

InfoLibrarian™ Server Installation and Configuration Guide

Installation and Configuration for InfoLibrarian Server 4.1.2 (Build 090601)

This document provides additional details and instructions for configuring InfoLibrarian Server and Portals.

Files Required for this Setup and Configuration

ServerSetup.exe
.cab Scanner Package for your server
Application Product Key
Server Activation Key

This document also references the Books Online Documentation which can be found in the application installation folder after installation of the core components named InfoLibrarianHelp.chm.

The printed version is called InfoLibrarian User Manual.pdf
Located in the application installation folder docs/help files

These files can also be downloaded from our technical support website.

Upgrading from Previous Versions

Upgrade Steps

This version of InfoLibrarian contains a new updated online help, samples, documents, extended API's and updated installers for the server and portals. You will need to un-install and re-install the core components. To avoid any duplicate documentation, please do the following for a clean re-install of the core components.

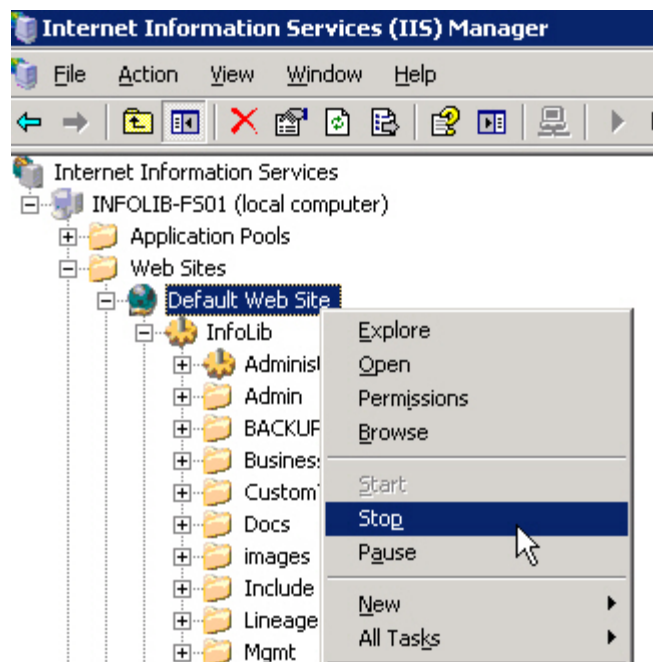
Note: The Portal 4.1 and custom portals will not be affected by this upgrade. The core dll's for InfoLibrarian 4.1 have not changed. But they will be re-configured as part of this installation process. The existing 4.1 portal will be restarted after this upgrade.

InfoLibrarian 4.1.2 portals will be created in new folders.

Upgrading InfoLibrarian Server

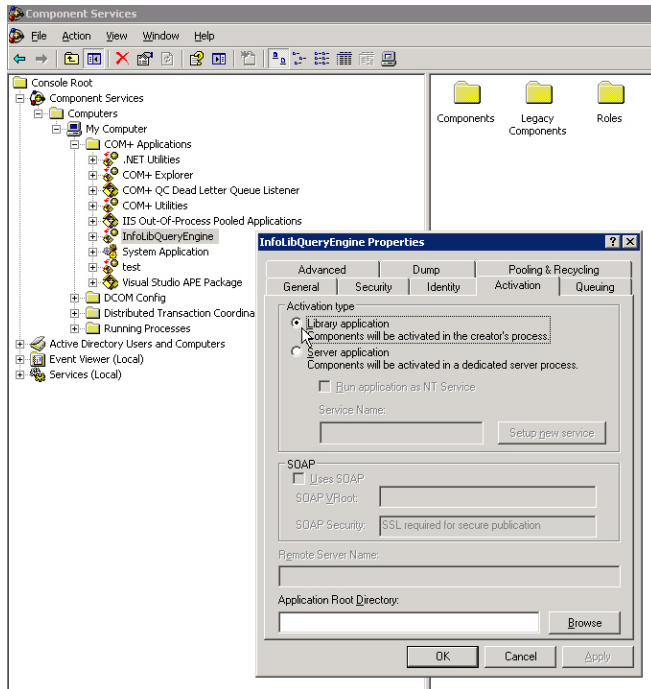
Close all instances of InfoLibrarian tools on the server. Verify in task manager no instances of dllhost, ILAdmin or Rescan.exe are running.

Stop the Web Server Service for the Virtual Directory "InfoLib" and any custom portals.



IMPORTANT!

Within **Control Panel/Component Services** verify to COM+ Application **InfoLibQueryEngine/Properties/Activation** is set to a **Library Application** prior to upgrade, if it is set to Server Application in your environment then reset it to a Library Application and click **Apply** prior to continuing with your upgrade.



Remove InfoLibrarian Tools using **Control Panel Add/Remove Programs**.

Note:

This step will not remove scanners, Scan Logs or other log files. This uninstall will only remove the core components that are to be upgraded in the next steps. Your Server and License keys will also be remembered after the upgrade.

Upgrading Clients

Refer to the **Installing Client Tools.pdf** available from our website.

Permissions

Installation must be done by a user that has **LOCAL** administration rights on the server. In addition, keep in mind that regional settings on server, portal, and client must all be the same for proper functionality of the software.

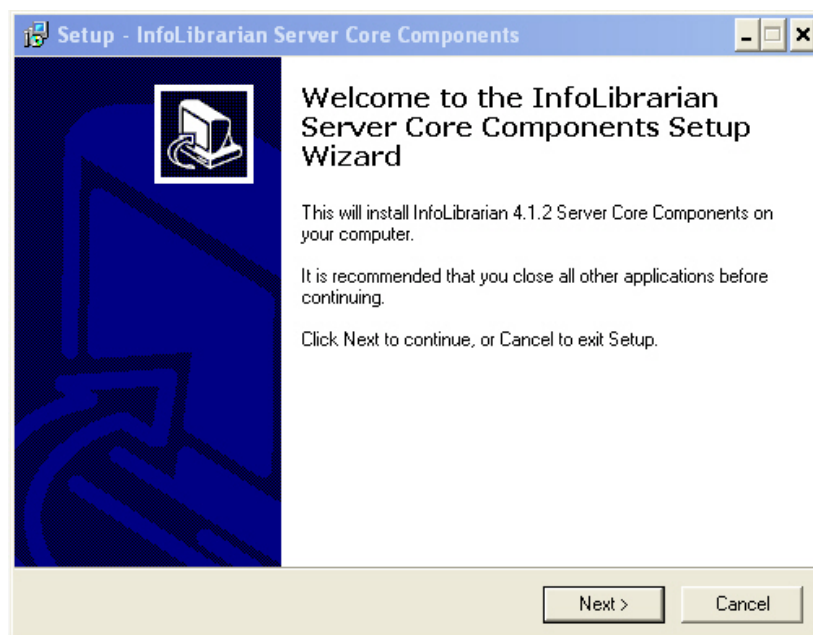
Server Core Components Installer

The Server Core Components Installer will install all the InfoLibrarian Desktop Tools, Documentation, Core Components and Server Components required by the Portal, Server and Scanning Engine. Once these are installed, you will be able to activate your Server Key and configure the InfoLibrarian Portal.

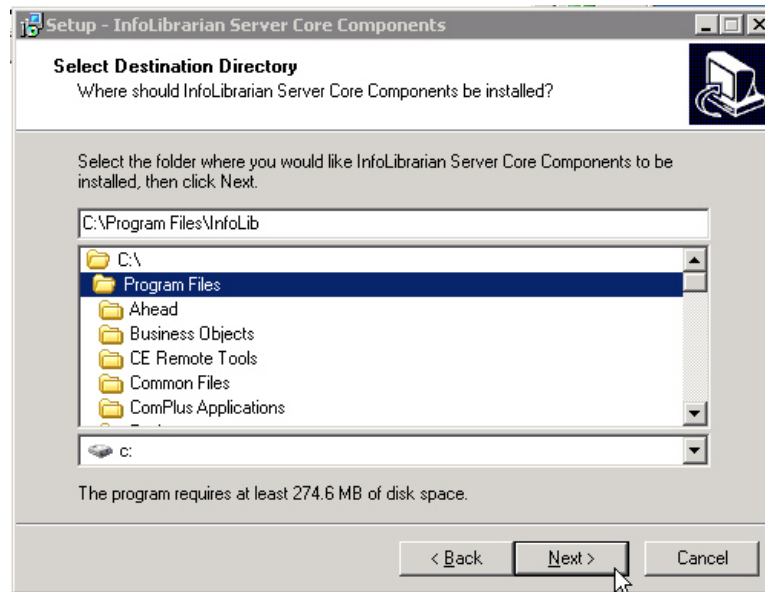
This installer also contains the files for creating and/or upgrading your repository. Once this setup is complete, re-boot the server.

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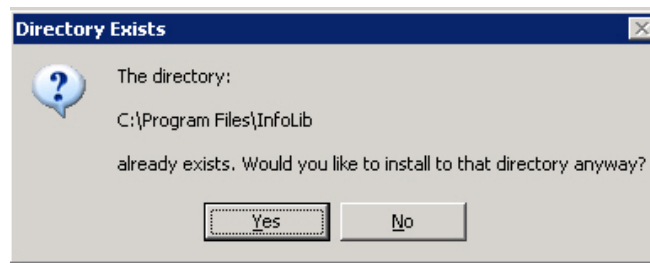
Run ServerSetup.exe to install InfoLibrarian 4.1.2 Server Core Components



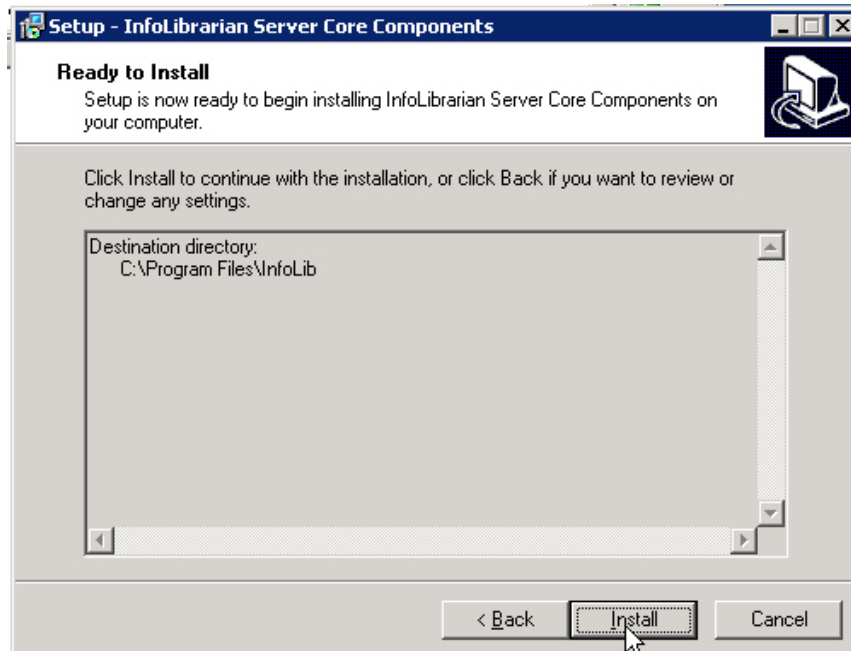
Note: You will require a Server Key to install InfoLibrarian Server. The server key is provided to your organization when you purchase a Server License.



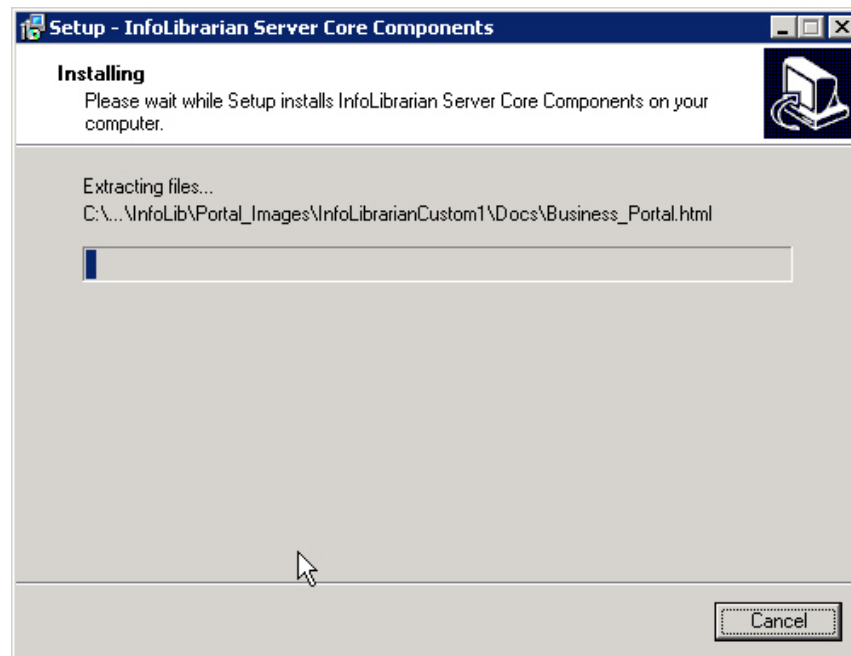
When selecting the destination directory click **Next** to select the default location. If you wish to install InfoLibrarian at a different location, you may need to reconfigure COM+ Manually during the Web Server configuration.

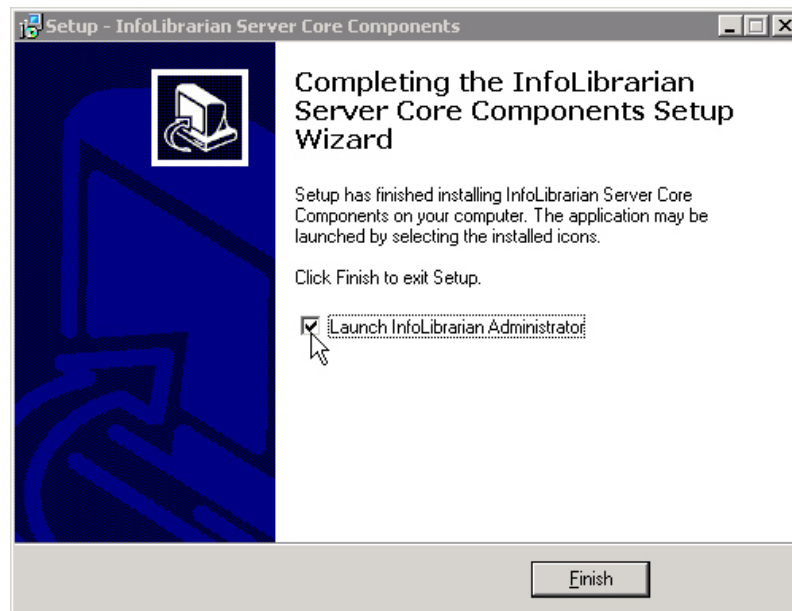


This screen will appear if upgrading, select **Yes** to install at this location.



Click **Install** to begin the Installation/Upgrade.

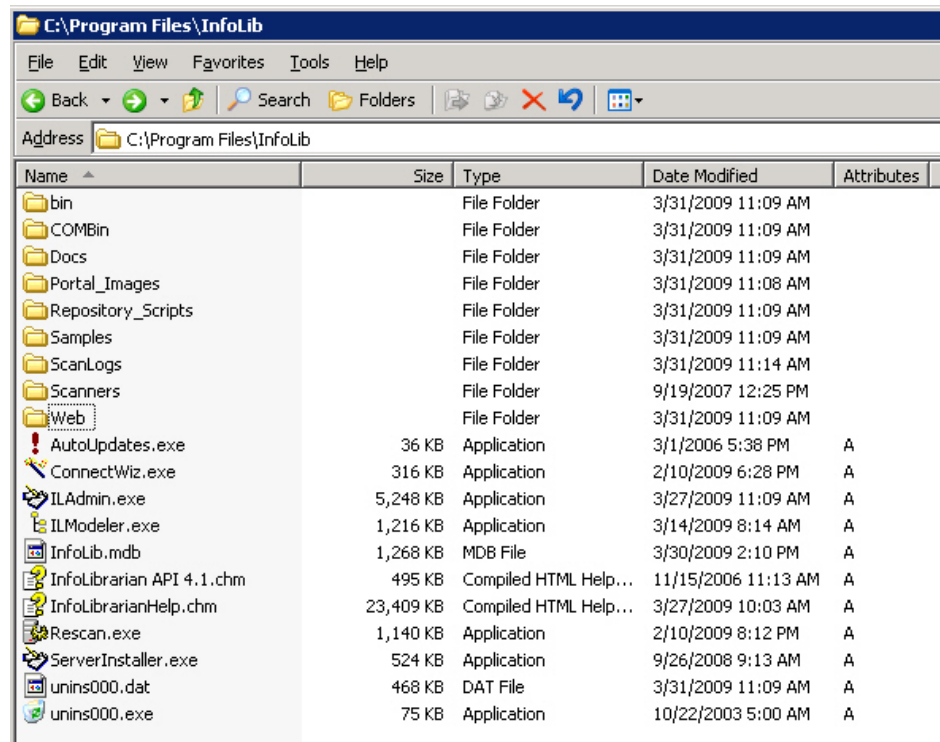




At this point the Server Core Components are Installed/Upgraded. Select Launch the InfoLibrarian Administrator. If you were performing an upgrade, all your settings, repository connection etc will be remembered and you are now finished with this step.

If this is a fresh install, refer to the documentation Installing Client Tools.pdf or the online help found in the InfoLibrarian Administrator to setup the repository connection and configure InfoLibrarian Tools, product key and registering scanners.

Note: There is a repository Update required if upgrading.



Name	Size	Type	Date Modified	Attributes
bin		File Folder	3/31/2009 11:09 AM	
COMBin		File Folder	3/31/2009 11:09 AM	
Docs		File Folder	3/31/2009 11:09 AM	
Portal_Images		File Folder	3/31/2009 11:08 AM	
Repository_Scripts		File Folder	3/31/2009 11:09 AM	
Samples		File Folder	3/31/2009 11:09 AM	
ScanLogs		File Folder	3/31/2009 11:14 AM	
Scanners		File Folder	9/19/2007 12:25 PM	
Web		File Folder	3/31/2009 11:09 AM	
AutoUpdates.exe	36 KB	Application	3/1/2006 5:38 PM	A
ConnectWiz.exe	316 KB	Application	2/10/2009 6:28 PM	A
ILAdmin.exe	5,248 KB	Application	3/27/2009 11:09 AM	A
ILModeler.exe	1,216 KB	Application	3/14/2009 8:14 AM	A
InfoLib.mdb	1,268 KB	MDB File	3/30/2009 2:10 PM	A
InfoLibrarian API 4.1.chm	495 KB	Compiled HTML Help...	11/15/2006 11:13 AM	A
InfoLibrarianHelp.chm	23,409 KB	Compiled HTML Help...	3/27/2009 10:03 AM	A
Rescan.exe	1,140 KB	Application	2/10/2009 8:12 PM	A
ServerInstaller.exe	524 KB	Application	9/26/2008 9:13 AM	A
unins000.dat	468 KB	DAT File	3/31/2009 11:09 AM	A
unins000.exe	75 KB	Application	10/22/2003 5:00 AM	A

If you navigate to the installation folder you will notice the Repository Scripts and Portal Images are located here. In later steps we will use the Server Installer to configure the Portal.

Repository Setup and Configuration

Repository Scripts

Once you complete the Server Core Components Setup, the Repository Scripts should be located here **C:\program files\infolib\Repository_Scripts**. This folder contains all the DDL Scripts for Oracle and SQL Server for a fresh repository 4.1 and all updates required to bring the repository current to version 4.1.2.

New SQL Server Repository Version 4.1

To install the full Infolibrarian repository 4.1 run these scripts in the following order:

1. SQL_Tables.sql
2. SQL_MasterView.sql
3. SQL_SEED_DATA.sql

Apply and verify all updates located in the **Fixes** folder

New ORACLE Repository Version 4.1

To install the full Infolibrarian repository 4.1 run these scripts in the following order:

1. ORACLE_TABLES.sql
2. SnapshotSequenceGenerator.sql
3. SequenceGenerator.sql
4. ORACLE_MetadataMasterViews.sql
5. ORACLE_SEED_DATA.sql

Apply and verify all updates located in the **Fixes** folder

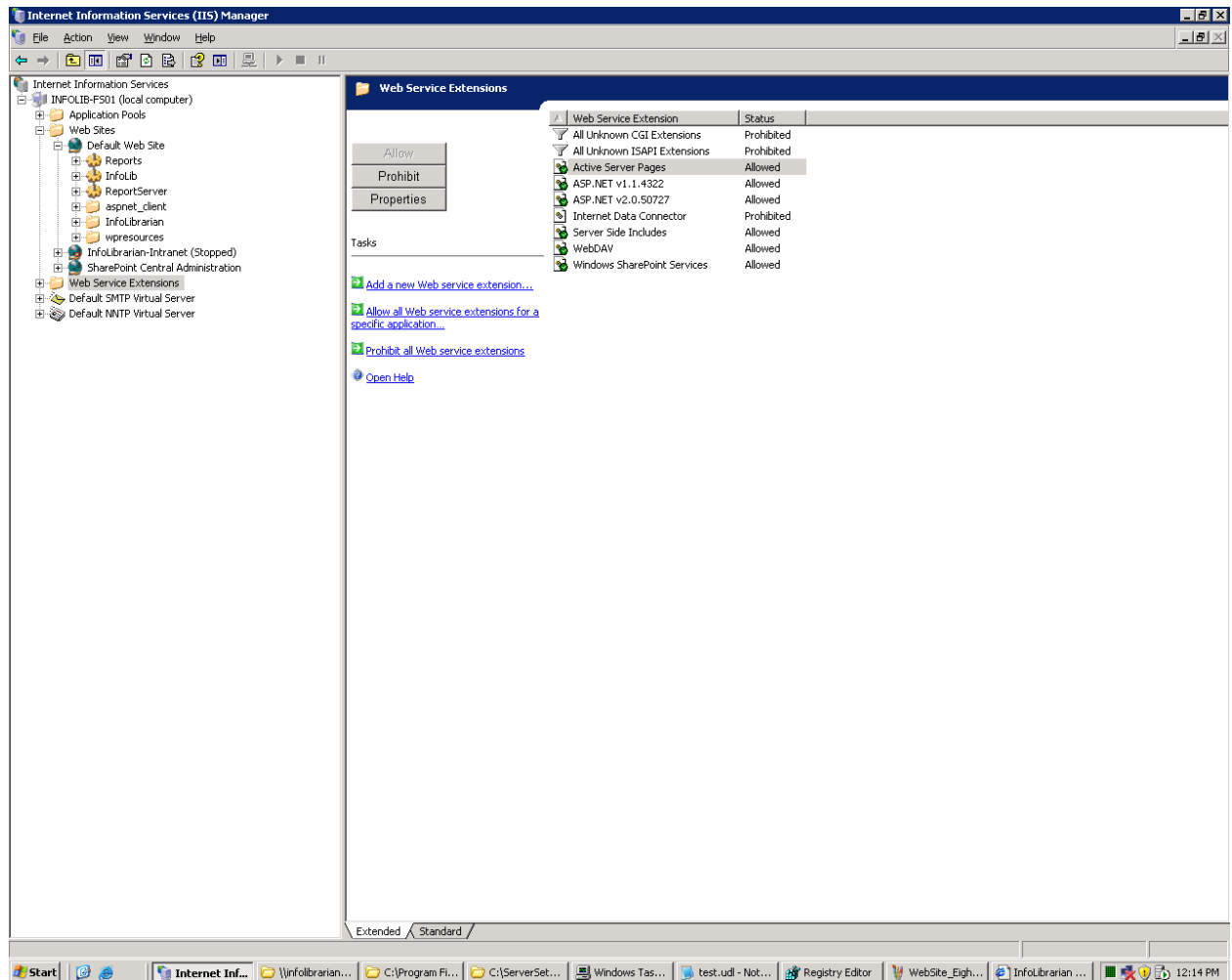
Upgrading the Repository from a previous version or creating a post v 4.1 repository.

View the Readme file in the extracted repository scripts folder and ensure all updates are applied in sequence.

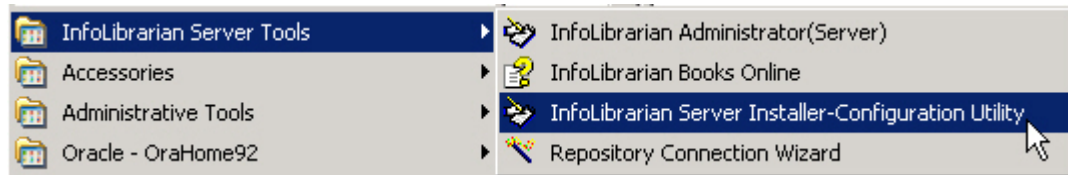
Portal Setup and Configuration

Administrative Tools / IIS Manager Make Sure ASP is enabled on the server as per this screen shot.

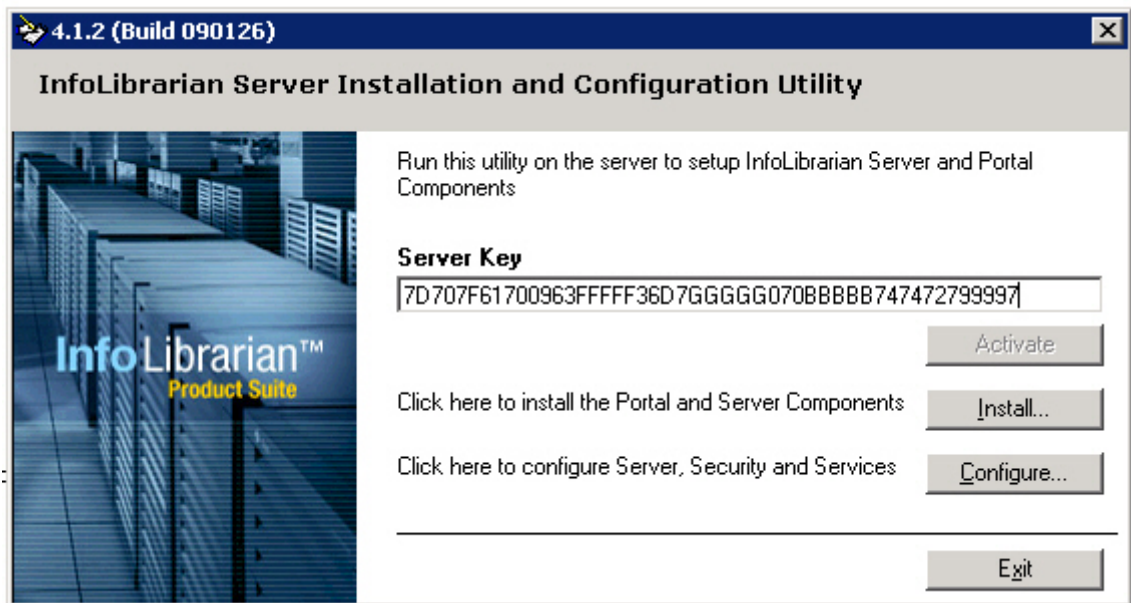
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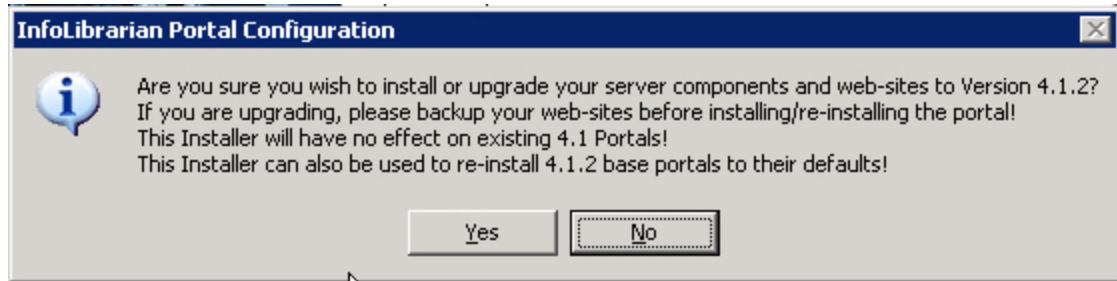
Go to the "InfoLibrarian Sever Installer-Configuration Utility" found in the **Start/Programs InfoLibrarian Server Tools** on your server.



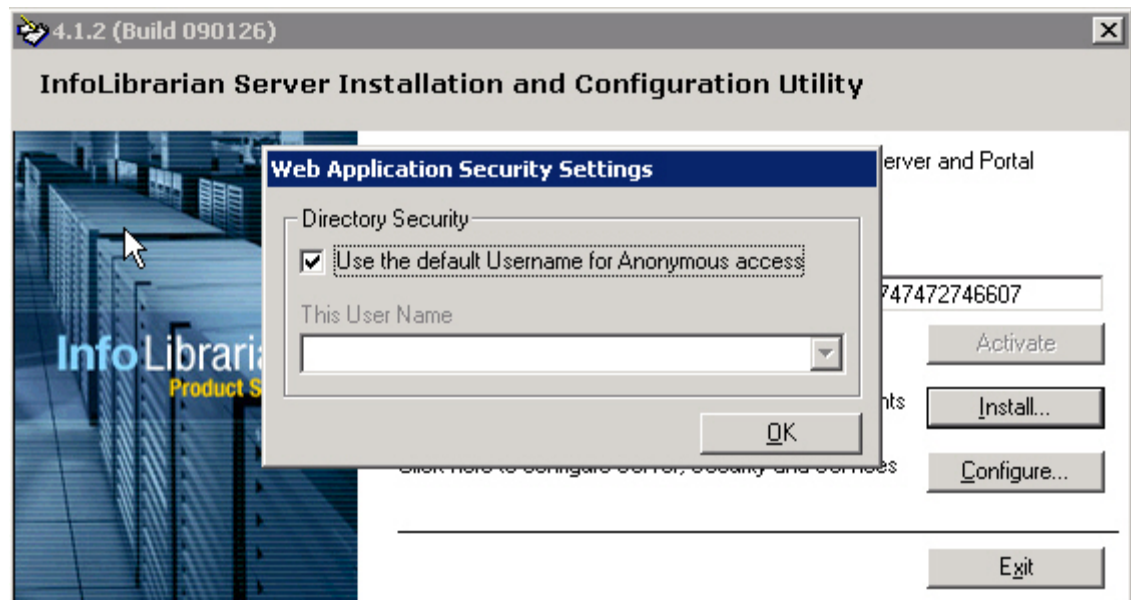
You will require a server key to proceed to this step. Paste the server Key in the provided text box and click Active. If you are upgrading then the server key has been activated and the Activate button is grayed out.



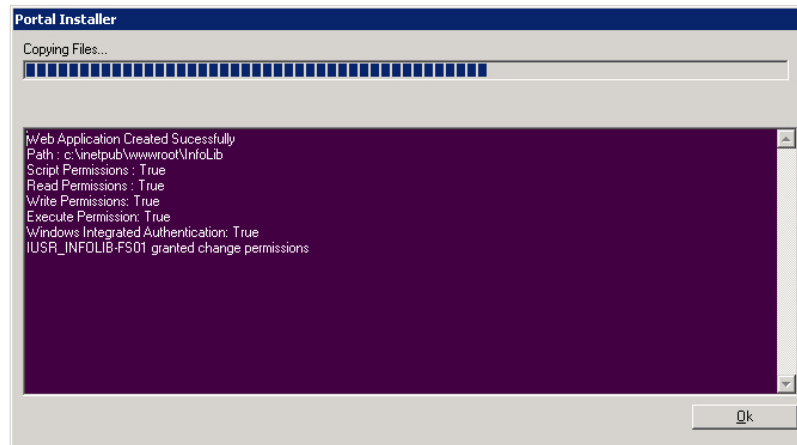
Make sure the version is correct on this dialog 4.1.2.



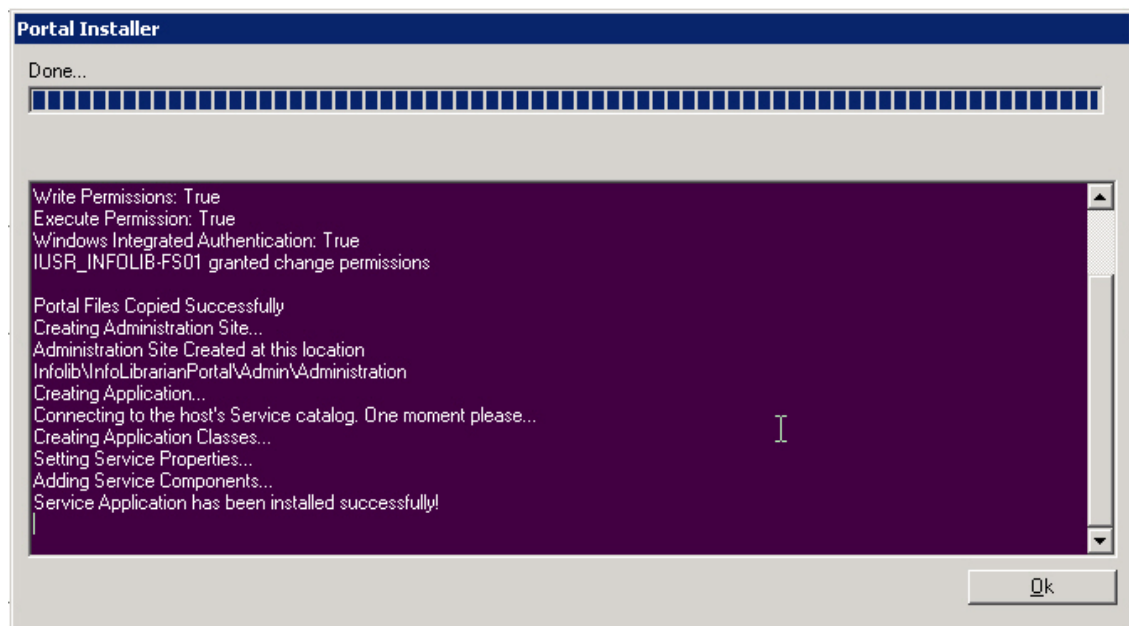
Clicking **Install** will present this dialog. Choose **Yes**.



Click **Ok** to choose default for the moment.



You will see a dialog similar to this one. Once completed you should see the following output. If any errors occurred they will be indicated here. You can copy this text and send to support if there are any errors displayed.

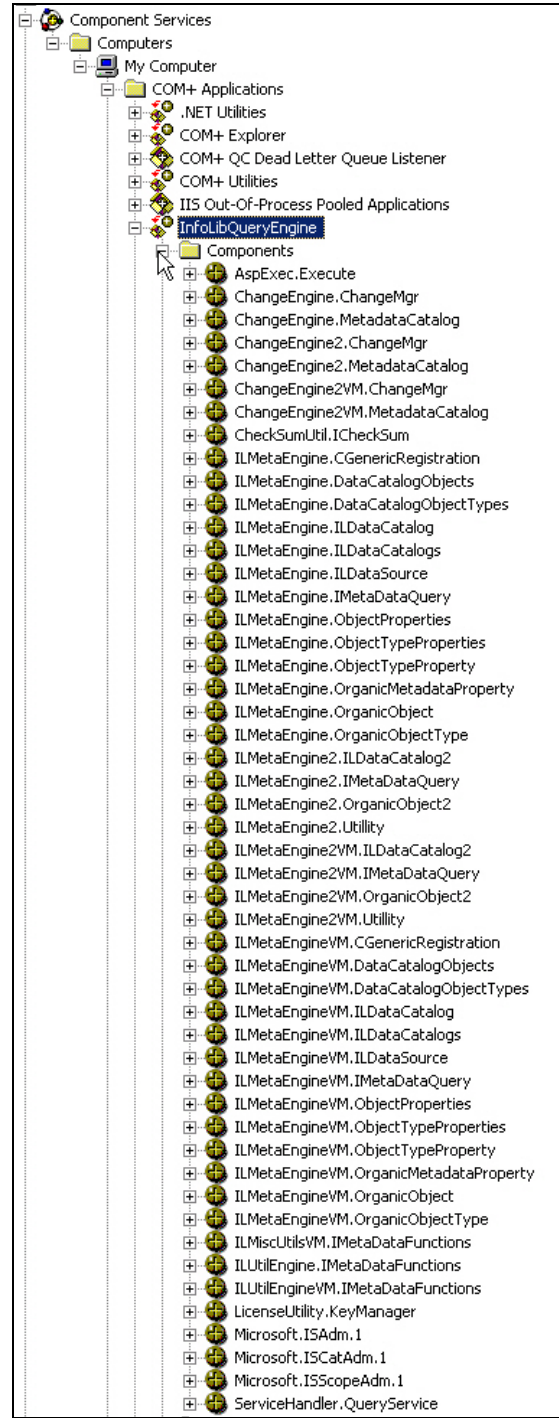


Portal Installation should now be complete.

Component Services – InfoLibrarian Components

Control Panel/Component Services should contain the InfoLibrarian components similar to the following. By default these are set for just in time activation and no further configuration is required.

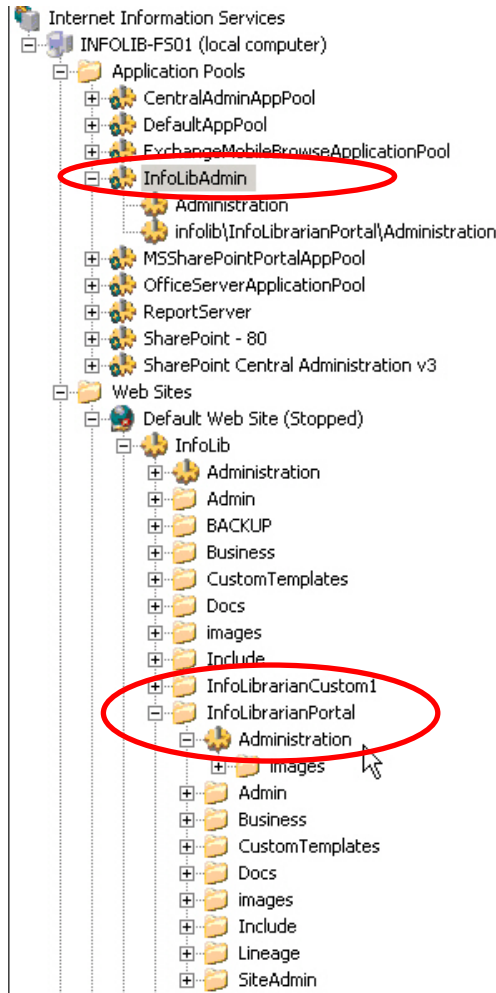
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IIS Web Services – InfoLibrarian Web Portal

Control Panel/Internet Information Services Manager should contain the circled InfoLibrarian Application Pools and Web Sites.

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Application Pools – InfoLibAdmin

Application Pool for the Administration virtual directories setup by the installer.

Version 4.1 Portal Sites (These folders not present on new 4.1.2 install)

Default Web Site/InfoLib sub-folders un-touched by the upgrade.

Version 4.1.2 Portal Sites – Created by this Setup

InfoLibrarian Custom1 – Custom sites template.

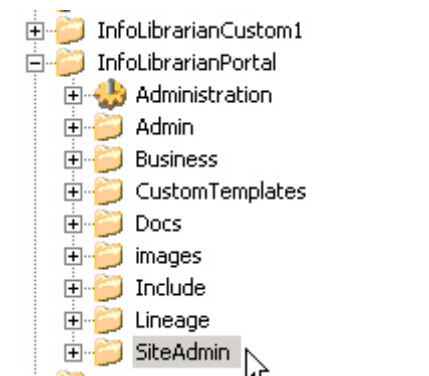
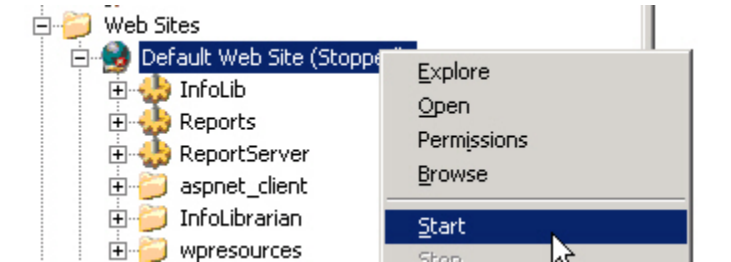
InfoLibrarianPortal – Full InfoLibrarian Portal 4.1.2

See **Books Online** section **Product Components > InfoLibrarian Portals** for more info on the Portals

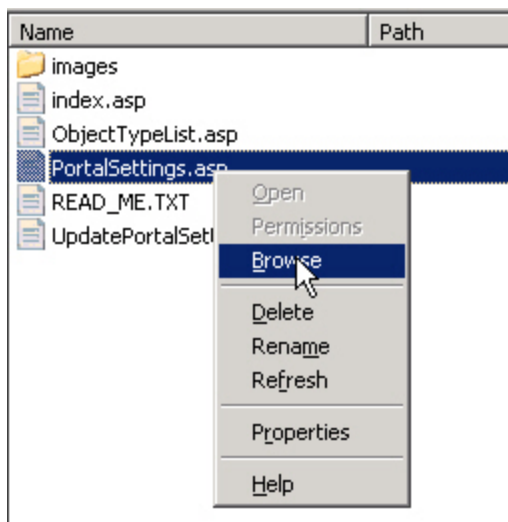
Configuring the Portal

Re-Start the web-site you stopped at the beginning of this document

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Find the **InfoLibrarian Portal** Virtual Directory and navigate to the **SiteAdmin** Sub-folder
In the results pane launch the **PortalSettings.asp** page. You can also click on the **Portal** Link within the **InfoLibrarian Administrator** to access this location.



The Following Site Settings Page is Displayed

InfoLibrarian Portal Site Settings

Server Status: Server License Validated!
Site Location: C:\inetpub\wwwroot\InfoLibrarian\Portal

Print this page

Site Configuration Help and Tips:

Repository Connection | Site Portal Settings | Search For Settings | Search Results Settings | Lineage Analysis Settings | Business Sub Portal Settings

Custom Site Repository Connection (Not Set By Default.)

Setting	Value
Provider:	NOT SET
DataSource:	NOT SET
Catalog:	NOT SET
Login:	NOT SET
Connection Checksum:	...
Connection Status:	Connection Not OK

Click here to view settings and tips

Setting	Value
Database Provider Name (Required)	Microsoft SQL Server
DataSource/Listener Name	Microsoft SQL Server
Catalog/Schema Name	Oracle
Database Username	Microsoft Access
Database Password ***	Specify OLEDB Connection String

* Optionally Specify OLEDB Connection String Only

Repository Object Types (Click this link to view the repository object types list. (Click here to test a repository Query and verify portal connection is ok.))

Update

Configure Custom Site Repository Connection

This page activates the repository connection for the site. You can choose the built in provider from the list or specify an OLEDB Connection String.

To Specify an OLEDB Connection String, first select "Specify OLEDB Connection String" from the drop-down and enter your OLEDB connection string in the field provided. When using OLEDB Connection String - You must still specify the DataSource, Catalog, User-name and password however; the OLEDB Connect string will be used. Otherwise choose the provider from the drop-down and fill in the appropriate connection information to set the connection. Once you submit the connection info, it will be encrypted and if the Connection Status above indicates 'Connection OK' then your connection for this site is set.

Connecting to Oracle

See This Section on Generating UDL File and OLEDB Connection string. You will need an OLEDB Connection String to connect to Oracle using the OLEDB Source. The built-in Microsoft Provider for Oracle is Problematic.

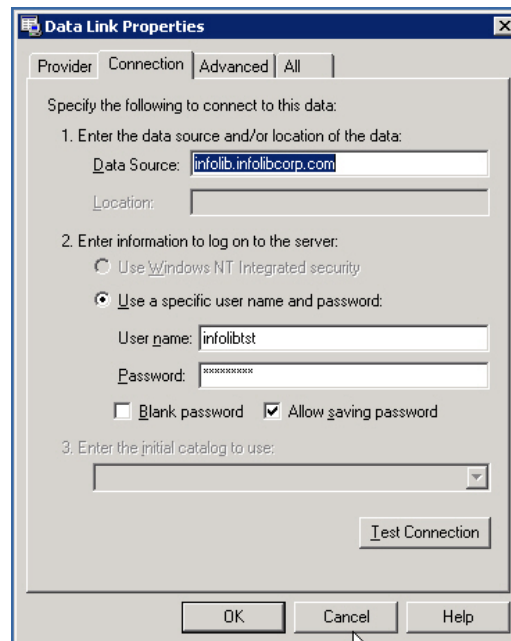
Refer to the Book Online Section Microsoft data Links for OLEDB and Creating OLEDB Data Links File for more help on generating an OLEDB connection string and Data Links files.

If you successfully create a Data Links file on your server desktop, you can open that file with notepad to copy and paste the connection string onto this screen to establish a repository connection.

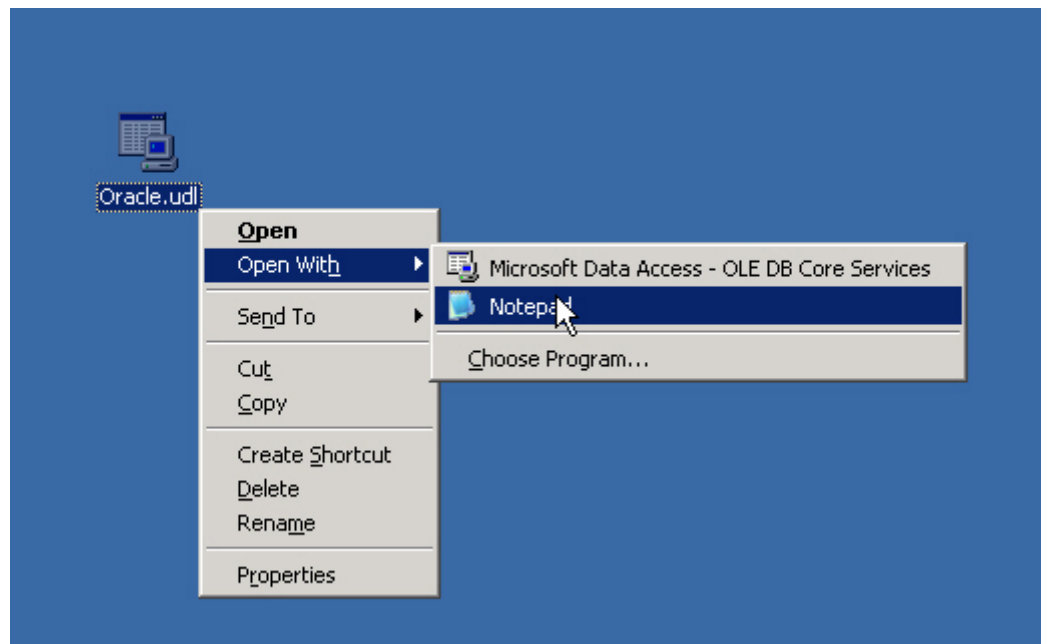
To create a Universal Data Link (.udl) file

1. Open Windows Explorer.
2. Select the folder in which you want to store the .udl file.
3. If you are running Windows 2000 or later, select New on the File menu, and choose Text Document. A new file named New test.txt appears in the directory. Rename this file, removing all spaces and changing its file extension to .udl. Note A warning that changing file extensions can cause files to become unusable might appear. Disregard it.

A new file test.udl appears in the directory. You can rename this file. Double click the file to open it.



Here we have created a Data Links file on the desktop named Oracle.udl and configured our Oracle connection. Note the Allow saving password is selected. This will be encrypted when stored in InfoLibrarian. Save these settings.



Now we can open the .udl file with notepad.

Here are the contents of our .udl file. Copy the Connection string in its entirety as seen here.

```
[oledb]
; Everything after this line is an OLE DB initstring
Provider=OraOLEDB.Oracle.1;Password=tst;Persist Security Info=True;User ID=infolibtst;Data Source=infolib.infolibcorp.com
```

In the SiteSettings/Repository Connection web page we can paste as follows. Note that we selected Specify OLEDB Connection String from the drop down and filled in the information about our connection. This is what the users will see as the configured repository. Just type xxx for the password as it has no effect when using the OLEDB option.

[Click here to view settings and tips](#)

Setting	Value
Database Provider Name (Required)	Specify OLEDB Connection String
DataSource/Listener Name	INFOLIB.INFOLIBCORP.com
Catalog/Schema Name	INFOLIB
Database UserName	INFOLIBTST
Database Password ***	*****

* Optionally Specify OLEDB Connection String Only

Provider=OraOLEDB.Oracle.1;Password=tst;Persist Security Info=True;User ID=infolibtst;Data Source=infolib.infolibcorp.com

Once we click Update on this page we see the following:

Custom Site Repository Settings	
Provider:	OLEDB
DataSource:	INFOLIB.INFOLIBCORP.com
Catalog:	INFOLIB
Login:	INFOLIBTST
Connection Checksum:	65465A425C505046087B47557A787070771A7A46545759511B050E64544746435A4651095E5...
Connection Status:	Connection OK

Custom Site Repository Connection (Not Set By Default.)

Notice that the display information is saved and the actual connection checksum is encrypted. You should see Connection OK. This information is stored in the site.ini file located in the root of this site.

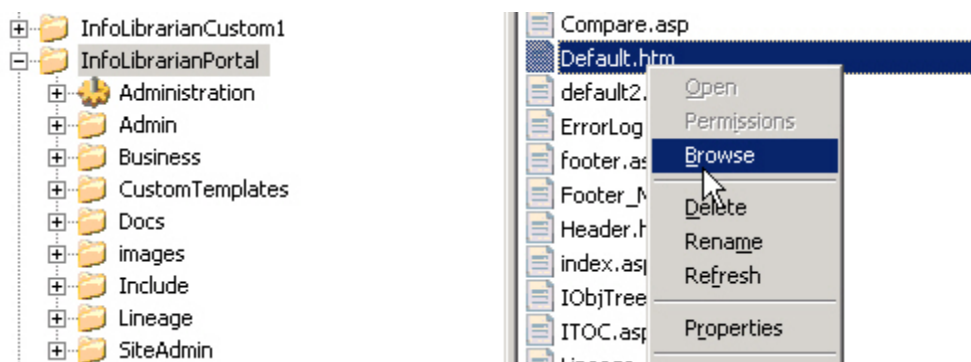
If you cannot get a successful connection, verify your OLEDB connection string and that it contains the password. The other settings here are for display purposes only. The connection is established by what is contained in the connection string you pasted in when using OLEDB option.

The InfoLibrarianPortal site is now configured to connect to your repository.

Refer to the Books Online documentation for more information of other settings for your site.

Verifying the Portal Settings

Locate the **InfoLibrarianPortal** Virtual Directory and in the results pane right click **Default.html** and click **Browse**.



Click the Portal Info Link located below the Search button and you should see a page similar to the following. Verify the Server Key and Connections are ok. This is the Main Portal Site. This site is configured for Anonymous access by default. See Internet Information Services Documentation to setup authentication for this site.

Search for

Search Type

Keyword Search Search

[Advanced Search](#) | [Help](#) | [Portal Info](#)

- Business Subject Areas View
 - SubjectAreaOne
 - TEST3
 - TESTING
- Business Terms Glossary
- Repository Metadata
- Scanned Metadata

InfoLibrarian™ Portal Status

[Print this page](#)

InfoLibrarian Server Information

Setting	Value
System Time	
Server Instance Name:	INFOLIB-FS01
InfoLibrarian Portal Version:	InfoLibrarian Portal 4.1.2 (Build 090126)
Server License Status:	Server License Key Ok
Total Physical Memory:	
Total Disk Space Free	6.03 GB
InfoLibrarian Server Engine Build	Build(090126)
Total # Administrators	3
Total Repository Objects	221,796
Total Repository Properties	235,296
Total Repository Snapshot Objects	0

Portal Site Information

Setting	Value
Site Location :	C:\inetpub\wwwroot\InfoLib\InfoLibrarianPortal
Connection Status :	OK
Repository Mart Location :	OLEDDB
Repository Instance :	INFOLIB.INFOLIBCORP.com
Repository Database Name :	INFOLIB
Repository Schema :	INFOLIBTST
Portal Current User :	IUSR_INFOLIB-FS01
Portal Version :	4.1.2
Repository Version Info	4.1.0 - 90101

Portal CustomSite1

The PortalCustomSite1 is the base template image which allows you to create any number of custom portal sites. Each of which can be configured and customized to meet your needs.

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1. Copy this Entire Folder to a New Folder on your web server under the INFOLIB site location. Such as InfoLib/CustomSite2 etc.. to create custom sites.
2. Launch the SiteAdmin/Index.asp within this new site to configure the site and the database connection for this site Only.
3. By default the Database Connection is NOT SET on Custom Sites.
Default.htm is the Core portal.
Default2.htm shows connection info footer and site connection status.

This is a complete copy of the InfoLibrarian Portal with source and can be maintained as a completely separate site with its own configuration repository and portal settings.

NOTE: GO TO THIS SITE /SiteAdmin/index.asp to setup and Verify repository connection and Site settings.

You may also setup security, Virtual directories and redirect users to the following locations within this site:

1. /Default.htm - Default Portal (Full Features) Default2.htm shows connection info footer.
3. /Business/Default.htm (Default Business Portal) Default2.htm shows connection info footer.
3. /mgmt/default.htm (Change Managers) Default2.htm shows connection info footer.
- 4./Contribution/default.htm (Contributor Portal) Default2.htm shows connection info footer.
- 5 /SiteAdmin/Index.asp (Site Administration) Recommend Security on IIS via virtual ...

IIS Custom Errors : "500,100,URL,/InfoLib/500-100.asp" - Setting this value will enable the 500-100 custom error handling for this site.

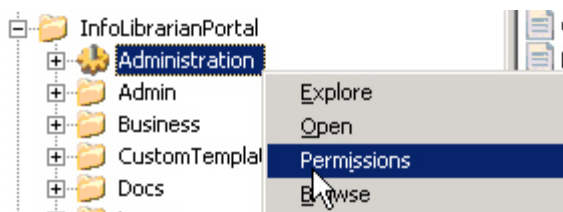
Please see you Microsoft Internet Information Services Documentation for more info.

Administration Portal Security Setup The Enterprise Control Center Site

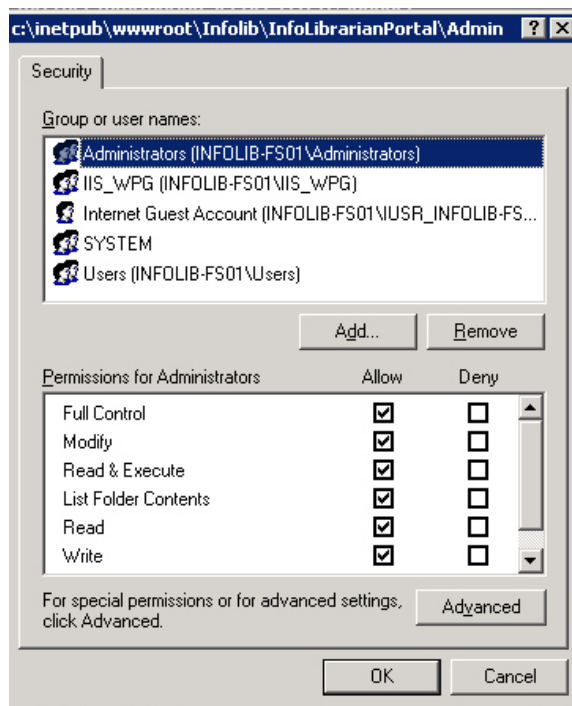
In this section we will configure the Enterprise Control Center Virtual Directory Security. This site is located at /Infolib/Administration.

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Open IIS Administrative Tools /Internet Information Services. Expand Web Sites /Default Web Site /Infolib/InfoLibrarianPortal. Right click **Administration** and select **Permissions**.



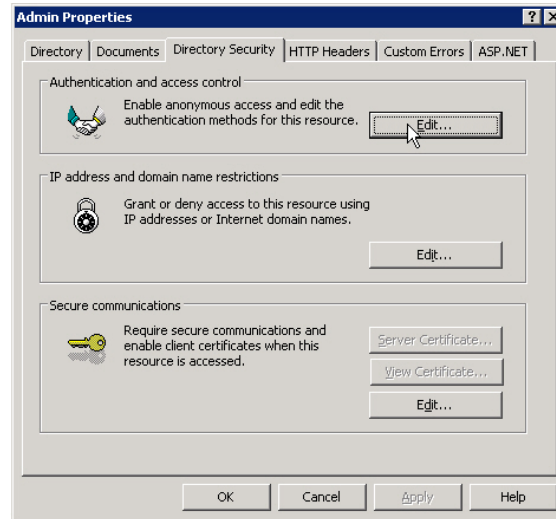
Add the local Administrator account that you will be using to connect to the Administration portal with full control. Administration portal is now ready for new connections. To prevent other users from accessing the global Administration Site, remove Guest and Users accounts here, this will require authentication of the Administrator Account to access the site.



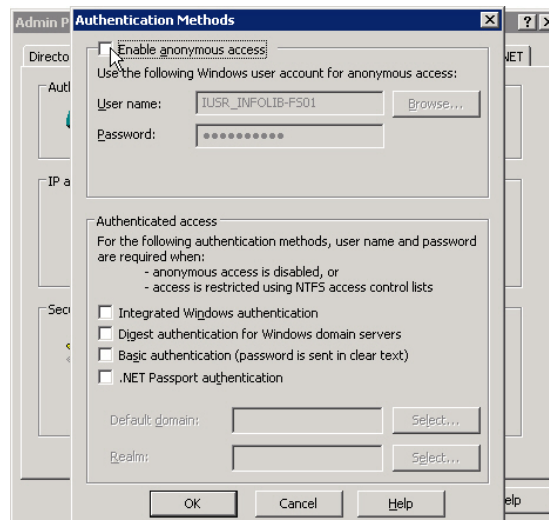
See **Books Online** section **Product Components > InfoLibrarian Portals > Enterprise Control Center** for more information about the Enterprise Control Center and functionalities.

Administration Portal Security Setup The Enterprise Control Center Site Continued

Open IIS Administrative Tools /Internet Information Services. Expand Web Sites /Default Web Site /Infolib/InfoLibrarianPortal. Right click **Admin** and select **Properties**. Go to the **Directory Security** Tab and Click **Edit**.



Clear all checkboxes to completely deny access to this folder. The Admin folder/site will be accessed via the previously configured Administration Virtual Directory which now requires authentication you set for it.

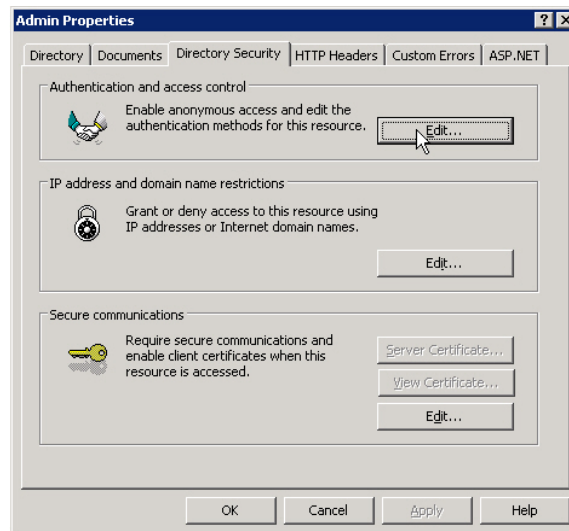


See **Books Online** section **Product Components > InfoLibrarian Portals > Enterprise Control Center** for more information about the Enterprise Control Center and functionalities.

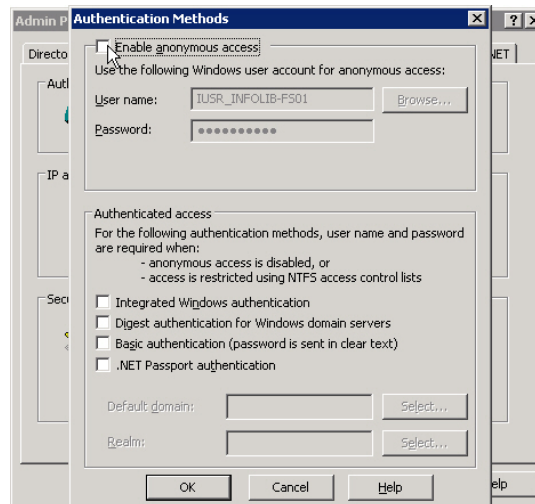
Portal Security Setup Site Administration Portal Sites

You will probably want to lock down the **SiteAdmin** for each portal to prevent users from changing configuration settings. These steps apply to all custom portal sites. Open IIS Administrative Tools /Internet Information Services. Expand Web Sites /Default Web Site /InfoLibrarianPortal. Right click **SiteAdmin** and select **Properties**. Go to the **Directory Security** Tab and Click **Edit**.

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Set the options you require here. Typically you will disable anonymous access and then enable Integrated Windows Authentication. Under this scenario, you will need to right click the SiteAdmin/Permissions to add/remove users.



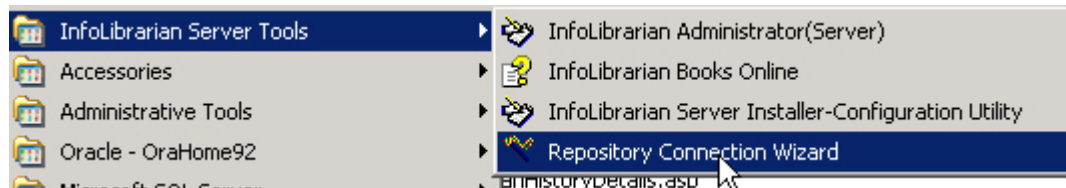
See **Books Online** section **Product Components > InfoLibrarian Portals > Enterprise Control Center > Site Portal Settings** for more information about Site Administration and functionalities.

See **Microsoft Internet Information Services Documentation** to setup authentication for Virtual Directories and Web Sites.

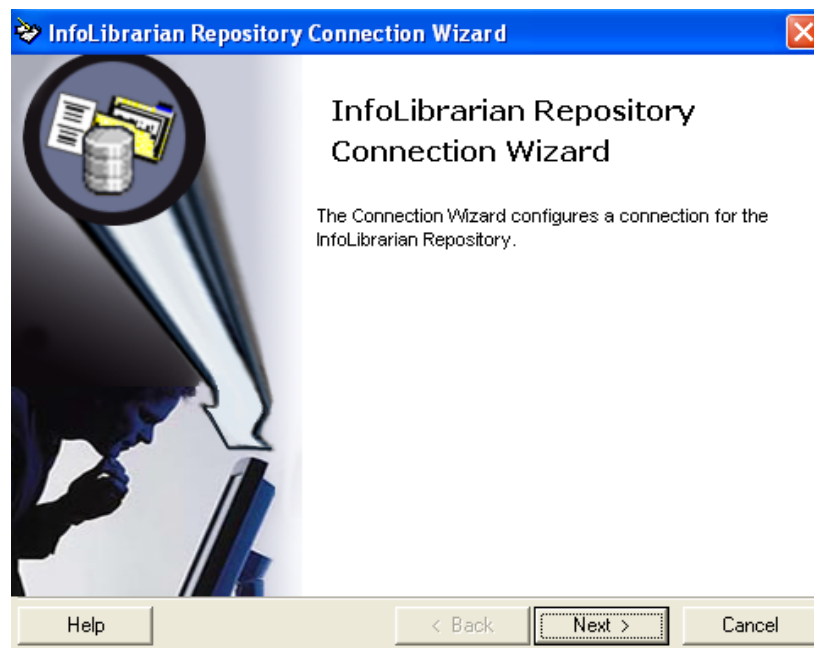
Settings a Global Repository Connection

These settings apply to the Machine Instance Globally for Auto-Scanning and Repository Administration. Only one active server repository connection may be configured for Scanning and Administration per server instance. This is the same setting set within the Repository Connection Wizard. Each Web Site however, has its own connection as seen in the previous sections.

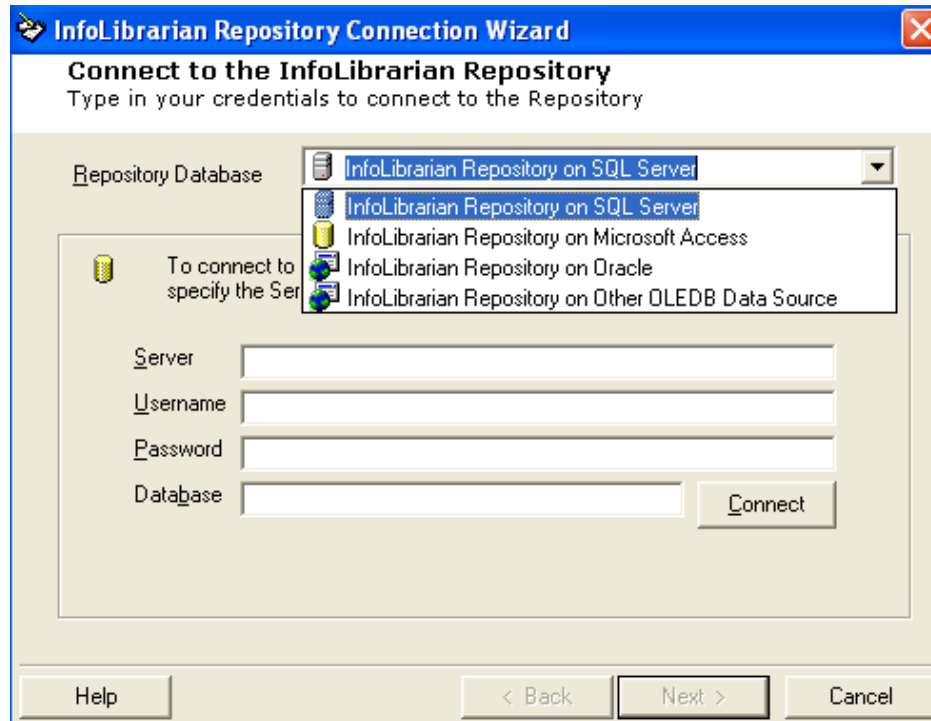
Start Menu/InfoLibrarian Server Tools...Click on the **Repository Connection Wizard**.



Click **Next** to begin configuration.

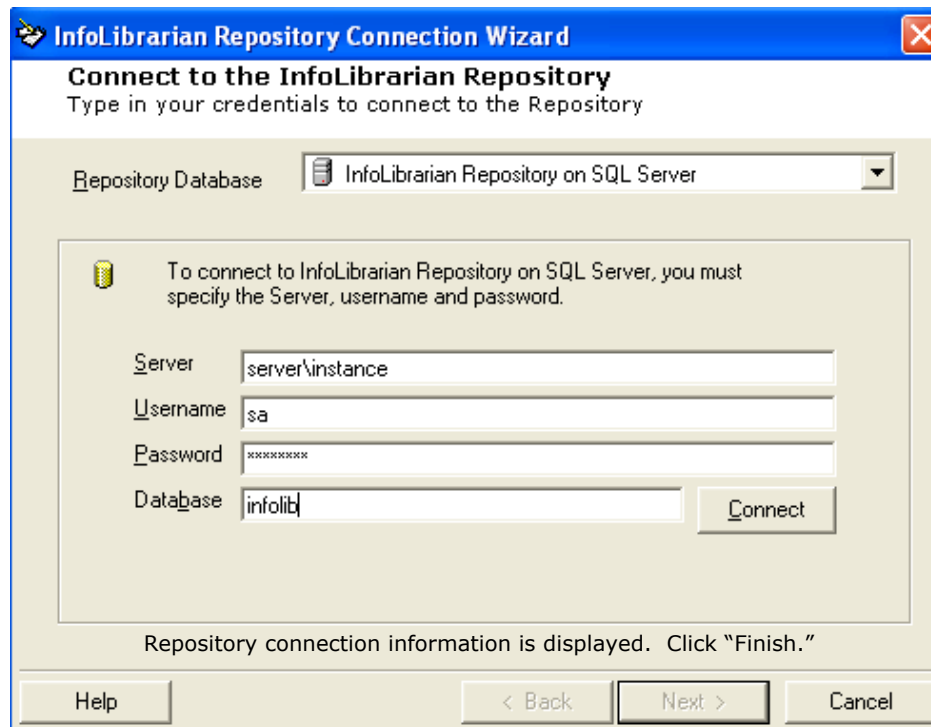


Select the type of repository you will be using from the **Repository Database** drop down menu.



The image shows a screenshot of the 'InfoLibrarian Repository Connection Wizard' dialog box. The title bar is blue with the text 'InfoLibrarian Repository Connection Wizard' and a close button. The main window has a light beige background. At the top, it says 'Connect to the InfoLibrarian Repository' and 'Type in your credentials to connect to the Repository'. Below this, there is a 'Repository Database' label and a dropdown menu. The dropdown menu is open, showing four options: 'InfoLibrarian Repository on SQL Server' (selected), 'InfoLibrarian Repository on Microsoft Access', 'InfoLibrarian Repository on Oracle', and 'InfoLibrarian Repository on Other OLEDB Data Source'. To the left of the dropdown menu, there is a small yellow icon and the text 'To connect to specify the Ser'. Below the dropdown menu, there are four text input fields labeled 'Server', 'Username', 'Password', and 'Database'. To the right of the 'Database' field is a 'Connect' button. At the bottom of the dialog box, there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

Type in the required information, click **Connect** and then **Next**



The dialog box is titled "InfoLibrarian Repository Connection Wizard" with a close button (X) in the top right corner. Below the title bar, the text reads "Connect to the InfoLibrarian Repository" and "Type in your credentials to connect to the Repository".

There is a label "Repository Database" followed by a dropdown menu showing "InfoLibrarian Repository on SQL Server".

Below this is a yellow warning icon and the text: "To connect to InfoLibrarian Repository on SQL Server, you must specify the Server, username and password."

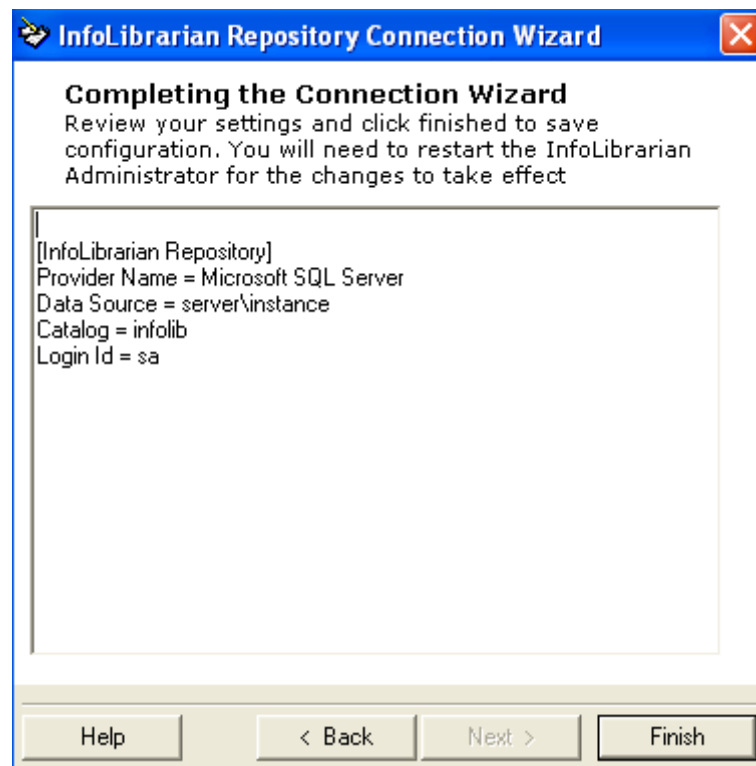
There are four input fields:

- Server:** server\instance
- Username:** sa
- Password:** masked with asterisks (xxxxxxxx)
- Database:** infolib

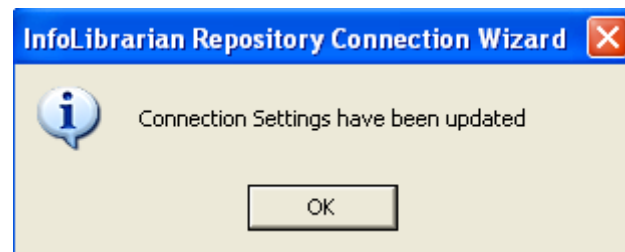
A "Connect" button is located to the right of the Database field.

Below the input fields, the text says: "Repository connection information is displayed. Click 'Finish.'"

At the bottom, there are four buttons: "Help", "< Back", "Next >", and "Cancel".

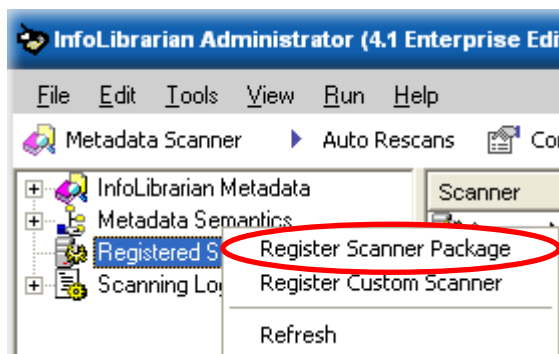


You will see this message when the Repository setup is completed



Registering the Scanner Package

Open the Administrator and right click **Registered Scanners**. Select **Register Scanner Package** from the list. Browse for the .cab file provided to you for this server.



You will see this message when the Scanner Package setup is completed. Click **OK** when completed.



Publishing Portals to your Users

Enterprise Control Center

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<http://ServerName/InfoLib/Administration> or <http://IPAddress/InfoLib/Administration>

Published InfoLibrarian Portal

<http://ServerName/Infolib/Default.htm> or <http://IPAddress/Infolib/Default.htm>

Where to go from Here?

The InfoLibrarian Portals are installed in the **inetpub\wwwroot\InfoLib** folder on your server. These folders contains Readme.txt files describing in more detail the various templates and settings for your portals.

See **Books Online** section **Product Components > InfoLibrarian Portals > Enterprise Control Center** for more information about the Enterprise Control Center and functionalities.

See **Books Online** section **Product Components > InfoLibrarian Portals > Site Administration** for more information about the Custom Site Administration and functionalities.

See **Books Online** section **Product Components > InfoLibrarian Administrator** for more information about the InfoLibrarian Administrator and functionalities.

Full Web based documentation is also available via the portal by clicking **Help** below the search button.