Installation Guide

Last Revision: Oct 03, 2005

Contents

Before You Begin

This guide will help the administrator install Netdoc, configure IIS, and set up SQL Server so Netdoc will function properly. Additional help and information maybe found at www.bradyid.com on the Online Knowledge Base. It's important to consult you Network and Database administrator before performing any installation. This guide is a basic set up structure.   The administrators may require addition settings for security purposes.

- Internet Information Services (IIS), SQL Server 2000 or greater, and .NET Framework 1.1 or higher is required for the *NetDoc* application to operate. Ensure these software packages are installed before going any further.

> **NOTE:** Microsoft's .NET Framework is essential for the *NetDoc* application to operate properly with IIS. For that reason, we strongly suggest (re)installing the .NET Framework before configuring anything. The .NET Framework can be downloaded from www.microsoft.com.

- The person doing the installation will need to be an administrator. This person will be responsible for configuring IIS and SQL and will need the rights to do so.

- It is strongly recommended that a database administrator handle the SQL portion of the installation to ensure database security and integrity.

- Refer to the Netdoc User Guide for complete system requirements.

Installation Overview

To complete the installation and setup of the NetDoc application, you will:

1. Install Netdoc on your IIS server.

2. Create the SQL Server Netdoc database to store the data.

3. Configure the SQL Server security. (optional)

4. Configure the IIS to display Netdoc on an Intranet.

5. Connect Netdoc IIS to Netdoc SQL Server.

6. Add Netdoc users to view and administrate the software.

7. Configure the way Netdoc security allows people to log in. (optional)

Installation for Microsoft Windows 2000®, Windows 2003®, and Windows XP Professional®

The *NetDoc* application uses a Microsoft SQL Server database that is installed on your server (see Create the SQL Server Database). Client machines use the *NetDoc* application via the web browser. Below are the setup instructions for setting up the *NetDoc* application on the server:

1. Insert the *NetDoc* CD into the CD-ROM drive. The install screen appears. (If the install does not start automatically, select **Run** from the **Start** menu, type D:\setup.exe and skip Step 2.)

2. Click **Install NetDoc**.

3. The *NetDoc* InstallShield Wizard screen appears, extracting files for the installation. Click **Next**.

4. Accept the **End User License Agreement** (EULA) to continue. If you decline the agreement, the software will not install.

5. Enter your User Name, Organization, and Serial Number. The serial number is located on the inside cover of the DVD case. Click **Next**.

6. The Choose Destination Location screen appears showing the default directory where the *NetDoc* application will be installed. If you don't want to use the default directory, click **Browse** to select an alternate installation location for the *NetDoc* application.
    Note: Brady recommends that you use the default installation directory location. Not doing so may result in additional IIS configuration steps.

7. Click **Next**.

8. The Setup Type screen appears. Select **Install** (databases on server). Click **Next**.

9. The installation process begins. The progress of the installation shows on the display bar.

10. The final screen appears when the installation is complete. Click **Finish**.

Create the SQL Server Database

1. From the **Start** menu, choose **Programs**, then **Microsoft SQL Server**. Click **Enterprise Manager**.

2. Locate the SQL Server group where the *NetDoc* database will reside, for instance, SQL_TEST_SERVER.

3. Open the database folder, then either right-click on **Databases**, or choose **New Database** from the **Action** menu.

4. The Database Properties window appears. Under the **General** tab, enter a name for the database in the **Name** field and click **OK**. Make a note of the name, as you will need it later.

5. Expand by the database tree clicking the (+) symbols and select the database you just created.

6. Click the **Tools** menu and select **SQL Query Analyzer**.

7. Click the **File** menu and select **Open**.

8. In the Open Query File dialog box, browse to the *NetDoc* installation location you selected in Installation for Microsoft Windows 2000®, Windows 2003®, and Windows XP Professional®. The default location is **C:\Inetpub\wwwroot\NetDoc**.

9. In the root of the *NetDoc* directory, click the **NetDoc.sql** file, then click **Open**.

10. Click **Execute Query**.
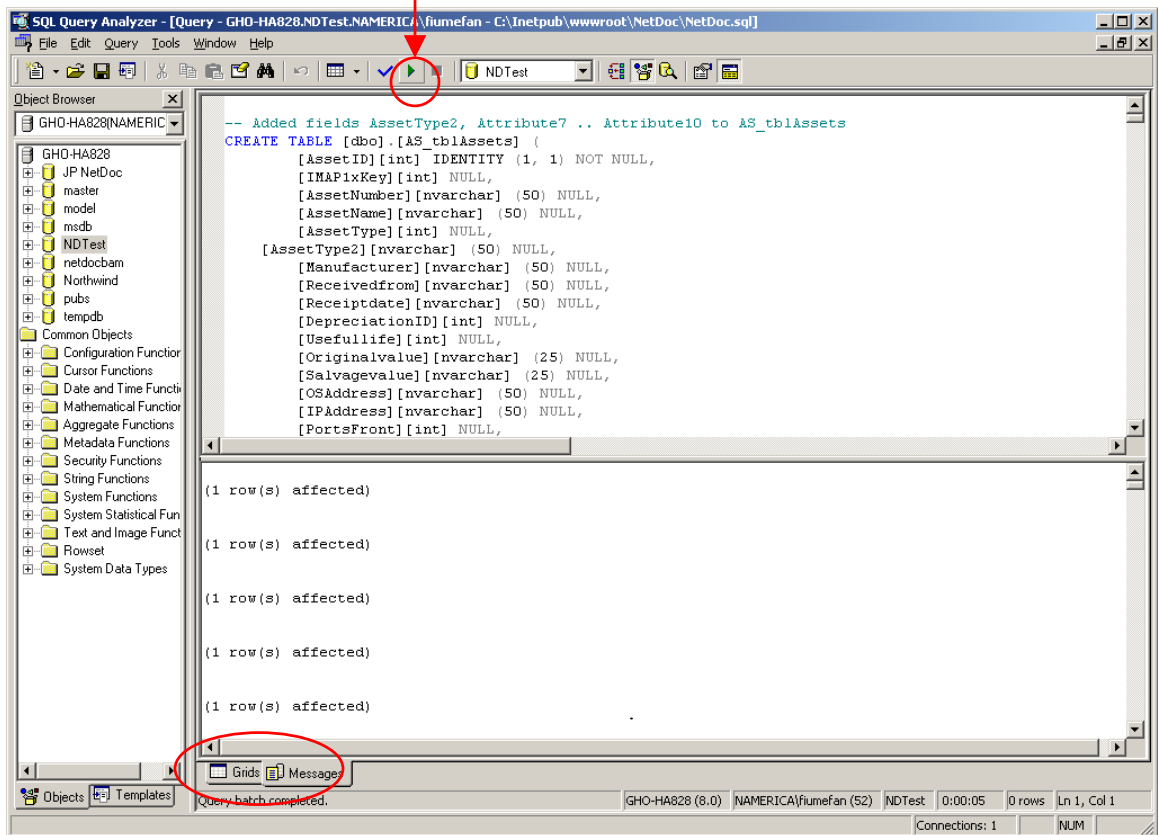
11. Confirm that "Query batch completed" is shown at the bottom of the screen. If you receive an error, please consult with Microsoft's SQL 2000 Server User Guide.

12. Click **Exit** on the File menu to close the Query Analyzer.

Configure SQL Server Security

1. Start the **SQL Server Enterprise Manager** by going to Start, Programs, and SQL 2000 Server in the windows start menu.

2. Right click the name of your SQL server, then click **Properties**.
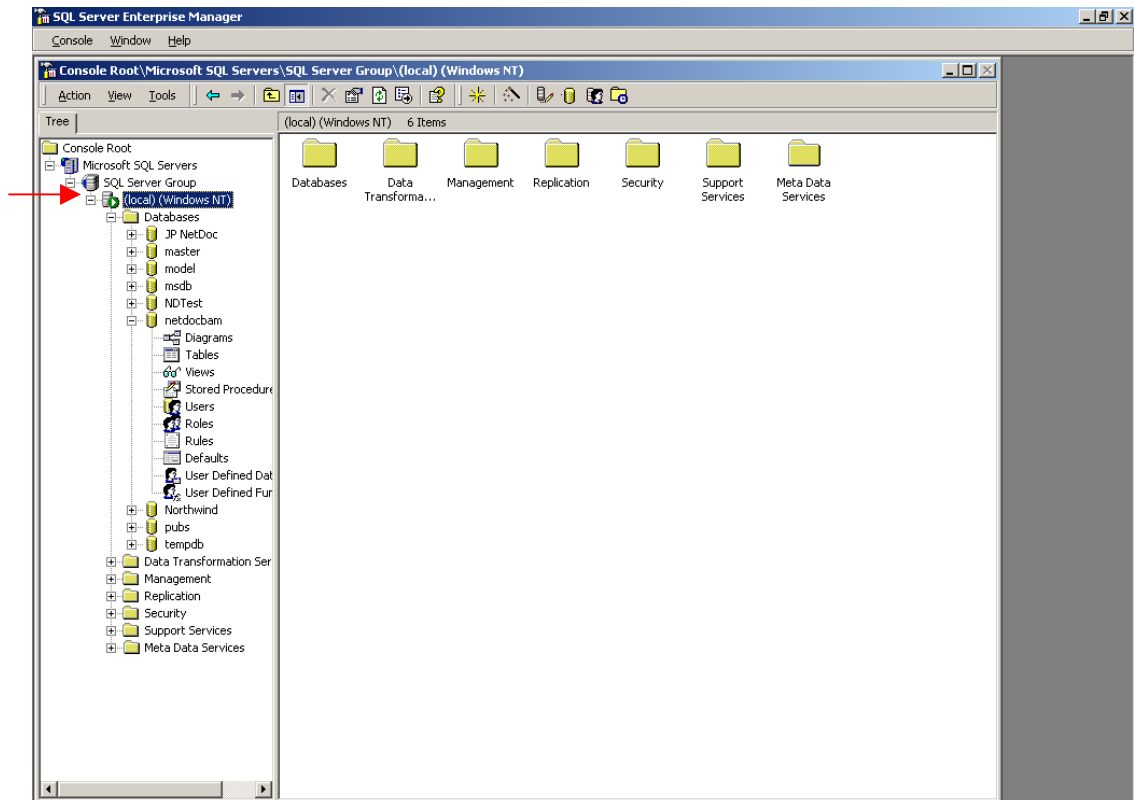
3. Click the **Security** tab. Under **Authentication** in the **Security** section, make sure that **SQL Server and Windows** is selected.
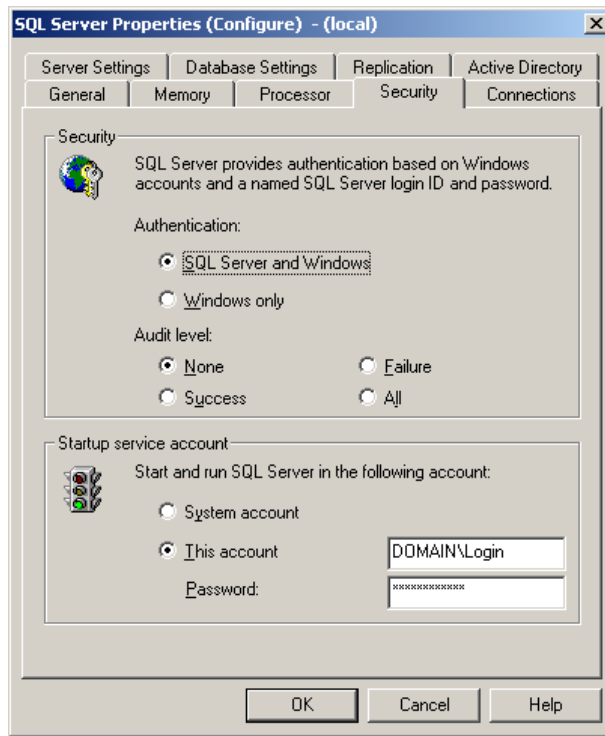

4. Under **Startup service account**, select **this account** and enter the name and password of a local administrator account. If you don't have the administrator account information, please contact your IT department.

5. Click **OK** to close the Properties dialog box.

6. You are now finished configuring the SQL server security. Close the SQL Server Enterprise Manager.

## Add the Database User in SQL Server

Note: This section provides general guidelines for establishing new database securities with in the SQL server. Please follow these instructions as a guideline. A database administrator should perform all SQL configurations due for security purposes.

1. Start the **SQL Server Enterprise Manager** by going to Start, Programs, and SQL 2000 Server in the windows start menu.

2. Expand the tree to show your *NetDoc* database.
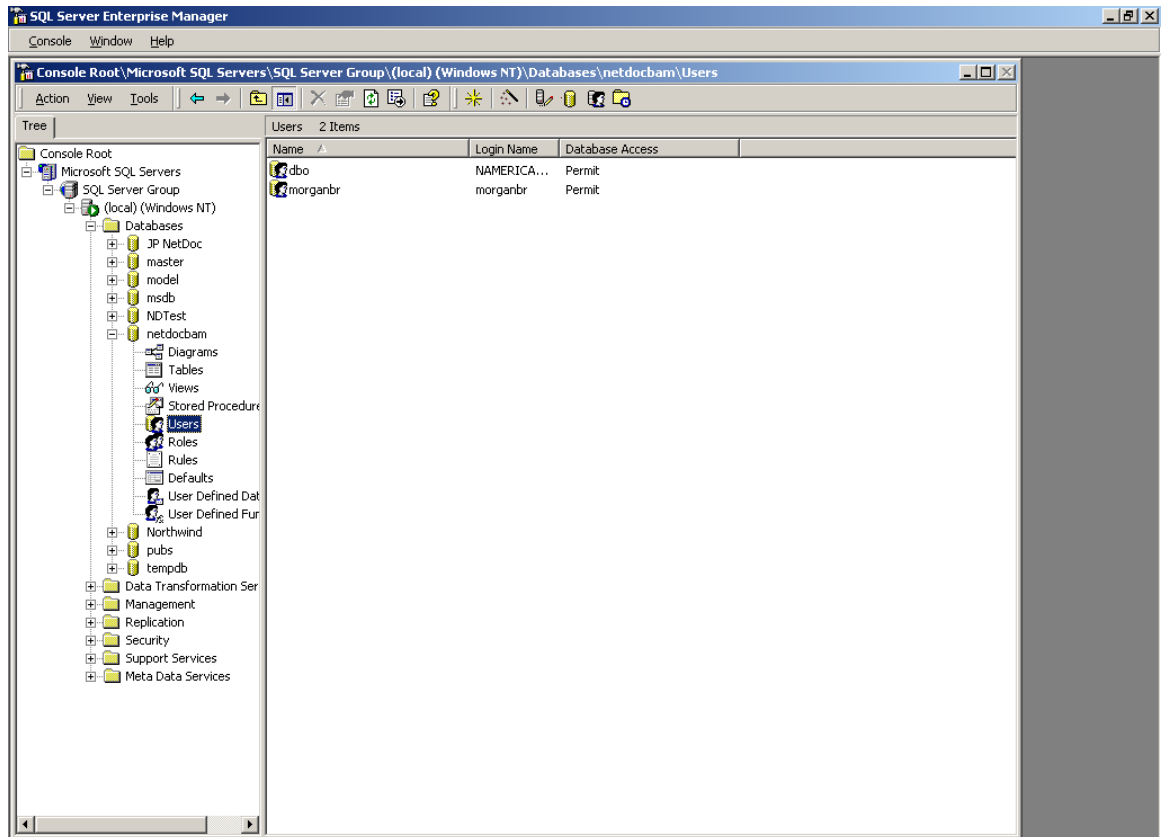
3. Right click on **Users** and select **New Database User**.

4. For the **Login name** field, click the down arrow and select **<new>**.
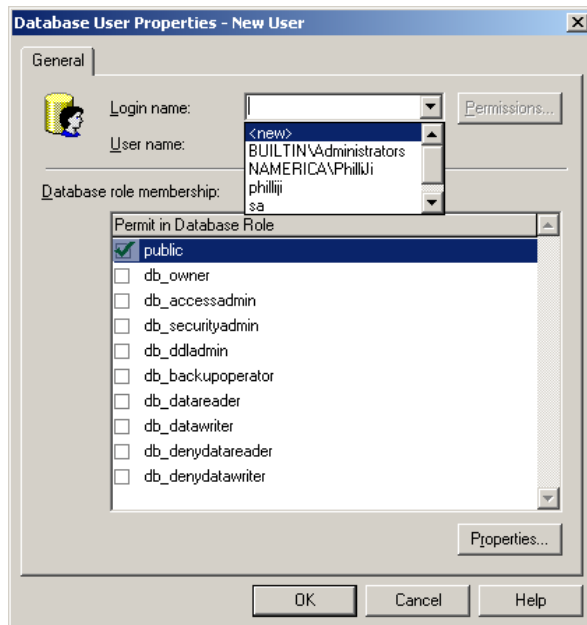
5. When the SQL Server Login Properties – New Login dialog box appears, type the new login name you want and select **SQL Server Authentication**. Then enter a password. Make a note of the name and password you entered, as you will need this later. Click **OK**.
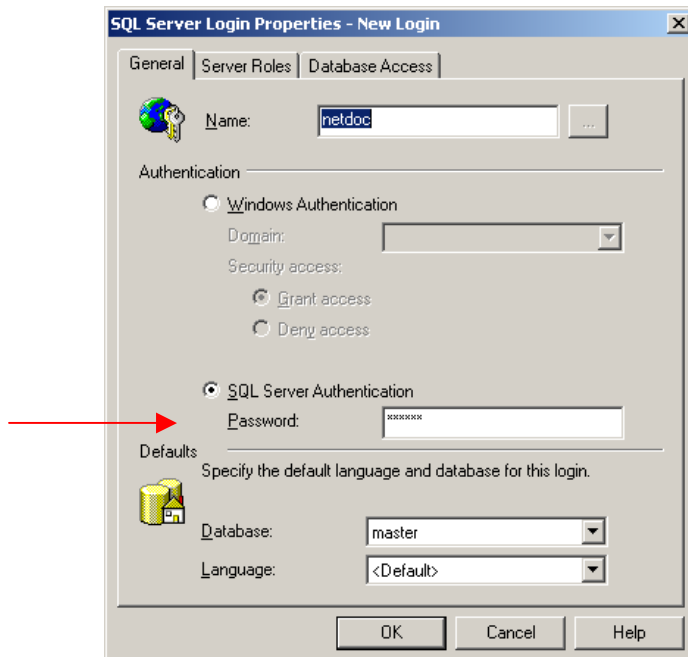
6. In the Database User Properties dialog box, click the down arrow next to **Login name** and select your newly added name. Check the **db_owner** checkbox, then click **OK**.
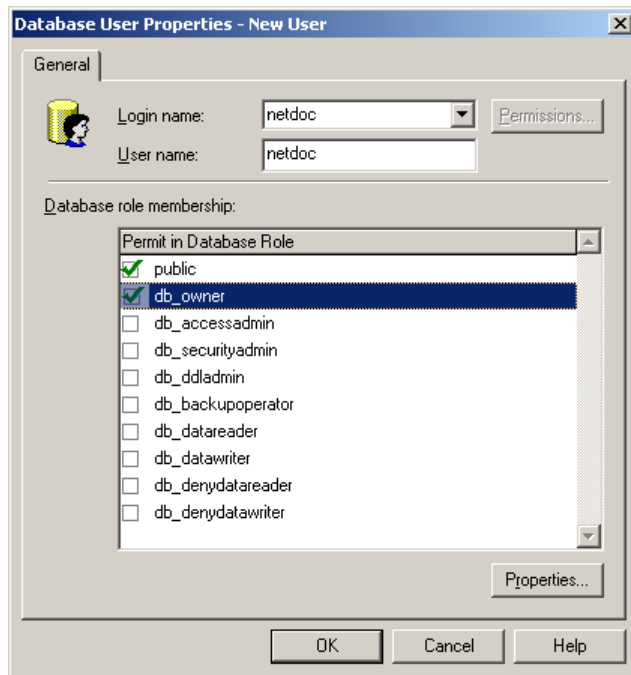
7. You should now see your newly added user in the main pane of the SQL Server Enterprise Manager window. You can now close the SQL Server Enterprise Manager.

Configure IIS

Make sure you complete this step before attempting to connect to the database; without configuring IIS first, users will not be able to connect to the database (see Connect to the SQL Server Database).

Configuration for Windows 2003

1. Launch **Windows Explorer**.

2. Browse to the *NetDoc* installation location. The default location is **C:\Inetpub\wwwroot\NetDoc**.

3. Right-click on the *NetDoc* folder and select **Properties**.

4. Select the **Security** tab.

5. Select the **IIS_WPG** user.
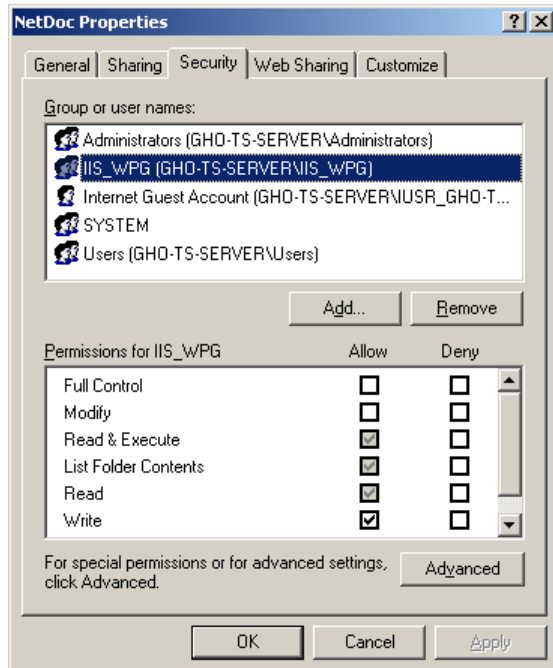
6. Select the **Write** check box in the **Allow** column in the **Permissions** area.

7. Click **Apply**, then click **OK**.

Configuration for Windows 2000

1. Launch **Windows Explorer**.

2. Browse to the *NetDoc* installation location. The default location is **C:\Inetpub\wwwroot\NetDoc**.

3. Right-click on the *NetDoc* folder and select **Properties**.
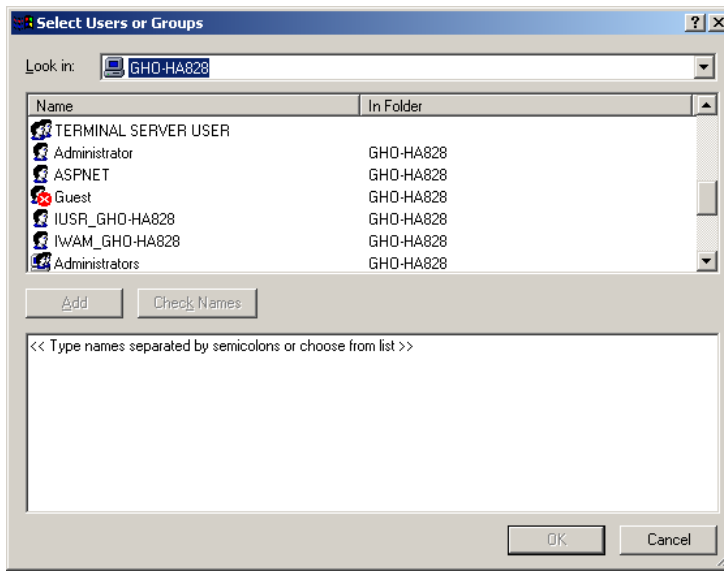
4. Select the **Security** tab.

5. Click the **Add** button.

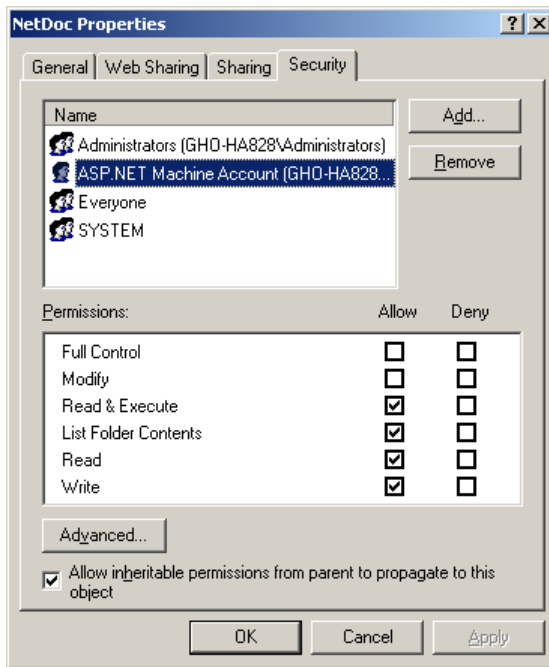6. In the Select Users or Groups dialog box, select the **ASPNET** user and click the **Add** button.

Select Users or Groups

Look in: GHO-HA828

Name	In Folder
TERMINAL SERVER USER	
Administrator	GHO-HA828
ASPNET	GHO-HA828
Guest	GHO-HA828
IUSR_GHO-HA828	GHO-HA828
IWAM_GHO-HA828	GHO-HA828
Administrators	GHO-HA828

Add   Check Names

<< Type names separated by semicolons or choose from list >>

OK   Cancel

7. Click **OK.**

8. On the Security tab, select the **Write** check box in the **Allow** column in the **Permissions** area.

NetDoc Properties

General | Web Sharing | Sharing | Security

Name
Administrators (GHO-HA828\Administrators)
ASP.NET Machine Account (GHO-HA828...
Everyone
SYSTEM

Add...   Remove

Permissions:

	Allow	Deny
Full Control	☐	☐
Modify	☐	☐
Read & Execute	☑	☐
List Folder Contents	☑	☐
Read	☑	☐
Write	☑	☐

Advanced...

☑ Allow inheritable permissions from parent to propagate to this object

OK   Cancel   Apply

9. Click **Apply**, then click **OK**.

10. You are now finished configuring the folder permissions. You can close **Windows Explorer**.

Configure IIS Security

1. From the **Start** menu, select **Control Panel**, select **Administrative Tools**, and open the **Internet Services Manager**.

2. In the tree, locate the Internet Information Services name. Below should be the name of your server. Make a note of this name, as you will need it later.

3. Expand your server name, then expand the **Default Web Site** option. Right-click **NetDoc** and select **Properties**.
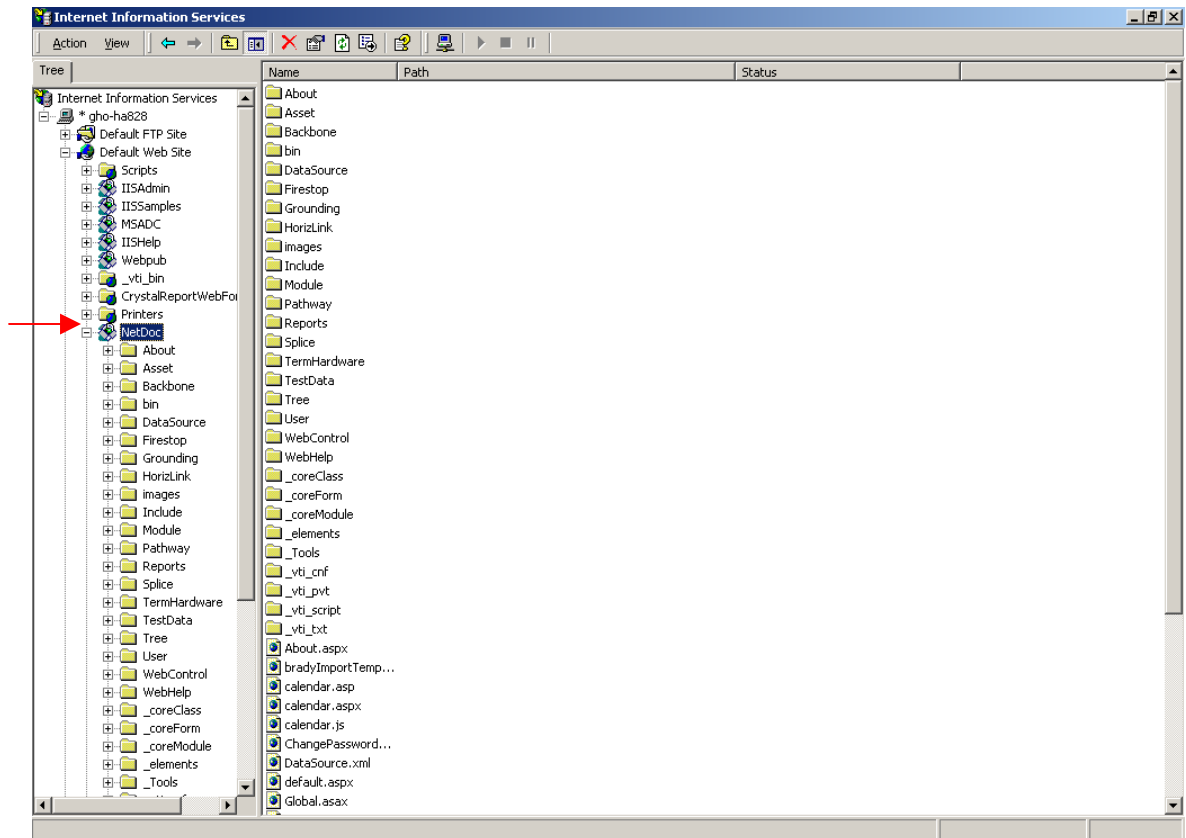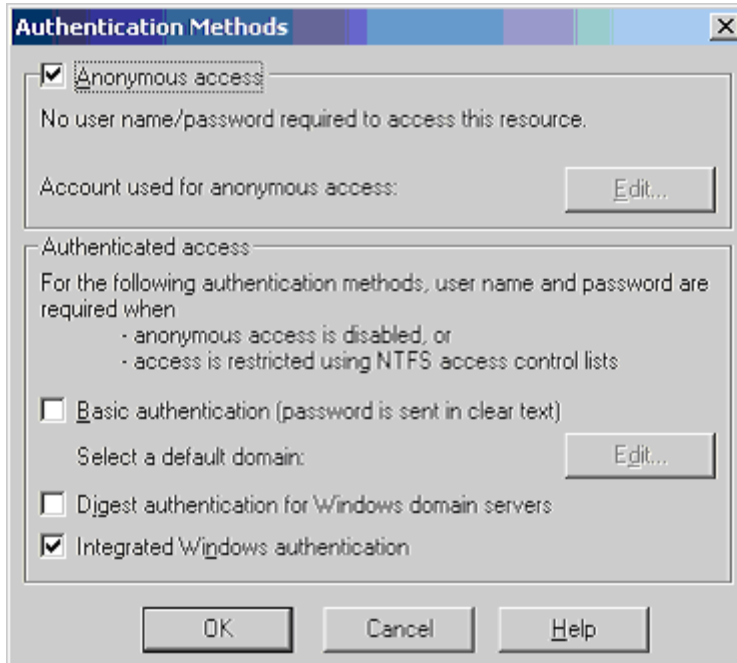
4. In the NetDoc Properties dialog box, ensure that the **Application Protection** setting is set to **Low**.
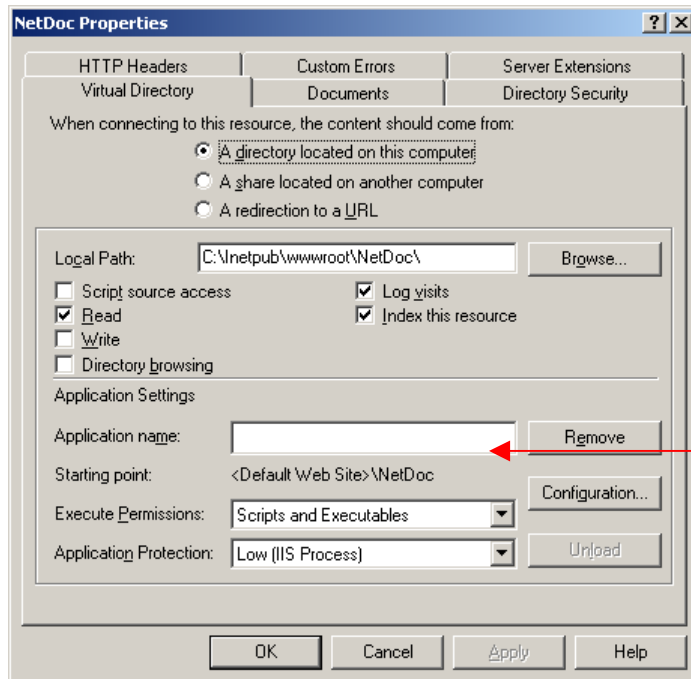
5. Click the Directory Security Tab.
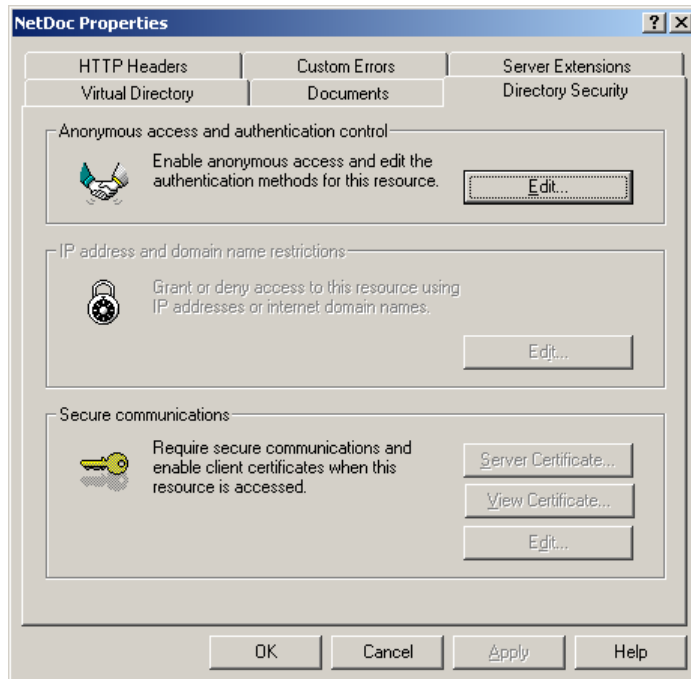
6. In the **Anonymous access and authentication control** section, click the **Edit** button. The Authentication Methods dialog box appears.

(Windows 2000 Server example)

7. Make sure **Anonymous access** is checked as well as Integrated **Windows authentication**. Everything else can remain as is. Click **OK**.

8. Click **OK** again to close the NetDoc Properties dialog box.

9. Close the Internet Information Services window. You are now finished configuring IIS security.

Connect to the SQL Server Database

Note: It's important to disable any pop-up blocker programs. Netdoc may not function properly with pop-up blockers.

1. Launch **Internet Explorer**.

2. Type *http://(Server Name)/Netdoc* in the browser address field.

3. Press **Enter** or click the **Go** button in the browser. The Netdoc login website should appear.

4. Click **Select Database**. A pop up window titled **Netdoc Data Source** should appear.

5. Enter the name of the **Server**, **Database**, **User name** (see [Add Database User to SQL](#)), and **Password**. This is the information you noted earlier when you created the SQL server database and added the database user to the server.

6. Click **Connect**. The **Netdoc Data Source** dialog box closes and the Home Page appears, displaying the connected database.

Create a Contact (optional)

Note: You will need to create a contact before you configure how users log in. Contacts will be users who will be able to view the content of Netdoc, and Administrators who are able to add, edit, and delete the information.

1. In Internet Explorer, go to the *NetDoc* Home Page and click **Companies** under the **Setup** menu on the right. The Company Info page appears.

2. Click the **Add** button and a white text box will appear.

3. Enter the **Company Name**, **Address**, **City**, **State**, **Zip Code**, and **Phone Number**.

4. Click the **Save** button and close the Window by pressing the "x" on the top right hand corner.

5. Click the **Launch Application** link and the cable infrastructure screen will appear.

6. Select **Contacts** from the drop-down menu on top.

7. Click the **Add** button.

8. Your first user should be the over all administrator of the product. He will be the one responsible for maintaining access to Netdoc. Enter the information for the contact.

9. Create a **User Name** and **Password**.

10. Check the **Administrator** check box.

11. Click **Save**.

12. You can now use this new user login information to access Netdoc. Repeat steps 6-11 for each administrator.

13. Close Internet Explorer.

Security Configuration

This section is to configure the way you log into Netdoc. There are three basic options; No login (**none**), Netdoc controlled login (**forms**), Windows/Netdoc control login (**windows**). For ease of use, Brady suggests using the **Forms** option for **Authorization Mode** and **Authentication**. This will allow *NetDoc* to manage the passwords.

Configuring security requires three settings to reflect the correct mode: **Authorization Mode**, **Authentication**, and **User Access**. These settings already exist in lines in the

Web.Config file shipped with the software. (The file can be found in the root of the web where it was installed.)

To access the settings, open the **Web.Config** file using Notepad or any other text editor and locate the lines listed below. See [Setting Security](#) for a description of settings and user types and instructions for accessing and implementing settings correctly.

NOTE: *Authentication Mode* values are case sensitive.

1. Authorization Mode:
<add key="AuthMode" value="xxx" />
Valid values for xxx are: None, Forms, Windows

2. Authentication:
<authentication mode= "xxx"/>
Valid values for xxx are: None, Forms, Windows

3. User access:
a) Setting for None/Forms:
<allow users="*" /> <!-- Allow all users -->
<!--deny users="?" /--> <!-- Deny all users -->

b) Setting for Windows
<!--allow users="*" /--> <!-- Allow all users -->
<deny users="?" /> <!-- Deny all users -->