

# Administrator's Upgrade Guide.

InfoRouter Version 6.0 to Version 7.0



**T**hank you for upgrading infoRouter. This guide will take you through the step-by-step upgrade procedures required for a successful implementation. Please follow these steps and perform them in the order in which they are described.

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1) MAKE SURE INFOROUTER VERSION 6 IS UP TO DATE

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Run the Version 6 live update tool. Make sure your Version 6 copy has latest the patches. InfoRouter Version 7 upgrade tool can upgrade only infoRouter Version 6 with latest patches.

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2) CHECK THE CHANGES AND NEW FEATURES

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Version 7 has many enhancements and small behavioral changes. Please check our web site for new features and changes. <http://www.inforouter.com>

**IMPORTANT NOTE: The Review mechanism has been changed. The existing review definitions cannot be upgraded.**

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3) BACKUP VERSION 6 .

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Please backup the entire Application path, Warehouse and database.

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4) UNINSTALL VERSION 6

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Uninstall the Version 6 application from “Add Remove Programs” section of the server’s control panel. If any files or folders exist in the application path delete them all.

The Version 7 Upgrade tool needs only the Database and the Warehouse to complete the upgrade.

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5) INSTALL MS .NET FRAME WORK

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InfoRouter Version 7 is built on the MS. Net Frame work. The application cannot start without it. You may download the .NET Framework from Microsoft’s web site free of charge.

## 6) HARWARE & SOFTWARE REQUIREMENTS

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Review the Server & Client Requirements document (V7Requirements) located in the installation path to make sure that you have allocated resources that meet the minimum requirements for best performance.

## 7) PREPARE TO RUN THE SETUP PROGRAM

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Make sure that IIS is running

Make sure .Net framework 1.1 (or higher) is installed on your IIS server.

Copy the file called “Setup.zip” to the installation path.

Extract the zip to this location (ex: “c:\infoRouter”)

## 8) RUN THE SETUP PROGRAM

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Run the Setup program called “IRSetup.exe” located in the installation path

The screenshot shows the 'infoRouter Version 7 Upgrade' dialog box. The title bar is blue with the text 'infoRouter Version 7 Upgrade'. Below the title bar, there is a warning icon and the text: 'This Application will upgrade your inforouter copy from version 6 to Version 7. Please backup all your application, database and document warehouse'. There is a help icon on the right. The main area has two radio buttons: 'New Install' (unselected) and 'Upgrade from Version 6' (selected). Below these are two text boxes: 'Product License Key' with the value 'XXXX-XXX-XXX-XXXX' and 'IIS Virtual Directory Name' with the value 'InfoRouter'. A section titled 'infoRouter Database Connection' contains two radio buttons: 'MS SQL Server' (selected) and 'Oracle' (unselected). Below these are four text boxes: 'Server Name' with '(local)', 'User Name' with 'sa', 'Password' with '\*\*\*\*\*', and 'Database Name' with 'InfoRouter'. At the bottom left, there is a section titled 'Upgrade Status' with a list of steps: 'Validating License Key', 'Connecting to the Database', 'Creating Virtual Directory', 'Converting Warehouse', 'Converting Database', and 'Registering Components'. At the bottom right, there are two buttons: 'Start' and 'Close'.

9) ENTER THE REQUIRED INFORMATION AND SELECT  
OPTIONS

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Choose **Upgrade from version 6** option on the setup screen.

Enter your infoRouter license key for Version 7.

Enter “infoRouter” for the IIS Virtual Directory name or optionally specify other name.

10) CHOOSE YOUR DATABASE TYPE

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Choose database type (SQL SERVER or ORACLE).

Please make sure that this matches the existing database type.

**FOR MS SQL SERVER (VERSION 6.5, 7.0 OR 2000)**

Select the MS SQL Server Option

***Enter Server Name:***

Machine Name (Name of the server on which the infoRouter version 6  
database is on)

***Enter User Name:***

SA (system administrator) or equal user name

***Enter Password:***

Password for the specified SQL server user

***Enter Database Name:***

InfoRouter Version 6 Database Name

**FOR ORACLE 8I OR HIGHER**

Select the ORACLE Option

***Enter Service Name:***

Service Name, which is the infoRouter Version 6 database, running on

***Enter User Name:***

sys account or equal user name

***Enter Password:***

Password for the ‘sys’ account

11) START THE UPGRADE

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Click Start button to start upgrade process. Monitor the upgrade status as the upgrade process moves down the list of events.

## 1 2 ) V E R I F Y A N E R R O R F R E E U P G R A D E

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Make sure that an error free upgrade is complete. If for any reason, you receive error messages, correct the errors described by the messages and re-run the upgrade process. The upgrade program can be run as many times as you wish. It will automatically skip over the steps that have successfully completed and re-process the remaining tasks.

## 1 3 ) C O N F I G U R E I I S A N D I N F O R O U T E R S E C U R I T Y

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If you choose to use the distributed model and the warehouse resides 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.

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<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.

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

### **Important Notes:**

This user account 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. All mapped drives must be visible to the local account iusr\_machinename or the domain user selected for anonymous access.

If you wish to use remote paths (mapped drives) for storage, you must make sure to use a domain account and NOT a local account. Since local accounts are by definition, local, these accounts have no privileges on remote paths.

#### 14) CONFIGURE SMTP SERVER

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As of Version 7, the SMTP server requires a configuration. With the implementation of .NET, Microsoft changed the default behavior of the SMTP Server so that it needs to be configured to allow relaying.

To configure the SMTP server, please follow the instructions in the power point presentation called "SMTP Configuration.ppt" included in the install directory.

# TROUBLESHOOTING THE UPGRADE

ISSUE: CLIENTS CANNOT NAVIGATE TO THE INFOROUTER  
DEFAULT PORTAL

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## **Check for the following on the Server machine:**

Confirm that the server is running.

Confirm that the WWW service is running.

Confirm that the InfoRouter Web based application service is running. (IIS Management Console)

## **Check for the following on the Client machine:**

Try to reach other sites known to be working.

Check the proxy server settings (if proxy server or firewall exists)

Instead of trying `http://[machine_name or ]/infoRouter` try the IP address instead. “`http://[Ip address of machine]/infoRouter`”

If typing the IP Address works

- Check the DNS entries for an Internet connection
- Check the Wins entries or broadcasting for an Intranet connection

Try to ping the IP address of the machine, if the machine is not behind a proxy server.

Check your cables, connections and other networking instruments.

ISSUE: DATA ACCESS ERROR UPON LOG IN

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Check the status of SQL Server or Oracle and make sure that it is running

If the database user or password has been changed, make sure that the same change has been made in the “`C:\infoRouter\IRWEB.DSN`” file.

To find similar documents, please visit our web site at <http://www.inforouter.com>

