

infoRouter V8.0

Implementation Guide



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infoRouter Implementation Guide – Version 8.0

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.

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 System Requirements – V8.x](#)) 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 .NET 4.5 framework installed. You must also make sure that your server has all the latest patches for your OS.

BEFORE YOU BEGIN THE IMPLEMENTATION

Please make sure to verify that your server complies with the minimum requirements specified in the relevant guides below:

[Windows 2012 Server – Standard Edition Required Features](#)

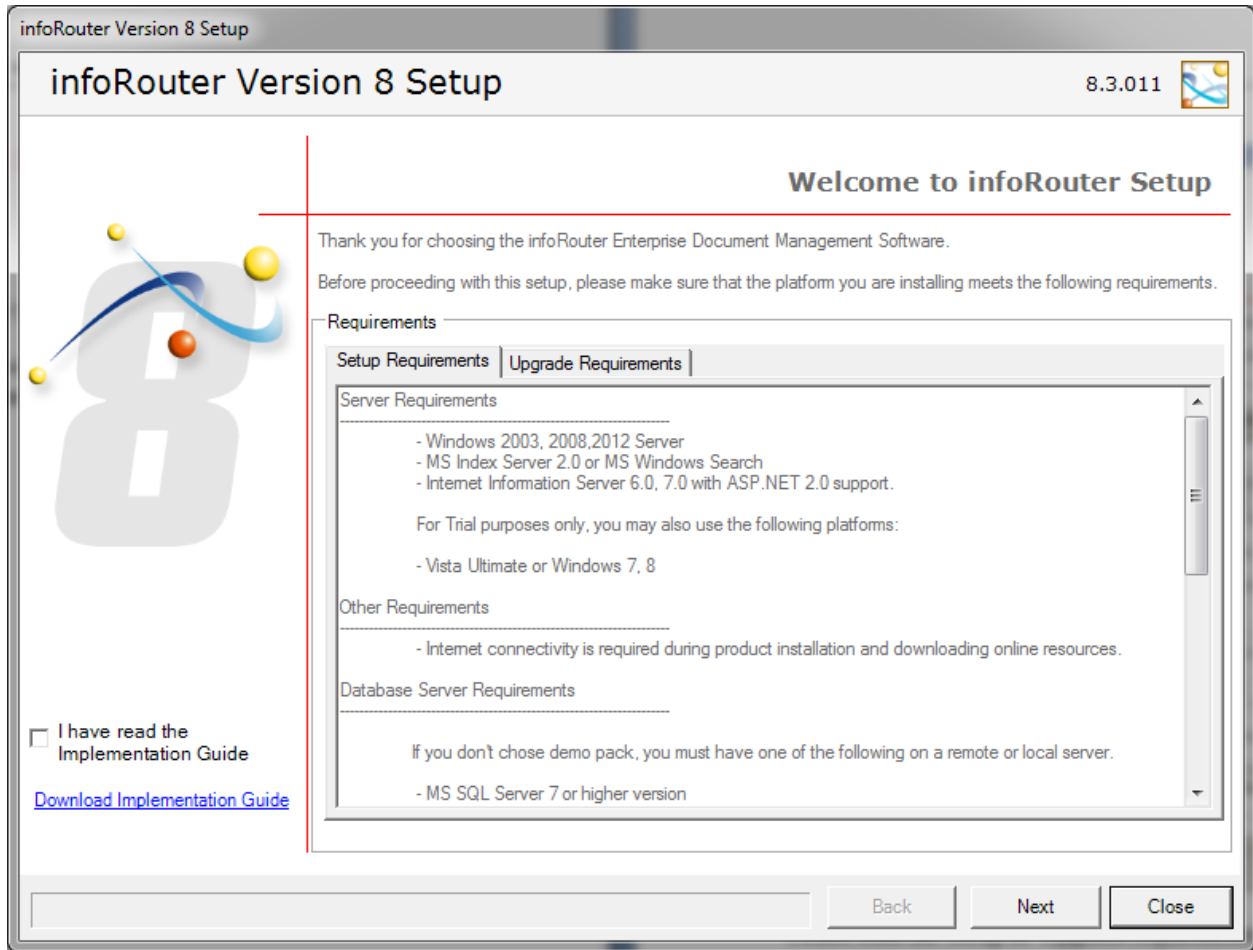
[Windows 2008 Web Edition– Required Features](#)

[Windows 2008 Standard Edition Required Features](#)

IMPORTANT CHECK LIST PRIOR TO INSTALLATION

- 1) Logon to the web server (2008 or 2012) 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 2.0 has been enabled on your server.
- 4) Download the setup program (the download link will be sent via email) and double click to begin the installation.
- 5) Follow the on–screen instructions.

1) RUN THE SETUP PROGRAM

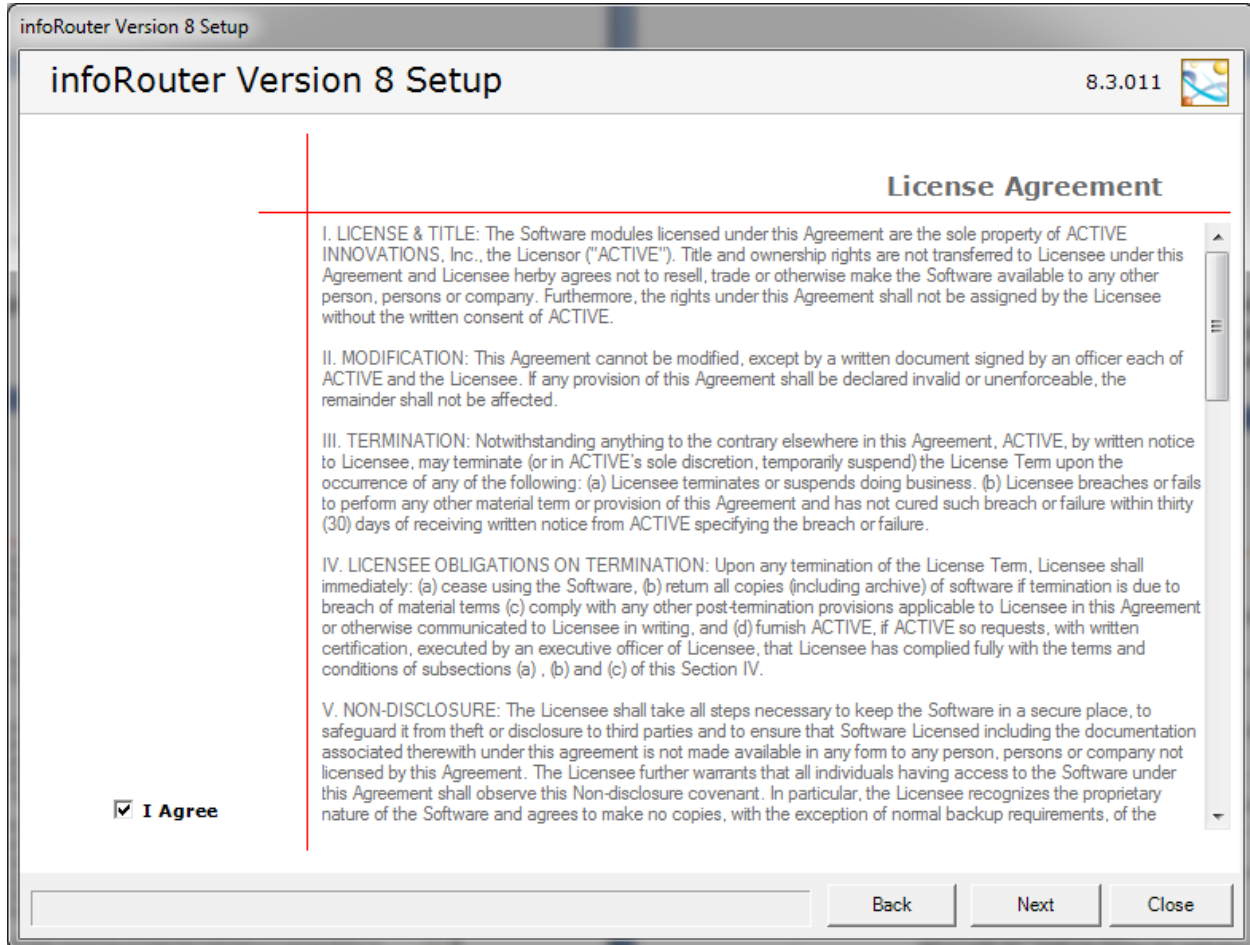


Please read the Setup or Upgrade requirements.

Click on the “Next” button to proceed.

2) PLEASE READ THE LICENSE AGREEMENT

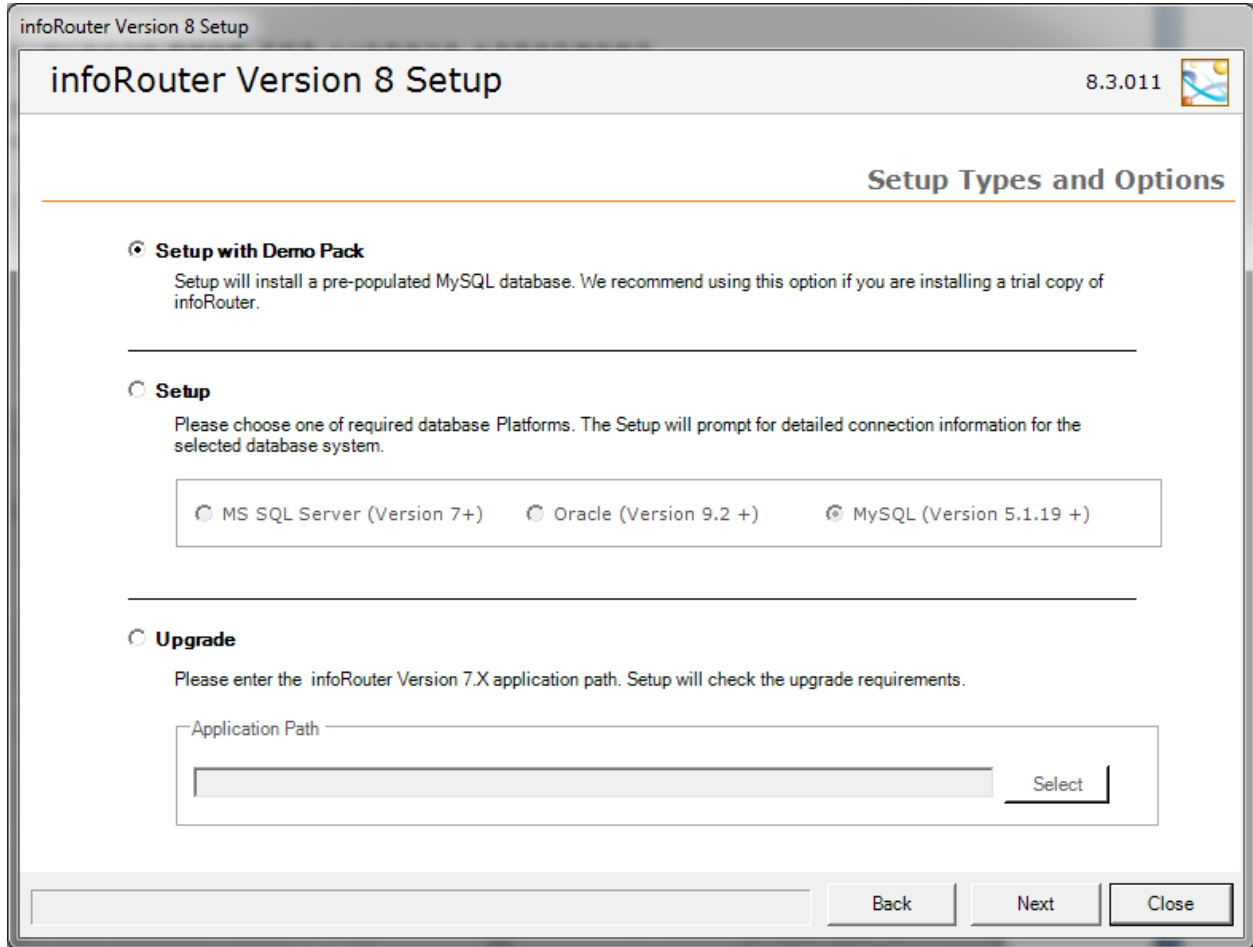
Please read the license agreement and check the “I Agree” checkbox to confirm that you have understood and accepted the license terms.



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. 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.

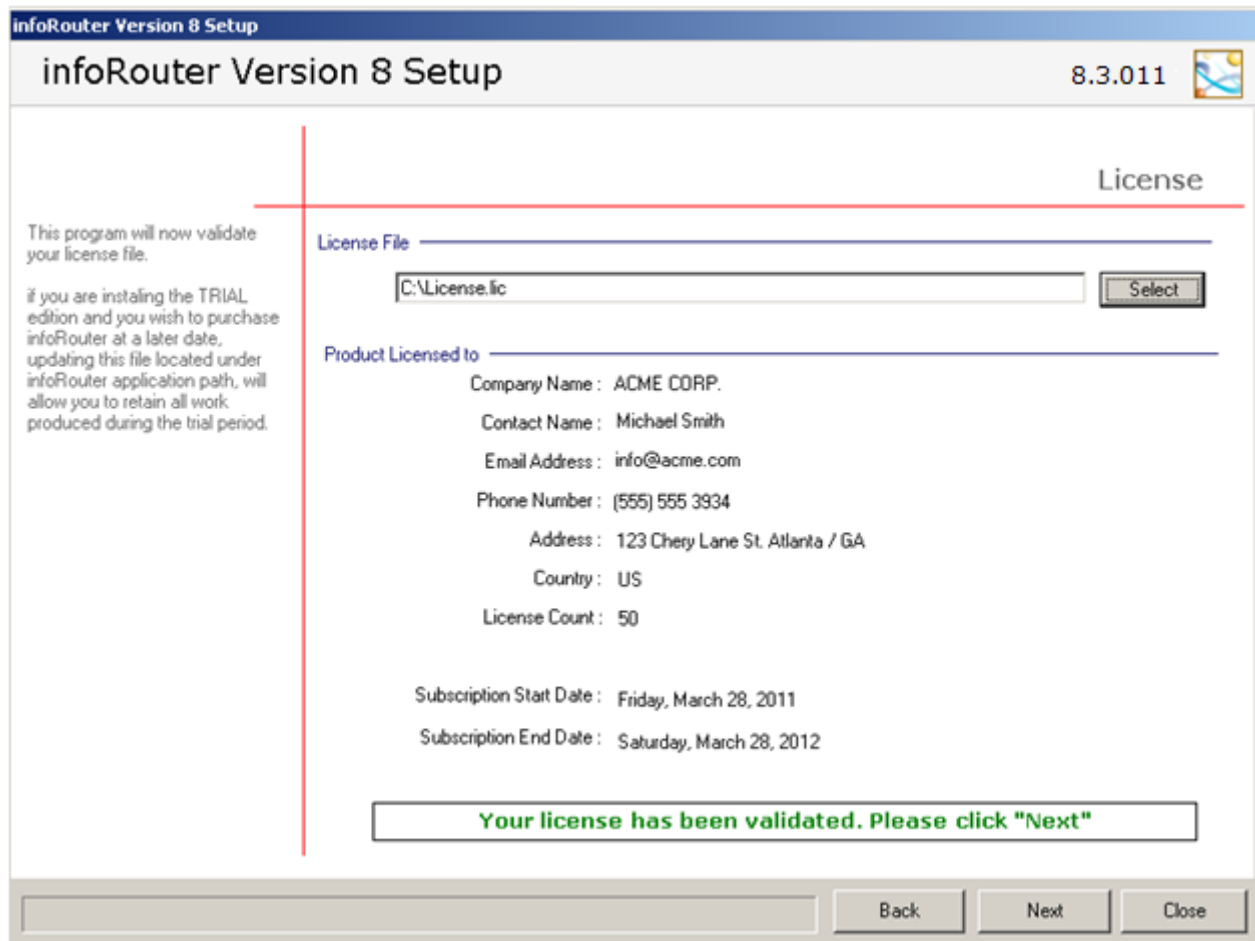
Please be prepared for database setup section, you will specify the following:

- 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.



If you get an error stating that the license is invalid, please make sure that the license.lic file permissions have been appropriately set. Copying the license file on to the desktop or a folder on your workstation may change its security and the setup program may not be able to read this file.

If this is the case, simply change the security on the license.lic file to allow "Read" for "Everyone".

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 where possible. Remember, you will be able to change these later on.

Please do NOT choose a root folder such as C:\ or D:\ for the application path.

Please do NOT choose a root folder such as C:\ or D:\ for the warehouse path.

You may choose either MS Windows Search or MS Index Server.

Windows 2008 can use both options above, however Windows 2012 only supports MS Windows Search.

Windows search is the new generation search engine on Windows platforms. Microsoft no longer delivers MS Index Server on these new platforms. By default infoRouter uses MS Windows Search and no setting required for this option.

infoRouter Version 8 Setup

8.3.011

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 on the same server.

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

Application Path

Warehouse Path

Temporary Path

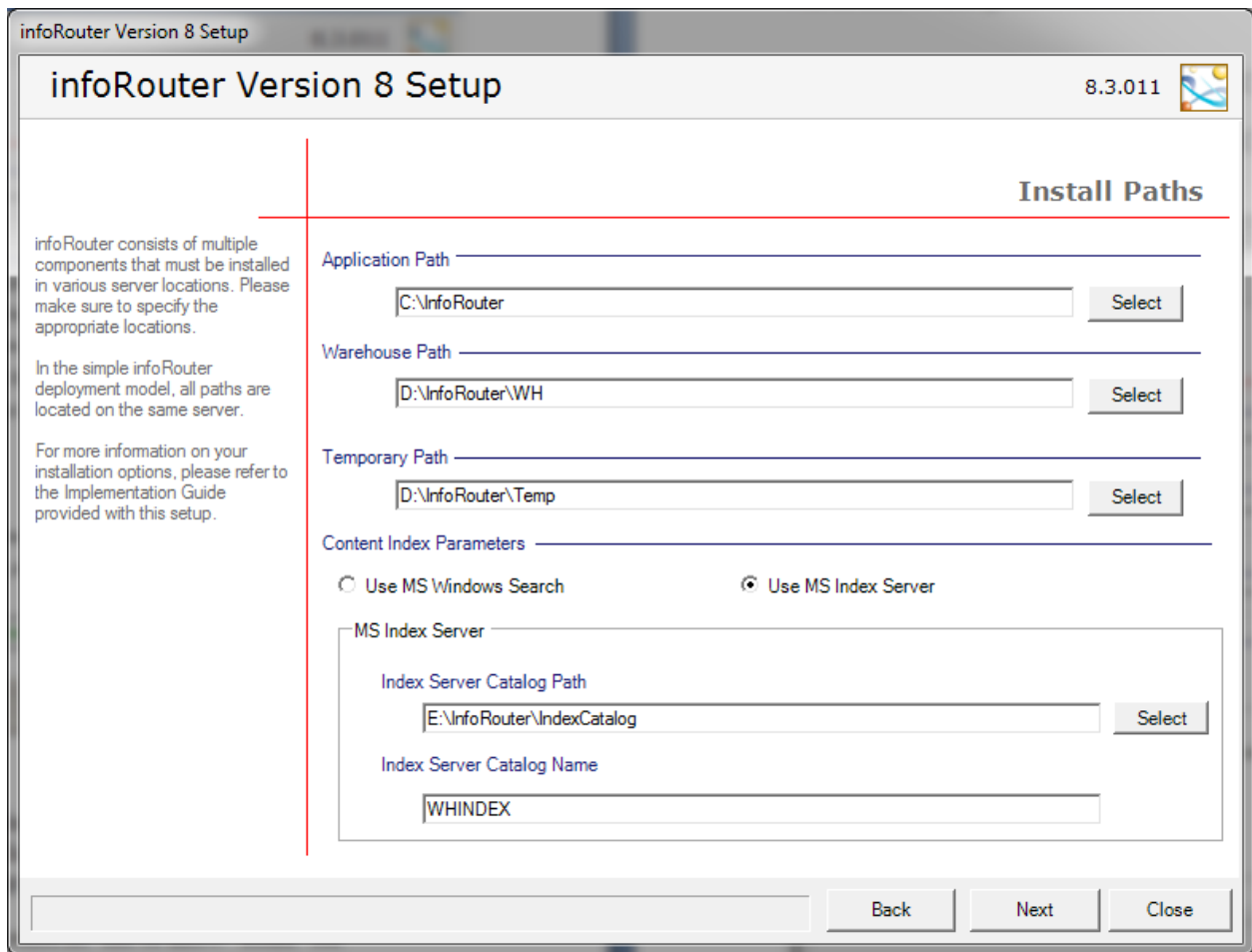
Content Index Parameters

Use MS Windows Search Use MS Index Server

Windows Search

No setting required for using Windows Search

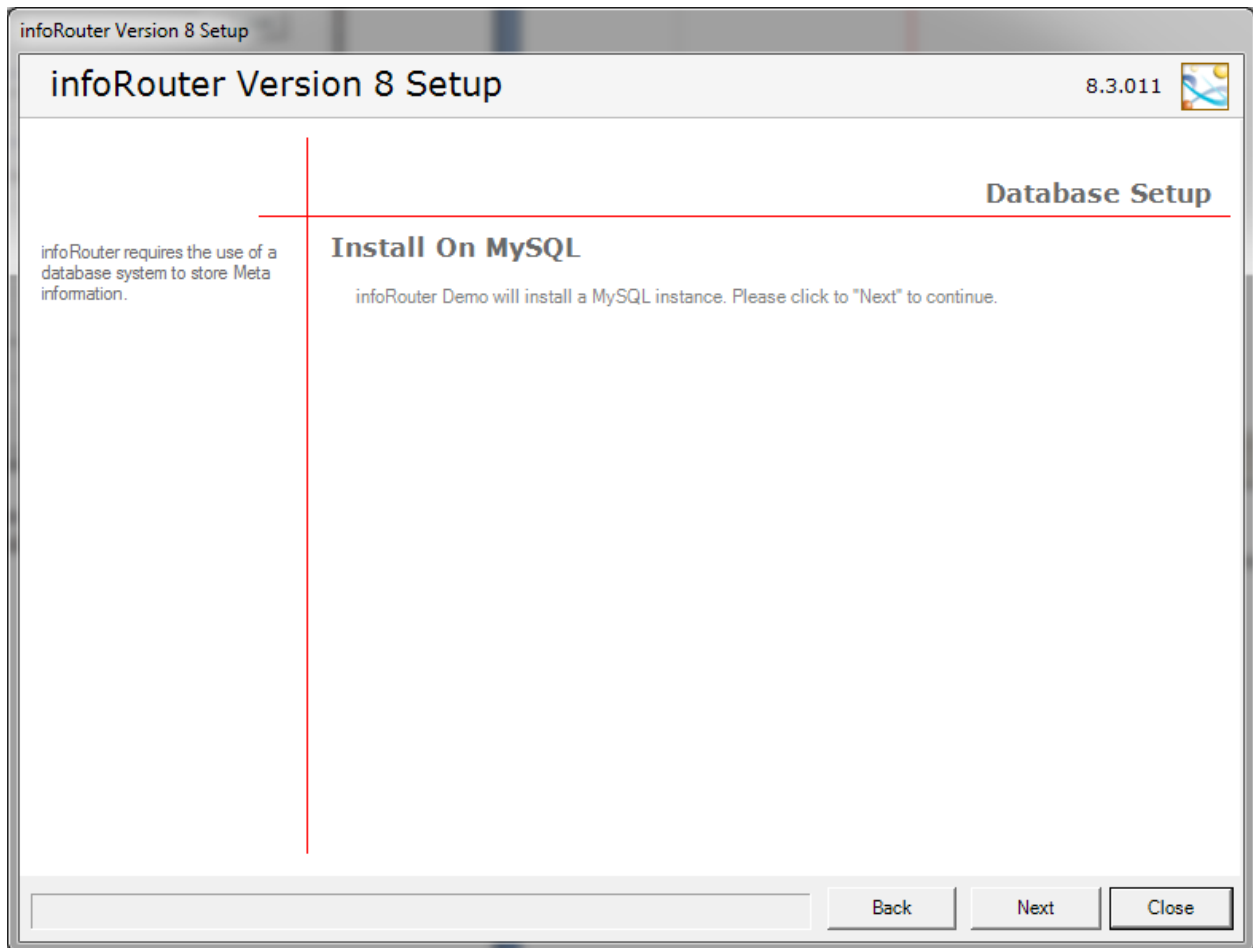
If you choose Index server you need to specify catalog name and index location. Unless you absolutely need to use a different name, do NOT change the catalog name.



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.

Database selection:

This screen demonstrates the setup when an existing MySQL instance is chosen. Please make sure that the version of the MySQL instance complies with the requirements document.

The screenshot shows the 'infoRouter Version 8 Setup' window with the 'Database Setup' section. The title bar includes 'infoRouter Version 8 Setup' and '8.1.152'. The main content area is titled 'Install On MySQL' and contains the following fields:

- Server Name: 127.0.0.1
- Port Number: 3306
- User Name: root
- Password: [masked]
- Database Name: infoRouter

On the left side, there is a note: 'infoRouter requires the use of a database system to store Meta information.' At the bottom, there is a note: 'infoRouter requires MySQL 5 or above.' The bottom of the window features 'Back', 'Next', and 'Close' buttons.

Installing on an old unsupported version or installing on a version of MySQL higher than the recommended version (including Beta versions) will create problems going forward. So please take the time to verify the version of MySQL before you go any further.

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 latest version of MySQL that has been verified to work with infoRouter is MySQL Version 5.5 .

The following screen describes the Oracle database selection

infoRouter Version 8 Setup 8.1.152

Database Setup

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

Install On Oracle

The IP Address of the ORACLE Server _____
192.168.1.66:1521/infoRouter

User Name _____
iruser

Password _____
xxxx

Please make sure that compatible Oracle Client software is installed on this server.

Back Next Close

Using Oracle as your database platform requires a previously installed and working Oracle Database Server, minimum Oracle 11g 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

infoRouter Version 8 Setup 8.1.152

Database Setup

Install on MS SQL Server

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

Server Name
SqlServerMachine

User Name
sa

Password
xxxxxxx

Database Name
infoRouter

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

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.

Alternatively, you may choose to have the setup program create a virtual directory for you.

We recommend using the default name of infoRouter.

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

The screenshot shows the 'IIS Application Configuration' window of the 'infoRouter Version 8 Setup' wizard. The window title is 'infoRouter Version 8 Setup' with version '8.1.152' and a logo. The main content area is titled 'IIS Application Configuration'. On the left, a note states 'infoRouter requires MS Internet Information Server (IIS)'. The central part features a table titled 'IIS web sites' with the following data:

| ID | Name | Status | IP | Port | Header | Protocol |
|----|------------------|---------|----|------|--------|----------|
| 1 | Default Web Site | Started | * | 80 | | http:// |

Below the table, there are two radio button options:

- Create the infoRouter application on the selected web site
- Create the infoRouter application as a virtual directory on the selected web site

The 'IIS virtual directory name' is set to 'InfoRouter' in a text box. Below this, the 'Fully qualified application URL will be:' is shown as 'http://WIN2003-BASE/InfoRouter/'. At the bottom right, there are 'Back', 'Next', and 'Close' buttons.

7) IMPLEMENTING SSL

infoRouter can run in HTTPS mode and this is generally transparent to infoRouter. However, we recommend implementing infoRouter in the regular HTTP mode during the initial install. Once the initial installation is successfully completed, SSL should be implemented as a second step.

Please refer to the SSL section at the end of this document to make the required changes.

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 title bar 'infoRouter Version 8 Setup' and version '8.1.152'. The main heading is 'Configure SMTP Parameters'. 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 'SMTP Server Configuration' section includes fields for 'Server Name' (127.0.0.1), 'Port Number' (25), and 'Connection Timeout' (10 Seconds). Below these are fields for 'Account Name' (inforoutersmtpuser) and 'Account Password' (masked with asterisks). The 'infoRouter system email address' section has a field containing 'inforouter@acme.com' with a note: 'Specify the email address that the infoRouter notification service will use as the email sender.' At the bottom, there are 'Back', 'Next', and 'Close' buttons.

Please make sure that the SMTP server you wish to use is configured to allow relay from the infoRouter server. If the SMTP server does not require an account name but you specify this information in the screen above emails are likely to fail.

If you find that you cannot send emails from infoRouter after the implementation, please refer to the [SMTP Troubleshooting Guide](#)

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.

infoRouter Version 8 Setup

8.1.152

Final Settings

"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.

"sysadmin" account password Display Password Characters

Password confirmation

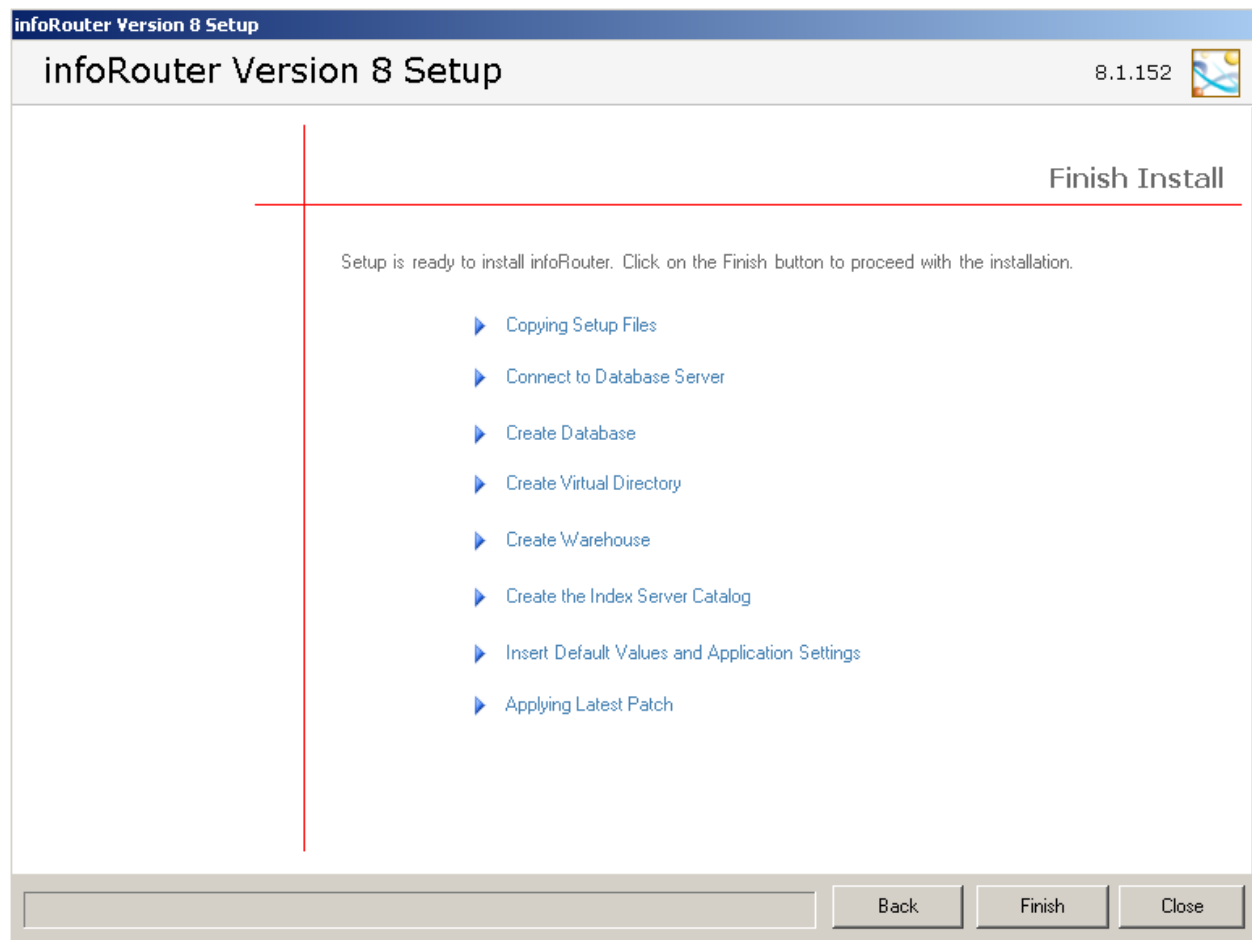
sysadmin email address

Back Next 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 set to “pass”.

10) FINISHING INSTALL

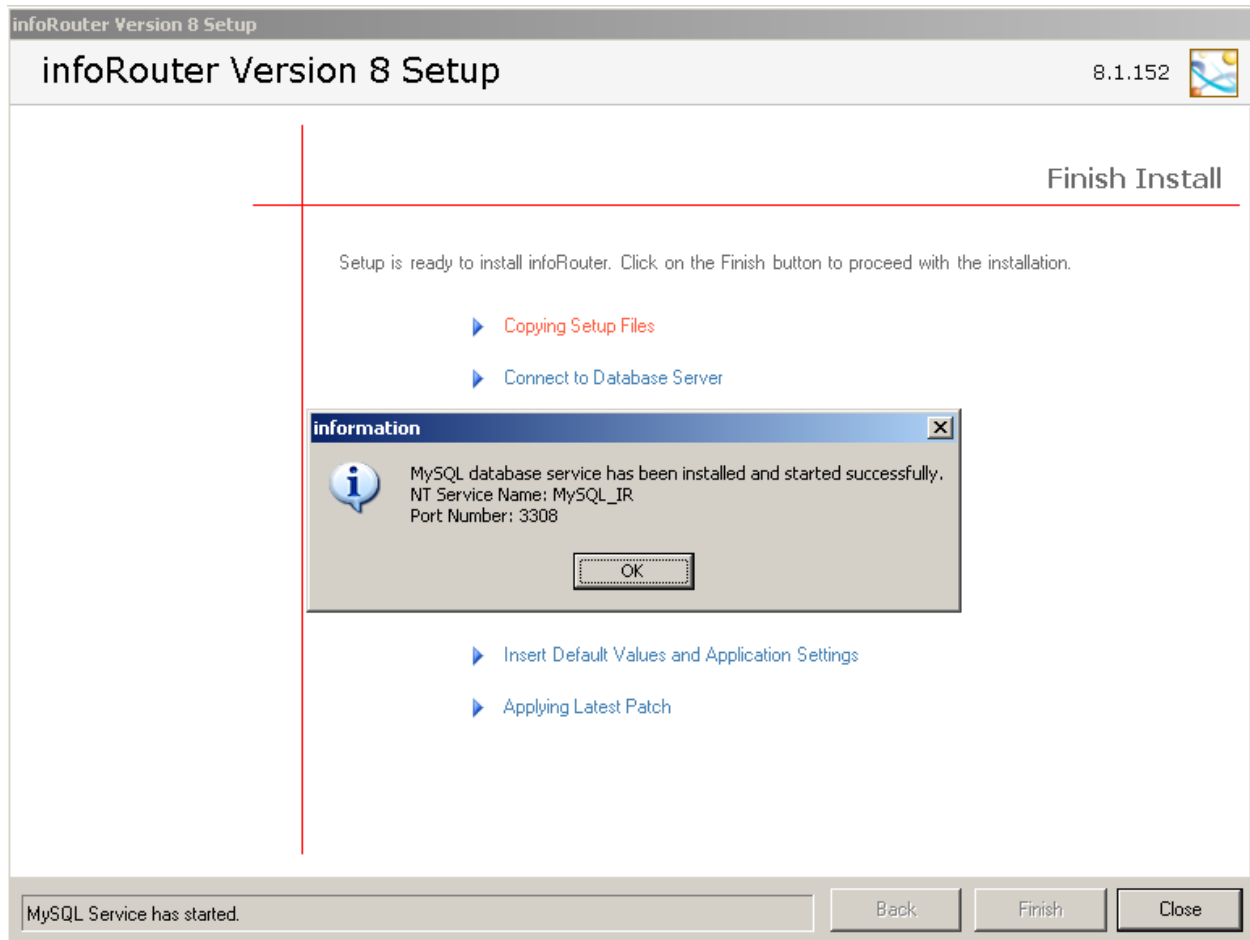
Click the Finish Button to Install



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.

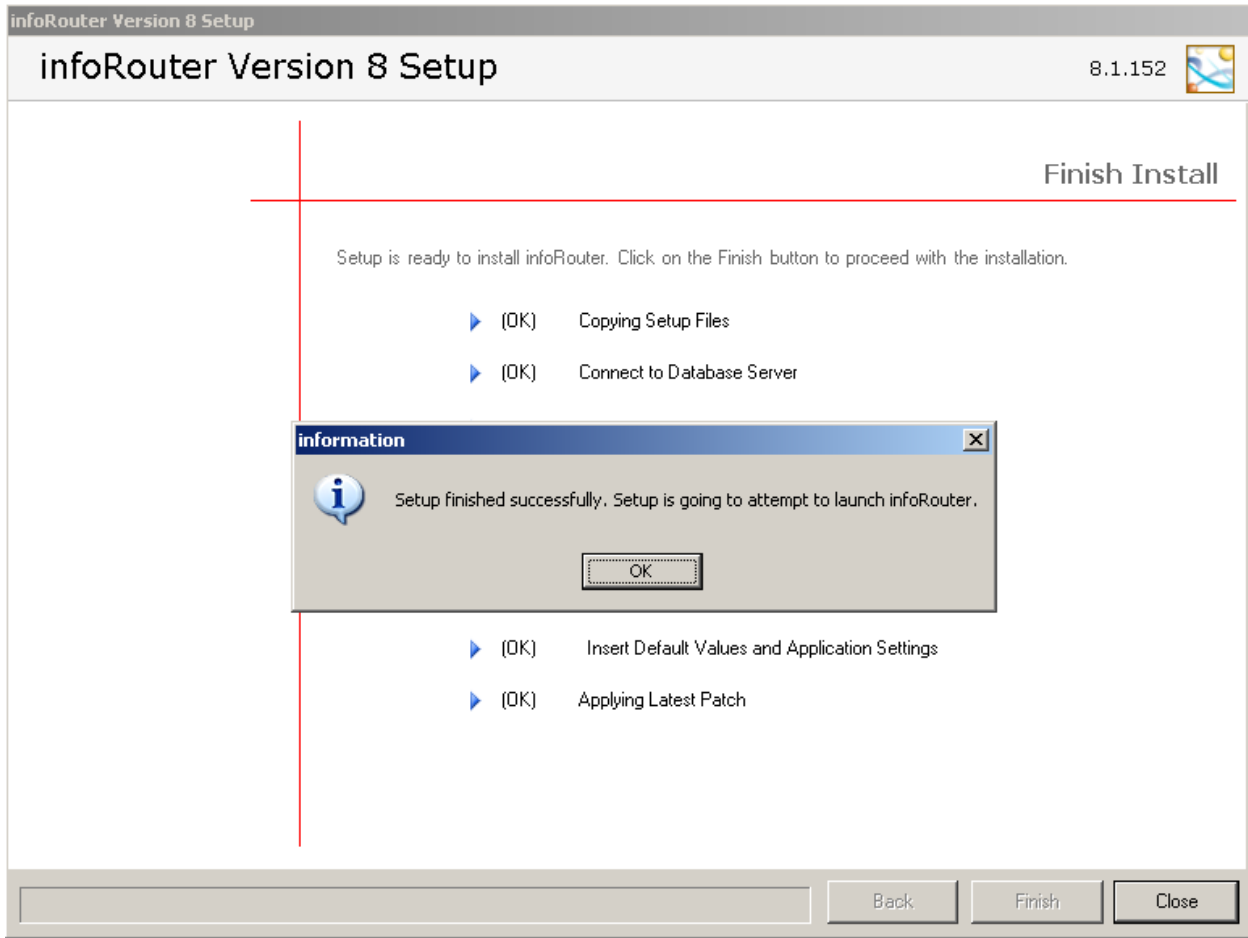
Note that the DEMO PACK will always be installed with the MySQL database.



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.

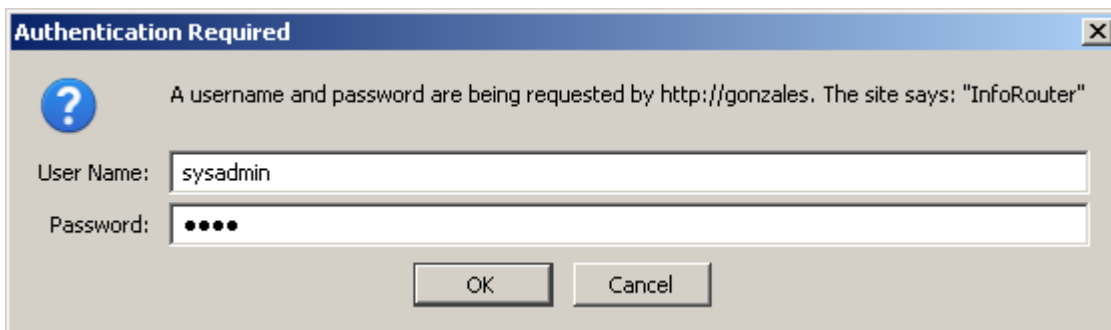


12) LOGGING ON TO INFOROUTER

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”

1 3) 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

Now that the installation of infoRouter is complete, the only remaining task is to provide MS Index Server / MS Windows Search additional tools to help you find documents quickly and easily.

By default, MS Index Server / MS Windows Search 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. (IFilters for MS Office 2007 and 2010 file formats (.docx, .xlsx, .pptx) can be downloaded from Microsoft.

If you would like to have MS Index Server / MS Windows Search 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 / MS Windows Search 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.

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

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 editing and saving of the web.config file causes the infoRouter application to restart.

NT Level Security Requirements:

The domain account specified in the Web.config file must have the following access permissions to the following paths.

"Network Service" account (Windows 2008 and 2012) 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

The specified 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 impersonation.

NT Level Security Requirements for Windows 2008 and 2012 server 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-SimpleModel-V8.x](#) document.

7) IMPLEMENTING SSL

Implementing SSL is out of the scope of this document and is not a support service we provide. If you intend to use SSL, you must purchase a real certificate from one of the few certificate providers in the marketplace and apply it to the IIS server on which infoRouter runs.

Once this is done and is tested to be in working order, you must make a few changes in two infoRouter configuration files.

- 1) Change the “Application URL” parameter in the infoRouter Web.config file.

Example:

http://server_name/infoRouter
must be changed to
https://server_name/infoRouter

- 2) Change the infoRouter Web Service URL in the IRMaintenance.config file.

Example:

http://server_name/infoRouter/srv.asmx
must be changed to
https://server_name/infoRouter/srv.asmx

The infoRouter web.config file can be found in a sub-folder called “site” in the infoRouter application directory.

Examples:

C:\inforouter\site\web.config
or
D:\inforouter\site\web.config

The infoRouter IRMaintenance.config file can be found in a sub-folder called “IRMaintenance” in the infoRouter application directory.

Example:

C:\inforouter\IRMaintenance\web.config

BACKUPS AND ONGOING SYSTEM MAINTENANCE

Backup Strategy:

You must have a backup strategy for infoRouter. Please read and implement the recommendations outlined in the [Backup Restore Disaster Recovery Guide](#). In the event of a hardware failure or disaster, your backups may be the only source of recovery.

You are responsible to keep regular and verified backups of the system as described by the document mentioned above.

infoRouter System Maintenance:

You must also have a strategy for system maintenance. Active Innovations makes regular announcements for new releases and patches. These announcements are sent to the technical contact we have on file for you. Please read these announcements and perform the requested actions to make sure your system is kept up to date with the latest version of the software.

A system administrator must be designated to perform regular system maintenance tasks such as running Live Updates, maintaining the infoRouter system recycle bin, managing users etc.

Please download the required documentation from our support site and check back regularly for updated documentation.

Required Reading:

[infoRouter Administrator's Guide V8.x](#)

[infoRouter Live Update](#)

Operating System & Database System Updates and patches:

You are responsible of maintaining the operating system on which infoRouter runs. Please keep up with the patches provided by your system vendor.

Active Innovations does not provide support for underlying operating systems or database platforms. You must designate a dedicated or part-time staff to maintain these platforms.

Manual or automated maintenance jobs must be created and implemented to keep these systems running in good condition by your staff.