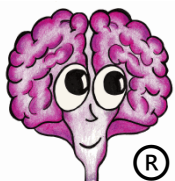


# DocuBrain® TechDoc

## Installation Guide



A DocuBrain® Product

<https://docubrain.com/>

By Prevo Technologies, Inc.

<https://prevo.com/>



# DocuBrain® TechDoc Installation Guide

By Prevo Technologies, Inc.

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# Table of Contents

- Assumptions..... 1
- Important Windows Operating System Information ..... 2
- Installing TechDoc on the Cloud ..... 2
- Installing TechDoc on a Virtual Machine ..... 2
- Windows Server 2012 R2 Installation ..... 3
- Windows Server 2016 Installation ..... 4
- Windows Server 2019 Installation ..... 6
- Windows Server 2022 Installation ..... 8
- Microsoft SQL Server Installation ..... 10
- CIS Templates and Security Policies..... 11
- Verify System is ready to Install or Upgrade ..... 11
- Full Backup of the Server ..... 12
- Install TechDoc..... 13
- Restart the Server ..... 18
- New Document Manager Post-Setup ..... 18
- New Search Manager Post-Setup ..... 19
- TechDoc Testing..... 20



## Assumptions

This guide provides instructions on how to install/upgrade TechDoc. It is assumed that the reader is already knowledgeable about how to install Windows Server, IIS, SQL Server, Service Packs, Hot Fixes, etc. Therefore, issues like what hardware drivers are needed for a particular system are not addressed here.

This guide assumes that all steps are performed by someone logged into Windows Server 2012 R2/2016/2019 with a Local account having administrator privileges. Numerous Group Policy settings can prevent a Domain-authenticated administrator account from properly completing installation of the product.

This guide also makes assumptions about where various folders are located on your server. If these assumptions are incorrect, you will need to use the actual folder instead of the folder mentioned in this guide. When a folder assumption is used, the assumed portion of the folder or file name will be shown bold and underlined to highlight the portion you may need to change to point to the correct location on your server.

The following list contains all the folders assumed throughout this document and their purpose:

- **C:\WINDOWS** – This is the folder where Windows Server 2012 R2/2016/2019 is installed on your server. Typing SET SYSTEMROOT at a command prompt will display what folder should be used if C:\WINDOWS is not correct.
- **D:\TechDoc** – This is the folder that the TechDoc application is installed in.
- **D:\htdocs** – This is the home folder for the TechDoc Web Site.
- **R:\** – This is the DVD (or folder) containing the original distribution for TechDoc Release 11.

## **Important Windows Operating System Information**

If this is a new installation of TechDoc, it is highly recommended to use Windows Server 2019 or 2022. If this is an upgrade of TechDoc, it is highly recommended that shortly after upgrading to TechDoc 11 that you consider upgrading the operating system to Windows Server 2019/2022 and the database to SQL Server 2019/2022.

TechDoc 11 supports Windows Server 2012 R2, Windows Server 2016, Windows Server 2019, and Windows Server 2022. Depending on the version of Windows Server you are installing, be sure to refer to the appropriate Windows installation section for guidance below.

## **Installing TechDoc on the Cloud**

TechDoc can be installed on the cloud. Currently, TechDoc supports running on Microsoft Azure. While TechDoc should be able to run on other cloud environments with enough resources, only Microsoft Azure has been thoroughly tested and supported.

If Render is to be installed on the cloud, make sure to install the Document Manager on an Azure instance that supports nested virtualization and has enough resource to run the Document Manager and the nested Render VM running within the same Azure instance.

## **Installing TechDoc on a Virtual Machine**

TechDoc can also be installed on a virtual machine. While TechDoc should be able to run on any virtual environment with enough resources, only Hyper-V and VMware have been thoroughly tested.

Never attempt to install TechDoc and Render on the same VM. If TechDoc will be installed on a virtual machine, it is perfectly acceptable though to have the TechDoc VM and Render VM hosted on the same Hyper-V or VMware server. It is also acceptable to have the TechDoc VM and Render VM running on different Hyper-V and/or VMware servers.

## Windows Server 2012 R2 Installation

If you already have Windows Server 2012 R2 and IIS installed on your server or you are using a different version of Windows Server, you may skip this section. However, if this is the first time that TechDoc is being installed on the server, you should still review the steps outlined in this section to ensure that you have all the necessary components and settings that TechDoc requires.

These are not complete instructions since Operating System installations depend greatly on the hardware being used and your site requirements. They should be viewed more as general guidelines.

- Install Windows Server 2012 R2. The suggested disk layout is Operating System and Products on C:, TechDoc and other application files on D: and data on E:, F:, etc.
- By default, IIS is loaded but not enabled. The TechDoc installer will install the IIS role and ISAPI Filter, ISAPIExtensions, and RequestFiltering role services automatically if need be.
- For security purposes, many TechDoc systems use an ASP file to redirect incoming users to the TechDoc application home page (usually /servlet/dm.web.HomePage or /servlet/sm.web.HomePage) but they change the extension from .asp to something like .aspx or .redirect and then they disable .asp files from being executable.

For example, let's assume that a TechDoc system has a file named index.redirect in the home folder, that index.redirect is set as the default document, and that it contains ASP code to redirect a user to the TechDoc application home page. Even if this has been set up properly beforehand, running an IIS security tool may cause the redirect to stop working by locking down the system more than you'd like. If this happens or you'd like to set up your system to work this way, you can follow these steps to re-enable/enable the redirect with an extension other than .asp:

- If necessary, add the ASP Role Service to the server found under Web Server (IIS), Web Server, Application Development in Server Manager.
- Run the Internet Information Services (IIS) Manager.
- Expand the current computer's name in the left pane to see its services.
- Expand Sites under the current computer's name.
- Select the default web site and choose Default Document from the right pane.
- Make sure that the Default Document feature is enabled under the Actions pane.

- Look in the [Default Document](#) file list to see if [index.redirect](#) (or whatever name that you've decided to call your special script) is in there. If not, click [Add...](#) under Actions, enter [index.redirect](#) (or your script's name), and click [OK](#).
  - Select the default web site and choose [Handler Mappings](#) from the right pane.
  - In the [Handler Mappings](#) pane, look for a request path of [index.redirect](#) (or whatever file name you've chosen to use).
    - If the request path is there, select that mapping in the list, click [Edit...](#) under the Actions pane. Make sure that the executable is set to [C:\WINDOWS\System32\inetsrv\asp.dll](#). Click the Request Restrictions button and make sure that the Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Edit Script Map](#) window and then click the OK button to change the Script Map.
    - If the request path is NOT there, click [Add Script Map](#) under the Actions pane. Set the request path to [index.redirect](#) (or whatever file name you plan to use), set the executable to [C:\WINDOWS\System32\inetsrv\asp.dll](#), set the name to [Index Redirect](#) (or whatever you would like to name it). Click the Request Restrictions button and make sure that Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Add Script Map](#) window and then click the OK button to create the Script Map.
  - You may now close the Internet Information Services (IIS) Manager window.
- Install the latest Service Pack, Security Rollups, Hot Fixes, etc.

## Windows Server 2016 Installation

If you already have Windows Server 2016 and IIS installed on your server or you are using a different version of Windows Server, you may skip this section. However, if this is the first time that TechDoc is being installed on the server, you should still review the steps outlined in this section to ensure that you have all the necessary components and settings that TechDoc requires.



These are not complete instructions since Operating System installations depend greatly on the hardware being used and your site requirements. They should be viewed more as general guidelines.

- Install Windows Server 2016. The suggested disk layout is Operating System and Products on C:, TechDoc and other application files on D: and data on E:, F:, etc.
- By default, IIS is loaded but not enabled. The TechDoc installer will install the IIS role and ISAPI Filter, ISAPIExtensions, and RequestFiltering role services automatically if need be.
- For security purposes, many TechDoc systems use an ASP file to redirect incoming users to the TechDoc application home page (usually /servlet/dm.web.HomePage or /servlet/sm.web.HomePage) but they change the extension from .asp to something like .aspx or .redirect and then they disable .asp files from being executable.

For example, let's assume that a TechDoc system has a file named index.redirect in the home folder, that index.redirect is set as the default document, and that it contains ASP code to redirect a user to the TechDoc application home page. Even if this has been set up properly beforehand, running an IIS security tool may cause the redirect to stop working by locking down the system more than you'd like. If this happens or you'd like to set up your system to work this way, you can follow these steps to re-enable/enable the redirect with an extension other than .asp:

- If necessary, add the ASP Role Service to the server found under Web Server (IIS), Web Server, Application Development in Server Manager.
- Run the Internet Information Services (IIS) Manager.
- Expand the current computer's name in the left pane to see its services.
- Expand Sites under the current computer's name.
- Select the default web site and choose Default Document from the right pane.
- Make sure that the Default Document feature is enabled under the Actions pane.
- Look in the Default Document file list to see if index.redirect (or whatever name that you've decided to call your special script) is in there. If not, click Add... under Actions, enter index.redirect (or your script's name), and click OK.
- Select the default web site and choose Handler Mappings from the right pane.
- In the Handler Mappings pane, look for a request path of index.redirect (or whatever file name you've chosen to use).

- If the request path is there, select that mapping in the list, click [Edit...](#) under the Actions pane. Make sure that the executable is set to [C:\WINDOWS\System32\inet\\_srv\asp.dll](#). Click the Request Restrictions button and make sure that the Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Edit Script Map](#) window and then click the OK button to change the Script Map.
  - If the request path is NOT there, click [Add Script Map](#) under the Actions pane. Set the request path to [index.redirect](#) (or whatever file name you plan to use), set the executable to [C:\WINDOWS\System32\inet\\_srv\asp.dll](#), set the name to [Index Redirect](#) (or whatever you would like to name it). Click the Request Restrictions button and make sure that Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Add Script Map](#) window and then click the OK button to create the Script Map.
  - You may now close the Internet Information Services (IIS) Manager window.
- Install the latest updates, Security Rollups, Hot Fixes, etc.

## Windows Server 2019 Installation

If you already have Windows Server 2019 and IIS installed on your server or you are using a different version of Windows Server, you may skip this section. However, if this is the first time that TechDoc is being installed on the server, you should still review the steps outlined in this section to ensure that you have all the necessary components and settings that TechDoc requires.

These are not complete instructions since Operating System installations depend greatly on the hardware being used and your site requirements. They should be viewed more as general guidelines.

- Install Windows Server 2019. The suggested disk layout is Operating System and Products on [C:](#), TechDoc and other application files on [D:](#) and data on [E:](#), [F:](#), etc.

- By default, IIS is loaded but not enabled. The TechDoc installer will install the IIS role and ISAPI Filter, ISAPIExtensions, and RequestFiltering role services automatically if need be.
- For security purposes, many TechDoc systems use an ASP file to redirect incoming users to the TechDoc application home page (usually /servlet/dm.web.HomePage or /servlet/sm.web.HomePage) but they change the extension from [.asp](#) to something like [.aspx](#) or [.redirect](#) and then they disable [.asp](#) files from being executable.

For example, let's assume that a TechDoc system has a file named [index.redirect](#) in the home folder, that [index.redirect](#) is set as the default document, and that it contains ASP code to redirect a user to the TechDoc application home page. Even if this has been set up properly beforehand, running an IIS security tool may cause the redirect to stop working by locking down the system more than you'd like. If this happens or you'd like to set up your system to work this way, you can follow these steps to re-enable/enable the redirect with an extension other than [.asp](#):

- If necessary, add the ASP Role Service to the server found under Web Server (IIS), Web Server, Application Development in Server Manager.
- Run the Internet Information Services (IIS) Manager.
- Expand the current computer's name in the left pane to see its services.
- Expand [Sites](#) under the current computer's name.
- Select the default web site and choose [Default Document](#) from the right pane.
- Make sure that the [Default Document](#) feature is enabled under the Actions pane.
- Look in the [Default Document](#) file list to see if [index.redirect](#) (or whatever name that you've decided to call your special script) is in there. If not, click [Add...](#) under Actions, enter [index.redirect](#) (or your script's name), and click [OK](#).
- Select the default web site and choose [Handler Mappings](#) from the right pane.
- In the [Handler Mappings](#) pane, look for a request path of [index.redirect](#) (or whatever file name you've chosen to use).
  - If the request path is there, select that mapping in the list, click [Edit...](#) under the Actions pane. Make sure that the executable is set to [C:\WINDOWS\System32\inetsrv\asp.dll](#). Click the Request Restrictions button and make sure that the Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK

button to return to the [Edit Script Map](#) window and then click the OK button to change the Script Map.

- If the request path is NOT there, click [Add Script Map](#) under the Actions pane. Set the request path to [index.redirect](#) (or whatever file name you plan to use), set the executable to [C:\WINDOWS\System32\inetsrv\asp.dll](#), set the name to [Index Redirect](#) (or whatever you would like to name it). Click the Request Restrictions button and make sure that Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Add Script Map](#) window and then click the OK button to create the Script Map.
- You may now close the Internet Information Services (IIS) Manager window.
- Install the latest updates, Security Rollups, Hot Fixes, etc.

## Windows Server 2022 Installation

If you already have Windows Server 2022 and IIS installed on your server or you are using a different version of Windows Server, you may skip this section. However, if this is the first time that TechDoc is being installed on the server, you should still review the steps outlined in this section to ensure that you have all the necessary components and settings that TechDoc requires.

These are not complete instructions since Operating System installations depend greatly on the hardware being used and your site requirements. They should be viewed more as general guidelines.

- Install Windows Server 2022. The suggested disk layout is Operating System and Products on [C:](#), TechDoc and other application files on [D:](#) and data on [E:](#), [F:](#), etc.
- By default, IIS is loaded but not enabled. The TechDoc installer will install the IIS role and ISAPI Filter, ISAPIExtensions, and RequestFiltering role services automatically if need be.
- For security purposes, many TechDoc systems use an ASP file to redirect incoming users to the TechDoc application home page (usually [/servlet/dm.web.HomePage](#) or [/servlet/sm.web.HomePage](#)) but they change the extension from [.asp](#) to something like [.aspx](#) or [.redirect](#) and then they

disable [.asp](#) files from being executable.

For example, let's assume that a TechDoc system has a file named [index.redirect](#) in the home folder, that [index.redirect](#) is set as the default document, and that it contains ASP code to redirect a user to the TechDoc application home page. Even if this has been set up properly beforehand, running an IIS security tool may cause the redirect to stop working by locking down the system more than you'd like. If this happens or you'd like to set up your system to work this way, you can follow these steps to re-enable/enable the redirect with an extension other than [.asp](#):

- If necessary, add the ASP Role Service to the server found under Web Server (IIS), Web Server, Application Development in Server Manager.
- Run the Internet Information Services (IIS) Manager.
- Expand the current computer's name in the left pane to see its services.
- Expand [Sites](#) under the current computer's name.
- Select the default web site and choose [Default Document](#) from the right pane.
- Make sure that the [Default Document](#) feature is enabled under the Actions pane.
- Look in the [Default Document](#) file list to see if [index.redirect](#) (or whatever name that you've decided to call your special script) is in there. If not, click [Add...](#) under Actions, enter [index.redirect](#) (or your script's name), and click [OK](#).
- Select the default web site and choose [Handler Mappings](#) from the right pane.
- In the [Handler Mappings](#) pane, look for a request path of [index.redirect](#) (or whatever file name you've chosen to use).
  - If the request path is there, select that mapping in the list, click [Edit...](#) under the Actions pane. Make sure that the executable is set to [C:\WINDOWS\System32\inetsrv\asp.dll](#). Click the Request Restrictions button and make sure that the Mapping section is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click [OK](#) button to return to the [Edit Script Map](#) window and then click the [OK](#) button to change the Script Map.
  - If the request path is NOT there, click [Add Script Map](#) under the Actions pane. Set the request path to [index.redirect](#) (or whatever file name you plan to use), set the executable to [C:\WINDOWS\System32\inetsrv\asp.dll](#), set the name to [Index Redirect](#) (or whatever you would like to name it). Click the Request Restrictions button and make sure that Mapping section

is set to only invoke the handler for a request mapped to a file, that the Verbs section allows at least the [GET](#), [HEAD](#), and [POST](#) methods, and that the Access section is set to Script. Click OK button to return to the [Add Script Map](#) window and then click the OK button to create the Script Map.

- You may now close the Internet Information Services (IIS) Manager window.
- Install the latest updates, Security Rollups, Hot Fixes, etc.

## Microsoft SQL Server Installation

This section describes basic instructions for installing Microsoft SQL Server. If you already have Microsoft SQL Server 2014, 2016, 2017, 2019, or 2022 installed on your server or you plan to access SQL Server running on a remote server or you plan to use an Azure database, you should still review this section for the couple of SQL Server settings that your installed version or remotely installed version should have set in order to work with TechDoc.

Microsoft SQL Server Express editions are supported. However, know the limitations placed on the edition you choose to use. It affects how many documents can be stored in TechDoc and how much concurrent activity can be supported.

These are not complete instructions since installations depend greatly on your site requirements. They should be viewed more as general guidelines.

- Install Microsoft SQL Server. TechDoc has been tested with Microsoft SQL Server 2014, 2016, 2017, 2019, and 2022.
- When installing SQL Server, make sure to install the Client Tools Connectivity and Management Tools (Basic or Complete) features and set the Authentication Mode to Mixed (SQL and Windows) mode.
- Install the latest SQL Server Service Pack, Security Rollups, Hot Fixes, etc.
- When installing SQL Server, it is necessary to enable the [TCP/IP](#) and [Shared Memory](#) protocols after installation completes. To make these requirements are met, do the following:
  - Open the [SQL Server Configuration Manager](#).
  - In the left pane, expand the section labeled [SQL Server Network Configuration](#), and click [Protocols for MSSQLSERVER](#).
  - In the right pane, right click [TCP/IP](#) and select [Enable](#) if necessary.

- In the right pane, right click [Shared Memory](#) and select [Enable](#) if necessary.
- Close the [SQL Server Configuration Manager](#).
- Now restart the SQL Server service to make the changes above take effect.

## CIS Templates and Security Policies

Many administrators are applying Security Policy Templates to harden their systems. While this is a good idea, many templates disable IIS, which disables the use of TechDoc as well. If you choose to apply a Security Policy Template to this machine, be aware that some policies may have to be relaxed before TechDoc will install and run properly.

## Verify System is ready to Install or Upgrade

The Installer can install a new Document Manager and/or Search Manager and it can upgrade an existing Document Manager and/or Search Manager from Release 10 or 10.1 to Release 11. If you are currently running a version prior to Release 10, you must perform each intermediate upgrade in sequential order until you have reached Release 10 before allowing the Installer to perform an upgrade. For example, if you are running Release 9, you will need to upgrade to Release 10 before running this upgrade.

In addition, if you are installing or upgrading a Document Manager, every Search Manager running on another server that this Document Manager updates or will update must be running Release 11 or a minor update of Release 11 (11.1, 11.2, etc.) before proceeding with this install/upgrade. If this is an upgrade and the Search Manager is running on the same server as the Document Manager, the Search Manager can be running Release 10 or later as both the Document Manager and Search Manager will be upgraded at the same time.

- If you are upgrading a Document Manager...
  - Verify that the Document Manager is currently running Release 10 or higher. To check the version of the Document Manager, you can use a URL similar to:

**<https://SERVER.HOSTNAME.HERE/servlet/dm.web>About>**

Note: Change *https* to *http* if the Document Manager does not support the https protocol. Also, change *SERVER.HOSTNAME.HERE* to the fully

qualified host name of the Document Manager that is actually being checked.

- If you are installing or upgrading a Document Manager...
  - Verify that any Search Manager running on another server that this Document Manager updates or will update has already been upgraded to Release 11 or another minor version of Release 11 (11.1, 11.2, etc.). To check the version of a Search Manager, you can use a URL similar to:

**`https://SERVER.HOSTNAME.HERE/servlet/sm.web>About`**

Note: Change *https* to *http* if the Search Manager does not support the https protocol. Also, change *SERVER.HOSTNAME.HERE* to the fully qualified host name of the Search Manager that is actually being checked.

**Note:** If a Search Manager is running on the same system as the Document Manager, the TechDoc setup will upgrade them both at the same time so there is no need to upgrade that Search Manager ahead of time.

- If you are upgrading a Search Manager...
  - Verify that the Search Manager is currently running Release 10 or higher. To check the version of the Search Manager, you can use a URL similar to:

**`https://SERVER.HOSTNAME.HERE/servlet/sm.web>About`**

Note: Change *https* to *http* if the Search Manager does not support the https protocol. Also, change *SERVER.HOSTNAME.HERE* to the fully qualified host name of the Search Manager that is actually being checked.

## Full Backup of the Server

Even though a large amount of testing has been done to make the install/upgrade process work smoothly with a variety of hardware and software configurations, a full backup of the server should be performed before proceeding any further.

- Perform a full backup of the server including all disks and databases.



## Install TechDoc

- Run [R:\TechDoc11Setup.exe](#).
- You may be prompted by an [Open File – Security Warning](#) dialog that says that the publisher could not be verified. If so, this is normal and you should click [Run](#) to start the TechDoc installer.
- After a progress window is displayed, you will be presented with the [TechDoc Setup Wizard](#) dialog. Click [Next](#) to begin the setup process.
- You will be prompted to ensure that you are satisfied with your server back up. If you are, click [Yes](#) to continue. If not, click [No](#), backup your server and perform this whole section again.
- If you are not logged into Windows with a user account that has administrator privileges, a warning dialog will be displayed. If this happens, click [OK](#) to exit the setup, log out and log back in to a user account that has administrator privileges, and perform this whole section again.
- If you are not installing this on a supported version of Windows Server a warning dialog will be displayed. Note that TechDoc may work on other versions of Windows, but it has only been tested on the Windows Server versions listed above. If this happens, you can click [No](#) to exit the setup or click [Yes](#) if you wish to try to install TechDoc anyway.
- If Microsoft SQL Server was not installed earlier, you will be prompted to do so now if you will not be using a remote database. If you wish to install Microsoft SQL Server click [Yes](#) and refer to the Microsoft SQL Server Installation section above. After the installation of SQL Server is done, perform this whole section again. If you will be using a remote database, click [No](#).
- If IIS is not currently installed on the server, you will receive a message saying “Installing IIS and supporting role services...”. This process can take several minutes to complete. After the installation of IIS is done, the installer will continue.
- When prompted that the Tomcat and IIS services must be stopped, click [Yes](#) to continue.
- If the Tomcat service is installed and it fails to stop, a warning dialog will be displayed. If this happens, click [OK](#) to exit the setup, manually stop the Tomcat service, and perform this whole section again.
- If the IIS service fails to stop, a warning dialog will be displayed. If this happens, click [OK](#) to exit the setup, manually stop the IIS service, and perform this whole section again.
- At this point, you will probably receive a message that the TechDoc Java Runtime needs to be installed/updated. If you do:

- Click [Yes](#) to continue the install of the TechDoc Java Runtime.
  - After a progress window about the setup loading is finished, you will be presented with the [TechDoc JRE Setup Wizard](#) dialog. Click [Next](#) to begin the TechDoc JRE setup process.
  - You will be presented with the [TechDoc JRE Runtime License Agreement](#) screen. Read the agreement. If you agree, check the box next to [I accept the terms of the License Agreement](#) and click [Next](#) to continue. If you do not agree, click [Cancel](#) and abort the installation.
  - Next the components screen will appear. Click [Next](#).
  - Now you may get a message that an existing TechDoc directory was found. If you do, click [OK](#) to continue. Otherwise, the [Install Location](#) dialog will be displayed. Choose which folder that you want to install TechDoc JRE under and click [Next](#).
  - After the files have finished copying, click [Finish](#).
  - You will receive a message that the TechDoc JRE was successfully installed. Click [OK](#) to close the dialog. To continue, return to the top of this section and re-run the TechDoc installer.
- You will be presented with the [TechDoc License Agreement](#) screen. Read the agreement. If you agree, check the box next to [I accept the terms of the License Agreement](#) and click [Next](#) to continue. If you do not agree, click [Cancel](#) and abort the installation.
- If a previous version of TechDoc is installed the [TechDoc Backup](#) dialog will be displayed. Browse to or create a folder where TechDoc can save files that might be modified or overwritten by this upgrade. The folder that you choose does not have to be empty but it cannot contain a TechDoc or htdocs folder inside of it and it can't be the top level of a disk drive (e.g. [C:\](#), [D:\](#), etc.). If you choose a folder that does not exist, you will be prompted to create it before continuing.
- Now the [Choose Components](#) dialog will be displayed. There is a component for a Document Manager and a Search Manager. If an existing installation of either one is found, the corresponding component will automatically be checked and cannot be unchecked. If an existing installation of either one is not found, the corresponding component will be unchecked and you may check it to add that component as part of the upgrade. In order to continue, a Document Manager or Search Manager must be checked. Once the appropriate component(s) is/are checked, click [Next](#).
- If the Document Manager is being installed with the Render VM under a VMware product, a check is made to make sure that the VMware VIX API is installed. If the VIX API is not yet installed, the installer will attempt to find and run the VMware VIX API installer. If the installer is unable to locate the VMware VIX API installer, you will have to exit the TechDoc installer, manually install the VIX API, and then run the TechDoc installer again.

- If a Search Manager is going to be installed or upgraded, the [Search Manager Database Connection Information](#) dialog will be displayed. Enter the connection information for the SQL Server database where the Search Manager database is or will be stored. The username and password of a database administrator and the internet address of the database server must be entered. Optionally the port number and instance name can be entered if the database is not running on the default port number 1433 or as the default instance. After the connection information has been entered, click [Next](#) to continue.
- If a Document Manager is going to be installed or upgraded, the [Document Manager Database Connection Information](#) dialog will be displayed. Enter the connection information for the SQL Server database where the Document Manager database is or will be stored. The username and password of a database administrator and the internet address of the database server must be entered. Optionally the port number and instance name can be entered if the database is not running on the default port number 1433 or as the default instance. After the connection information has been entered, click [Next](#) to continue.
- If a previous version of a Document Manager or Search Manager is found on the server, a warning will be display that one or both are about to be upgraded. If so, click [OK](#) to continue. If this is a new install the [Choose Installation Location](#) dialog will be displayed. Choose a folder to install to and click [Next](#) to continue.
- A [Web Site Folder](#) dialog will be displayed. If the previous location of the Web Site Folder can be determined, it will be shown but cannot be edited. If a previous location cannot be found, you will need to enter or browse to the folder that is used as the Home Folder by IIS for the Web Site hosting of TechDoc.

There is also a checkbox to [Enable Home Folder Mirror](#). If you are installing a DM and an SM on the same server, you may want them to appear as different IIS web sites with different host names instead of one integrated web site. Doing this makes it easier in the future to split the DM and SM to different servers without having to change URL's. If you want them to appear as different IIS web sites, you can check this box to have a second set of all the TechDoc web files copied to another folder that is used as the SM's IIS home folder.

Once you've set the home folder(s), click [Next](#) to continue.

- You may receive a warning that one of the home folder(s) already exists. If this happens and it is ok for the setup to update that folder, click [Yes](#) to continue.

Otherwise, click [No](#) and you will be sent to the previous step to readjust the home folder location(s).

- If you are installing a Search Manager, a [Search Manager File Area Folder](#) dialog will be displayed. If the previous location of the Search Manager File Area Folder can be determined, it will be shown but cannot be edited. If a previous location cannot be found, you will need to enter or browse to the folder that is used as the Search Manager File Area Folder where the Lucene search index and other Search Manager files will be stored. Click [Next](#) to continue. If the folder does not exist, you will be asked if you wish to have it created.
- If you are installing a Document Manager, a [Doc Manager File Area Folder](#) dialog will be displayed. If the previous location of the Doc Manager File Area Folder can be determined, it will be shown but cannot be edited. If a previous location cannot be found, you will need to enter or browse to the folder that is used as the initial Doc Manager File Area Folder where documents will be stored. Click [Next](#) to continue. If the folder does not exist, you will be asked if you wish to have it created.
- Now the [Installing](#) dialog will be displayed. After the files have finished copying, click [Next](#) to continue.
- If you are installing or upgrading a Search Manager, a [Search Manager Database Setup](#) dialog will be displayed. Using the connection information entered earlier, the installer will install or upgrade the Search Manager database. This process can take up to several minutes depending on the database, whether the database is local or remote, etc. A progress dialog will be displayed during the database configuration. After the configuration is complete, click [Next](#) to continue.
- If you are installing or upgrading a Document Manager, a [Document Manager Database Setup](#) dialog will be displayed. Using the connection information entered earlier, the installer will install or upgrade the Document Manager database. This process can take up to several minutes depending on the database, whether the database is local or remote, etc. A progress dialog will be displayed during the database configuration. After the configuration is complete, click [Next](#) to continue.
- If you are installing a Document Manager that will be using a Render virtual machine under Hyper-V, VMware ESX, or VMware Server, the [Hyper-V or VMware Render Configuration](#) dialog will be displayed. At this time there is no automatic installation of the Render virtual machine into Hyper-V or any VMware products. Enter the connection information for the Hyper-V or VMware server and the information for the Render virtual machine.

If the Render virtual machine has not been setup yet, you can still specify the connection information here. The connection information can also be adjusted

later on using the Config TechDoc utility located in [D:\TechDoc\bin](#). If presented with the "Hyper-V or VMware Render Configuration" dialog, the following fields need to be filled in so TechDoc can communicate with the Hyper-V or VMware server and the render virtual machine:

- Server Address: This is the IP address or host name of the computer running Hyper-V or VMware where the Render VM will be hosted. The DM must be able to make a connection to this address in order to control the VM.
  - Server Username: This is the username of the account that TechDoc should use when connecting to Hyper-V or VMware server to control the Render VM.
  - Server Password: This is the password of the account that TechDoc should use when connecting to the Hyper-V or VMware server to control the Render virtual machine.
  - Render VM Name: This is the name that will be given to the virtual machine when it is/was created on the Hyper-V or VMware server.
  - Render VM IP Address: This is the IP address will/was given to the Render virtual machine itself when it is/was created. The DM must be able to make a connection to this address in order to send documents to be rendered on the Render VM.
- Now the [IIS Configuration](#) dialog will be displayed with a progress window. Next, you will be advised that you are going to be shown each of the web sites defined on your server to choose which one will be used as the home folder for TechDoc.

If you specified that you wanted to mirror the TechDoc home folder, you will be given the chance to choose which web site to mirror the TechDoc web files to.

After this completes, click [Next](#) to continue.

It will ask if you would like to start Tomcat and IIS now, click [Yes](#).

- Now the [Completing TechDoc Setup Wizard](#) dialog will be displayed. Click [Finish](#) to close the TechDoc setup program.
- If your system uses the Windows Firewall feature or a third-party Firewall product, you will need to manually make adjustments to the Firewall to allow access for HTTP (Port 80) and/or HTTPS (Port 443), depending on your configuration needs.

## Restart the Server

- Reboot the server to make sure all changes are reflected on the system and to make sure that everything runs properly after the system has been restarted.

## New Document Manager Post-Setup

If you did not install a new Document Manager, you can skip this section.

- When opening the Document Manager in a web browser for the first time, the setup wizard will be displayed. The setup wizard is used to configure the initial Admin account's username and password, upload the license, configure render settings, and more. The setup wizard must be completed before you can begin using the product. If needed the setup wizard can be run again at any point by visiting <http://localhost/servlet/dm.web.SetupWizard> or <https://localhost/servlet/dm.web.SetupWizard>.

If the Document Manager complains that you are not logging in from a campus address, make sure you run the browser on the system where TechDoc is installed and use [localhost](http://localhost) or [127.0.0.1](http://127.0.0.1) as the host name in the URL (i.e. <http://localhost/servlet/dm.web.HomePage> or <https://127.0.0.1/servlet/dm.web.HomePage>). [localhost](http://localhost) ([127.0.0.1](http://127.0.0.1)) is always considered a valid address to log in from.

- Once the setup wizard has been completed, you may log in to the Document Manager by visiting <http://localhost/servlet/dm.web.HomePage> or <https://localhost/servlet/dm.web.HomePage> using the admin credentials specified in the wizard.
- Review and modify the system properties as appropriate.
- Add campus addresses where users are allowed to log in from.
- Review and modify the document categories as appropriate.
- Add other data, such as community addresses, employers, organizations, user accounts, groups, keywords, document types, etc.
- Edit any of the [.page](#) files in [D:\TechDoc\etc](#) as appropriate.

## New Search Manager Post-Setup

If you did not install a new Search Manager, you can skip this section.

- When opening the Search Manager in a web browser for the first time, the setup wizard will be displayed. The setup wizard is used to configure the initial Admin account's username and password, upload the license, configure render settings, and more. The setup wizard must be completed before you can begin using the product. If needed the setup wizard can be run again at any point by visiting <http://localhost/servlet/sm.web.SetupWizard> or <https://localhost/servlet/sm.web.SetupWizard>.

If TechDoc complains that you are not logging in from a campus address, make sure you run the browser on the system where TechDoc is installed and use [localhost](#) or [127.0.0.1](#) as the host name in the URL (i.e. <http://localhost/servlet/sm.web.HomePage> or <https://127.0.0.1/servlet/sm.web.HomePage>). [localhost](#) ([127.0.0.1](#)) is always considered a valid address to log in from.

- Once the setup wizard has been completed, you may log in to the Search Manager by visiting <http://localhost/servlet/sm.web.HomePage> or <https://localhost/servlet/sm.web.HomePage> using the admin credentials specified in the wizard.
- Review and modify the system properties as appropriate.

If you plan to run this Search Manager in [Cached File Mode](#), you should make the [CachedFileMode](#) system property change now because it can only be changed when the Search Manager contains no documents. As soon as the first document from any remote host has been indexed, the system property cannot be changed without purging all the remote hosts.

### Notes:

Before changing to [Cached File Mode](#), be sure to read the Search Manager Admin Guide to understand the full impact of this decision.

In addition to the [CachedFileMode](#) system property, the [CachedFilesRequireAuthorization](#) and [DisableSearching](#) system properties can only be changed when the Search Manager contains no documents too. So you should decide how they should be set now as well.

- Add campus addresses where users are allowed to log in from.
- Add remote hosts that can store links in the Search Manager.

- Edit any of the [.layup\\*.ini](#) files in [D:\TechDoc\etc](#) as appropriate.
- Edit any of the [.page](#) files in [D:\TechDoc\etc](#) as appropriate.
- Edit any of the [.html](#) files in [D:\htdocs](#) as appropriate.

## TechDoc Testing

- Testing should be performed to make sure that TechDoc Release 11 is operating properly.
- Once testing is complete, if you installed a new Document Manager, log in to the Document Manager with an admin account, click the [Admin](#) menu, and then click the [System Properties](#) link. Find [SystemAvailable](#) and set it to [Yes](#). At the bottom of the screen, type in the reason (such as [Open system now that the TechDoc Release 11 installation is complete](#)). Click [OK](#) to make the changes and then log out of the Document Manager.