

# 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

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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.

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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.

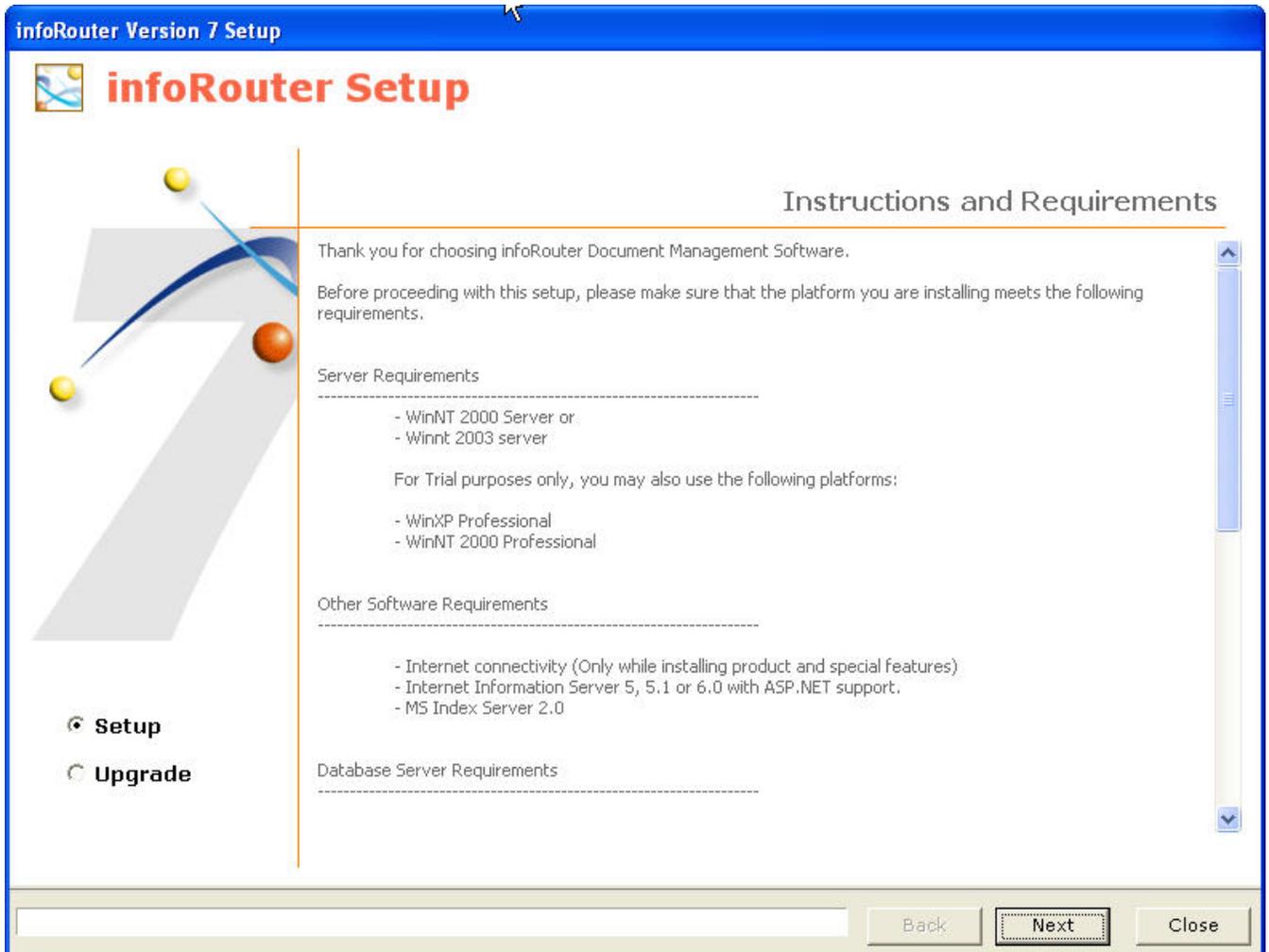
## 1) RUN THE SETUP PROGRAM

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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

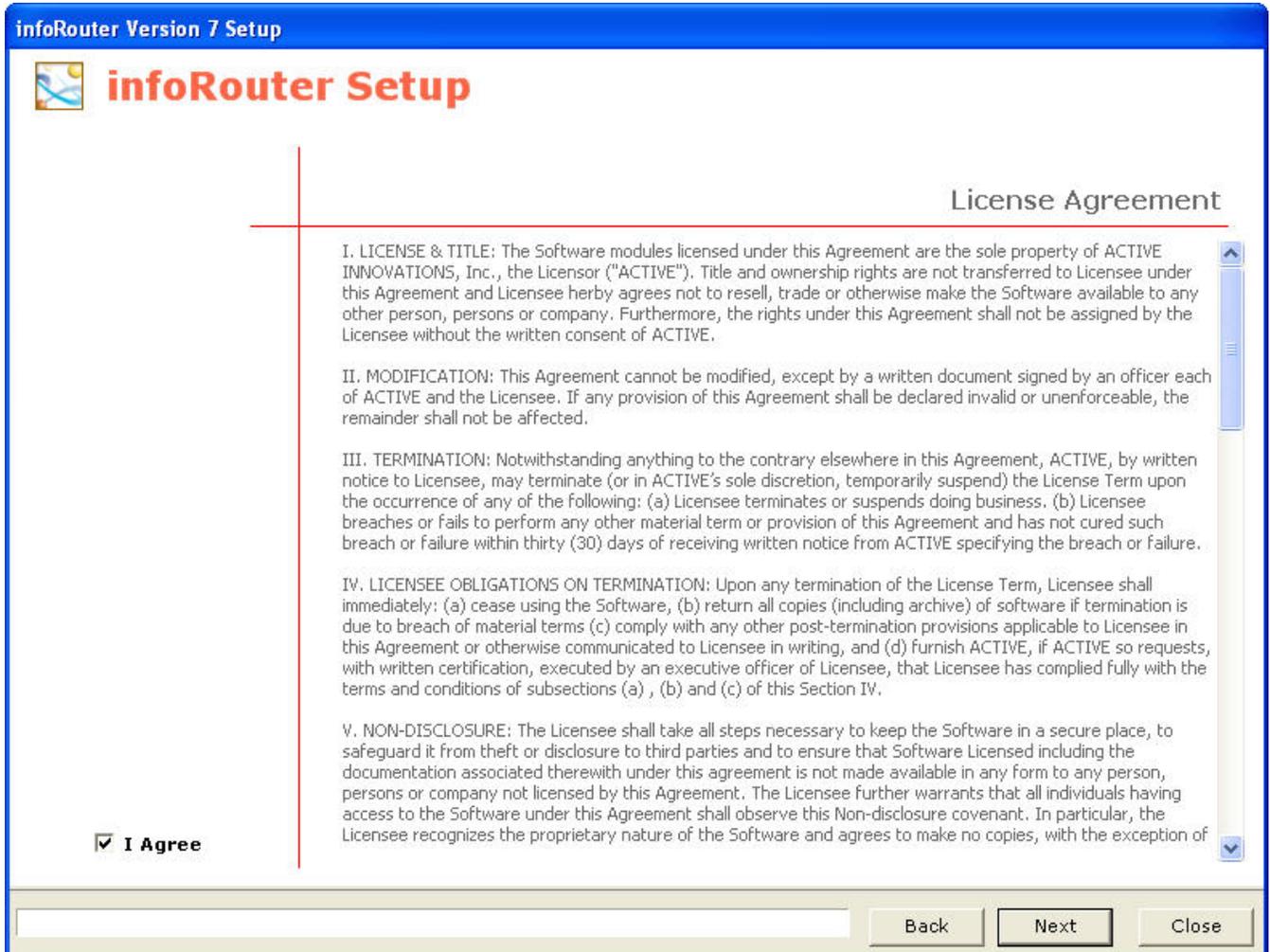
Run the Setup program called “IRSetup.exe”. This program can upgrade an existing Version 6.0 of infoRouter or create a new instance of infoRouter Version 7.0.



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.

The screenshot shows a Windows-style dialog box titled "infoRouter Version 7 Setup" with a blue header bar. The main title is "infoRouter Setup" in red. A "Register" button is in the top right. On the left, there is instructional text: "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." The form contains three sections: "Product License Key :" with a text box containing "XXXOAE2-1YY5-261-M2D"; "Company Name :" with a text box containing "Acme Corporation"; and "infoRouter Support User ID & Password :" with "User ID :" (text box: "acme@acme.com") and "Password :" (text box: "\*\*\*\*\*"). At the bottom are "Back", "Next", and "Close" buttons.

#### 4) SPECIFY INSTALLATION PATHS

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

**infoRouter Version 7 Setup**

**infoRouter Setup**

**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 in the same location. Example: "c:\infoRouter".

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

**Application Path :**  
Enter a path to store various components of infoRouter such as Configuration files, Portal definitions, Logs etc.

**Publishing Path :**  
Enter a path to store Virtual directory files.

**Warehouse Path :**  
Specify a path to store infoRouter documents.

**Temporary Path :**  
Enter a path to store temporary files.

**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.

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

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 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

Port Number :

**User Name :**

Enter a User Name

Password :

**Database Name :**

Name of the database that will be crated or used

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

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

**User Name :**

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

**Password :**

Password of the specified Oracle user above

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.

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.

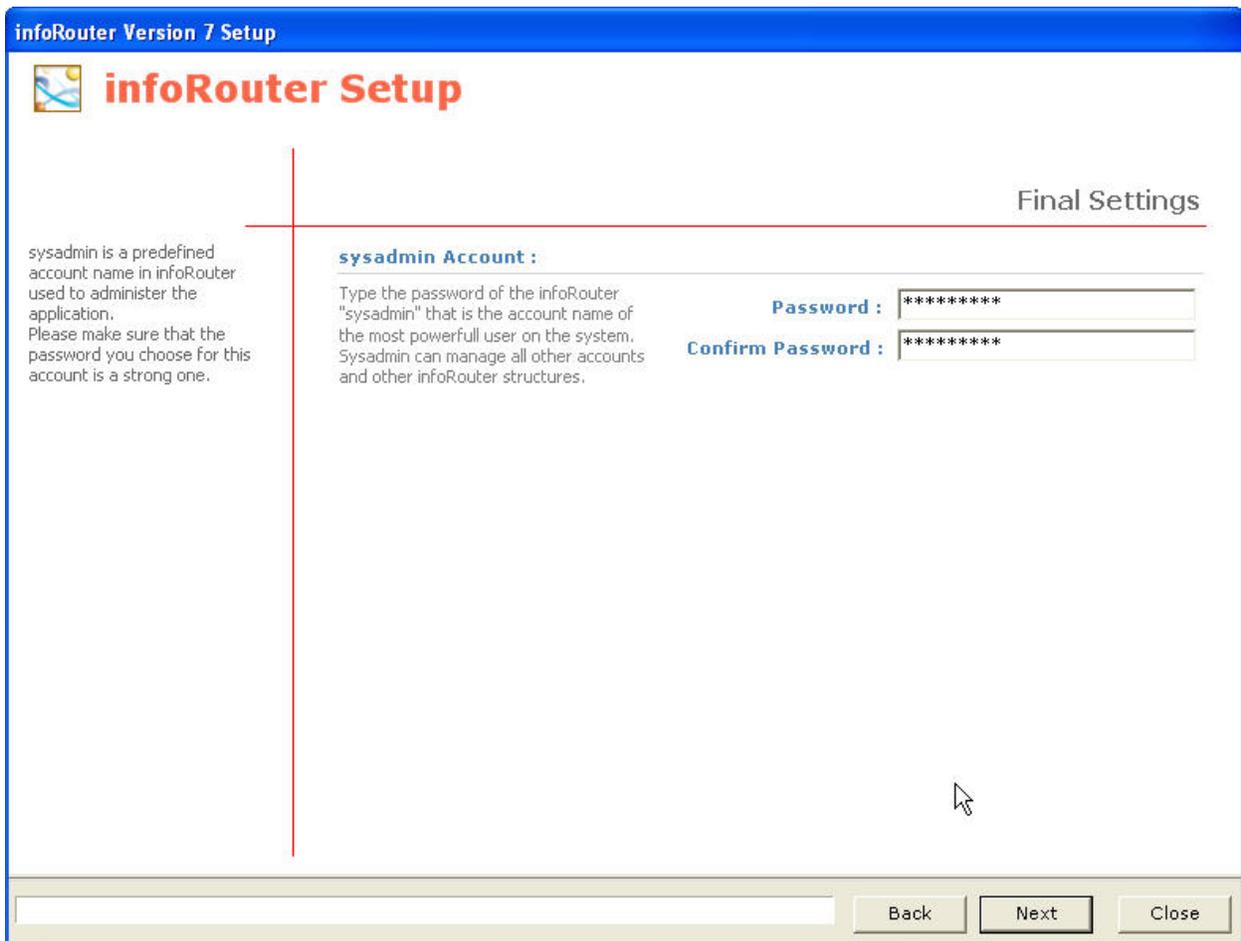
The screenshot shows the 'Virtual Directory Settings' window in the 'infoRouter Version 7 Setup' application. The window has a blue title bar and a white background. On the left, there is a sidebar with a logo and text explaining that infoRouter requires MS Internet Information Server (IIS) and provides instructions for running behind a proxy or firewall. The main area contains five configuration sections, each with a label, a description, and a text input field:

- IIS Web Name :** A dropdown menu currently set to 'Default Web Site'. Description: 'Select the web name. The virtual directory will be created under this web name.'
- IIS Virtual Directory Name :** A text box containing 'InfoRouter'. Description: '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'. Description: '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'. Description: 'Specify the email address that infoRouter notification service will use as a email sender.'
- Index Server Catalog Name**: A text box containing 'WHINDEX'. Description: 'The name of the Index Server Catalog.'

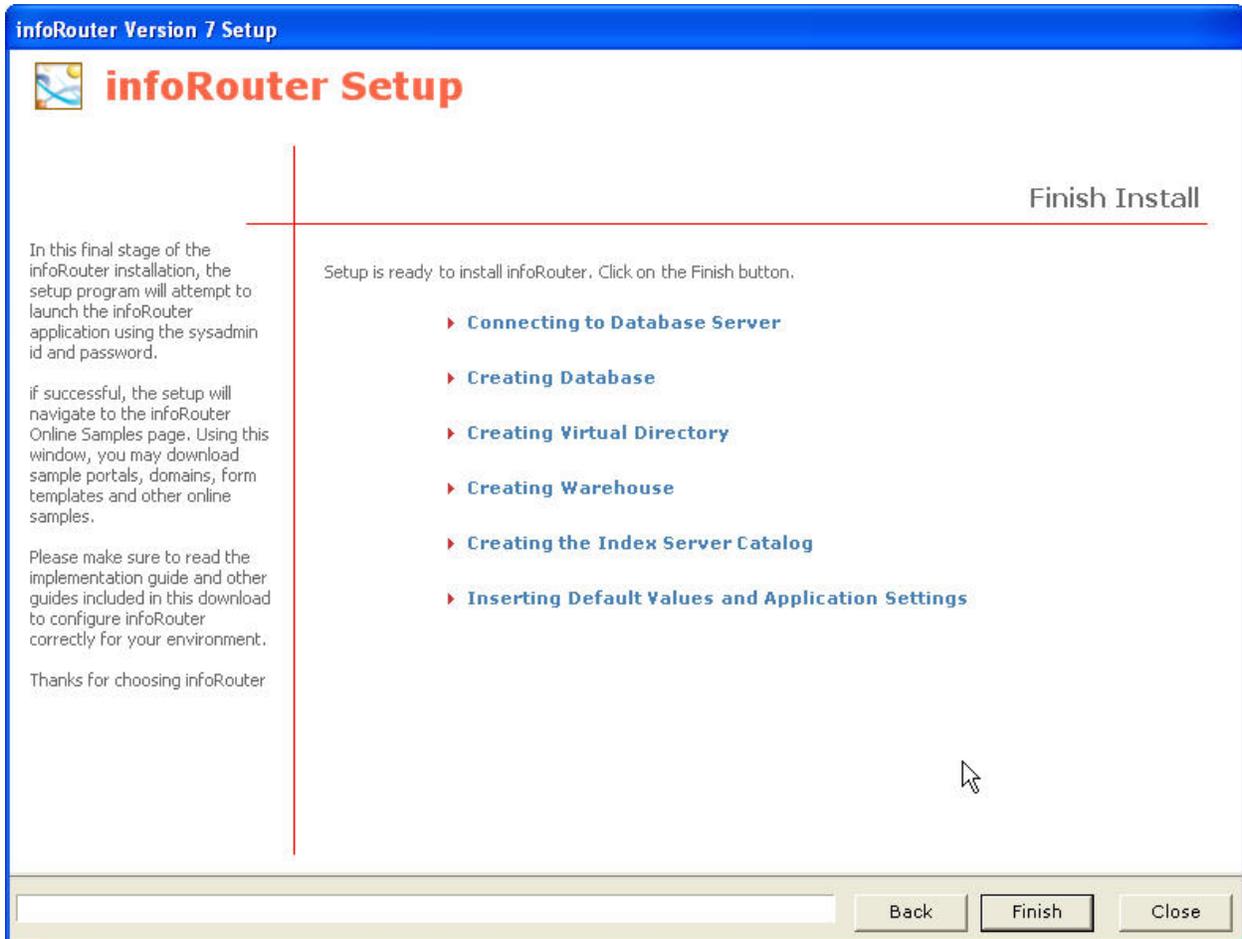
At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Close'.

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

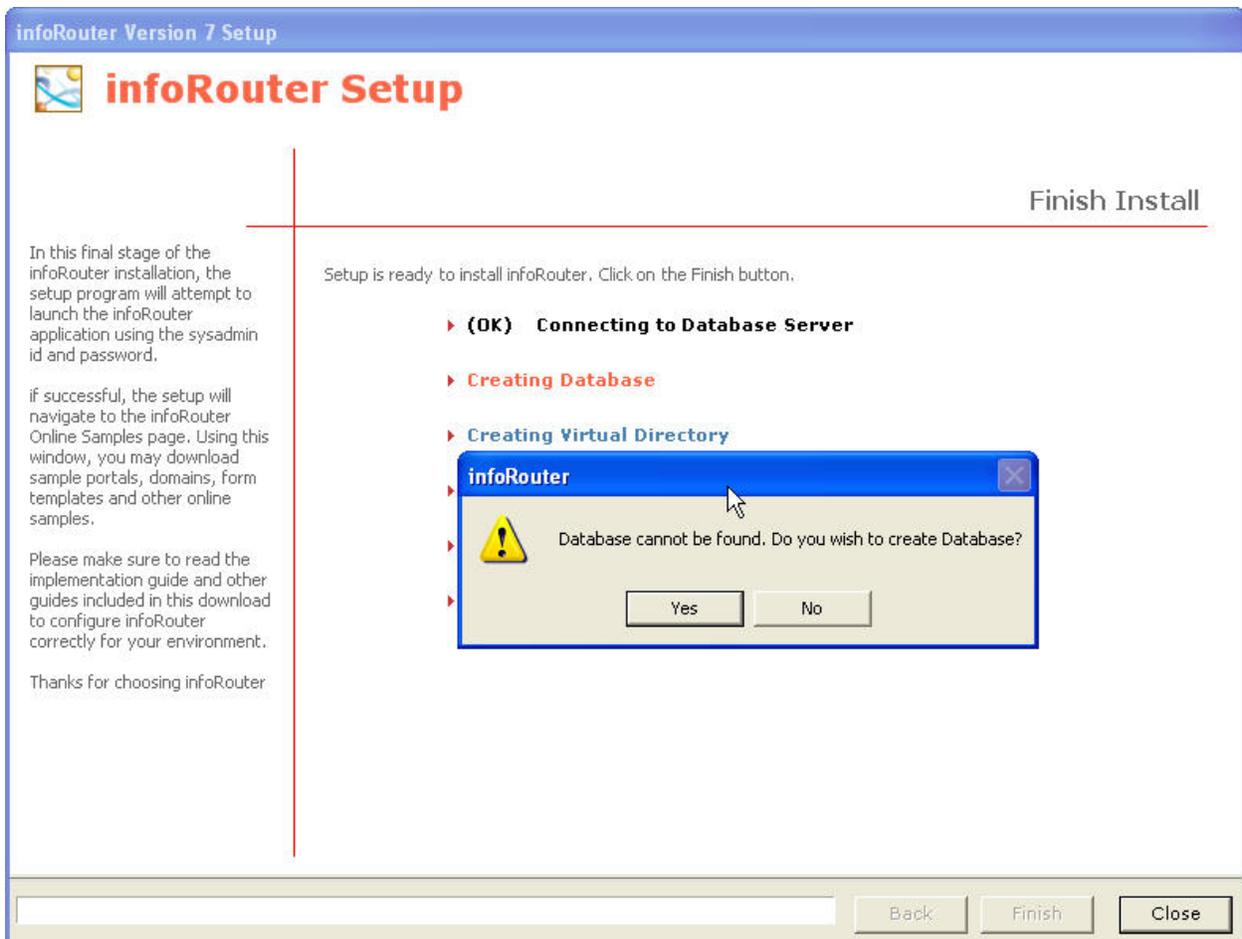


Click the Finish Button to Install



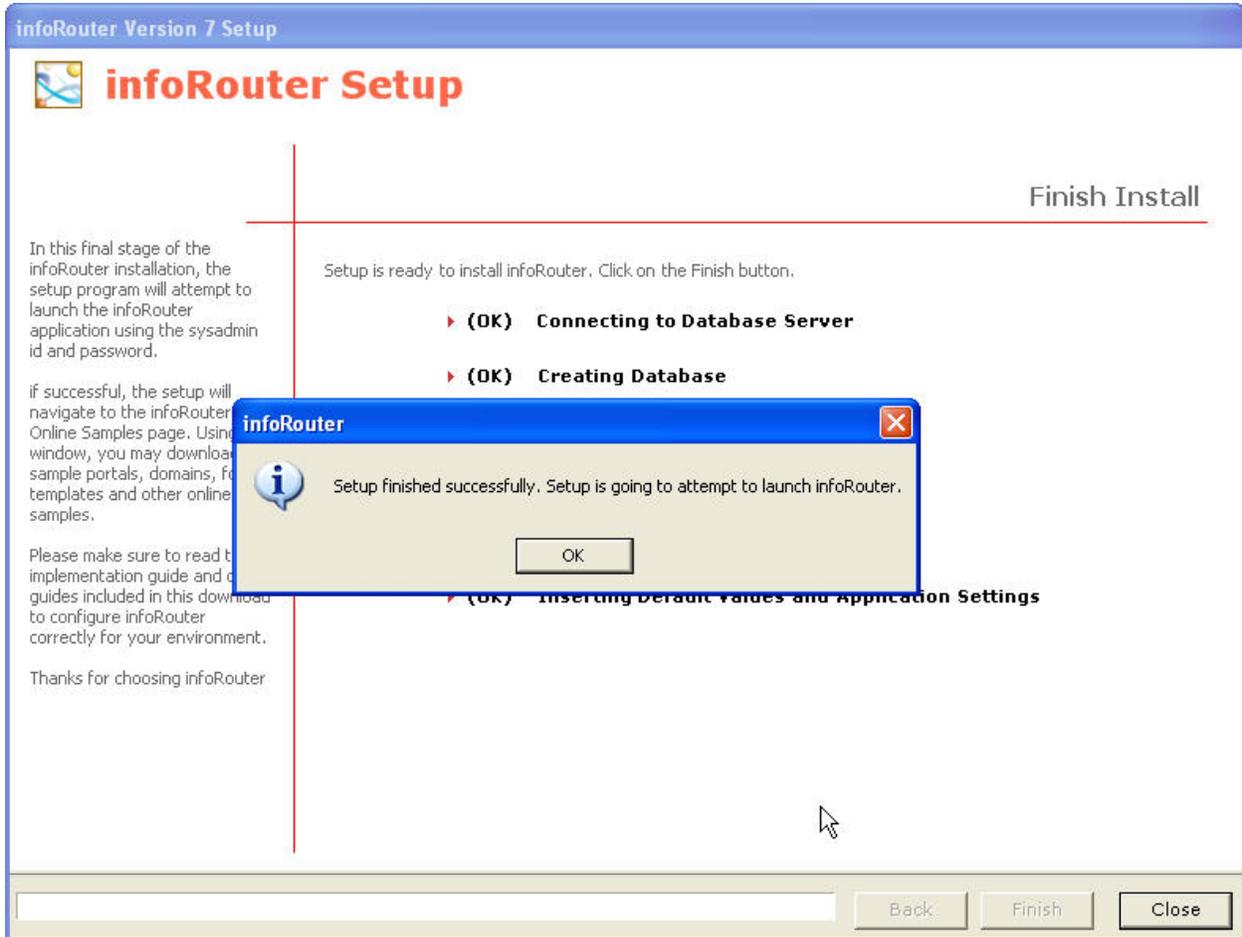
At this stage of the installation, the setup program will need to access the database specified in the previous step.

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.



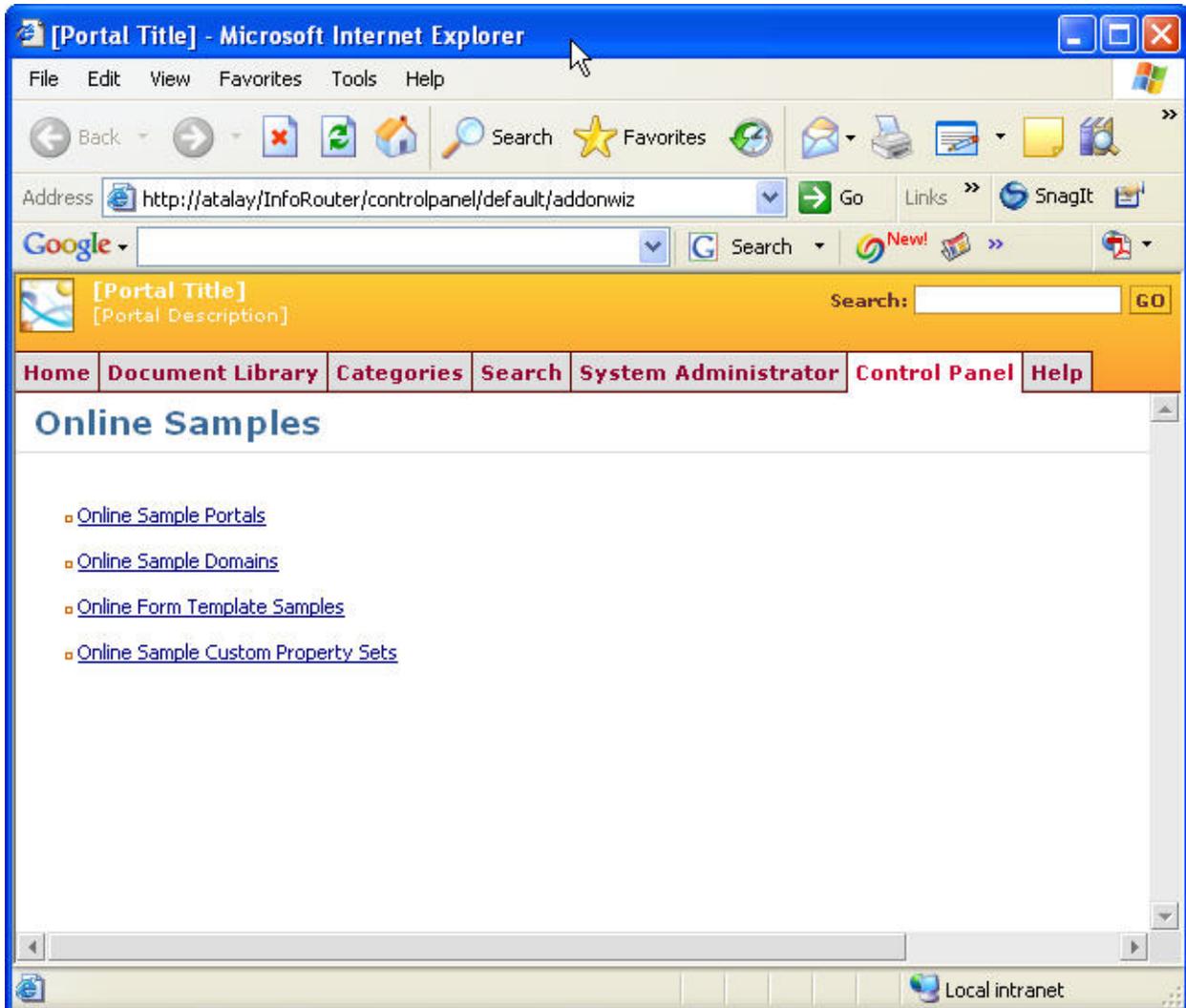
If the specified database does not exist, the setup program will confirm that a database does not exist and one is going to be created automatically.

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.



## 1 1 ) I N S T A L L A D D I T I O N A L I F I L T E R S

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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.

## 1 2 ) I N S T A L L A T I O N I S C O M P L E T E

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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.