Administrators

Enter specific search criteria in the search screen.

Enter a “Search Page Name”.

Enter a “Description” for the search page.

Select the prompts you wish to make visible in the new search screen.

Click on the “Save” button to save the search screen.

The new Saved Search Screen will appear in the search pages drop-down.

*Notice that when users select the search screen, they will be presented with a custom search screen.*

## *Advantages of creating saved search screens:*

Pre-defined search screens make searching for specific types of documents easy.

Unnecessary search prompts are eliminated from view, making the search process for specific document types easy.

Different groups of users can use custom search screens that are specific to them.

# 12) How to create Custom Property Sets

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infoRouter Custom Property Sets are a very powerful mechanism that allows users to create custom properties for documents, folders, and users.

Custom properties can be used to search for documents, folders, and users. You should plan for and create custom properties that fit your organization's needs.

## Examples:

A custom property can be created to categorize documents based on the customer for whom documents may have been created. This custom property may include fields such as:

Customer Number  
Customer Name  
Project

For every document you create that is related to a customer, you can now apply and search for these documents by specifying a customer number (even though the document may not include customer number information)

A custom property can be created for images. This custom property may include fields such as:

Image Type  
JPEG, BMP, GIF, EPS  
Image Size  
10X10, 16X16, 32X32, 800X600  
Resolution  
72dpi, 300dpi, 2400dpi

For every image document, you may assign the possible values. Using this custom property, you can search for images in infoRouter matching the criteria. You may even assign text values to images that might explain what the image is about. This type of search is not possible without a robust mechanism offered by infoRouter custom properties.

*Note: You may include custom properties in Categories and Saved Search screens.*

# 13) How to create Form Templates

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Form templates are yet another powerful mechanism that allow users to create documents by filling out simple forms. The forms can be designed using standard HTML editing tools.

## *How to create form templates:*

Simply design your form template using your favorite HTML editing tool. Upload your form template into the “Form Templates” library. The new form template will appear in a list of available “form templates” when users choose to create a document using a form template.

Please note that by default, the “Form Templates” library is Anonymous. If you wish to create form templates specific to libraries, create a folder in a library, but the folder must be named “[Form Templates].”

Library-specific templates will appear in the list of available Form Templates when a user chooses to create a document using form templates if the user has access to the library.

*For more information, please refer to the online help system.*

# 14) How to setup SMTP (Remote or Local)

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infoRouter requires the use of an SMTP server to send out notification emails. You may specify either a local SMTP Server or use a remote SMTP server.

To configure your SMTP preferences, please refer to the following documents:

[SMTP Configuration](#)

[Remote SMTP Configuration](#)

## 15) How to configure upload limits

With .NET many safeguards have been implemented to protect servers from malicious attacks. To protect servers against DOS attacks, limitations on uploads and downloads beyond certain sizes have been put into place. infoRouter is configured by default to limit uploads at 75 MB. This is a configurable number.

### *How to change the default (allowable) upload size limit:*

Navigate to the site folder located in the infoRouter application directory (usually c:\inforouter\site)

Edit the file called "Web.config" with Notepad.

Locate the line that refers to a parameter called "maxrequestlength"

You will see that it is set to be 75000 (roughly 75MB).

Increase this number to something higher to allow for uploads of larger files.

*Notes:* You need to make sure that your server has enough memory. Each uploaded file is kept in memory until the entire file is uploaded. Once uploaded, the file gets moved into the warehouse, and the memory is cleared. Even if you allocate a large amount of memory to your server to more than accommodate your largest file uploads, concurrent users all uploading large files may end up reaching the physical server memory limit. This may result in one or more uploads failing.

*For more information, please refer to the online help system.*

# 16) How to monitor infoRouter Logs

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infoRouter logs many major events in infoRouter. These logs are kept in various files in the application directory.

## *How to view infoRouter Logs:*

Navigate to the infoRouter application directory  
Further, navigate to the folder called “Logs”

In this directory, you will see the following three sub-directories

- Delete
- Logins
- Notifications

All sub-directories contain daily logs of Deletes, Logins, and Notifications, respectively. In future versions of infoRouter, these logs will include many other events.

Additional logs for other events can be accessed directly from within infoRouter.

*For more information, please refer to the online help system.*

# 17) How to set up the infoRouter Security / Password Policy

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infoRouter allows administrators to set rules for passwords. To set up these rules, please perform the following.

## *How to configure the infoRouter Password Policy:*

Navigate to the infoRouter Control Panel.

Click on the Application Settings link.

Scroll down to the section labeled “Password Policy”.

Enter your preference for each of the following prompts:

- Password expiration period (in days):
- Minimum Password Length:
- Passwords must include alpha characters (Aa-Zz):
- Passwords must include numeric characters (0-9):
- Passwords must include special characters ~!@#\$%^&\*()-\_+=:
- Password cannot be the same as email address:
- Password cannot be the same as user name:
- Check the weak password list:
- Track Logins:

Note: The “Weak Password List” is located in the “Config” directory, which is also located in the infoRouter application directory.

# 18) How to create PDF Templates

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PDF Form Templates allow administrators to create excellent looking forms, letters and other types of documents. PDF Templates can be tied to standard HTML Form templates in infoRouter. Simple instructions in HTML Form templates allow you to feed form information to these PDF templates. The result is pre-designed professional looking documents.

## *How to create PDF Form Templates:*

Simply design your document using your favorite tool, which allows you to convert to PDF. Using Adobe Acrobat Professional® or Adobe Designer®, create form fields directly on the PDF document. Refer to these form fields (by name) in your standard HTML Form template. You will have to make sure that the form template fields must match the PDF template fields exactly.

*For more information, please refer to the infoRouter Form Template Designers Guide.*

# 19) How to design PDF Cover Pages

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infoRouter allows administrators to design Cover Pages. These cover pages are optionally included in PDF documents when a user attempts to view these documents. The cover page can include vital information kept by infoRouter to give the user more information about the document.

## *How to edit the Default Cover Page:*

Different language variations of the cover page are located in the <application path>/config directory.

The English version is called CoverPage.en.pdf

Similarly, other language variations have a suffix like “es” for Spanish, “nl” for Dutch, etc.

You may edit any version of the cover page by using Adobe Form Designer®.

You may delete the fields you do not wish to include in the template.

You may also add your company logo to personalize the cover page.

You may NOT add additional fields at this time.

Fields included in the cover page by default:

Downloaded By

Downloaded On

Document Name

Document Description

Location

Download URL

Owner

Version Author

This Version Number

Latest Version Number

If you would like to see other fields, please contact us by email at [support@inforouter.com](mailto:support@inforouter.com) to provide feedback.

*For more information, please refer to the online help system.*