

# 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. Local users can be created by the system administrator and library managers.

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

Log into infoRouter as SYSADMIN

Navigate to the infoRouter Control Panel

Click on the “Users” link

Click on the “New User” link in 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.

Specific HELP about this document is now contained in separate documents.

Please refer to:

LDAP-Authentication-V80.pdf

LDAP-Manager-V80.pdf

## 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

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. In order to access a library, an infoRouter user must be a member of the library. 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 membership based and access to folders and documents are 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 users that are members of the library. In order to access the resources of a library, 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 "Add Member" menu 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 install 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.*

### *Using the infoRouter Import-Export GUI tool:*

infoRouter provides a Windows GUI application that can be downloaded to each user workstation. This tool allows users to quickly import and export documents into and out of infoRouter.

For more information on this tool, please refer to the following documentation:

[infoRouter Import Export Tool User's Guide](#)

## 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 be able to list the folder contents of the library. Now, go to each individual folder and assign folder specific permissions to individual users or groups.
- For sub-folder and document level security, you may wish to use security inheritance or individual folder and document 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 setup may provide useful information and links to commonly used forms, templates, Human Resources related 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. Use static and dynamic gadgets to automatically display project related information on these portals.

### Customer Portals:

You may create Customer Portals to communicate with customers. Customized portals for each one of your customers may be a very good idea. You can include their logos and provide customer specific information on each portal. Use gadgets to display contents of infoRouter folders. This way, your customers can quickly access 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 links 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 makes 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 over and over again.

# 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 links 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 document 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 allow 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 the needs of your organization.

### *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 from 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 into 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 one of the relevant documentation listed below.

[SMTP Configuration on Windows 2003 Servers](#)

[SMTP Configuration on Windows 2008 Servers](#)

[Remote SMTP Configuration](#)

[SMTP Troubleshooting Guide](#)

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

## 15) How to configure upload limits

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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 configure available import drives

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infoRouter allows the administrative users to import documents into infoRouter from drives visible from the infoRouter server. However, for security reasons, we do not display all the drives that is normally available to the server. A file called "AccessPaths.xml" located in a folder called "Config" which is located in the infoRouter application directory controls the drives that are visible to infoRouter administrative users.

### *How to restrict or allow drives from appearing in the Import Tool:*

Navigate to the infoRouter application directory

Further navigate to the folder called "Config"

Edit the file called "AccessPaths.xml" with Notepad to add or remove drive definitions.

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

## 17) 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 sub-directories

Error

Delete

Logins

Notifications

Logins

Login Attempts

Policy Updates

All sub-directories contain daily logs.

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

# 18) How to setup the infoRouter Security / Password Policy

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infoRouter allows administrators to set rules for passwords. To setup 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 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.

## 19) 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.*

## 20) 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 has 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 you 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 [support@inforouter.com](mailto:support@inforouter.com) to provide feedback.

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