

Perceptive Intelligent Capture Solution Configuration Manager

Installation and Setup Guide

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Table of Contents

Perceptive Intelligent Capture Solution Configuration Manager Overview	5
PIC Solution Configuration Manager Installation Process	5
Prepare to install.....	5
System Requirements	5
Operating systems.....	5
PIC Solution Configuration Manager database.....	5
Software	6
Internet Information Server	6
Internet browsers	6
Install PIC Solution Configuration Manager	7
Configure database checklist.....	7
<i>PIC Solution Configuration Manager SQL server checklist</i>	7
<i>PIC Solution Configuration Manager Oracle checklist</i>	7
<i>Manually create database objects</i>	7
<i>Migration Packet Share Path</i>	9
Configure Internet Information Server	9
<i>Creating the Application/Web site</i>	9
<i>Directory Security</i>	10
Configure Authentication	10
<i>Configure Forms Authentication</i>	10
<i>Configure Windows Authentication</i>	10
Post Installation Configuration	12
Deploying a Project Package.....	12
Managing Database Connections.....	12
Adding a Project.....	13
Restart the Internet Information Server	13

Index.....14

Perceptive Intelligent Capture Solution Configuration Manager Overview

The Perceptive Intelligent Capture (PIC) Solution Configuration Manager is a web-based application for the administrators of Perceptive Intelligent Capture. This application allows you to configure and manage the database for the different packaged solutions delivered by Perceptive Software. You can manage a database from an Internet browser by entering the PIC Solution Configuration Manager URL. The PIC Solution Configuration Manager saves the changes made and creates migration packets. You can then import those packets to other environments.

An initial installation of PIC Solution Configuration Manager requires that you complete several tasks in order. The following installation information assumes that you are performing an initial installation of PIC Solution Configuration Manager.

PIC Solution Configuration Manager Installation Process

Prepare to install

The following steps outline the high-level procedures that you need to perform to install and configure PIC Solution Configuration Manager and the information you need to verify before the installation.

Perform and verify the following procedures during the installation process.

- Confirm installation of software prerequisites
- Ensure you have enough disk space for the executables
- Enable Management Services in IIS

System Requirements

Operating systems

You must install and configure one of the following operating systems before you install PIC Solution Configuration Manager.

- Microsoft Windows Server 2008 R2
- Microsoft Windows 7

PIC Solution Configuration Manager database

The PIC Solution Configuration Manager module requires central management of project data in a database. The PIC Solution Configuration Manager database is certified to run on the following database platforms.

- Microsoft SQL Server 2008 R2
- ORACLE 11g R2

Software

You must install the following software applications before you install the application on your machine.

- Internet Information Server 7
- .NET Framework 3.5 SP1

Internet Information Server

Prior to installing PIC Solution Configuration Manager, you must install Microsoft IIS according to the instructions provided on the Microsoft website. Refer to the Intelligent Capture Technical Specifications for information about supported versions of IIS, as well as any other prerequisite for this product.

During the installation of IIS 7, make sure that you install the following Role Services:

- Static Content
- Default Document
- Directory Browsing
- HTTP Errors
- ASP.NET
- .NET Extensibility
- HTTP Logging
- Request Monitor

For more information on installing and configuring IIS, refer to the Microsoft documentation.

Internet browsers

The PIC Solution Configuration Manager application is certified to use the following internet browsers

- Internet Explorer 9 and higher
- Google Chrome
- Mozilla Firefox

Install PIC Solution Configuration Manager

The following sections define the steps required to install the PIC Solution Configuration Manager.

Configure database checklist

You configure the database checklist depending on your operating system.

PIC Solution Configuration Manager SQL server checklist

You must create the following database accounts before installing PIC Solution Configuration Manager

- Administrative database account with create, modify, and delete rights in the database tables. You can use windows authentication if you have administrator rights to the database server.
- User database account used by PIC Solution Configuration Manager with administrative rights to add, modify, and delete data. You can use windows authentication if your installation has the appropriate rights to the database server.

PIC Solution Configuration Manager Oracle checklist

You must complete the following tasks before installing PIC Solution Configuration Manager.

1. Create an ORACLE instance for PIC Solution Configuration.
2. Create a user for PIC Solution Configuration Manager with a password.
3. Assign rights to the user.
 1. Allow increased growth of data.
 2. Allow insertion, modification, and deletion of data.
 3. Allow creation of database entities.
4. Create an administrative database account with create, modify, and delete rights in the database tables. You can use windows authentication if you have administrator rights to the database server.
5. Create database account used by PIC Solution Configuration Manager with administrative rights to add, modify, and delete data. You can use windows authentication if you are installation has the appropriate rights to the database server.

Manually create database objects

You can install the database manually for the installation of PIC Solution Configuration Manager. For more information on installing the database, refer to the following information on the respective company's website.

- Oracle 11g R2 documentation.
- Microsoft SQL Server 2008 R2 documentation

After creation of a new database on the respective server, complete the following steps to install and configure the database manually.

1. Extract the **PIC_Solution_Configuration_Manager_x.x.xxxx.zip** to a directory of your choice.
2. Launch Windows Explorer and navigate to **<ExtractedFolderLocation>\Database\CreationScripts**.

There are two folders, SQL Server and ORACLE. Each folder contains database scripts to execute that will create the tables, views, indexes, and default data values.

3. Run the database script for your installed database server to create the appropriate values.
4. Check that the database tables have been created correctly and no errors were reported on execution of the database scripts.
5. Navigate to the **<ExtractedFolderLocation>\PICSCMWeb** folder and open the **Web.config** file in Notepad.
6. Search for the connection string in the file - **<connectionStrings>**.
7. Modify the connection strings to connect to the databases. (The “configurator” connection string should point to the PIC Solution Configuration Manager database, and the “distiller” connection string should point to the Perceptive Intelligent Capture database.) Passwords entered within the Web.config connection string will be encrypted upon the start of the PIC Solution Configuration Application and stored as encrypted text within the Web.config file.

Note Replace the values in **RED** with actual values.

SQLServer Example

```
<connectionStrings>
<add name="configurator" connectionString="Data Source=SQLServerName;Initial
Catalog=configurator;Integrated Security=False;User ID=User ID;Password=
Password;MultipleActiveResultSets=True" providerName="System.Data.SqlClient" />

<add name="distiller" connectionString="Data Source=SQLServerName;Initial
Catalog=Intelligent Capture database name;Integrated Security=False;User ID=User
ID;Password= Password;MultipleActiveResultSets=True"
providerName="System.Data.SqlClient" />
</connectionStrings>
```

ORACLE Example

```
<connectionStrings>
<add name="configurator" connectionString="Data Source=Oracle Server Name/Oracle
database name;User ID=User ID;Password=Password"
providerName="Oracle.DataAccess.Client" />
```



```
<add name="distiller" connectionString="Data Source=Oracle Server Name/Oracle
database name;User ID=User ID;Password=Password"
    providerName="Oracle.DataAccess.Client" />
</connectionStrings>
```

Migration Packet Share Path

PIC Solution Configuration Manager saves each configuration change into a migration packet. These packets can be exported to a network share and then imported to another system from the share. Configuration of the Share path is controlled within Web.config. To configure the Share path:

1. Navigate to the **<ExtractedFolderLocation>\PICSCMWeb** folder and open the **Web.config** file in Notepad.
2. Search for **<add key="DefaultImportPath"** and **<add key="DefaultExportPath"**
3. Modify the Import and Export path values to your network share
4. Save the **Web.config** file.

Configure Internet Information Server

You need to install the Microsoft Internet Information Server before installing PIC Solution Configuration Manager using the settings outlined in the [Internet Information Server](#) section of this document.

Creating the Application/Web site

Create a new Application with the following Settings.

- Map the Physical Path to the physical path from which the PIC Solution Configuration Manager was extracted.
- Create an application pool or change **DefaultAppPool** with the following advanced properties.
 - Enable 32-bit applications = True
 - Managed pipeline mode = Integrated
 - Identity is set to NetworkService
- Assign the Configurator application to this application pool so that the application can run under 32-bit mode.
- Configure default document to include only **Login.aspx**.
- If your installation is on Windows 2008 R2, disable DEP with following command:
 - `bcdedit.exe /set {current} nx AlwaysOff`

Directory Security

1. Provide modify permission to the App pool under which the PIC Solution Configuration Manager will be running to the PICSCMWeb physical folder.
2. Provide the modify permission to the App pool under which the PIC Solution Configuration Manager will be running to the Network share where the Export and Import Packet will happen.

Configure Authentication

Configure Forms Authentication

The PIC Solution Configuration Manager allows you to log in with your Perceptive Intelligent Capture user account. In this case, PIC Solution Configuration Manager will authenticate the username and password against the Perceptive_Database. The user must be assigned the ADM role within the PIC project in order to have access to the PIC Solution Configuration Manager. There are no additional steps required to enable Forms Authentication.

Configure Windows Authentication

The PIC Solution Configuration Manager allows you to log in with your Windows user account. In this case, the password shared with Windows is used to log in to PIC Solution Configuration Manager. A check against the Perceptive_Database will be performed to ensure the Windows user has been assigned the ADM role within the PIC project in order to have access to the PIC Solution Configuration Manager.

To use this option, you first need to configure the IIS server.

Note Only Windows Authentication access will be possible after this option is configured.

Configure Windows Authentication for IIS 7

Before starting to configure IIS, make sure that the Configurator application is working properly and back up the web.config file.

Note For more information on configuring Windows authentication within IIS, refer to the Microsoft website.

To configure Windows Authentication access to PIC Solution Configuration Manager with IIS 7:

1. Open the **Authentication** application settings in IIS group.
2. Enable **Windows Authentication** and disable all other authentication methods.
3. Close all of the running browser sessions prior to access the Configurator application.

Windows Authentication Changes to Web.config File

It is highly recommended to have two versions of the web.config file – one for standard authentication and one for Windows Authentication. This will simplify switching between modes.

The following list shows required steps to convert a standard web.config to a web.config with Windows Authentication enabled.

1. Change the **<authentication>** section (located in the **<configuration><system.web>** directory) to the following: **<authentication mode="Windows">**
2. Remove the following line: **<forms loginUrl="Login.aspx" defaultUrl="ConfigureProject.aspx" " />**
This is a child of the **<authentication>** section, and is only needed for standard authentication.
3. Change the **<authentication>** (located in the **<configuration><system.web>**) from 'deny' to 'allow':
<authorization >allow users="?" /> </authorization>

Post Installation Configuration

The following sections define the steps required to configure the PIC Solution Configuration Manager.

Deploying a Project Package

PIC Solution Configuration Manager supported projects can be deployed into the application by uploading the appropriate package. Packages are named SCM_ProjectNameandVersion_PackageBuildNumber. For instance, the first Package delivered for PIC for Invoices version 2.5 would be named "SCM_PIC2.5_001.zip". This package contains the control file PIC Solution Configuration Manager uses to display the project's configuration options along with Help Text for the project's configurable options. To upload a package, follow these steps:

1. Log in to PIC Solution Configuration Manager.
2. Select **Manage Project Configuration** → **Manage Existing Package** from the menu bar.
3. Click the **Browse** button and select the package Zip file you want to add.
4. Select the **Is Active** check box to make the project active upon deployment.
5. Click the **Add New Package** button.
6. A message box displays noting the package has been deployed. The new package now displays in the Existing Packages table.

Managing Database Connections

PIC Solution Configuration Manager needs access to the configuration database of the projects. These connections' settings should be configured for each project you wish to configure. To configure database connections:

1. Log in to PIC Solution Configuration Manager.
2. Select **Manage Project Configuration** → **Manage Database Connections** from the menu bar.
3. Enter a database connection number (this can be any integer from 1 to 999999999, but it is suggested to start with 1).
4. Select a Provider Type (SQL or Oracle).
5. Configure the appropriate columns for the provider selected (**Server Name**, **Database Name** (SQL only), **Username/Password** or **Integrated Security**).
6. To test the connection settings, click the **Test Connection** button.
7. Click **OK** on the **Test Success** message box and then click **Insert** to add the connection number to the list of available connections.

Adding a Project

With a package deployed and a database connection group available, you can now add your project to the PIC Solution Configuration Manager's table of available projects. To add a project, complete the following steps.

1. Log in to PIC Solution Configuration Manager.
2. Select **Manage Project Configuration** from the menu bar.
3. Enter a **Project Name** (This name does not have to align with the actual project file name, but should be easily recognizable by all project administrators e.g. "Invoices")
4. Select a **Package** and **Version** from the drop-down lists and select the **Connection Group** assigned to the project's configuration database.
5. Set the **Active** flag according to whether you want the project to appear within Configure Project.
6. Click **Insert** to add the project.

Restart the Internet Information Server

After adding a package, you need to restart the IIS server that hosts the PIC Solution Manager. This enables you to view the updates that the package brings into the project.

When the IIS server starts, the display text table is cached locally. So, the updates made to this table are not displayed even if you refresh the login session after adding the package. To view the changes to the display text in the PIC Solution Manager user interface, you must restart the IIS server.

Index

add	
project	12
authentication	
configure	9
configuration	
post installation.....	11
configure	
authentication	9
database checklist	6
Internet Information Server	8
database	
PIC Solution Configuration Manager	5
database checklist	
configure	6
database connections	
manage.....	11
deploy	
project package	11
install.....	4
Install	
PIC Solution Configuration Manager	6
Installation	
PIC Solution Configuration Manager	4
Internet browsers	6
Internet Information Server.....	5
configure	8
restart.....	12
manage	
database connections	11
operating systems.....	5
Overview	
Perceptive Intelligent Capture Solution Configuration Manager.....	4
Perceptive Intelligent Capture Solution Configuration Manager	
Overview	4
PIC Solution Configuration Manager	
database.....	5
Install.....	6
Installation	4
post installation	
configuration.....	11
project	
add	12
project package	
deploy.....	11
restart	
Internet Information Server	12
software.....	5
System Requirements.....	5