

## logIQDoc™ – Installation Guide

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## ***Introduction***

### **Document Purpose**

This document provides guidance for installing all the components needed for the logIQDoc™ Document Management Software solution – logIQDoc Web Application, atypIQ License Server, atypIQ Search Files Service, atypIQ logIQKey application.

The logIQDoc™ Document Management Software solution allows organizations to create and manage a set of uniform models for retention, security, classification, search, retrieval and automatic notification and alerts for changing content. The benefits of such a system quickly become more obvious in the ever changing landscape of business where non-compliance may mean costly fines, sanctions, litigation and personal liability.

### **Intended audience**

The intended audience is composed of Windows Systems Administrators and technical Windows power users working in managed environments.

The document assumes that the reader has some experience installing and administering Windows-based systems in domain or stand-alone configurations. Basic IIS Web Server configuration and administration experience is required.

### **logIQDoc - the Enterprise Document Management Solution**

logIQDoc™ is an electronic document management system of the next generation, which systematically manages and utilizes the unstructured digital information from inside and outside the company.

logIQDoc™ offers powerful features that are typically only found in document management software applications costing hundreds of thousands of euro.

Tons of features make it easier than ever before to create, store, secure, distribute, edit, track, manage, restore, share, and audit your valuable information assets, without going through the unnecessary sophistication (and expense) of some goliath DMS systems.

## ***Installation***

### **Instant Deployment, Remote Administration**

Since logIQDoc™ is completely centralized and the access browser based, deployment will be very easy. A typical installation and deployment takes only a few hours. Because it is fully browser-based, deployment across your enterprise will be effortless.

The logIQDoc™ document management system only requires a server side installation that has a few easy steps. There are no mandatory client-side components to install. Only if needed, an integration add-in for Microsoft Office and Windows Explorer can be also installed on the client. After deployment, all logIQDoc™ administration functions can be performed remotely using the web browser interface. Using the “Import from Disk” and the “Upload from Zip” tools, you can import all of your existing documents into logIQDoc™.

### **Prerequisites**

#### **Server requirements:**

Pentium 4 or higher processor, Minimum 1 GB of RAM, 500MB disk space

Windows Server 2003 SP2; Windows Server 2008; Windows XP Professional SP2

Internet Information Server (IIS) with ASP.NET Support

.NET Framework Version 3.0 with appropriate Service Pack

One of the following DBMS platforms:

MS SQL Server 7, 2000, 2005, 2008, SQL Server Express

Oracle 8i, 9i, 10i

DB2

MySQL 4.1 and up

Postgress

Firebird

(more details: [iBatis supported databases](#))

**Minimum Client requirements:**

Windows Family, MAC OS, Linux Family with Internet Explorer 7/ 8 and up, Firefox 2/3 and up, Safari 3/4 and up, Google Chrome 3 and up.

For the “Microsoft Office and Windows Explorer Integration for logIQDoc” client add-in, .NET Framework 3.0 with appropriate service pack is required.

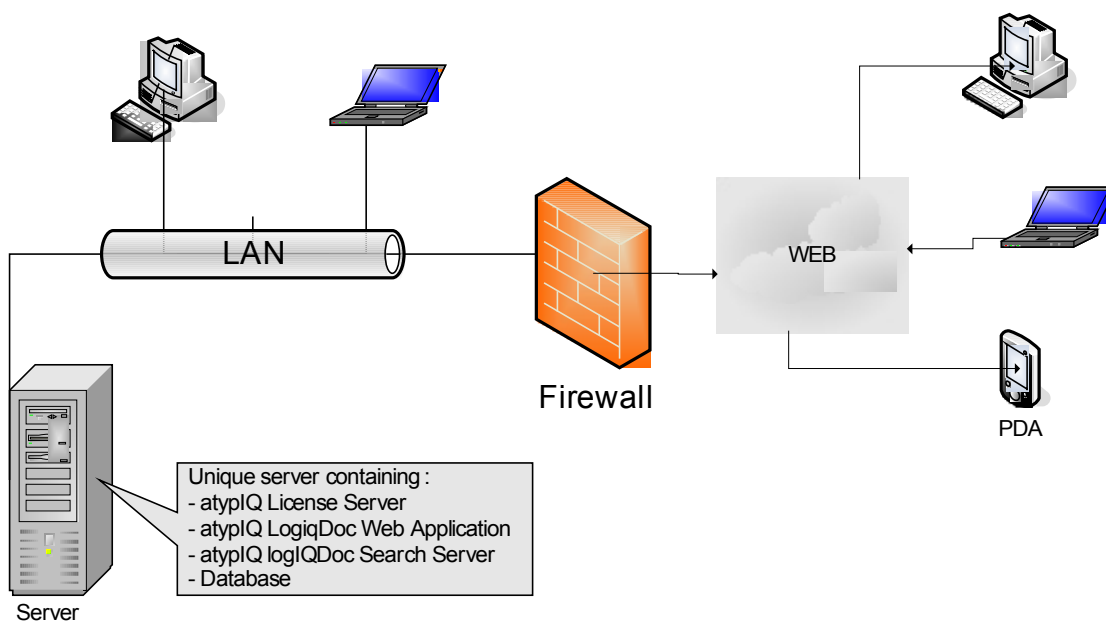
For the “logIQKey” client application, .NET Framework 3.0 with appropriate service pack is required.

## Planning for technical structure

The distributed architecture of logIQDoc™ allows you to install the different components of logIQDoc™ across multiple servers to achieve load balancing. You can use more than one server to participate in managing your information with speed and confidence.

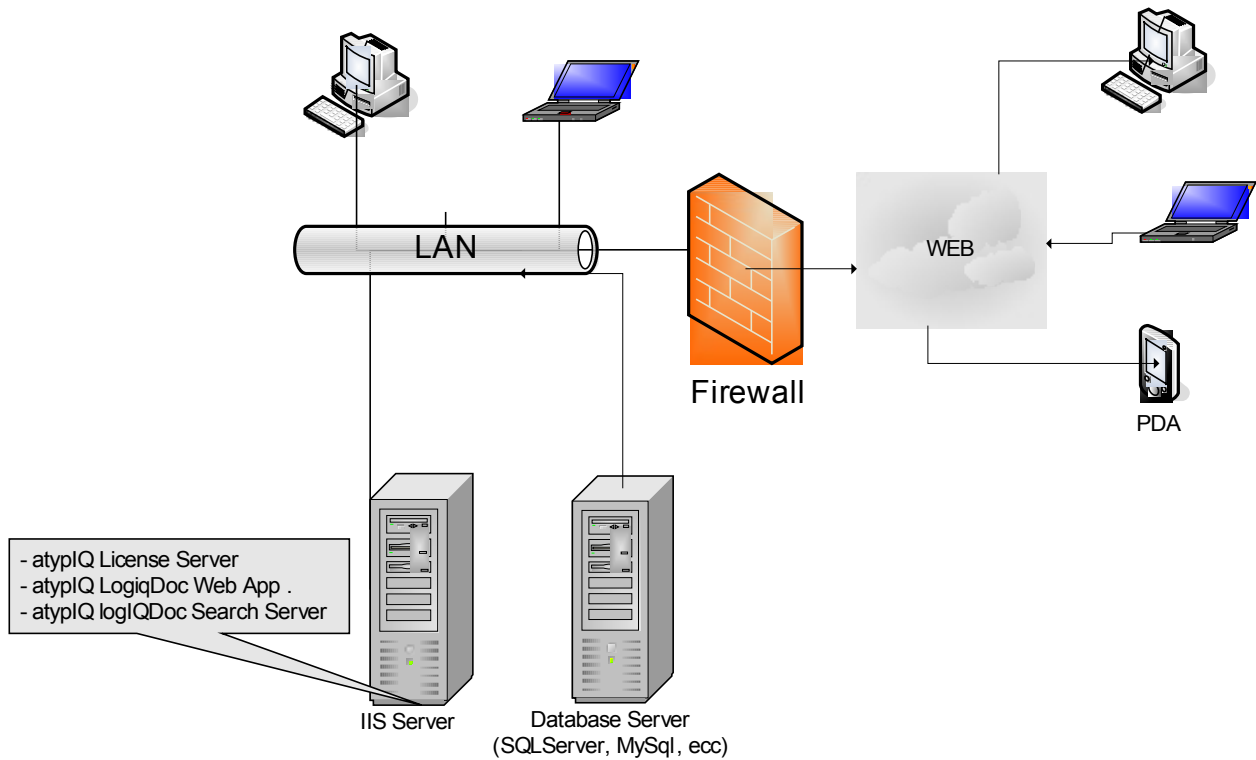
### Simple Topology (one server)

You can install all the server components on only one physical server:



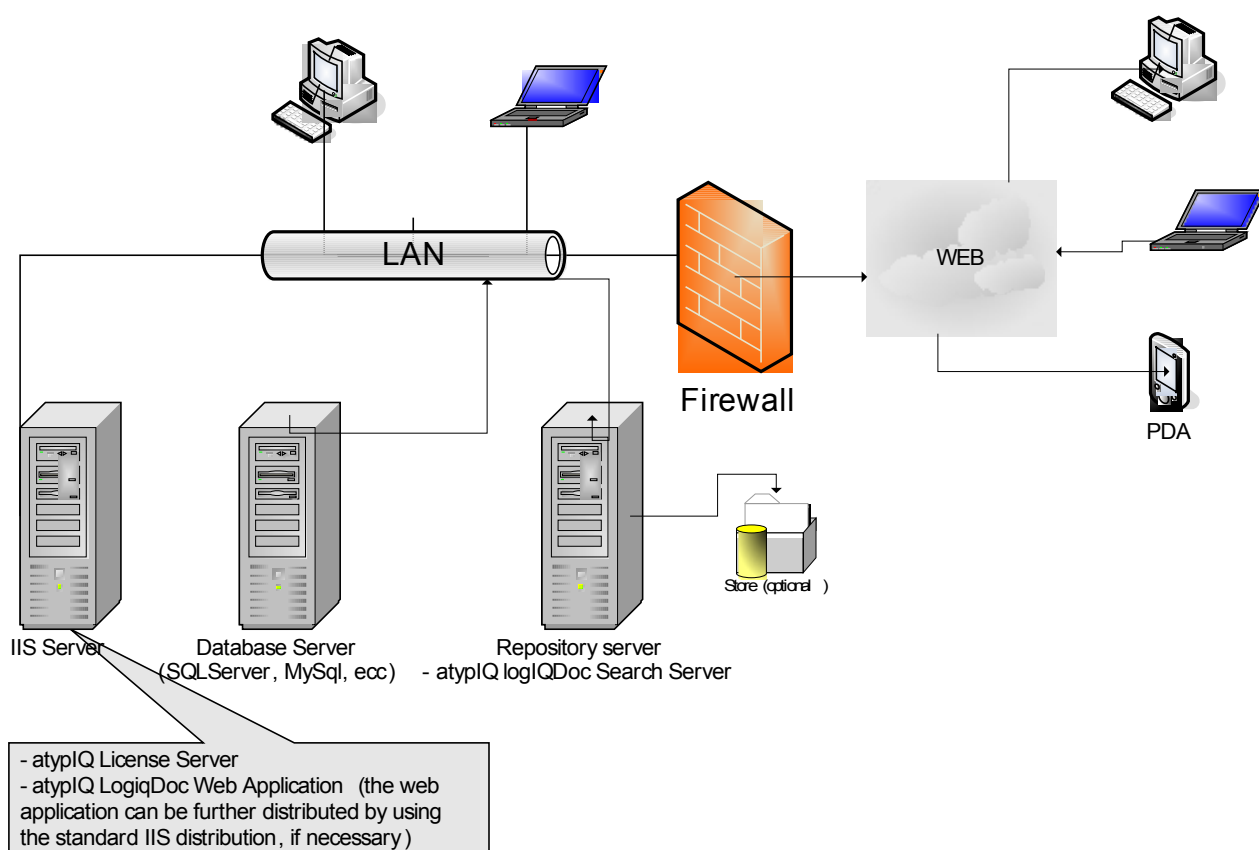
### Separate Database Server Topology (two server):

Segregate the Database Server on a separate Server. The Database Server can be installed on any operating system (ex: a MySQL install on a Linux operating system)



### Distributed Server Topology (3...n servers):

If you want to achieve maximum scalability, you can distribute the load across multiple physical servers.



## atypiQ License Server & atypiQ License Manager

The atypiQ License Server (ALS) is the central license manager for logIQDoc and all the other products from atypiQ Software.

In order to have a running logIQDoc installation, the ALS must be installed, configured and activated with the proper license information. It can be installed on any machine inside your LAN or even WAN (the access is webservice based).

Installation procedure:

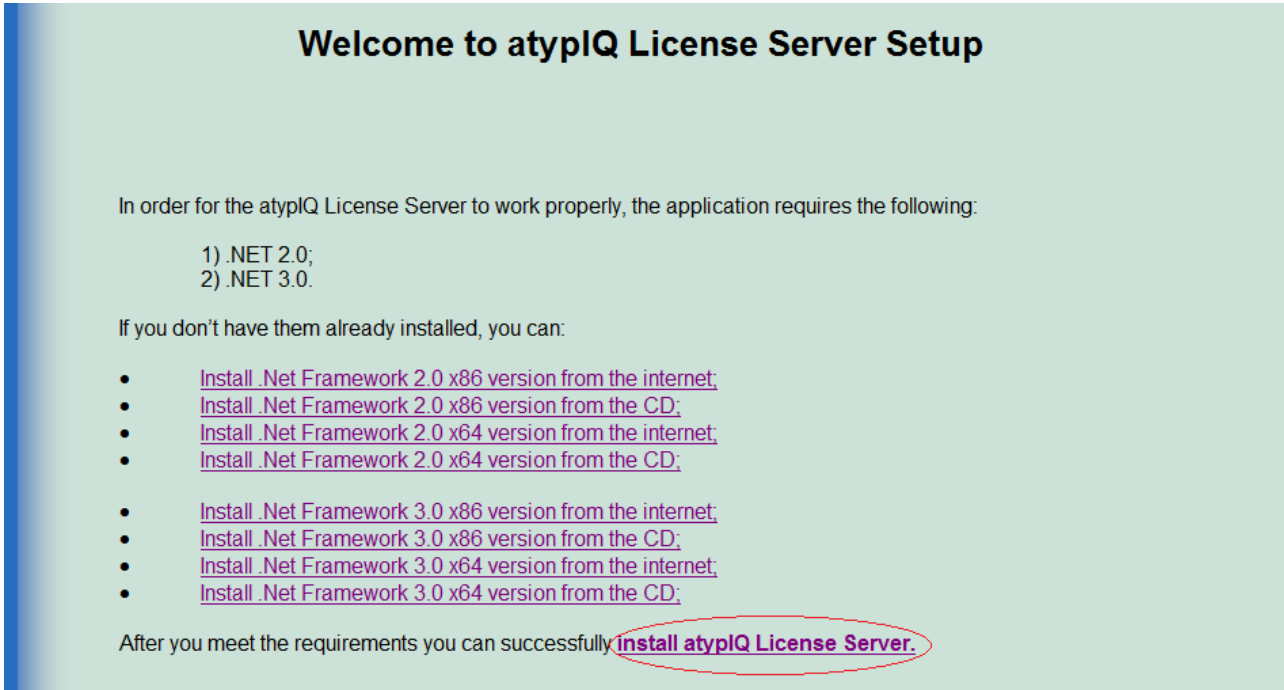
1. From the main setup page, navigate the the atypiQ License Server Setup.



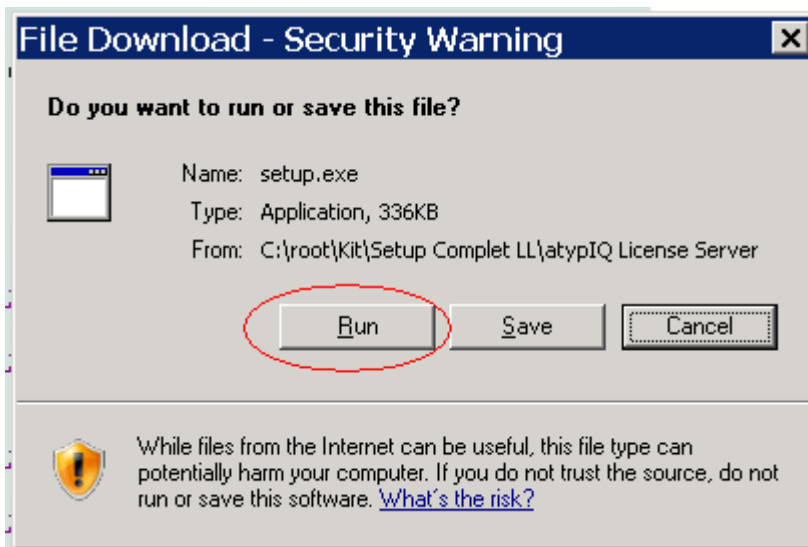
2. Verify that on your system you have installed Dot Net Framework 2.0 and 3.0. If not, you must install them by choosing to download the latest version from the Microsoft website or

directly from the CD.

3. Once you insure that the requirements are met, proceed to the atypiQ License Server installation

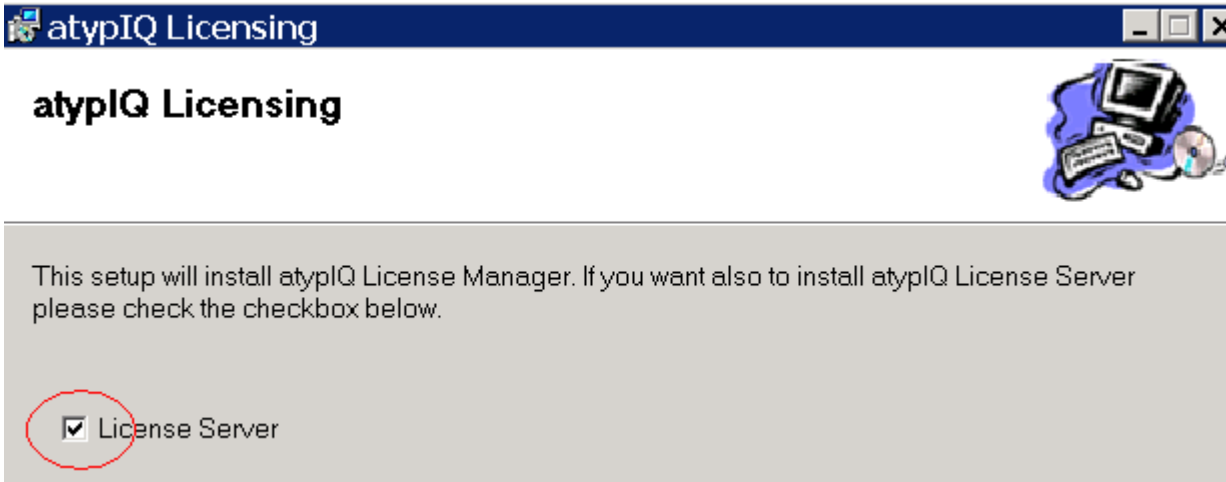


4. Choose "Run" in order to launch the setup



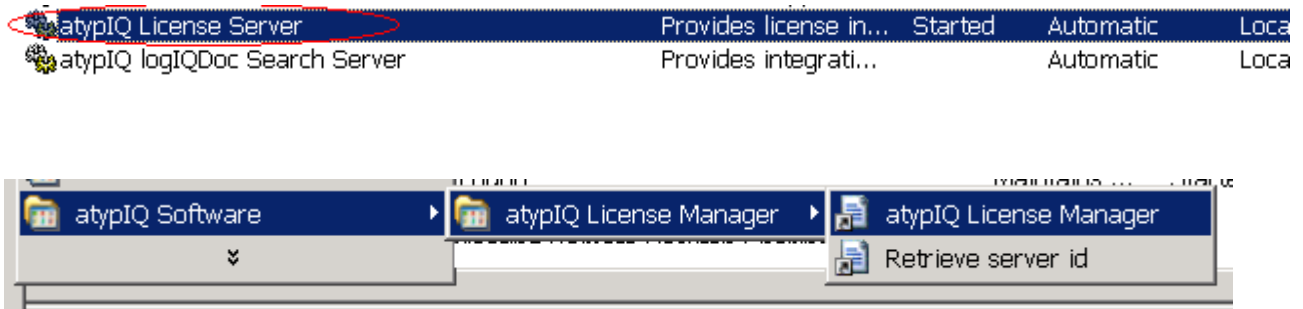
5. Once the setup starts, click "Next" and then please read carefully the License Agreement. Once you agree to the terms, click "Next"
6. If you want to install only the License Manager for managing a remote installation of the ALS, uncheck the option License Server. If you wish to install both the License Manager

and the License Server, just click “Next”



7. Click “Next” and then “Finish”.

The installation is complete. You should find the *atypIQ License Server* Windows Service running, and be able to launch the License manager from the start menu



For details about configuration issues, navigate to the configuration section.

## logIQDoc Search Server

logIQDoc's Integrated full-text searching and powerful advanced search features make it simple to locate exactly what you need from wherever you are. That means no more wasting time trying to find a document, and no time spent recreating content that already exists.

The logIQDoc Search Server provides the integration with the indexing service used to provide full-text search capabilities. The indexing service for Windows based repositories is Windows Search (WDS).

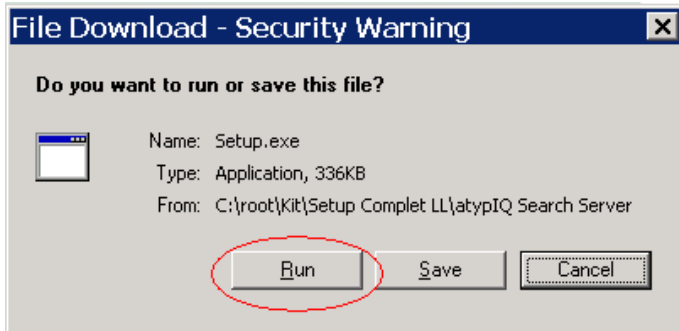
1. From the main setup page, navigate to the logIQDoc Search Server setup page
2. Verify that on your system you have installed Dot Net Framework 2.0 and 3.0. If not, you must install them by choosing to download the latest version from the Microsoft website or directly from the CD.
3. Verify if you have already installed the Windows Search Service. If not, you must install it by choosing to download the latest version from the Microsoft website or directly from the CD.
4. If you want Adobe pdf files to be full-text indexed and you don't have already installed the Adobe Reader, you can install the Adobe Acrobat Filter.
5. If you want OpenOffice.org documents to be full-text indexed and you don't have already installed it, you can install the OpenOffice.org Filter

Note: you can install any other filter compatible with the WDS indexing service

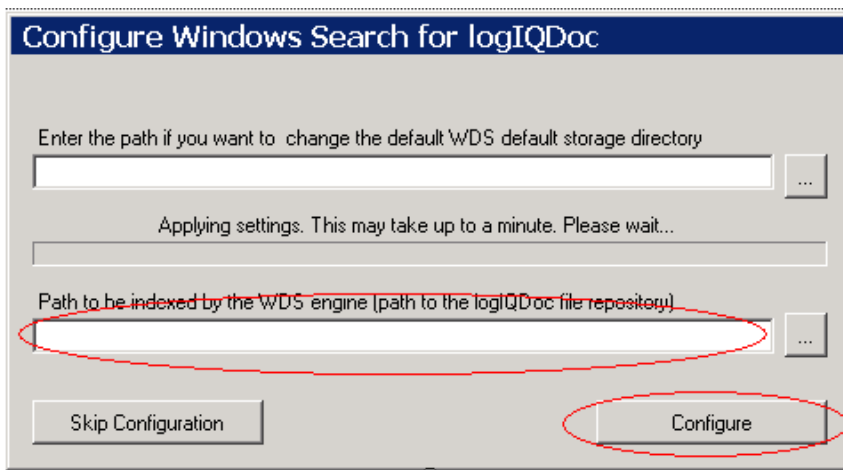
6. Once you insure that the the above requirements are met, proceed to the logIQDoc Search Server installation

After you meet the requirements you can successfully **install the logIQDoc™ Search Server.**

7. Choose run in order to start the setup procedure



8. Once the setup starts, click “Next” and then please read carefully the License Agreement. Once you agree to the terms, click “Next”
9. The “Configure Windows Search For logIQDoc” form will appear.



- In the first textbox, you can choose to configure WDS to store its files and database into a custom location. Optional. Note: you cannot choose a root directory.
- In the second textbox you must indicate the path to the logIQDoc file repository that will contain the physical files to be indexed. Mandatory
- Click “Configure” or “Skip Configuration” and wait for the setup to finish

10. The installation is complete. You should find the *atypIQ logIQDoc Search Server* Windows Service running, and have the WDS service configured.

atypIQ License Server	Provides license in...	Started	Automatic	Local
atypIQ logIQDoc Search Server	Provides integrati...		Automatic	Local

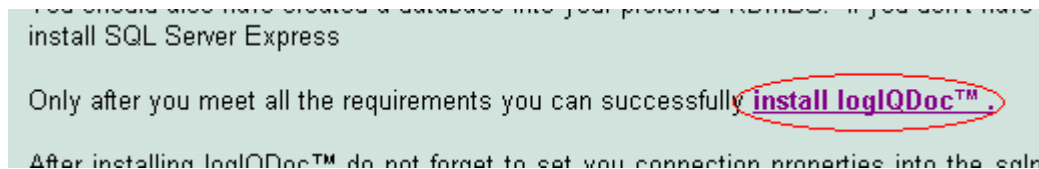
For details about configuration issues, navigate to the configuration section.

## logIQDoc EDMS Web Application

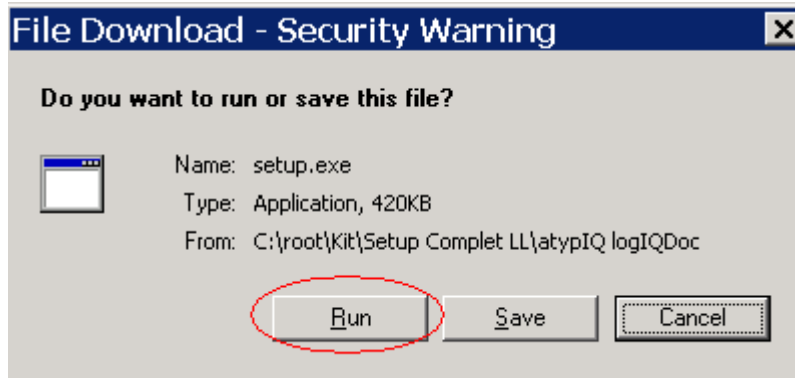
The logIQDoc Web Application is where the core business logic and the user interface run.

It runs in a IIS server configured for ASP.NET 2.0.

1. From the main setup page, navigate to the logIQDoc setup
2. Verify that on your system you have installed Dot Net Framework 2.0 and 3.0, IIS and a database. If not, you must install them by choosing to download the latest version from the Microsoft website or directly from the CD.
3. Once you insure that the requirements are met, proceed to the logIQDoc Web Application installation



4. Choose run in order to start the setup procedure



5. Once the setup starts, click "Next" and then please read carefully the License Agreement. Once you agree to the terms, click "Next".
6. The "Select Installation Address" form will appear. Read the instructions and choose what suits better your environment

## Select Installation Address

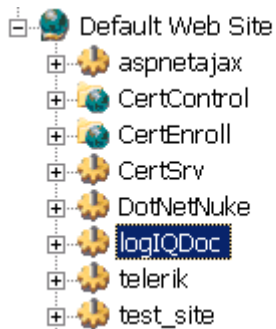


The installer will install atypiQ logIQDoc WebApplication to the following web location.  
To install to this web location, click "Next". To install to a different web location, enter it below.

Site:  
Default Web Site

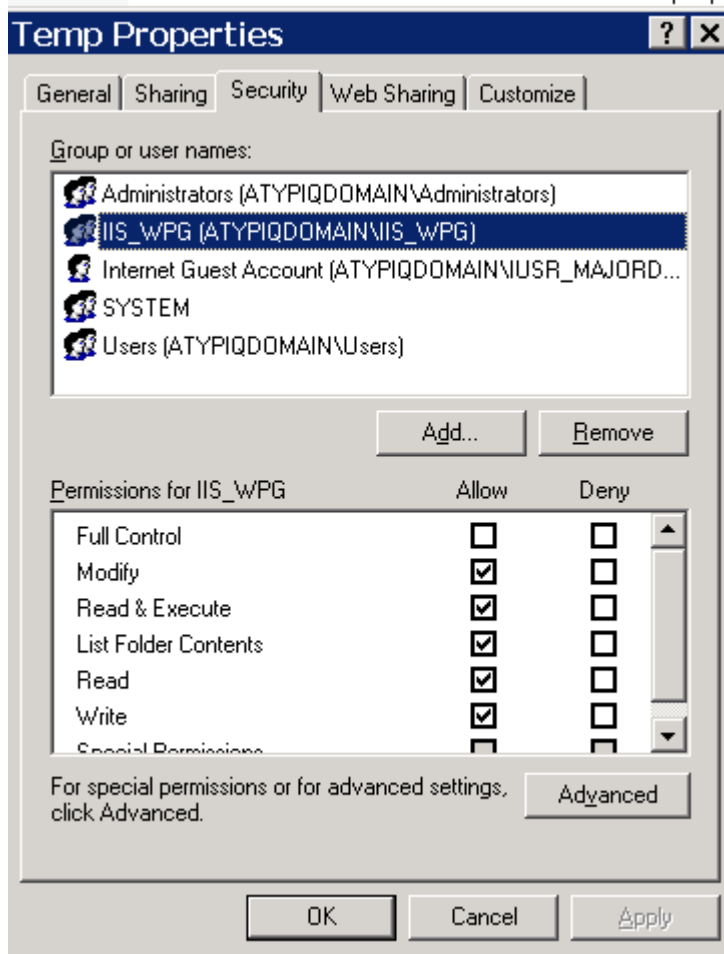
Virtual directory:  
logIQDoc

7. The software installation is now complete. You should find in your IIS Manager the new virtual directory you have chosen



8. Into the folder where the virtual directory is pointing (usually C:\inetpub\wwwroot\logIQDoc), you must allow Modify permissions for the IIS service for the Logs and Temp folders. In Windows Server 2003 the user is IIS\_WPG; in Windows XP SP2 the user is ASPNET
9. Some systems may not be updated to the last windows patch, so you may get the error explained at the Microsoft website (<http://support.microsoft.com/kb/322886>)

In order to bypass this problem, assign modify permissions to IIS for the c:\windows\temp folder, as you've just done with the folder in the virtual directory.



For details about configuration issues, navigate to the configuration section.

## Microsoft Office and Explorer Integration for logIQDoc

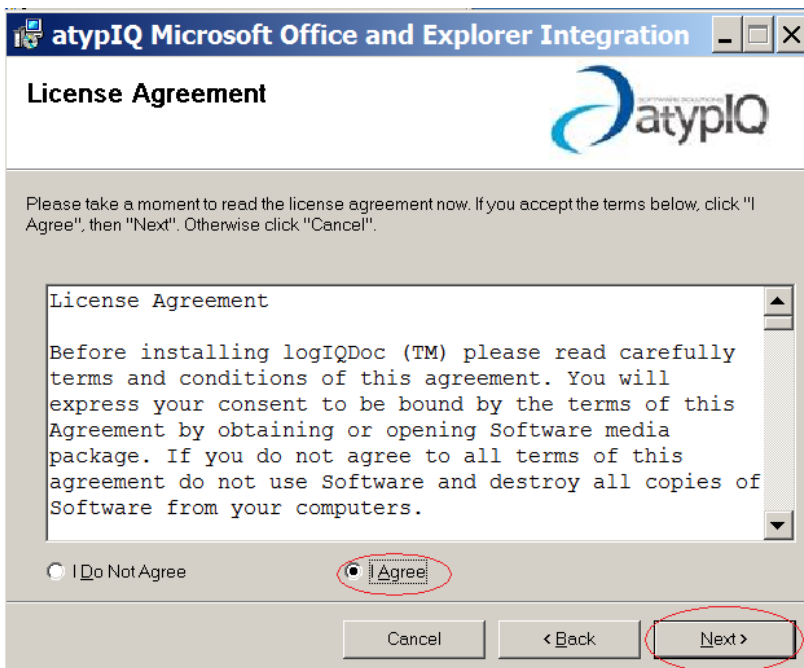
This add-in is used to connect to logIQDoc from any Microsoft Office application (Word, Excel and PowerPoint), simplifying and enhancing your work. It also integrates with the Windows Explorer contextual menu making it simple to upload to and get documents from logIQDoc.

1. From the main setup page, navigate to the Microsoft Office and Explorer Integration for logIQDoc setup page.
2. Verify that on your system you have installed Dot Net Framework 2.0 and 3.0, and Microsoft Office (2003 and up). If not, you must install them by choosing to download the latest version from the Microsoft website or directly from the CD.
3. Once you insure that the requirements are met, proceed to the Microsoft Office and Explorer Integration for logIQDoc installation.

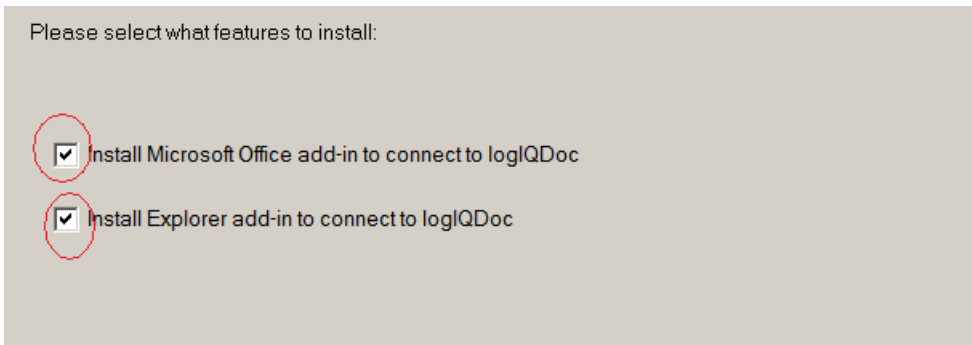
- [Install Windows Installer 3.1 from the CD.](#)

After you meet the requirements you can successfully install [Microsoft Office and Explorer Integration for logIQDoc](#)

4. Once the setup starts, click "Next" and then please read carefully the License Agreement. Once you agree to the terms, click "Next".

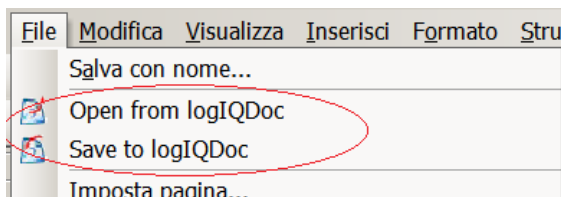


5. You can choose whether to install only the Microsoft Office integration components (if you have it installed), only the Windows Explorer Integration components, or both (recommended). Then click “Next”

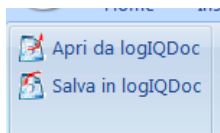


6. Choose the installation path (leaving default is recommended), click “Next” and proceed with the install
7. To verify if the add-in has been correctly installed, you should open Word and verify that the Open From logIQDoc and Save to logIQDoc options have been added to the menu:

- a. In Microsoft Office 2003 or Microsoft Office XP, go to the file menu:

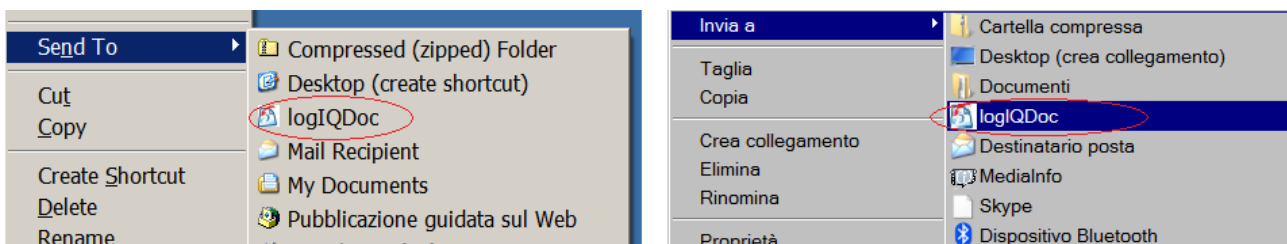


- b. In Microsoft Office 2007 (Vista): go to the Add-Ins tab:



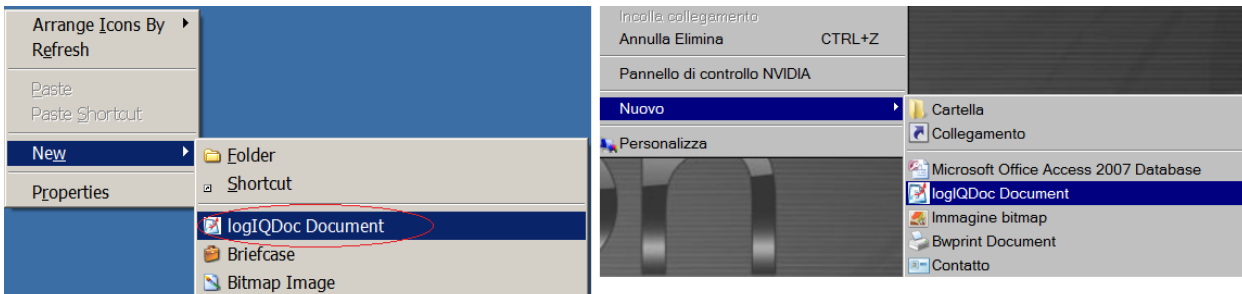
8. To verify that the Windows Explorer extension has been correctly installed (English-Italian):

- a. Right click on a file and go to the “Send To” contextual menu:



- b. Right click where you can create a new document, and go to the “New” contextual

menu:



For details about configuration issues, navigate to the configuration section.

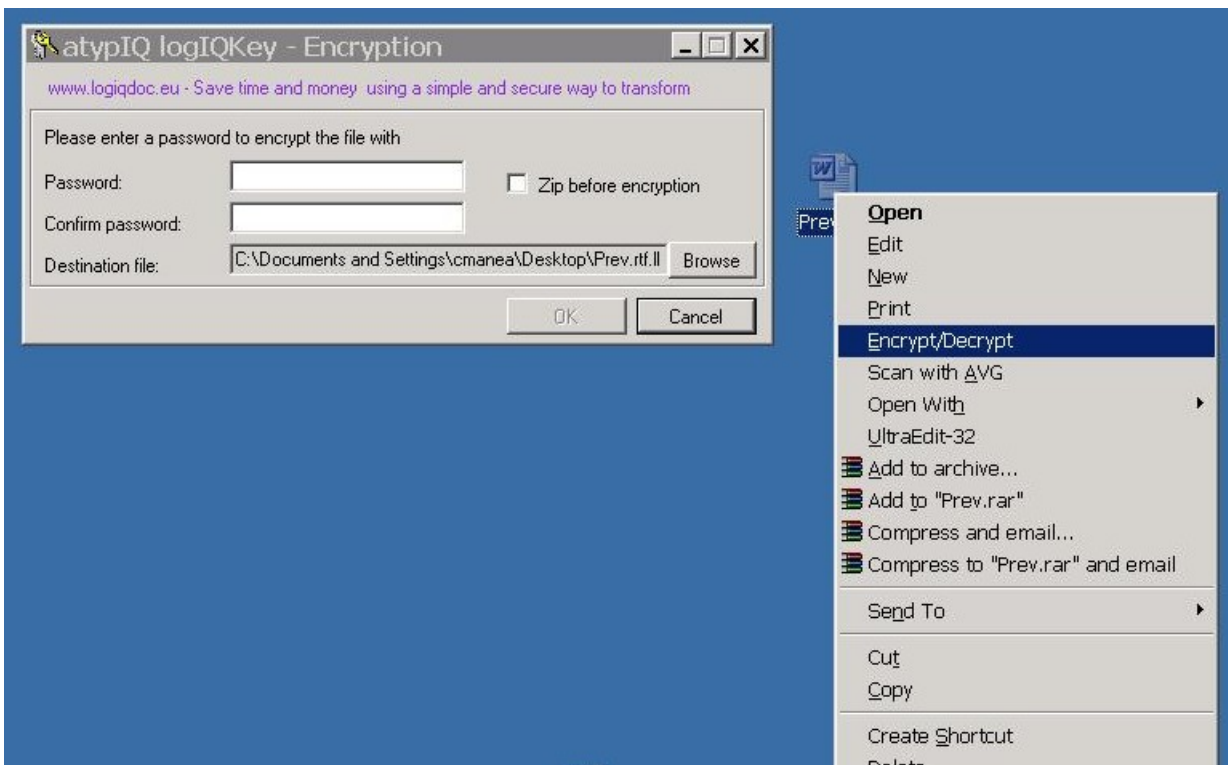
## logIQKey client application

atypiQ logIQKey is a small but very useful utility which helps you protect your data. Use it to enforce encrypting policy in logIQDoc using the Fortress Groups and to exchange critical documents with your partners in a simple and secure way. It uses a very strong encrypting algorithm, making it virtually impossible to decrypt.

It is integrated with Windows shell and contextual menu.

Just navigate to the logIQKey setup page, launch the setup, read carefully the License Agreement, and if you agree proceed to installation by clicking next.

Once the setup is completed, the application is fully configured and integrated into your system.

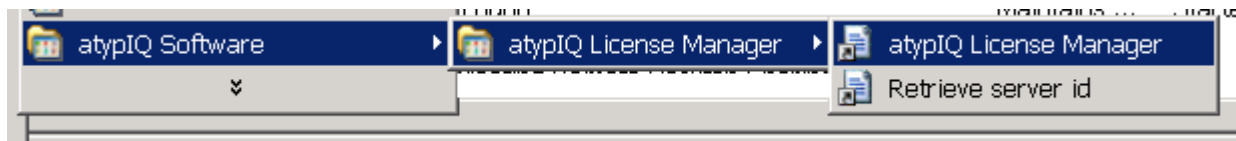


## Configuration

### atypiQ License Server & atypiQ License Manager

#### How to set and activate a license configuration

- launch the atypiQ Licence Manager client application from the start menu



- set your licensing configuration by choosing
  1. The number of concurrent users. A concurrent user can log into the system multiple times from multiple locations
  2. The number of named users: A named user can log into the system only once from a specific location
  3. Date interval for the license
  4. License Type
  5. The server id of the physical or virtual machine where the logIQDoc Web Application is installed. It defaults to the server id of the local machine. If logIQDoc is not installed on the same machine, you must first retrieve the server id by launching the “Retrieve server id” application on the server where logIQDoc is installed.
- Once you have set your values, save the settings to the license server.
- Then save the license configuration to disk by choosing “Save settings file to disk”. You should send the configuration file to atypiQ software, that will provide you a license key file to activate your license.
- Once you have received the license key file, choose “Activate License” and provide the path to the file.

## logIQDoc EDMS Web Application

### Relevant Configuration Files under the virtual directory

- **Web.config**

The relevant settings in this file are as follows:

```
<appSettings>
  <add key="SearchServiceAddress" value="net.tcp://localhost:8095"></add>
  <add key="LicenseServerAddress"
value="http://localhost:8096/service1"></add>
  <add key="EnableWorkingThread" value="true"></add>
</appSettings>
<connectionStrings>
  <add name="ADService"
connectionString="LDAP://majordom.atypiQdomain.local/CN=Users,DC=atypiQdomain,DC=local"/>
</connectionStrings>
```

SearchServiceAddress – if you have installed the atypiQ logIQDoc Search Server on the same machine as the web application, you don't need to change anything. If you have installed it on another system (or/and have changed the port where the search server is listening), you must change this value appropriately.

LicenseServerAddress - if you have installed the atypiQ License Server on the same machine as the web application, you don't need to change anything. If you have installed it on another system (or/and have changed the port where the search server is listening), you must change this value appropriately.

EnableWorkingThread – the web server maintains a working thread that will perform some batch activities like sending emails to subscribers. If you want to deactivate this thread, set this value to false. NOTE: all the "batch" operations will be halted

ADService - defines the connection string to your Active Directory (or other LDAP service) in order to integrate the Active Directory Security

- **Log4netconfig.xml**

The application uses for logging the apache log4net framework. By default, it logs on file system under the Log folder found in you web application directory. You can change the logging path by changing `<file value="Logs\\logIQDoc.log"/>` to better serve your needs.

For more advanced configuration options go to: <http://logging.apache.org/log4net/release/config-examples.html>

NOTE: remember to give write permissions to the is IIS\_WPG or APNET user to the logging folder.

- **Sqlmap.config**

See next chapter

**Before making the first call to the logIQDoc Web Application, you must insure that:**

- You have created a database on your Database Server to be used by the the application
- You have created a folder on the file system (local or shared on another machine) that will be used as the file repository by the application. Insure you have enough space for your requirements
- You have given write permissions to the is IIS\_WPG or APNET user to the Log folder and the Temp folder under the virtual folder of your application (usually usually C:\inetpub\wwwroot\logIQDoc)
- You must “tell” the logIQDoc Web Application where is your db, and what are the credentials needed to access it. The file that contains this information is named: **sqlmap.config** and you can find it in your base virtual repository folder (usually C:\inetpub\wwwroot\logIQDoc). The following configuration is supposed to work with SQL Server 2005 or SQL Server 2005 Express

If you want to use SQL Server Authentication, than you must provide the username and the password to access:

```
<property key="connectionString" value="Data Source=localhost;Initial  
Catalog=logIQDoc;User=sa;Pwd=thisismypwd;Pooling=True" />
```

If you want to use Windows Integrated Authentication, than you set the connection string property like this:

```
<property key="connectionString" value="Data Source=localhost;Initial  
Catalog=logIQDoc;Integrated Security=SSPI />
```

Data Source – you must put the database information (usually the name of the computer where your DB server resides)

Initial Catalog – should be the name of the database

NOTE: Are you using SQL Server 2005 Express? Don't miss the server name syntax Servername\SQLEXPRESS where you substitute Servername with the name of the computer where the SQL Server 2005 Express installation resides.

## Your first access to logIQDoc

When you first access the atypiQ logIQDoc Web Application, it will create the database tables, load the text resources and other settings. This will take one minute or two.

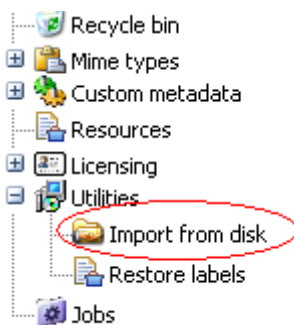
When you first login to the application, the user-password pair will become the credentials for the administrator of the entire system. Write down your credentials since by default they cannot be recovered. This way we have eliminated the problem of having the admin user with a default password, a well-known security breach of most systems

The only mandatory setting is in Application Settings. Here you must set the **Repository Path** to the path on the file system (can be a share if you have chosen to distribute the repository to another PC). The IIS worker process must be able to access this path.

NOTE: carefully plan where you will store the repository, since it can grow exponentially in time.

In the Configuration Management tab, you can perform the administrative tasks (user management, domain creation, etc)

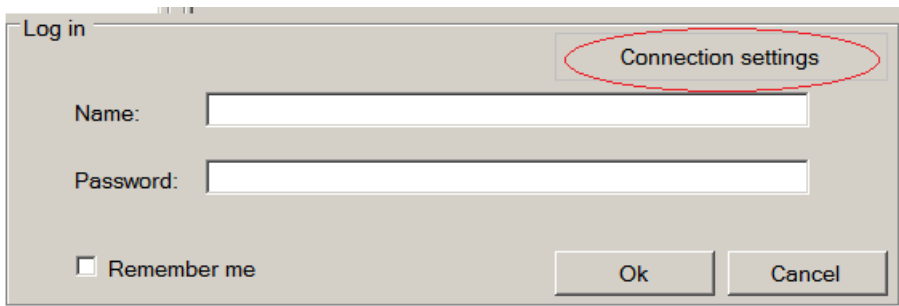
If you want to "bulk load" a repository of existing files and documents into logIQDoc, you can use the "Import from disk" utility. The path that you will choose must be accessible for reading by the web server.



## Microsoft Office and Explorer Integration for logIQDoc

### How to set up and activate the connection to logIQDoc

- Launch for the first time the add-in from the Microsoft Office menu or from the Windows Explorer contextual menu (see the installation section)
- The client application should start
- If it is the first launch, or if you want to connect to another logIQDoc system, into the Login dialog click the “Connection Settings” button:

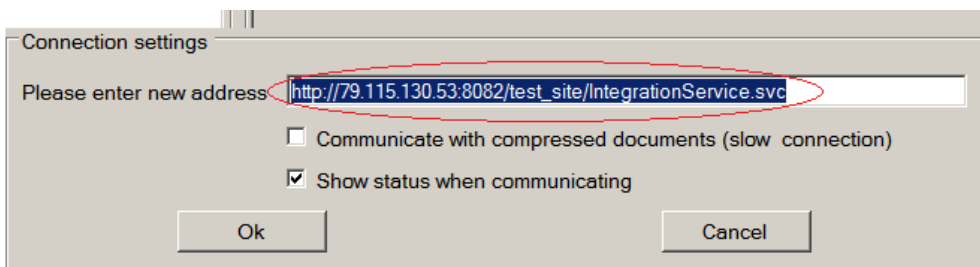


- First set the Address where the logIQDoc EDMS web application is available (the root address), and add “/IntegrationService.svc” at the end of that address.

Example: if the root address of your logIQDoc web application is:

[http://79.115.130.53:8082/test\\_site/](http://79.115.130.53:8082/test_site/) then you should have as an address this:

[http://79.115.130.53:8082/test\\_site/IntegrationService.svc](http://79.115.130.53:8082/test_site/IntegrationService.svc)



- If the logIQDoc web application is installed outside your local network (LAN) (like internet, or VPN access, or any other slower connection), you can improve the response time by

communicating with compressed documents.

NOTE: the documents will be compressed on the client and uncompressed on the server (and vice versa). This of course will mean more processor work on both client and server, so use this option only for slow connections.