

infoRouter V8.0 implementation Guide.



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infoRouter Implementation Guide - Version 8.0

<http://www.inforouter.com>

infoRouter V8.0 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 required reading material as indicated in the email you received from us.

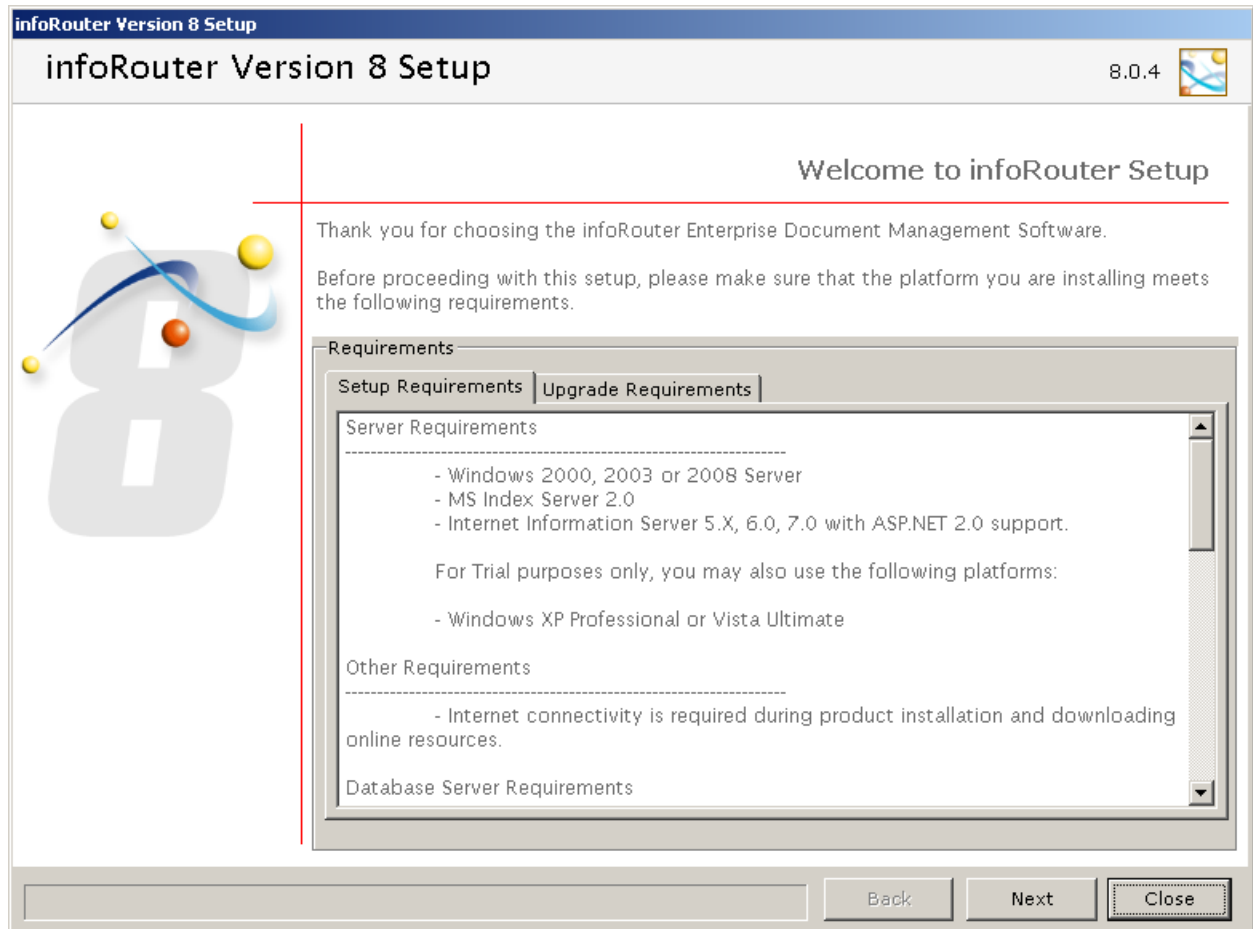
Before you begin to run any setup program, please review the Server & Client Requirements document (infoRouter_V8.0_Requirements.pdf) to make sure that you have allocated resources that meet the minimum requirements for best performance.

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_V8.0_Requirements.pdf).

IMPORTANT CHECK LIST PRIOR TO INSTALLATION

- 1) Logon to the web server (Windows 2000 or 2003 or 2008) as “Administrator” or use an account that has full administration rights.
- 2) Make sure that IIS is installed and running
- 3) Make sure that ASP.NET has been enabled on your server
- 4) Download the setup program (IRSetup80.exe) and double click to begin the installation. This program can upgrade an existing Version 7.X of infoRouter or create a new instance of infoRouter Version 8.0
- 5) Follow the on-screen instructions

1) RUN THE SETUP PROGRAM

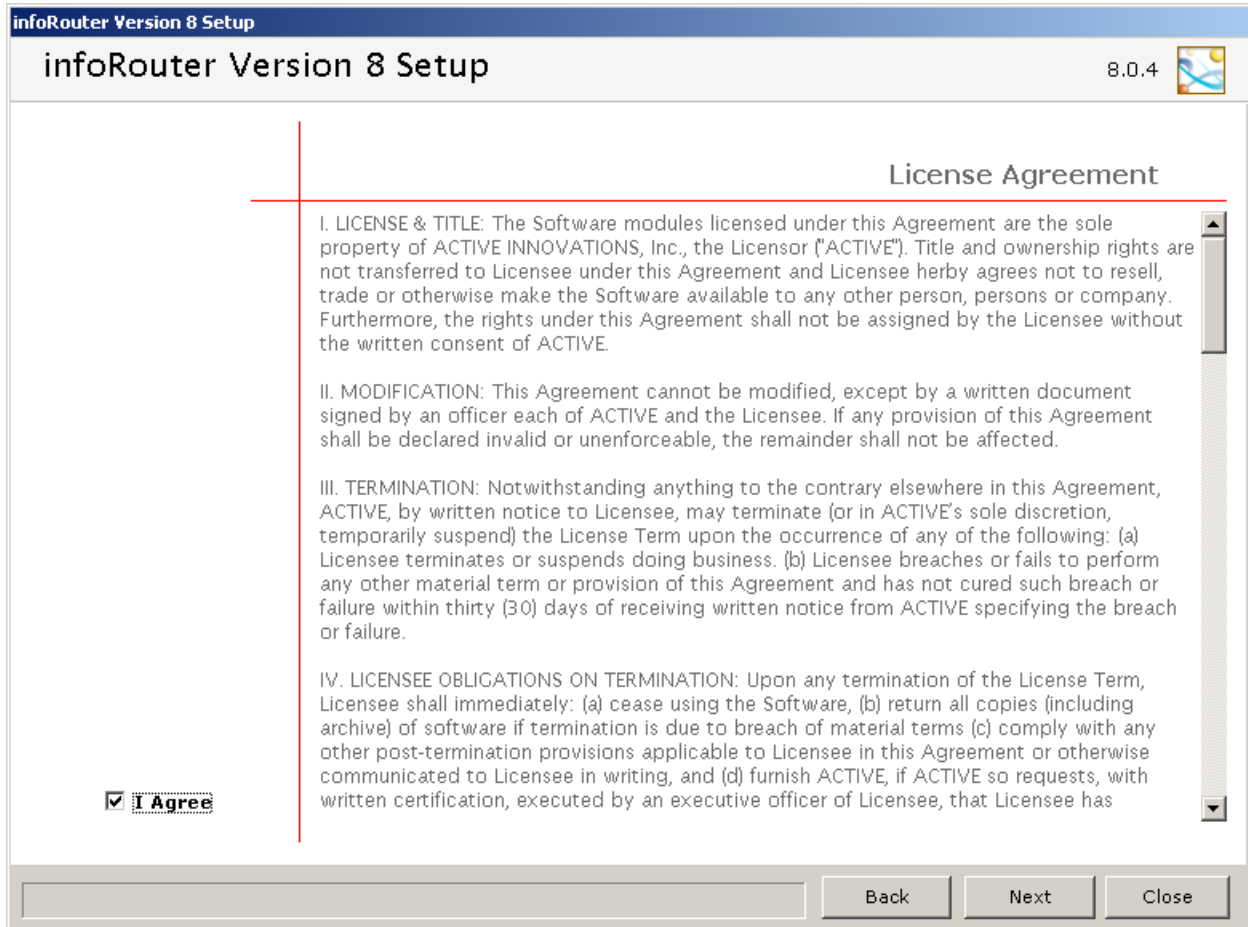


Please read the Setup or Upgrade requirements.

Click on the “Next” button to proceed.

2) PLEASE READ THE LICENSE AGREEMENT

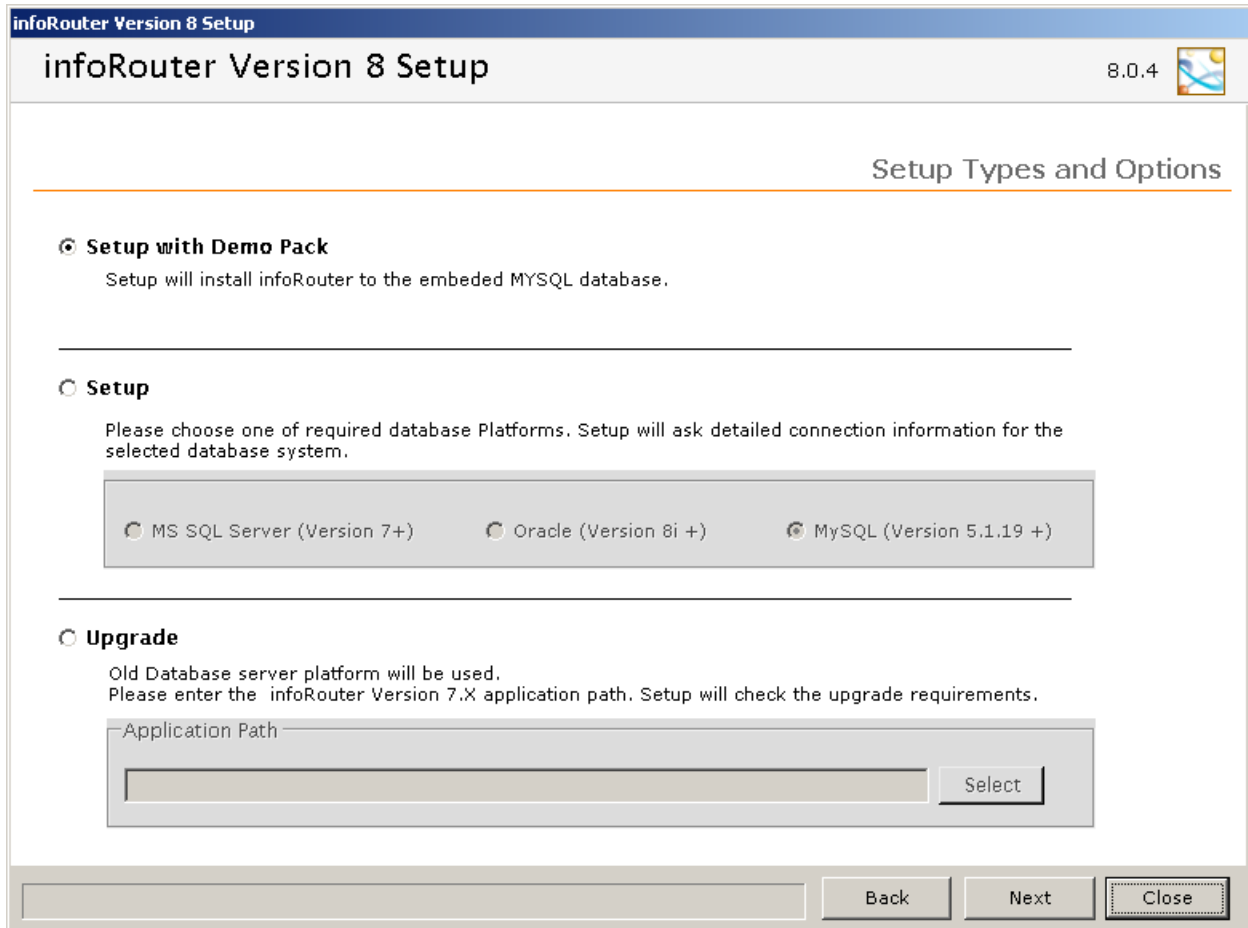
Please read the license agreement and check the “I Agree” checkbox to confirm that you have understood and accepted the license terms.



Click on the “Next” button to proceed.

3) SETUP / UPGRADE CHECK

Make sure to select the “Setup with Demo Pack” option if you are a trial user. It may be a very good idea to use this option if you intend to use infoRouter with MySQL. This option provides a sample database and warehouse to demonstrate many features of infoRouter.



If you choose “Setup” option, you must choose the database platform you wish to use with infoRouter. Make your selection by clicking on the appropriate radio button.

Please be prepared for database setup section, you will specify the following:

- Server name on which the database is located
- 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

Click on the “Next” button to proceed.

4) REGISTER YOUR LICENSE

Select your license file, which was provided to you with the download instructions.

The screenshot shows the 'infoRouter Version 8 Setup' window. The title bar includes the text 'infoRouter Version 8 Setup' and '8.0.4' next to a logo. The main window has a header 'License' on the right. On the left, there is instructional text: 'This program will now validate your license file. if you are installing the TRIAL edition and you wish to purchase infoRouter at a later date, updating this file located under infoRouter application path, will allow you to retain all work produced during the trial period.' The main area is divided into two sections. The top section is 'License File', with a text box containing 'C:\Documents and Settings\Administrator\Desktop\license.lic' and a 'Select' button. The bottom section is 'Product Licensed to', with the following details: Company Name : ACME CORP., Contact Name : Michael Smith, Email Address : info@acme.com, Phone Number : (555) 555 3934, Address : 123 Chery Lane St. Atlanta / GA, Country : US, License Count : 50. Below these details are two 'Subscription Start Date' entries: 'Friday, March 28, 2008' and 'Saturday, March 28, 2020'. At the bottom of the main area, a green message box states 'Your license has been validated. Please click "Next"'. The bottom of the window features a 'Back' button, a 'Next' button, and a 'Close' button.

infoRouter Version 8 Setup

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License

This program will now validate your license file.

if you are installing the TRIAL edition and you wish to purchase infoRouter at a later date, updating this file located under infoRouter application path, will allow you to retain all work produced during the trial period.

License File

C:\Documents and Settings\Administrator\Desktop\license.lic

Select

Product Licensed to

Company Name : ACME CORP.
Contact Name : Michael Smith
Email Address : info@acme.com
Phone Number : (555) 555 3934
Address : 123 Chery Lane St. Atlanta / GA
Country : US
License Count : 50

Subscription Start Date : Friday, March 28, 2008
Subscription Start Date : Saturday, March 28, 2020

Your license has been validated. Please click "Next"

Back Next Close

5) SPECIFY INSTALLATION PATHS

A series of default paths will be provided. Either confirm the default installation paths or choose new paths. We strongly recommend taking the default values. Remember, you will be able to change these later on.

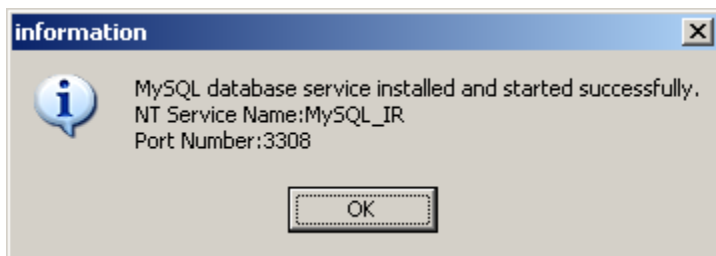
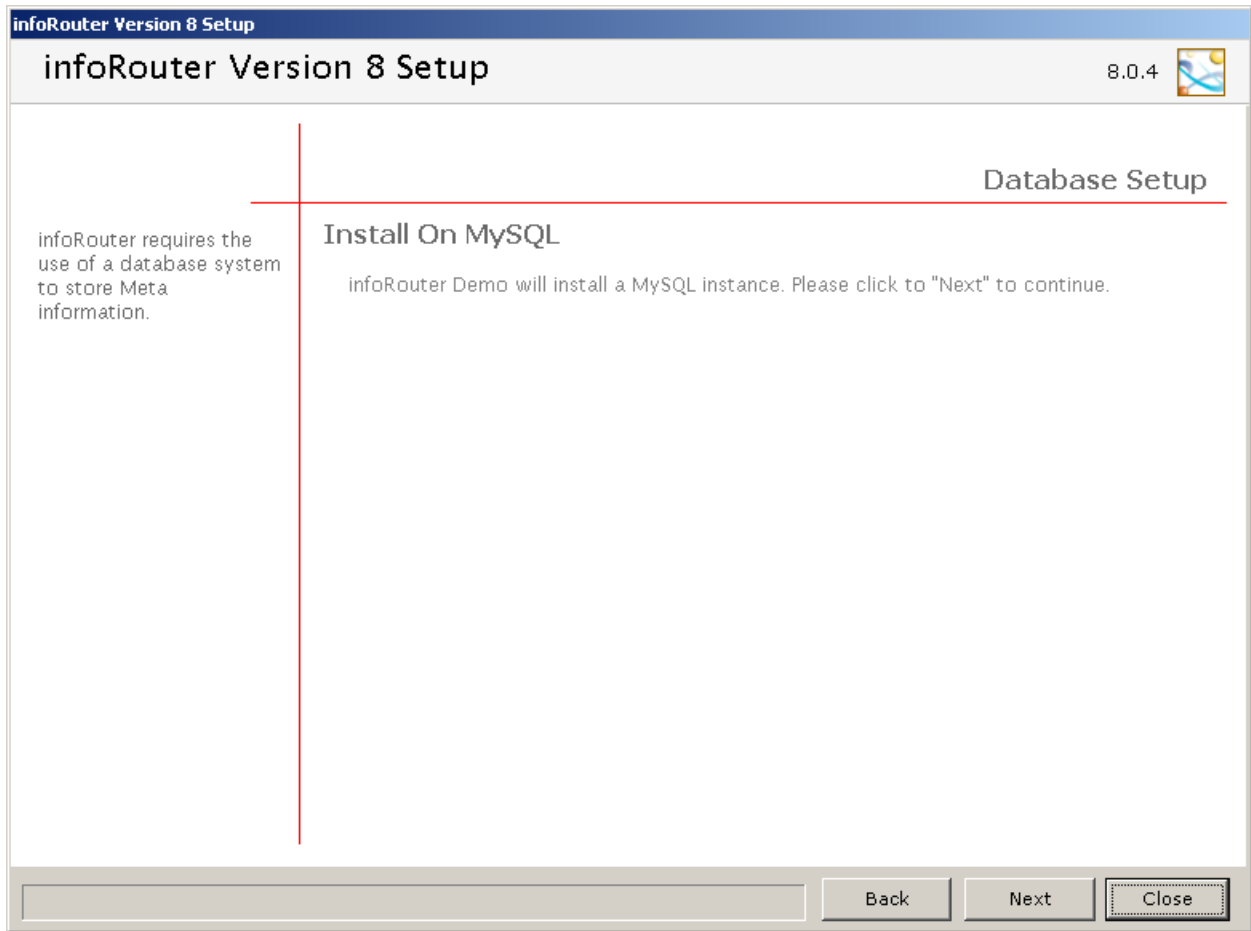
The screenshot shows the 'infoRouter Version 8 Setup' window, specifically the 'Install Paths' tab. The window title bar includes 'infoRouter Version 8 Setup' and '8.0.4'. On the left, there is instructional text: 'infoRouter consists of multiple components that must be installed in various server locations. Please make sure to specify the appropriate locations. In the simple infoRouter deployment model, all paths are located on the same server. For more information on your installation options, please refer to the Implementation Guide provided with this setup.' The main area contains five fields with 'Select' buttons: 'Application Path' (C:\InfoRouter), 'Warehouse Path' (C:\InfoRouter\WH), 'Temporary Path' (C:\InfoRouter\Temp), 'Index Server Catalog Path' (C:\InfoRouter\Catalog), and 'Index Server Catalog Name' (WHINDEX). At the bottom are 'Back', 'Next', and 'Close' buttons.

Field Name	Default Value
Application Path	C:\InfoRouter
Warehouse Path	C:\InfoRouter\WH
Temporary Path	C:\InfoRouter\Temp
Index Server Catalog Path	C:\InfoRouter\Catalog
Index Server Catalog Name	WHINDEX

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.

6) DATABASE SETUP

DEMO PACK OPTION

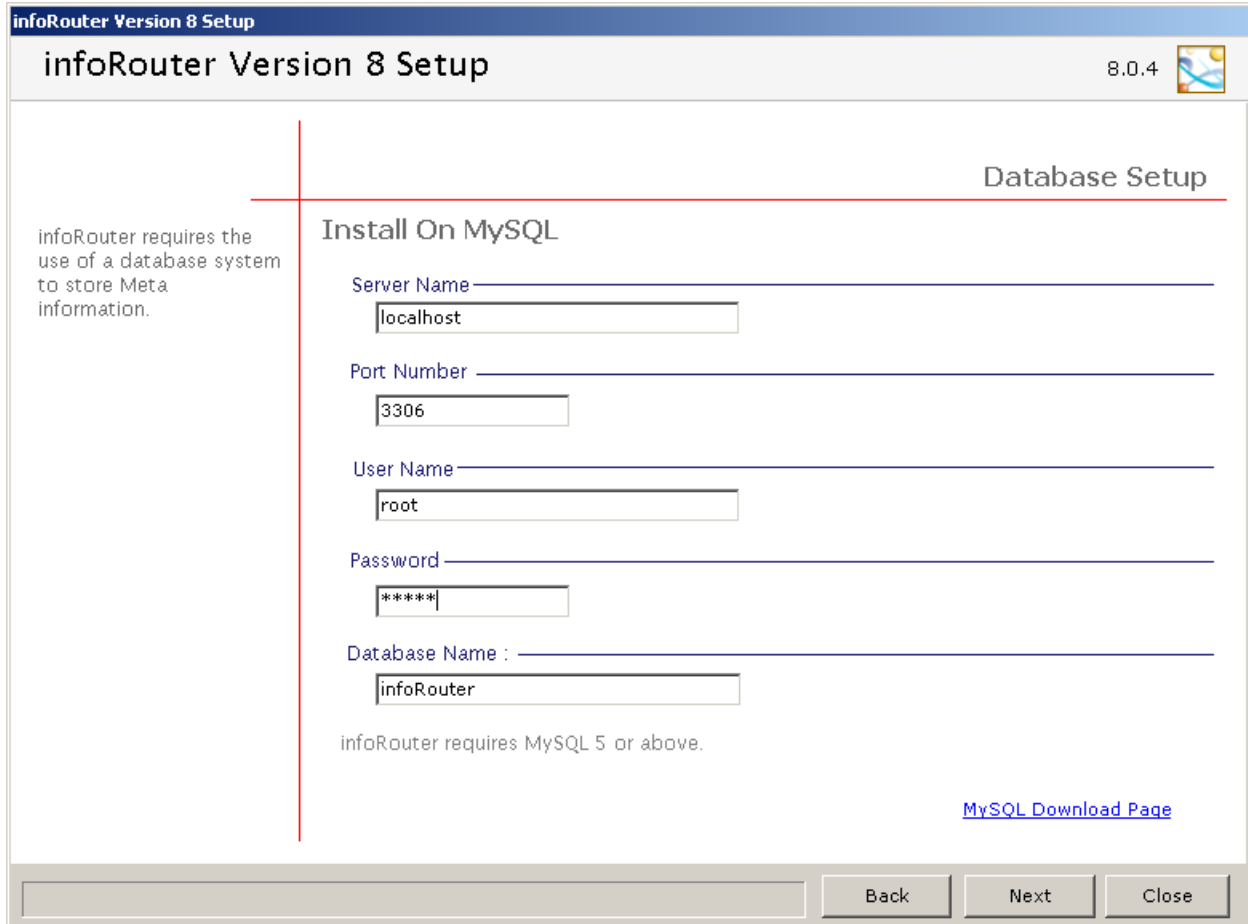


The above screen demonstrates the setup of infoRouter with the DEMO PACK option chosen. Note that the DEMO PACK will always be installed with the MySQL database.

INSTALL on existing MySQL

This screen demonstrates the setup when a clean MySQL install is chosen.

The following screen describes the MySQL database selection



The screenshot shows the 'infoRouter Version 8 Setup' window. The title bar includes 'infoRouter Version 8 Setup' and '8.0.4'. The main content area is titled 'Database Setup' and 'Install On MySQL'. On the left, a note states: 'infoRouter requires the use of a database system to store Meta information.' The form fields are: Server Name (localhost), Port Number (3306), User Name (root), Password (****), and Database Name (infoRouter). A note at the bottom states: 'infoRouter requires MySQL 5 or above.' A link for 'MySQL Download Page' is located at the bottom right. At the bottom of the window are 'Back', 'Next', and 'Close' buttons.

Notice that if you choose to install infoRouter to use MySQL, this screen provides a link from where you can download and install MySQL. If you do not already have MySQL installed, click on the “MySQL Download page” link before proceeding with the setup.

The following screen describes the Oracle database selection

infoRouter Version 8 Setup

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Database Setup

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

Install On Oracle

Service Name _____
INFOROUTER

User Name _____
IRUSER

Password _____

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

Back Next Close

Using Oracle as your database platform requires a previously installed and working Oracle Database Server, minimum Oracle 10g client on the infoRouter 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

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Database Setup

Install on MS SQL Server

Server Name _____
(local)

User Name _____
sa

Password _____

Database Name _____
infoRouter

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

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

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) WEB SITE AND/OR VIRTUAL DIRECTORY SETTINGS

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

Make sure that the “Fully Qualified URL” is accurate and it reflects your server name.

If you would like to use a web site instead of a virtual directory, select the previously created web site name from the IIS Web Sites List and choose “Create infoRouter application as selected Web site” option.

On Windows 2003 Server, select an application pool that supports ASP.NET 2.0 application. For VISTA and Windows 2008 server “Classic .Net AppPool” would be safer a choice.

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infoRouter requires MS Internet Information Server (IIS).

IIS Application Configuration

IIS Web Sites

ID	Name	Status	IP	Port	Header	Protocol
1	Default Web Site	Started	*	80		http://
1.	IRDEV80	Started	*	83		http://
1.	www.inforouter....	Started	*	85		http://
2.	PDFTECH	Started	*	81		http://
4.	IRDEV75	Started	*	82		http://

Create infoRouter application as selected Web Site

Create infoRouter application as Virtual Directory on the selected web site

IIS Virtual Directory Name :

IIS Application Pool

Fully Qualified Application URL will be :

Back Next Close

8) SMTP CONFIGURATION

Change the “System Email Address” by changing the “[your domain]” 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.

The screenshot shows the 'infoRouter Version 8 Setup' window with the 'Configure SMTP Parameters' section. On the left, a note states: 'infoRouter uses an SMTP Server to send email notifications. Please specify the SMTP Server details to be used.' The configuration fields are as follows:

- SMTP Server Name:** localhost
- SMTP Port Number:** 25
- Connection Timeout:** 10 Second
- SMTP User Account Name:** (empty field)
- SMTP User Account Password:** (empty field)
- System email address:** inforouter@[yourdomain.com]
- Test SMTP Parameters:** testemail@[yourdomain.com] (with a 'Send Test Email' button next to it)

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

Use the “Send Test Email” button to make sure your SMTP settings are correct.

9) 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.

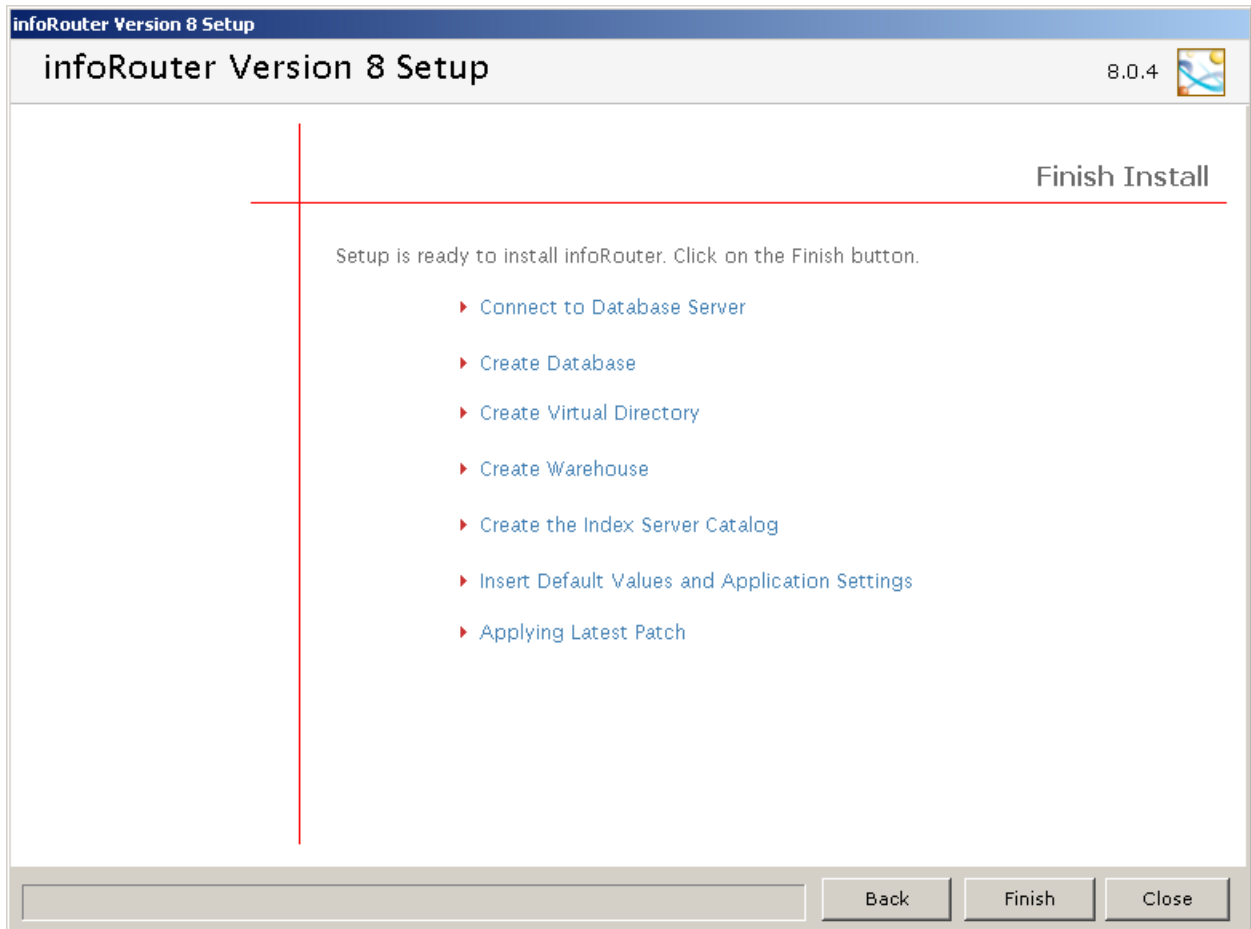
If you do forget your password, you may navigate to the HELP tab from any portal and click on the “Forgot Password” link. Enter your an email address and infoRouter will send you your password to the specified email address. The “Forgot password” option is only available after a successful install of infoRouter. Therefore, it is important to specify a valid email address for the “SYSADMIN” account.

The screenshot shows the 'Final Settings' window for 'infoRouter Version 8 Setup'. The window title bar includes the version '8.0.4' and a logo. The main content area is divided into a left sidebar and a main form area. The sidebar contains the following text: "sysadmin" is a predefined account name in infoRouter. It is used to administer the application. Please make sure that you choose a strong password for this account. The main form area contains three input fields: "sysadmin" account password (with a checkbox for "Display Password Characters"), Password confirmation, and sysadmin email address (with a placeholder "sysadmin@[yourdomain.com]"). At the bottom right, there are three buttons: "Back", "Next", and "Close".

Note: The SYSADMIN password is set to “pass” (in lowercase) by default. If you are installing the DEMO PACK, all pre-defined user passwords are also “pass”.

10) FINISHING INSTALL

Click the Finish Button to Install



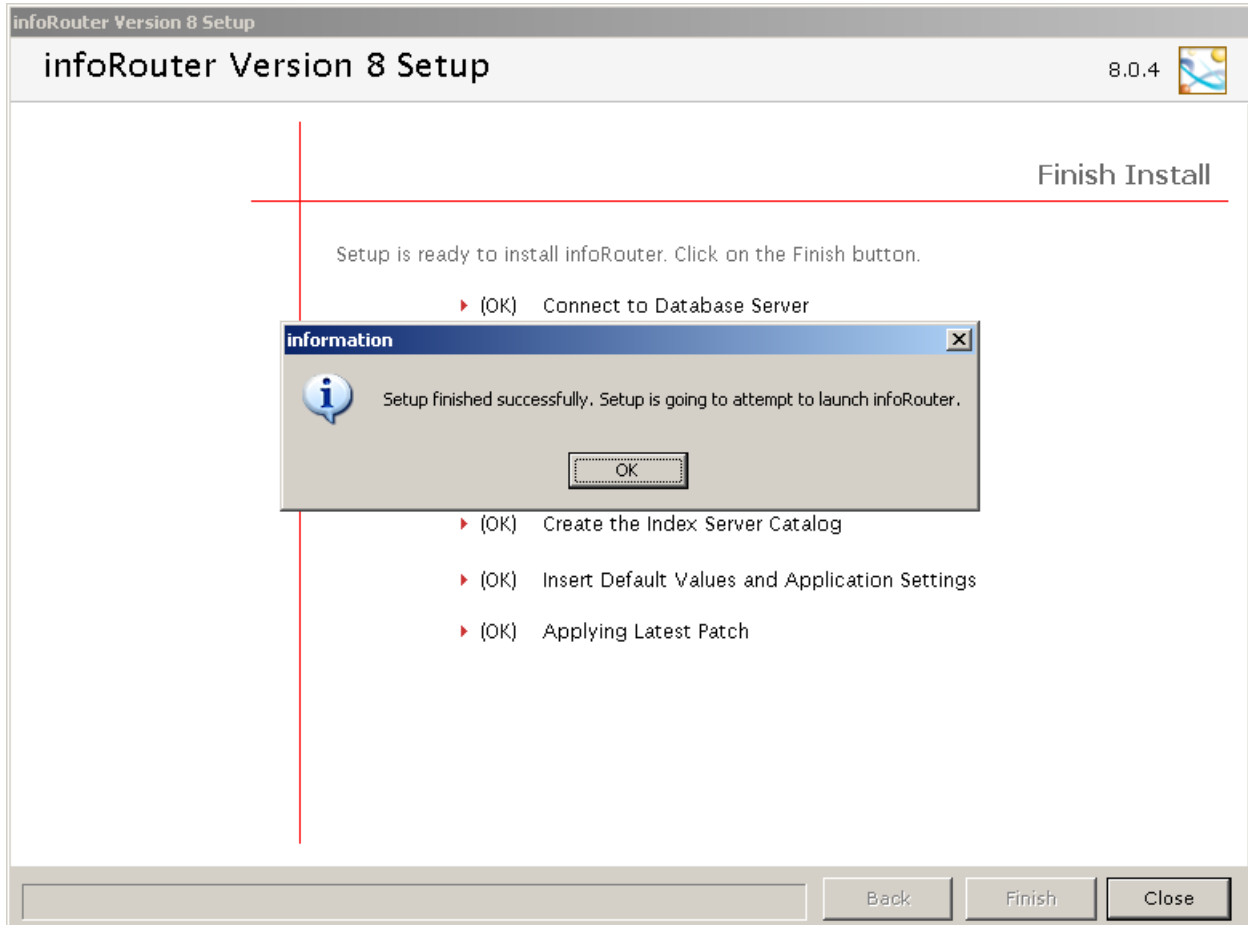
At this stage of the installation, the setup program will need to access the database specified in the previous step.

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 for you (MS SQL Server and MySQL only).

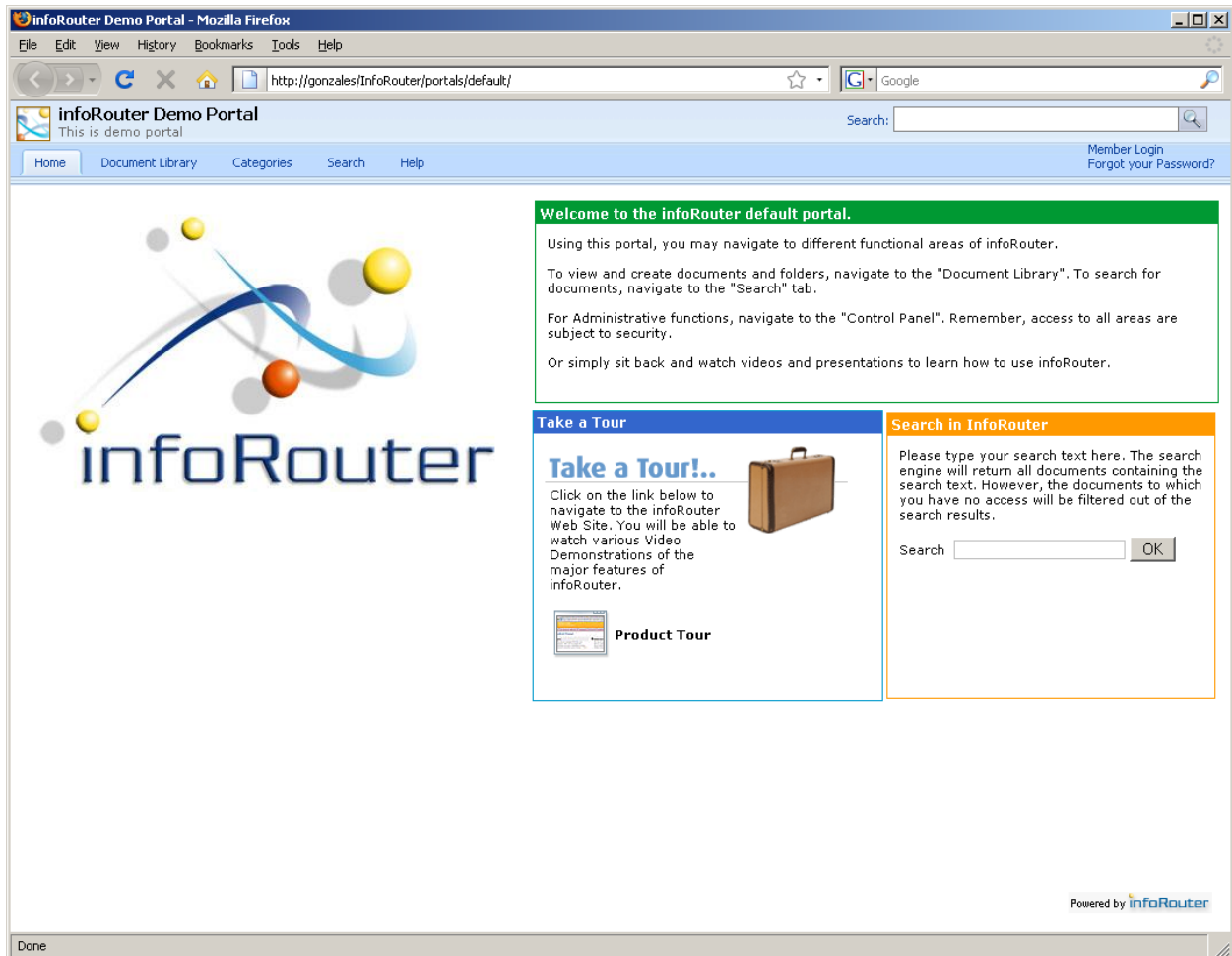
11) INSTALLATION IS COMPLETE

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



12) LOGGING ON TO INFOROUTER

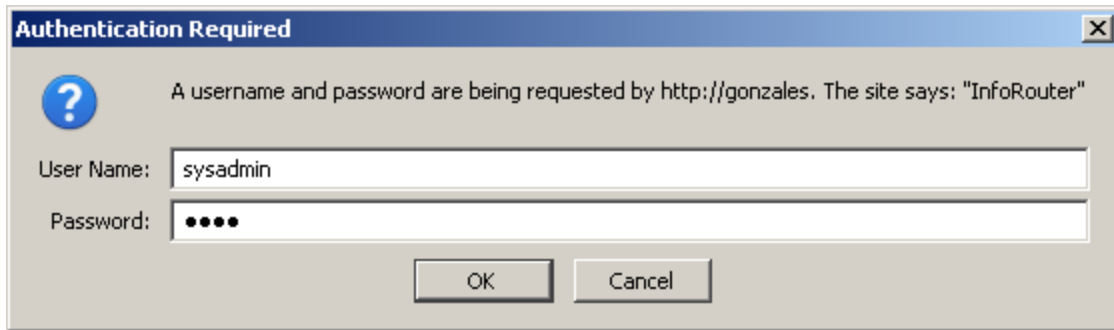
Once the setup is complete, the setup program will automatically launch infoRouter.



Click on the “Member Login” button located on the upper right corner of the browser window to log into infoRouter.

Remember, the SYSADMIN password is by default set to “pass”. Use “sysadmin” for the user id and “pass” and for the password.

Once again, the passwords for the pre-defined users are also “pass”



13) INSTALL ADDITIONAL IFILTERS

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.

These can be found in the infoRouter install directory. The iFilters can be located under infoRouter>ProgramSetups>iFilters.

If you need iFilters for additional file formats, there are a number of third-party companies that develop them.

14) INSTALLATION IS COMPLETE

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.

SECURITY REQUIREMENTS FOR SINGLE & DISTRIBUTED MODEL INSTALLATIONS

If you choose to use the Distributed Model, you must perform the following:

If you wish to place some or your entire 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 and 2008) 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

IMPORTANT NOTES ABOUT IMPERSONATION

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 and 2008 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

OTHER IMPORTANT CONSIDERATIONS & RESTRICTIONS

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.