

# KwikTag Server Installation Process

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## KwikTag 3.6 Installation Guide

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Ver 3.4

February 27, 2008

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3.3	J Wright	10/15/07	Additional updates for 3.6
3.4	J Wright	2/27/08	Added information regarding removing support for installations on domain controllers and SBS that was missing in initial release of the install guide

## Introduction

The following comprehensive build document includes all required steps to build a KwikTag system. This includes step by step instructions to install the operating system, OS/KwikTag dependencies, KwikTag software, scanners, etc. There is also an advanced section for troubleshooting and configuration. The intention of this document is provide all the necessary information to successfully install KwikTag by following through the entire document, section by section.

However, section 1 is a minimum requirements checklist, outlining the basic configuration required for KwikTag to function properly. Any existing server or standard build must meet the minimum requirements outlined in section 1 to be a supported KwikTag configuration. For new builds, it is recommended to follow the step by step build instructions (starting in section 2) to ensure a successful, supported KwikTag installation.

**Installations on 64-bit operating systems, SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported.**

The complete build instructions start in section 2. The high level steps are as follows:

- Install Operating System
- Install/configure IIS
- Install SQL Server
- Install Prerequisites
- Install KwikTag
- Post Install Configuration
- Install KwikTag Options
- Configure Input Devices

## 1 KwikTag Minimum Server Requirements

The following requirements are offered for an existing server or cases where the detailed build instructions cannot be followed. These are the minimum configuration settings required for KwikTag to function on Windows Server 2003 (32-bit only).

**Installations on 64-bit operating systems, SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported.**

## 1.1 Windows Server 2003

### **Installations on 64-bit operating systems, Domain Controllers, and Microsoft Small Business Server are not supported.**

These are the minimum configuration settings required for KwikTag to function on Windows Server 2003. For detailed instructions for installing and configuring a Windows Server 2003 machine please refer to the following sections:

Section 13.1 – Windows Server 2003 OS Installation

Section 13.2 – Internet Information Services 6.0 Setup

Section 14.1 – Installing and Configuring Microsoft SQL Server

Section 15 – Installing KwikTag Prerequisites

### **Minimum required windows services**

#### **KwikTag works with default Windows installed services.**

- Com + Event System
- Com + System Application
- Cryptographic Services
- DHCP Client
- Distributed File System
- Distributed Transaction Coordinator
- DNS Client
- Error Reporting Service
- Event Log
- FTP Publishing Service (only if using FTP scan device)
- HTTP SSL (IIS dependency)
- IIS Admin Service (installed by IIS)
- All KwikTag Services (installed by KwikTag)
- Logical Disk Manager
- MSSQLSERVER (installed by SQL 2000)
- Net Logon
- Network Connections
- Network Location Awareness (NLA)
- NS\$KwikTag (installed by KwikTag)
- NTLM Security Support Provider
- Plug and Play
- Protected Storage
- Remote Procedure Call (RPC)
- Security Accounts Manager
- Server
- SNMP
- SQLSERVERAGENT (installed by SQL 2000)
- System Event Notification
- Task Scheduler
- TCP/IP NetBIOS Helper
- Terminal Services
- Windows Management Instrumentation
- Windows Time
- Workstation

- World Wide Web Publishing Service (installed by IIS)

### **Required local accounts for KwikTag**

- KwikTag requires a local windows user account that must be added to the local Administrators group and have "logon as batch job" and "logon as a service". The recommended name for this account is ktuser. Verify there is no Domain or local policy that overrides these settings.
- IUSR\_Servername and IWAM\_Servername must have "Access this computer from a network", "logon locally", and "logon as a batch job". Verify there is no Domain or local policy that overrides these settings. (Note: Both accounts are created with these rights by default during the IIS installation)

### **Minimum required file system permissions**

#### **KwikTag works with the default Windows Server 2003 installed permissions.**

Default Windows 2003 permissions are already more secure than previous default Windows permissions, but if advanced security is required, see the KwikTag Security section (16.1) for further security measures.

### **Internet Information Services 6.0 requirements**

#### **Minimum Required IIS Components**

- Application Server [Details]
  - Application Server Console
  - ASP.NET
  - Enable network COM+ access
  - Internet Information Services (IIS) [Details]
    - Common Files
    - FTP (only if using FTP Scan device)
    - Internet Information Services Manager
    - World Wide Web Service [Details]
      - Active Server Pages
      - World Wide Web Service

#### **Minimum Required IIS Configuration**

- Disable session state
- Anonymous access only

### **SQL Server requirements**

#### **NOTE: SQL server clusters are not supported.**

- SQL Server 2005 Standard
- Mixed Mode authentication required
- SQL Auth User Account with the following permissions
  - Member of the System Administrators Role
  - Database Access – master database (public role needed)
  - Database Access – model database (public role needed)
  - Database Access – msdb database (public role needed)
- Supported SQL Collations

- SQL\_Latin1\_General\_CP1\_CI\_AS
- Latin1\_General\_CI\_AS
- French\_CI\_AS

**Service Pack Requirements**

- Windows Server 2003 Service Pack 2
- SQL Server 2005 Service Pack 2

**Microsoft .NET Framework Requirements**

- 1.1 Framework (built-in)
- 2.0 Framework

**Microsoft Internet Explorer Requirements**

- Internet Explorer 7.0

## 2 Required Materials

- ❑ Windows Server 2003 (32-bit) Standard CD
- ❑ Windows Server 2003 Service Pack 2
- ❑ SQL Server 2005 (32-bit) Standard CD
- ❑ SQL Server 2005 Service Pack 2
- ❑ KwikTag 3.6 Installation CD

## 3 KwikTag Server Configurations

The majority of Digital Filing KwikTag installations are installed as single server configurations. This document addresses these single server configurations as well as an installation performed on multiple servers. When selecting a configuration install the corresponding prerequisites as defined in section 4.

**Installations on 64-bit operating systems, SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported.**

- ❑ Single Server Configuration (KwikTag Workgroup, Departmental, or Enterprise)
  - All features installed on the same server
- ❑ Multi Server Configuration – (For Custom configurations)  
[Note: Servers can be installed in any combination of the 4 Core features listed below]
  - Web/Lib Server
  - Database Server
  - DAL Server
  - Paper Gateway Server

When installing in a multi server configuration it is recommended that you install in the following order:

- Web/Lib Server
- DAL Server
- Paper Gateway Server
- Database Server

You can install in any order, but if you install the Database feature prior to installing the DAL feature, you should use the “**Bypass installation of SQL Notifications Service**” option in the installation to avoid getting any errors related to modifying the SQL Notification services databases, and the steps will need to be run manually later. (Section 17.7)

**In KwikTag 3.6 the option to “Bypass installation of SQL Notifications Service” is checked by default. If you leave this option checked you will need to install the notification service instance manually in a post install configuration step.**

## 4 Install Operating System and Applications

- Windows Server 2003 (section 13.1)
  - **Installations on 64-bit operating systems, Domain Controllers, and Microsoft Small Business Server are not supported.**
- Install and Configure Internet Information Services 6.0 (Section 13.2)
- Install and Configure Microsoft SQL Server 2005 Standard (Section 14.1)
  - **NOTE: SQL server clusters are not supported.**

## 5 Install KwikTag Feature Prerequisites

- Single Server

For a Server 2003 Server:

- **Installations on 64-bit operating systems, Domain Controllers, and Microsoft Small Business Server are not supported..**
- IIS 6.0 (refer to section 13.2 for more detailed steps for installing IIS 6)
- Enable ASP .NET
  - Open Control Panel -> Add Remove Programs -> Windows Components
  - Select Application Server and click details
  - Check the checkbox for ASP.NET and click OK
  - Apply the changes and reboot if necessary
- Install Microsoft .NET Framework 2.0
- Install Microsoft Internet Explorer 7.0
- SQL Server 2005 Standard (refer to section 14 for more detailed steps for installing SQL Server)
  - **Installations on 64-bit operating systems, SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported..**
  - Install SQLXML and SQL Notification Services – **SQLXML and SQL Notification Services are a part of the Microsoft SQL Server installation package** (refer to section 15 for more detailed steps for installing prerequisites)

- Multi Server
  - 1. Web/Lib Server
    - IIS 6.0
    - Install Microsoft .NET Framework 2.0
    - Install Microsoft Internet Explorer 7.0
  - 2. Database Server
    - SQL Server 2005 Standard (64-bit SQL is supported if the SQL server is separate from any other KwikTag servers)
      - **Installations on SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported.**
    - Install Microsoft .NET Framework 2.0
    - Install Microsoft Internet Explorer 7.0
    - SQL Server 2005 Standard (refer to section 14 for more detailed steps for installing SQL Server)
      - **NOTE: 64-bit SQL server is supported if the SQL server is separate from any other KwikTag server. SQL server clusters are not supported.**
      - Install SQLXML and SQL Notification Services – **SQLXML and SQL Notification Services are a part of the Microsoft SQL Server installation package** (refer to section 15 for more detailed steps for installing prerequisites)
  - 3. DAL Server
    - IIS 6.0
    - Install Microsoft .NET Framework 2.0
    - Install Microsoft Internet Explorer 7.0
    - Install SQLXML and SQL Notification Services - **SQLXML and SQL Notification Services are a part of the Microsoft SQL Server installation package** (refer to section 15 for more detailed steps for installing prerequisites)
  - 4. Paper Gateway Server
    - IIS 6.0
    - Install Microsoft .NET Framework 2.0
    - Install Microsoft Internet Explorer 7.0
  - 5. Clients
    - Install Microsoft Internet Explorer 7.0

## 6 KwikTag Digital Filing Server Installation

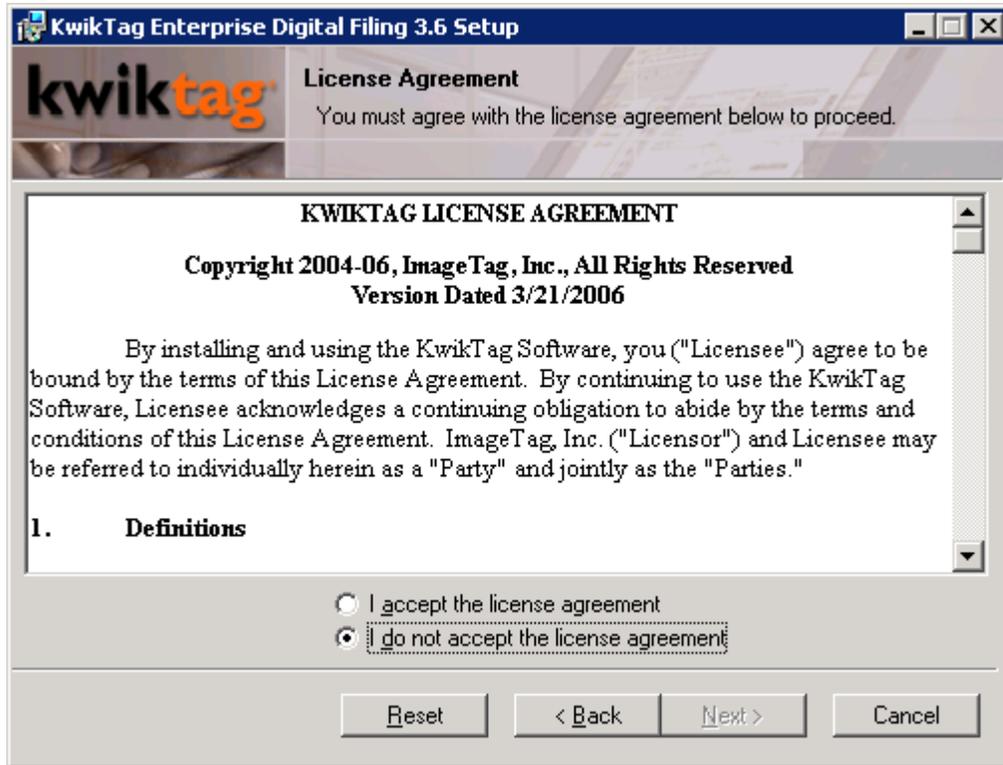
When installing in a multi server configuration it is recommended that you install in the following order:

- Web/Lib Server
- DAL Server
- Paper Gateway Server
- Database Server

You can install in any order, but if you install the Database feature prior to installing the DAL feature, you should use the **"Bypass installation of SQL Notifications Service"** option in the installation to avoid getting any errors related to modifying the SQL Notification services databases, and the steps will need to be run manually later.

**In KwikTag 3.6 the option to "Bypass installation of SQL Notifications Service" is checked by default. If you leave this option checked you will need to install the notification service instance manually in a post install configuration step.**





## 6.1 Company Information Screen

KwikTag Enterprise Digital Filing 3.6 Setup

**kwiktag** Company Information  
Enter the following information to personalize your installation.

Full Name:

Organization:

Customer Code:

Install Key:

Enter your user and organization information along with the provided Customer Code and Install Key. Contact KwikTag Customer Support at 1-887-KWIK-111 if you need assistance.

< Back   Next >   Cancel

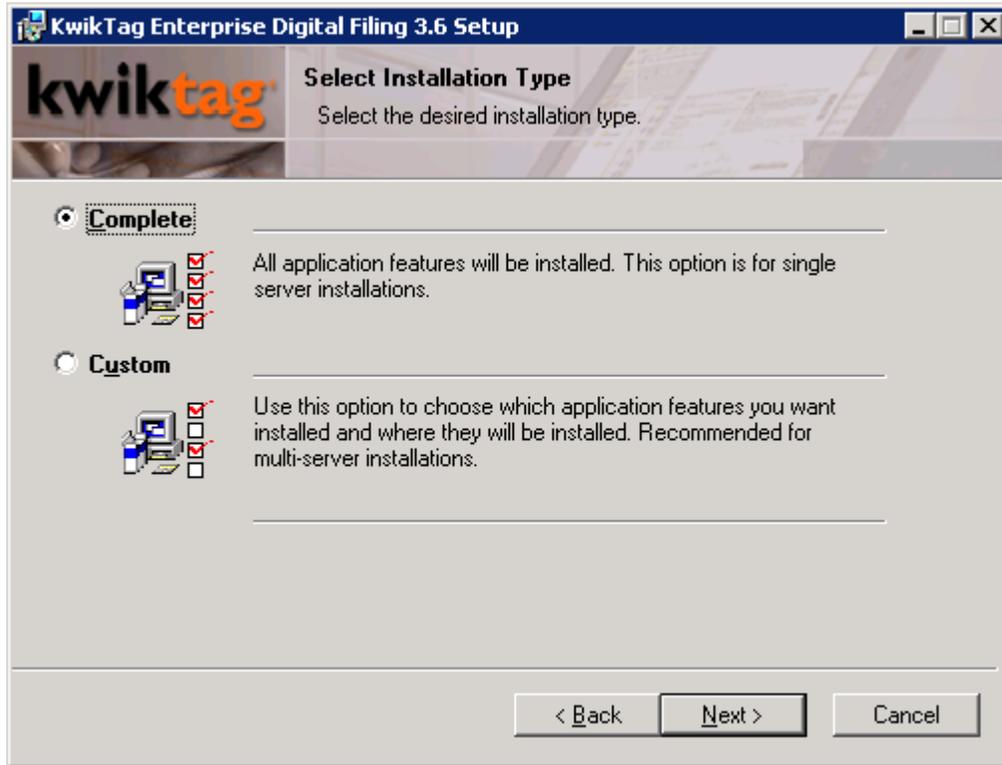
**Full Name:** This should be pre-filled and is for informational purposes.

**Organization:** The name of the Organization using the KwikTag Server, this is also pre-filled from the Windows Server.

**Customer Code:** 3 segment alphanumeric code assigned by ImageTag, Inc.

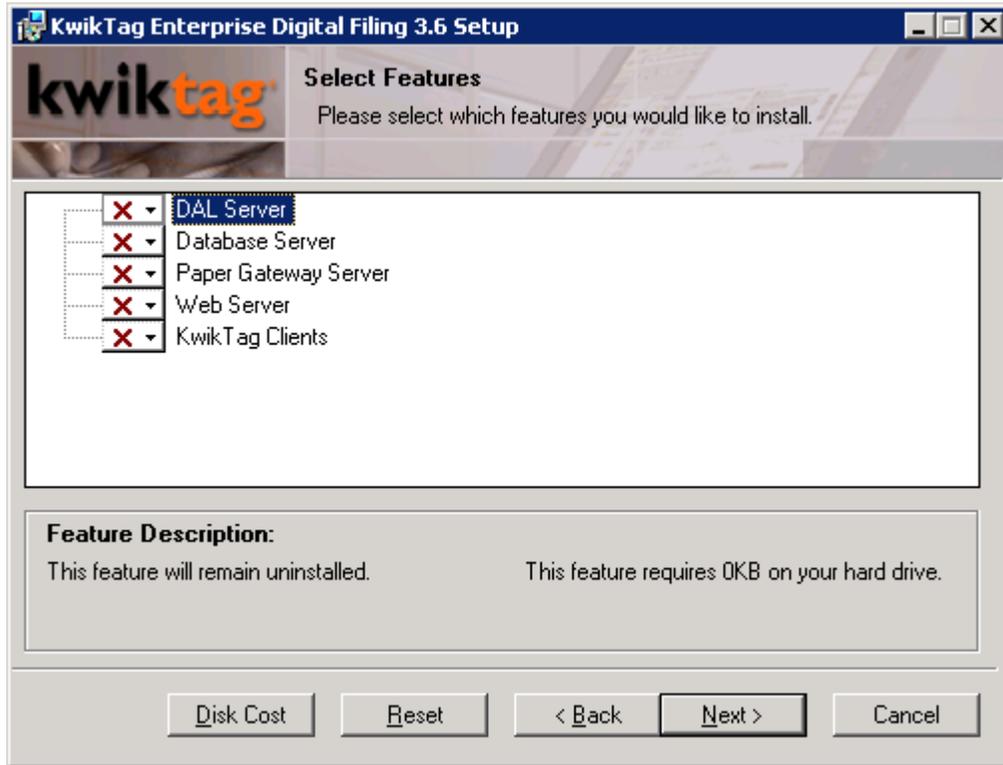
**Install Key:** 25-digit alphanumeric code assigned by ImageTag, Inc.

## 6.2 Installation Type

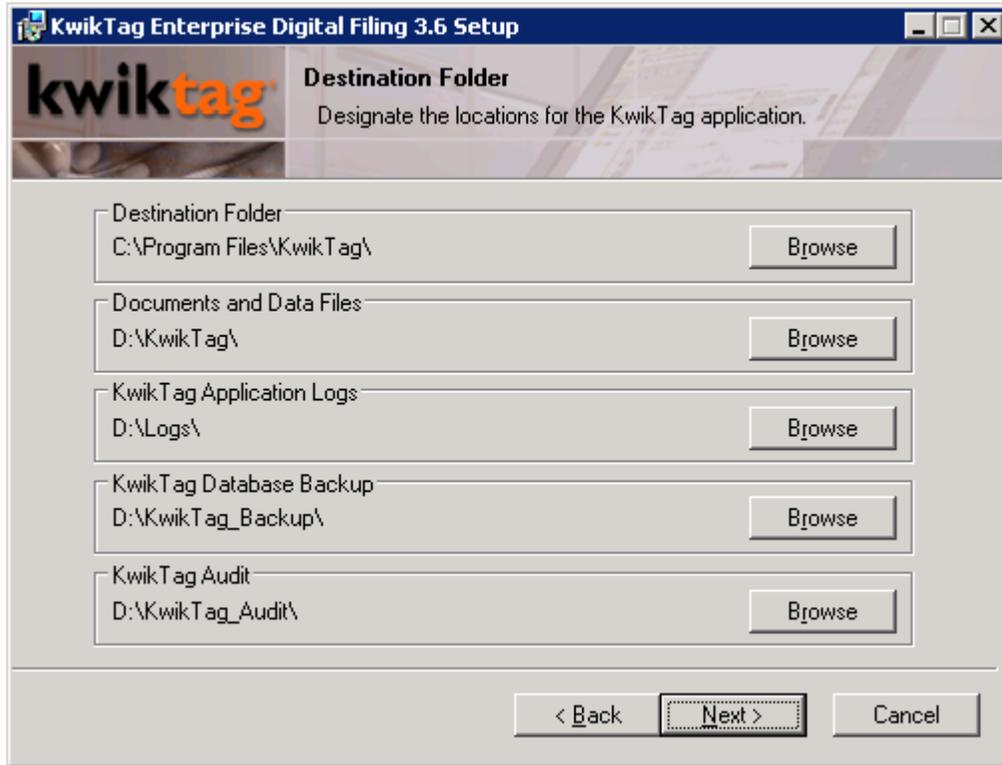


- For an installation on a single server run the Complete Install
- For an installation on multiple servers run the Custom Install and install the features on their corresponding boxes. For example in a dual server configuration install the Web/Lib Server, Database Server, DAL Server, and Admin Client features on one box and install only the Paper Gateway Server feature on another box.

### 6.3 Select Feature

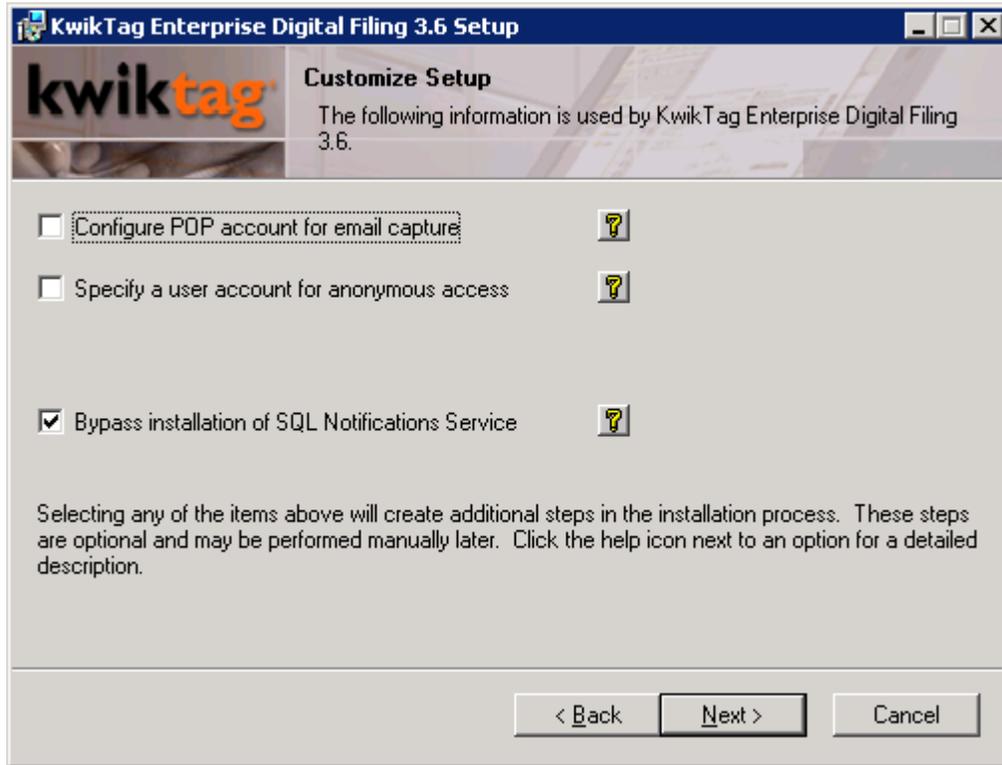


## 6.4 Destination Folders



Verify the destination folders listed on this screen. KwikTag supports various drive configurations, but defaults to C:\ for Program files and the drive with the most available space for Data and Configuration files.

## 6.5 Customize Setup Screen

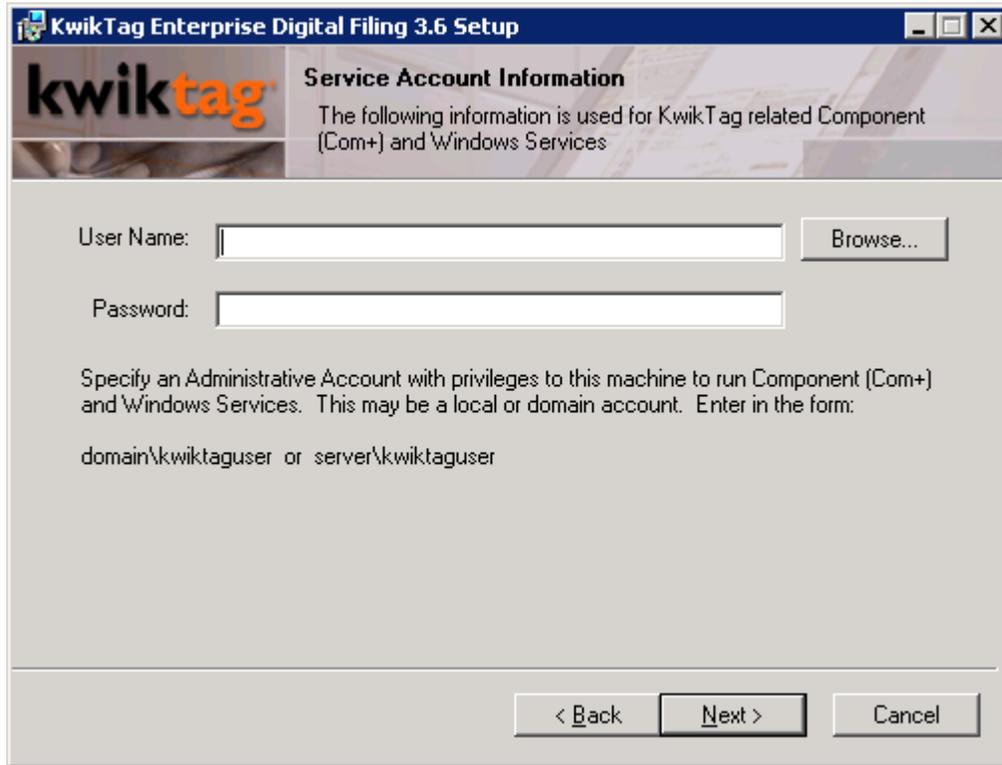


**Configure POP Account for E-mail Capture:** This option will enable the dialogs for configuring a POP Account during installation. The account is required to capture images sent from scan-to-email devices such as digital copiers. A KwikTag Service will monitor the account for incoming images and send them to the Paper Gateway for processing.

**Specify a user account for anonymous access:** This option, when selected, will allow the user to specify an account to use for Com Plus Roles in place of the IUSR account. Use this option if you are using an account other than IUSR in IIS for Anonymous Access for the KwikTag Website. This option will be disabled when installing on a Windows 2000 Server, or if the user is not installing a feature that can use this functionality.

**Bypass installation of SQL Notifications Service:** This option will bypass the setup of the KwikTag SQL Notifications Service during installation. Use this option only if you have specific requirements to change the parameters of the SQL Notifications install. In this case the installation program will copy the required files locally to run manually after the installation.

## 6.6 Service Account Information Screen



The screenshot shows a Windows-style dialog box titled "KwikTag Enterprise Digital Filing 3.6 Setup". The main heading is "Service Account Information". Below the heading, it states: "The following information is used for KwikTag related Component (Com+) and Windows Services".

There are two input fields: "User Name:" followed by a text box and a "Browse..." button, and "Password:" followed by a text box.

Below the input fields, there is a paragraph of instructions: "Specify an Administrative Account with privileges to this machine to run Component (Com+) and Windows Services. This may be a local or domain account. Enter in the form: domain\kwiktaguser or server\kwiktaguser".

At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

**User Name:** The account that will run all KwikTag services and Com+ Packages. It may be a local or domain account, but it must have local admin rights. Standard: servername\ktuser, the account must be entered with the server name (local) or domain name (domain) before the account name. (i.e. KwikTag\Administrator)

**Password:** The password for the user account.

## 6.7 KwikTag Web Site Information Screen

**KwikTag Enterprise Digital Filing 3.6 Setup**

**kwiktag** **KwikTag Web Site Information**  
Define a new Microsoft IIS Web site.

**Web Site Settings**

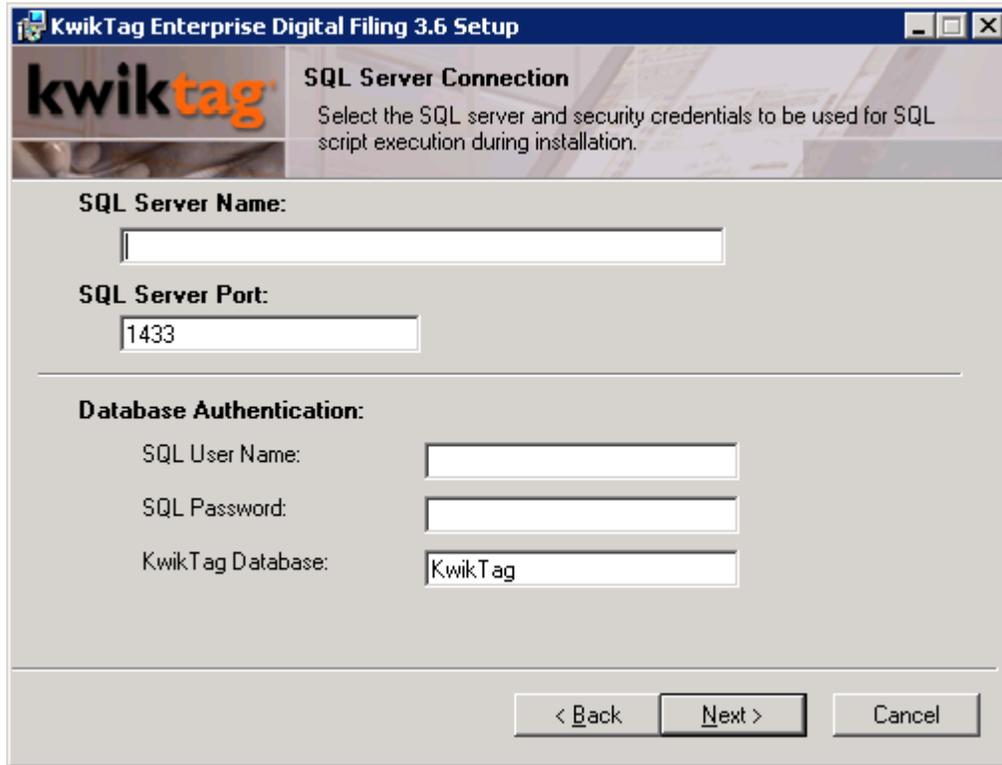
Description  ICP Port   
IP Address  SSL Port

< Back   Next >   Cancel

**IP Address:** The IP address to be assigned to the KwikTag website.

**NOTE:** If you plan to use windows authentication and the server has multiple IP Addresses and web sites, the IP address used for the KwikTag website **MUST** resolve to the NETBIOS name of the server in order for windows authentication to work.

## 6.8 SQL Server Connection Screen



The screenshot shows a Windows-style dialog box titled "KwikTag Enterprise Digital Filing 3.6 Setup" with a sub-header "SQL Server Connection". The sub-header includes the KwikTag logo and the instruction: "Select the SQL server and security credentials to be used for SQL script execution during installation." The form contains the following fields:

- SQL Server Name:** An empty text input field.
- SQL Server Port:** A text input field containing the value "1433".
- Database Authentication:** A section containing three fields:
  - SQL User Name:** An empty text input field.
  - SQL Password:** An empty text input field.
  - KwikTag Database:** A text input field containing the value "KwikTag".

At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

**SQL Server Name:** The name of the Server that the KwikTag database will be installed on. Microsoft SQL Server must be running on the KwikTag Database Server.

**SQL Server Port:** The port number that SQL Server is running on. By default this is 1433.

**SQL User name:** The standard sa account can be used, but this may be any SQL account with enough rights to access and run all components in the KwikTag database.

**SQL Password:** The password for the SQL user account.

**Database Name:** The name of the database to be used for the KwikTag application. Standard is KwikTag, but may be any supported SQL name.

## 6.9 Configuration Screen

**KwikTag Enterprise Digital Filing 3.6 Setup**

**Configuration**  
Information for configuring KwikTag's Notification and VeriTag Services.

SMTP Server:

Admin Email Address:

Export Server:

eCover Destination:

Provide the SMTP server name relaying messages from the KwikTag Server. System generated e-mails come from the KwikTag Administrator, enter an appropriate email address.  
Enter the name of the KwikTag Server as the Export Server for single server installs; enter location of DAL for multi-server installs.  
eCovers act as cover sheets and when printed show the user the fax number, or e-mail address to send their documents (Optional).

< Back   Next >   Cancel

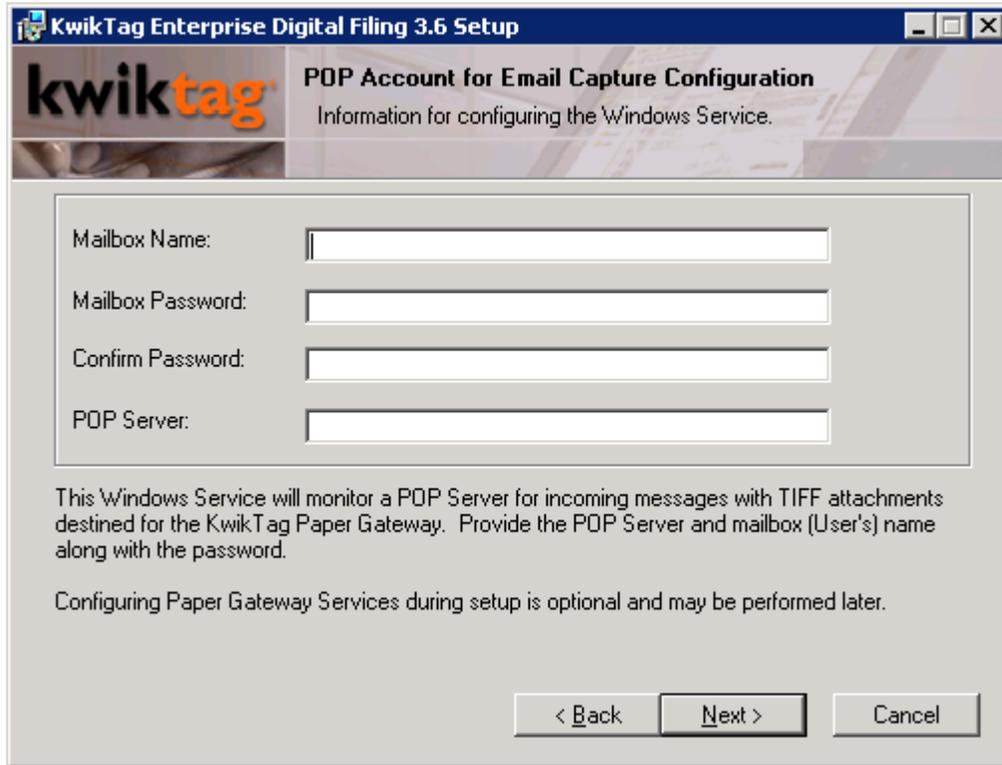
**SMTP Server:** Enter the DNS name that will be used to send KwikTag system e-mails.

**Admin Email Address:** Enter the email address to be used for the KwikTag Administrator account. This address will be the used for the default From address for all email notifications.

**Export Server:** In a multi-server config this is the server with the DAL feature installed, in a single server config it is the KwikTag Server.

**eCover Destination:** This is the phone number, or email address that will be displayed on e-Cover sheets. This is an optional field and, if left blank no phone number or email address will be displayed on e-Cover sheets.

## 6.10 POP Account for Email Capture Configuration Screen



The screenshot shows a Windows-style dialog box titled "KwikTag Enterprise Digital Filing 3.6 Setup". The main heading is "POP Account for Email Capture Configuration" with the subtitle "Information for configuring the Windows Service." Below the heading is the KwikTag logo. The dialog contains four input fields: "Mailbox Name:", "Mailbox Password:", "Confirm Password:", and "POP Server:". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Mailbox Name:

Mailbox Password:

Confirm Password:

POP Server:

This Windows Service will monitor a POP Server for incoming messages with TIFF attachments destined for the KwikTag Paper Gateway. Provide the POP Server and mailbox (User's) name along with the password.

Configuring Paper Gateway Services during setup is optional and may be performed later.

< Back   Next >   Cancel

**Mailbox Name:** Enter the name of the mailbox to be monitored for the Email Input Service.

**Mailbox Password:** Enter the password for the mailbox above.

**Confirm Password:** The password entered in the Confirm Password dialog will be compared to the previous field to verify that they match. The Next button will not become enabled until the fields match and the user Tabs out of the Confirm Password field.

**POP Server:** Enter the name of the POP server where the mailbox exists.

## 6.11 Anonymous User Account Information Screen

**KwikTag Enterprise Digital Filing 3.6 Setup**

**kwiktag** **Anonymous User Account Information**

The following logon information is used for KwikTag related Component (Com+) Service creator owner roles.

User Name:

Password:

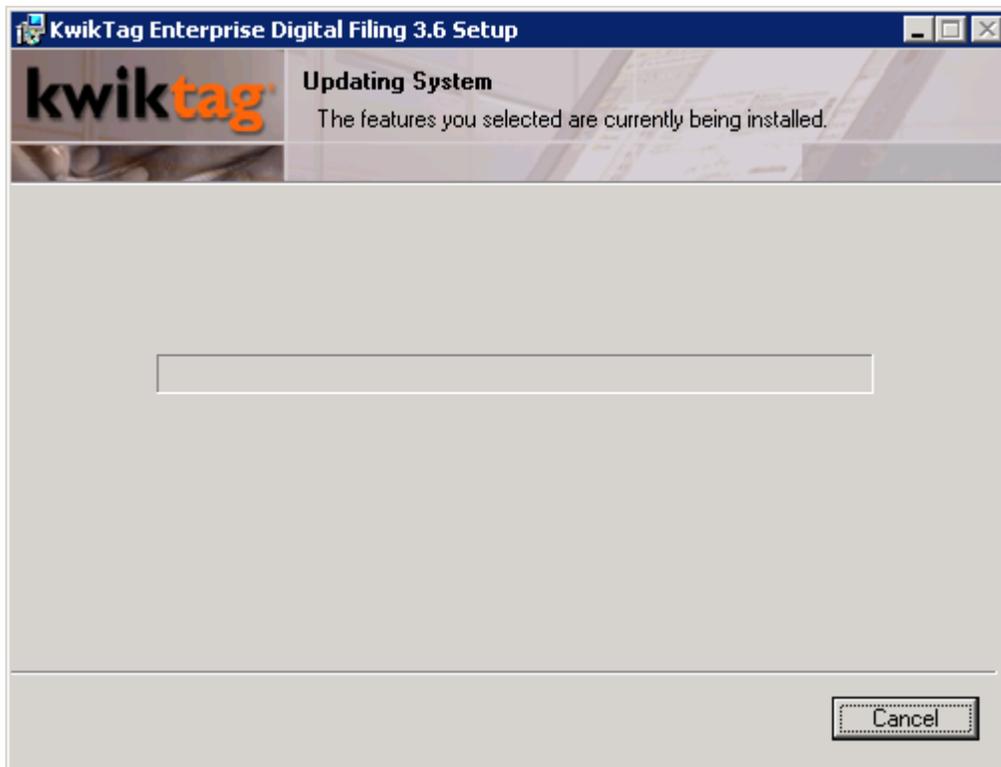
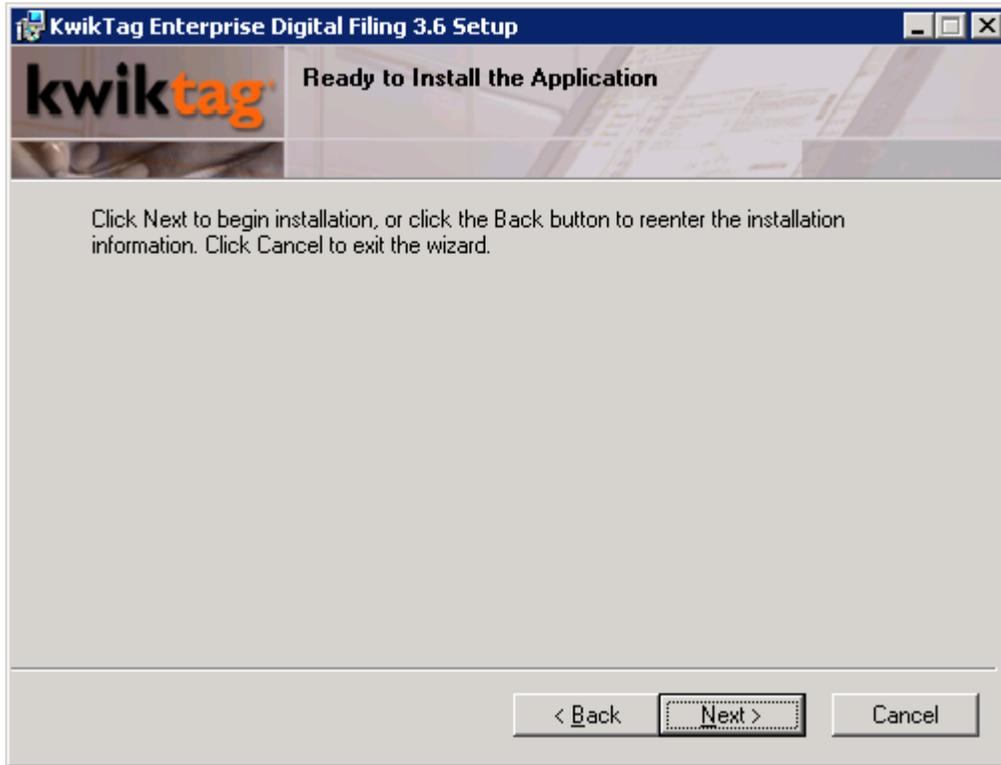
Specify a windows account that is used for anonymous access in IIS. Enter in the form:  
domain\kwiktaguser or server\kwiktaguser

< Back    Next >    Cancel

**User Name:** This is the account that is specified to be used with Anonymous access in IIS. This should only be used if you are not using the default IUSR account for Anonymous access and have already changed the settings in IIS.

**Password:** The password for the user account.

## 6.12 Beginning the Install



## 6.13 Completed Installation

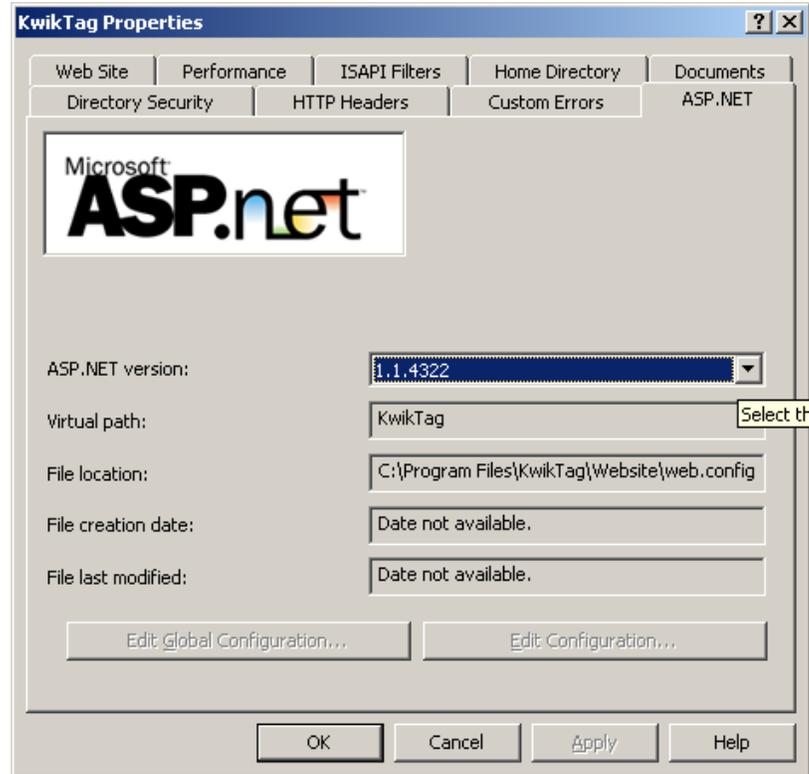


**NOTE:** After installing KwikTag you will be prompted to reboot.

## 7 Post-install Configuration

### 7.1 Single Server

NOTE: If you have installed the 2.0 or later Microsoft .NET Framework, you will need to verify that the KwikTag Website and the KwikTagWS application directory are set to use the 1.1.4322 framework. This can be changed in the ASP.NET tab in the properties of the website and the application:



ASP.NET Tab

Also, you will need to change the ASP Script timeout to 180 seconds for the KwikTag website. This can be found in the Home Directory > Configuration > Options tab in the KwikTag website properties.

1. Setting up your Global Settings
  - a. <sup>1</sup>Double click the KwikTag Admin Client icon on your desktop
  - b. <sup>2</sup>Click Tools/Global Settings
  - c. Web Settings
    - i. Add the IP or the name of your KwikTag Web Server
  - d. Paper Gateway Information

<sup>1</sup> Logon as Administrator with the default password

<sup>2</sup> Whenever you make a change to this panel you MUST click Apply for the changes to persist

- 
- i. Add the path to your import folder. It is recommended that you use a UNC path; however a local path can be used as well. The user account that is running the com+ packages should be given full control to this share.
      - ii. Add the path to your desired input folder such as device1, or another input folder of your choice. It is recommended that you use a UNC path; however a local path can be used as well. The user account that is running the com+ packages should be given full control to this share.
    - e. File Repositories
      - i. Click [New]
      - ii. Click [Browse]
      - iii. You can use any directory you want for your repository, however it is recommended that you use the D:\kwiktag\repository directory provided.
      - iv. Set the Max Size and Next Vol. Size
      - v. [Ok]
      - vi. [Apply]
  2. Install additional user licenses or options – if required
    - a. Obtain an updated customer code and install key
    - b. Run the KwikTag License Utility
  3. Apply latest KwikTag Service Pack or hot fixes available at time of install
  4. Internet Explorer Settings (Optional, but helps aid troubleshooting)
    - a. Open Internet Explorer
    - b. Tools/Internet Options
    - c. Click the Advanced Tab
    - d. Uncheck the checkbox for "Show friendly HTTP error messages" (Under Browsing)
    - e. [Apply]
    - f. [Ok]
  5. Edit the error\_email.txt file located in C:\Program Files\KwikTag\Website. Change the email address to the email address of the KwikTag system administrator.
  6. Change the KwikTag Paper Gateway com+ package activation from server to library
  7. Set the failure recovery options for the KwikTag 3.6 Job Service to 'Restart the Service'

## 7.2 Multi Server Configuration

Notes:

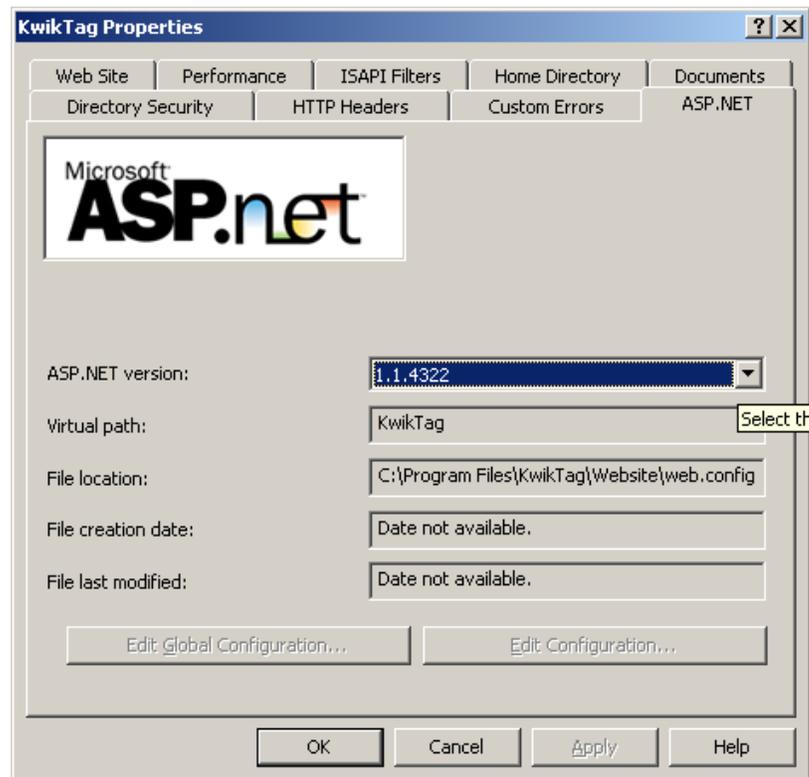
When Installing Kwiktag in a Multi Server configuration all Servers must have a local ktUser account (or other standard account) with the same password to run Com+ packages.

This section details the required steps for each Server when installed standalone. If more than one feature is installed on any Server there are two issues to address.

- a. Do not perform the same step more than once if it exists in multiple features being installed on a single Server
- b. Do not Create/Install Proxies for features that are installed on the same Server (i.e. if Web/Lib and DAL are installed on the same Server there is no need to install the DAL Proxy on the same Server for Web/Lib to function because the Com+ Package is locally installed)

### 7.2.1 Web/Lib Server

NOTE: If you have installed the 2.0 or later Microsoft .NET Framework, you will need to verify that the KwikTag Website and the KwikTagWS application directory are set to use the 1.1.4322 framework. This can be changed in the ASP.NET tab in the properties of the website and the application:



ASP.NET Tab

Also, you will need to change the ASP Script timeout to 180 seconds for the KwikTag website. This can be found in the Home Directory > Configuration > Options tab in the KwikTag website properties.

1. Create Web-Lib Proxy (To be installed on the DAL and PG Servers) – Refer to section 17 for a detailed explanation on creating com+ proxies
2. Install DAL Proxy (From DAL Server)
3. Install DBFinder Proxy (From DAL Server)
4. Setting up your Global Settings
  - a. <sup>3</sup>Double click the KwikTag Admin Client icon on your desktop
  - b. Click Tools/Security
  - c. <sup>4</sup>Click Tools/Global Settings
  - d. Web Settings
    - i. Add the IP or localhost name of your KwikTag Web Server
  - e. Paper Gateway Information
    - i. Add the path to your import folder. It is recommended that you use a UNC path; however a local path can be used as well. The user account that is running the com+ packages should be given full control to this share.
    - ii. Add the path to your desired input folder such as device1, or another input folder of your choice. It is recommended that you use a UNC path; however a local path can be used as well. The user account that is running the com+ packages should be given full control to this share.
  - f. File Repositories
    - i. Click [New]
    - ii. Click [Browse]
    - iii. You can use any directory you want for your repository, however it is recommended that you use a UNC to a share where user account that is running the com+ packages has full control and no one else has any access
    - iv. Set the Max Size and Next Vol. Size
    - v. [Ok]
    - vi. [Apply]
5. Apply latest KwikTag Service Pack or hot fixes available at time of install
6. Internet Explorer Settings (Optional, but helps aid troubleshooting)
  - a. Open Internet Explorer
  - b. Tools/Internet Options
  - c. Click the Advanced Tab
  - d. Uncheck the checkbox for "Show friendly HTTP error messages" (Under Browsing)
  - e. [Apply]
  - f. [Ok]
7. Edit the error\_email.txt file located in C:\Program Files\KwikTag\Website. Change the email address to the email address of the KwikTag system administrator.

---

<sup>3</sup> Logon as Administrator with the default password

<sup>4</sup> Whenever you make a change to this panel you MUST click Apply for the changes to persist

## 7.2.2 DAL Server

1. Create the DAL Proxy (To be installed on Web-Lib and PG Servers) – Refer to section 17 for a detailed explanation on creating com+ proxies
2. Create the DBFinder Proxy (To be installed on Web-Lib and PG Servers) – Refer to section 17 for a detailed explanation on creating com+ proxies
3. Install Web Lib Proxy (From Web-Lib Server)
4. Install additional user licenses or options – if required
  - a. Obtain an updated customer code and install key
  - b. Run the KwikTag License Utility
5. Apply latest KwikTag Service Pack or hot fixes available at time of install

## 7.2.3 PG Server

1. Configure the Paper Gateway & Paper Gateway Services as needed
  - a. If the DAL Server and Paper Gateway Server are on different machines, make sure all the Sourcename.xml log directories point to a directory that exists on both systems
2. Install DAL Proxy (From DAL Server)
3. Install DBFinder Proxy (From DAL Server)
4. Install Web Lib Proxy (From Web-Lib Server)
5. Apply latest KwikTag Service Pack or hot fixes available at time of install
6. Internet Explorer Settings
  - a. Open Internet Explorer
  - b. Tools/Internet Options
  - c. Click the Advanced Tab
  - d. Uncheck the checkbox for "Show friendly HTTP error messages" (Under Browsing)
  - e. [Apply]
  - f. [Ok]
7. Change the KwikTag Paper Gateway com+ package activation from server to library
8. Set the failure recovery options for the KwikTag 3.6 Job Service to 'Restart the Service'

## 7.2.4 Database Server

1. Apply latest KwikTag Service Pack or hot fixes available at time of install

## 8 Configuring KwikTag Services

### 8.1 Email Input Service

```
<data>
  <row>
    <service>
      <servicedata>
        <row>
          <interval>10</interval>
          <sourcelocation>D:\KwikTag\email</sourcelocation>
          <mail>
            <maildata>
              <row>
                <sourcename>EMAIL</sourcename>
                <mailbox>myKwikTag</mailbox>
                <password>emailpassword</password>
                <server>mail.mycompany.com</server>
                <joblocation>D:\KwikTag\Jobs</joblocation>
                <maxbatch>25</maxbatch>
              </row>
            </maildata>
          </mail>
        </row>
      </servicedata>
    </service>
    <trace>
      <tracedata>
        <row>
          <traceid>EmailInput</traceid>
          <loglevel>0</loglevel>
          <logtype>0</logtype>
          <loglocation>D:\Logs\EmailInput</loglocation>
        </row>
      </tracedata>
    </trace>
  </row>
</data>
```

Configuration Settings:

**Interval** – The interval, in seconds, between processing jobs.

**Sourcelocation** – The location on the file system to “pull” the images from.

**Mailbox** – The email account name for the service to check. This account must be POP3 enabled.

**Password** – The password for the email account the service is using.

**Server** – The server the service uses to check the e-mail account. For example, mail.mycompany.com. The mail server must be POP3 enabled.

**Maxbatch** – The maximum number of e-mails to process at a time.

**Traceid** – A unique name used when writing data to a log file

**LogLevel** – Controls if active logging is turned on or off. The default is 0 (off).

**Logtype** – Controls where data is logged. Valid entries for this setting are 0 (write to application event log) or 1 (log to file). The default is 0 (write to application event log).

**Loglocation** – The location on the file system for the service to write logs to when the logtype is set to 1.

Traceid and logging settings should only be modified to aid in troubleshooting issues with the service.

### 8.1.1 Configuring multiple email accounts

To configure the Email Input Capture Provider to check multiple email accounts you will need to add another row in the maildata element. This is what it would look like:

```
<maildata>
  <row>
    <sourcename>EMAIL</sourcename>
    <mailbox>myKwikTag</mailbox>
    <password>emailpassword</password>
    <server>mail.mycompany.com</server>
    <joblocation>D:\KwikTag\Jobs</joblocation>
    <maxbatch>25</maxbatch>
  </row>
  <row>
    <sourcename>EMAIL</sourcename>
    <mailbox>myKwikTag2</mailbox>
    <password>emailpassword</password>
    <server>mail.mycompany.com</server>
    <joblocation>D:\KwikTag\Jobs</joblocation>
    <maxbatch>25</maxbatch>
  </row>
</maildata>
```

The row(s) added appears here in bold. When multiple accounts are specified you will need to add more directories for the additional accounts. For example we are pulling from two accounts so there needs to be a D:\kwiktag\email\myKwikTag directory and an D:\kwiktag\email\myKwikTag2 directory and both would have their own sourcename.xml files as well as a sourcename.xml that remains in the root directory (D:\kwiktag\email)

## 8.2 Folder Input Service

```

<data>
  <row>
    <service>
      <servicedata>
        <row>
          <sourcelocation>D:\KwikTag\Input</sourcelocation>
          <joblocation>D:\KwikTag\Jobs</joblocation>
          <includesubdirectories>Yes</includesubdirectories>
          <movefilesonly>No</movefilesonly>
        </row>
      </servicedata>
    </service>
    <trace>
      <tracedata>
        <row>
          <traceid>FolderInput</traceid>
          <loglevel>0</loglevel>
          <logtype>0</logtype>
          <loglocation>D:\Logs\FolderInput</loglocation>
        </row>
      </tracedata>
    </trace>
  </row>
</data>

```

Configuration Settings:

**Sourcelocation** – The location on the file system to “pull” the images from.

**Joblocation** – The location on the file system to store the images for processing by the Job service.

**Includesubdirectories** – Search subdirectories of the Sourcelocation for more images to process. Valid entries for this setting are T or F (True or False), Yes or No, and 0 or 1 (Off or On). The default is T (True).

If includesubdirectories is used the service will only search subdirectories that are one level deep. For example, if the sourcelocation is set to D:\KwikTag\Input and includesubdirectories is set to T the service will search the D:\KwikTag\Input\subfolder1, but will not search the D:\KwikTag\Input\subfolder1\child directory.

**Movefilesonly** – Only the images will be moved, nothing else. Valid entries for this setting are Yes or No, T or F, and 1 or 0.

**Traceid** – A unique name used when writing data to a log file

**Loglevel** – Controls if active logging is turned on or off. The default is 0 (off).

**Logtype** – Controls where data is logged. Valid entries for this setting are 0 (write to application event log) or 1 (log to file). The default is 0 (write to application event log).

**Loglocation** – The location on the file system for the service to write logs to when the logtype is set to 1.

Traceid and logging settings should only be modified to aid in troubleshooting issues with the service.

## 8.3 Export Service

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <appSettings>
    <!-- This interval is how often the service must run
         This number is in minutes. -->
    <add key="onDemandInterval" value="1440" />

    <!-- The following settings of start time and endTime are
         designed to keep the service serving only between these
times
         This number is in military-time format hhmm.
         If you allow this service to run from 5pm to 6am
         you would choose startTime as 1700 and endTime as 0600
         -->
    <add key="startTime" value="0900" />
    <add key="endTime" value="1800" />

    <!-- This is the path where the Portable Respository Template
files are stored
         generally it is C:\Program Files\KwikTag\Export\Portable
Repository
         change it if the install drive of Kwiktag is other than c:
drive
         -->
    <add key="portableRepositoryTemplatePath" value="C:\Program
Files\KwikTag\Export\Portable Repository" />

    <!-- The following settings are for Internal Use Only and
         are NOT to be modified other than the developers -->
    <!-- the OrgId to be used for the Service. This should be
-900. -->
    <add key="OrgId" value="-900" />
  </appSettings>
</configuration>
```

### Configuration Settings:

**onDemandInterval** – This is how often the service should check for new export jobs to run. The default is 1440 minutes (1 day).

**startTime** – The time (in twenty-four hour format) that the service should start looking for jobs to process. The default is 0900 hours (9 A.M.).

**endTime** – The time (in twenty-four hour format) that the service should stop looking for jobs to process. The default is 1800 hours (6 P.M.).

**portableRepositoryTemplatePath** – This is the path to the portable repository files. The default is C:\Program Files\KwikTag\Export\Portable Repository

The export path is setup though the File – Export – Set Location dialog in the KwikTag Admin Client

## 8.4 Import Input Service

```
<data>
  <row>
    <service>
      <servicedata>
        <row>
          <sourcelocation>D:\KwikTag\import</sourcelocation>
          <joblocation>D:\KwikTag\Jobs</joblocation>
          <includesubdirectories>yes</includesubdirectories>
        </row>
      </servicedata>
    </service>
    <trace>
      <tracedata>
        <row>
          <traceid>ImportInput</traceid>
          <loglevel>0</loglevel>
          <logtype>0</logtype>
          <loglocation>D:\Logs\ImportInput</loglocation>
        </row>
      </tracedata>
    </trace>
  </row>
</data>
```

Configuration Settings:

**Sourcelocation** – The location on the file system to “pull” the images from.

**Joblocation** – The location on the file system to store the images for processing by the Job service.

**Includesubdirectories** – Search subdirectories of the Sourcelocation for more images to process. Valid entries for this setting are T or F (True or False), Yes or No, and 0 or 1 (Off or On). The default is T (True).

If includesubdirectories is used the service will only search subdirectories that are one level deep. For example, if the sourcelocation is set to `D:\KwikTag\import` and includesubdirectories is set to `T` the service will search the `D:\KwikTag\import\subfolder1`, but will not search the `D:\KwikTag\import\subfolder1\child` directory.

**Traceid** – A unique name used when writing data to a log file

**Loglevel** – Controls if active logging is turned on or off. The default is 0 (off).

**Logtype** – Controls where data is logged. Valid entries for this setting are 0 (write to application event log) or 1 (log to file). The default is 0 (write to application event log).

**Loglocation** – The location on the file system for the service to write logs to when the logtype is set to 1.

Traceid and logging settings should only be modified to aid in troubleshooting issues with the service.

## 8.5 KwikTag 3.6 Job Service

```

<?xml version="1.0" encoding="utf-8" ?>
<configuration>
  <configSections>
    <sectionGroup name="applicationSettings"
type="System.Configuration.ApplicationSettingsGroup, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" >
      <section
name="ImageTag.KwikTag.JobService.Process.FolderSettings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false"
/>
      <section
name="ImageTag.KwikTag.JobService.Process.KwikTagSettings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false"
/>
      <section name="ImageTag.KwikTag.JobService.Properties.Settings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false"
/>
      <section name="ImageTag.KwikTag.JobService.JobSettings"
type="System.Configuration.ClientSettingsSection, System, Version=2.0.0.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" requirePermission="false"
/>
    </sectionGroup>
  </configSections>
  <applicationSettings>
    <ImageTag.KwikTag.JobService.JobSettings>
      <setting name="runIntervalInSeconds" serializeAs="String">
        <value>5</value>
      </setting>
      <setting name="jobPath" serializeAs="String">
        <value>D:\KwikTag\Jobs</value>
      </setting>
      <setting name="inprocessPath" serializeAs="String">
        <value>D:\KwikTag\Jobs\Inprocess</value>
      </setting>
      <setting name="logPath" serializeAs="String">
        <value>D:\Logs\JobSvc</value>
      </setting>
      <setting name="failurePath" serializeAs="String">
        <value>D:\KwikTag\Jobs\Failure</value>
      </setting>
      <setting name="tempFolderPath" serializeAs="String">
        <value>D:\KwikTag\Jobs\Temp</value>
      </setting>
      <setting name="serviceName" serializeAs="String">
        <value>KwikTag 3.6 Job Service</value>
      </setting>
      <setting name="idleWaitSeconds" serializeAs="String">
        <value>5</value>
      </setting>
    </ImageTag.KwikTag.JobService.JobSettings>
  </applicationSettings>
</configuration>

```

```
<setting name="DEFAULT_INSTRUCTIONS" serializeAs="String">
  <value>DEFAULT_instructions.xml</value>
</setting>
<setting name="PGProcessTimeoutInSeconds" serializeAs="String">
  <value>600</value>
</setting>
</ImageTag.KwikTag.JobService.JobSettings>
</applicationSettings>
</configuration>
```

Configuration Settings:

**runIntervalInSeconds** – This is how frequently the job service should check for new files to process. The default is 15 seconds.

**idleWaitSeconds** – The amount of time to wait before pulling another document to process. The default is 5 seconds.

Note: You will need to change the Paper Gateway Com+ package from a server application to a library application. Also, you will need to change the failure recovery options for this service to 'Restart the Service'

## 8.6 Search Index Service (Global Search)

```

<data>
  <row>
    <service>
      <servicedata>
        <row>
          <orgid>-900</orgid>
          <!-- Index Service ID Do Not change unless
running more than one indexing service per database -->
          <indexserviceid>1</indexserviceid>

          <!-- Interval time in minutes -->
          <interval>5</interval>
          <excludesystemdrawers>False</excludesystemdrawers>
          <includearchiveddocuments>False</includearchiveddocuments>

          <!-- Set to 0 to return all results -->
          <maxfilestoretrieve>1000</maxfilestoretrieve>

          <!-- Set to 0 to not restrict the search time -->
          <timeoutseconds>5</timeoutseconds>

          <!-- The indexlocation, loglocation and
enableddebuglogging settings are updated in the database from this config
file. -->
          <!-- FolderPath where the indexed files are
stored -->
          <indexlocation>D:\KwikTag\KGSIndex</indexlocation>

          <!-- FolderPath where the search uses for temporary storage and debug
log files -->
          <loglocation>D:\Logs\KGSLogs</loglocation>

          <!-- search and index debug logging -->
          <enableddebuglogging>False</enableddebuglogging>

          <!-- IndexJob Settings -->
          <!-- Set to 0 to compress index on every interval -->
          <compressindexinterval type="Days">1</compressindexinterval>
          <createrelativepaths>False</createrelativepaths>
          <allowconcurrentaccess>True</allowconcurrentaccess>
          <indexnumbers>True</indexnumbers>
        </row>
      </servicedata>
    </service>
  <trace>
    <tracedata>
      <row>
        <traceid>ImageTag, Inc.</traceid>
        <loglevel>0</loglevel>
        <logtype>0</logtype>
        <loglocation>D:\Logs\SearchIndex</loglocation>
      </row>
    </tracedata>
  </trace>

```

```
</tracedata>
</trace>
</row>
</data>
```

Configuration Settings:

**Inteval** – The time, in minutes, between processing jobs. The default setting is five minutes.

**Excludsystemdrawers** – Exclude system drawers from global searches. Valid entries for this setting are True or False. The default setting is False.

**Includearchiveddocuments** – Include documents marked for archivel in global sarches. Valid entries for this setting are True or False. The default setting is False.

**Maxfilestoretrieve** – The maximum number of document records to search. The default setting is 1000.

**Indexlocation** – The location on the file system where indexed data is stored.

**Loglocation** – The location on the file system to tempory storage and debug log files.

**Enableddebuglogging** – Controls the logging to debug logs to the file system. Valid entries for this setting are True or False. The default setting is False.

**Compressindexinterval** – Compress indexed data on every interval. The default setting is 1 Day.

**Createrelativepaths** –

**Allowconcurrentaccess** – 9999

**Indexnumbers** –

**Traceid** – A unique name used when writing data to a log file

**LogLevel** – Controls if active logging is turned on or off. The default is 0 (off).

**Logtype** – Controls where data is logged. Valid entries f0r this setting are 0 (write to application event log) or 1 (log to file). The default is 0 (write to application event log).

**Loglocation** – The location on the file system for the service to write logs to when the logtype is set to 1.

Traceid and logging settings should only be modified to aid in troubleshooting issues with the service.

## 8.7 Connected Picklist Service

The KwikTag Connected Picklist Service is not installed by default. You can install it later by using the batch file located in C:\program files\KwikTag\services\ConnectPicklistSvc. When prompted the username must be entered in the format of server/user or domain/user.

### 8.7.1 Service Configuration

```
<?xml version="1.0" encoding="utf-8" ?>
<configuration>

    <configSections>
        <section name="customSettings"
            type="System.Configuration.NameValueSectionHandler"
allowLocation="false"/>
        <section name="enterpriselibrary.configurationSettings"
type="System.Configuration.IgnoreSectionHandler, System, Version=1.0.5000.0,
Culture=neutral, PublicKeyToken=b77a5c561934e089" />
    </configSections>

    <customSettings>
        <!-- This interval is how often the picklist service must replace
            values in the kwiktag system
            This number is in minutes. -->
        <add key="onDemandInterval" value="1440" />

        <!-- The following settings are for Internal Use Only and
            are NOT to be modified other than the developers -->
        <!-- the OrgId to be used for the Service. This should be
-900. -->
        <add key="OrgId" value="-900" />
    </customSettings>

    <enterpriselibrary.configurationSettings
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
        xmlns="http://www.microsoft.com/practices/enterpriselibrary/08-
31-2004/configuration">
        <configurationSections>
            <configurationSection
name="ImageTag.KwikTag.ConnectedPicklist.Service.Config" encrypt="false">
                <storageProvider
xsi:type="XmlFileStorageProviderData" name="XML File Storage Provider"
path="Picklist.config" />
                <dataTransformer xsi:type="CustomTransformerData"
name="Custom Transformer Provider"
type="StringSerializer.Configuration.StringTransformer,
StringSerializer.Configuration" />
            </configurationSection>
        </configurationSections>
        <keyAlgorithmStorageProvider xsi:nil="true" />
        <includeTypes />
    </enterpriselibrary.configurationSettings>
</configuration>
```

Configuration Settings:

**onDemandInterval** – The interval, in minutes, that determines how often the service will “refresh” the picklist data. The default setting is 1440 minutes (24 hours). **It is strongly recommended that the service is run more frequently than the 24 hour period.** The connected picklist services has been tested to work with up to 20,000 rows.

## 8.7.2 Picklist.config Configuration

```
<?xml version="1.0" encoding="utf-16"?>
<ImageTag.KwikTag.ConnectedPicklist.Service.Config>
  <xmlSerializerSection type="ImageTag.KwikTag.Transport.Configuration,
connectedPicklist, Version=1.0.0.0, Culture=neutral, PublicKeyToken=null">

    <connectedPicklistService xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
      <connectedPicklists>
        <connectedPicklist
          picklistName="Employees"
          oleDBConnectionString="Provider=sqloledb;Data
Source=localhost;Initial Catalog=Northwind;User Id=sa;Password=;"
          sqlStatement="SELECT LastName + ', ' + FirstName AS Expr1 FROM
Employees"
        />
        <connectedPicklist
          picklistName="Books"
          oleDBConnectionString="Provider=sqloledb;Data
Source=localhost;Initial Catalog=pubs;User Id=sa;Password=;"
          sqlStatement="SELECT title FROM titles WHERE (title LIKE
's%')"
        />
      </connectedPicklists>
    </connectedPicklistService>

  </xmlSerializerSection>
</ImageTag.KwikTag.ConnectedPicklist.Service.Config>
```

Configuration Settings:

**picklistName** – The name of the KwikTag picklist that the data will be added to.

**oleDBConnectString** – This defines how the service can make a connection to the database.

**sqlStatement** – A SQL query to retrieve data from the target database.

### NOTES:

Only the first column will be considered for the picklist value and name of the column is of no importance

**IMPORTANT:** Whenever the password to connect to another system changes, make sure the config file is updated, otherwise the service will keep retrying at the interval, which may sometimes lock up the db account.

## 8.8 Purge Service

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>

    <!-- Location on the file system of ktagPurge.exe
         This needs to be modified if the Kwiktag is installed on a
drive other than c:
         key="PurgeExeLocation" value="c:\Program
Files\KwikTag\purge\ktagPurge.exe" -->
    <add key="PurgeExeLocation" value="C:\Program
Files\KwikTag\Purge\ktagPurge.exe" />

    <!-- This interval is for the
         Base Purge options(Drawer Delete Options in the Admin Client)
         This number is in minutes. -->
    <add key="onDemandInterval" value="30" />

    <!-- The following settings are for Internal Use Only and
         are NOT to be modified other than the developers -->
    <!-- the OrgId to be used for the Purge. This should be -
900. -->
    <add key="OrgId" value="-900" />
  </appSettings>
</configuration>
```

### Configuration Settings:

**onDemandInterval** – The interval, in minutes, that determines how often the service will run a purge cycle. The default setting is 30 minutes.

## 8.9 Retention Service

```

<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>

    <!-- This interval is in minutes/hours/days/months
          based on archiveIntervalType value -->
    <add key="interval" value="7" />

    <!-- Valid options are Minutes, Hours, Days, Months for
intervalType -->
    <add key="intervalType" value="Days" />

    <!-- intervalStartTime must be in Military time of the Server's
timezone -->
    <add key="intervalStartTime" value="05:00" />

    <!-- The following settings are for Internal Use Only and
          are NOT to be modified other than the developers -->

    <!-- the OrgId to be used for the Purge. This should be -
900. -->
    <add key="OrgId" value="-900" />

    <!-- These type ids are outlined in the database. Here,
Archive Type Id = 1 is the
          Id you want to use. It is the 'Auto Archive' type
id. If a drawer is set to
          delete archive documents, this setting will insure
that they are removed. -->
    <add key="archiveTypeId" value="1" />

    <!-- This setting allows the Archive type to be rerun, not
just run once as most purge
          functions. -->
    <add key="rerunArchive" value="true" />

    <!-- This is how often the system will check the time on
the first day to determine whether
          the Archive should run and then set the
interval to run on that period. -->
    <add key="timeCheckInterval" value="1" />

  </appSettings>
</configuration>

```

---

Configuration Settings:

**Interval** – The interval that determines how often the service will run a check on retention data. The default setting is 7.

**Intervaltype** – The type of interval to use. Valid settings are Minutes, Hours, Days, and Months. The default setting is Days.

**Intervalstarttime** – The time when the service will run the check on retention data based on a 24:00 hour clock. The default setting is 05:00 (5 am).

**Archivetypeid** – The type of archive documents to process. The default setting is 1.

**Rerunarchive** – This setting allows archive purge actions to run multiple times. The default setting is true.

**Timecheckinterval** – This is how often the system will check the time, on the first day, to determine whether the Archive should run and then set the interval to run on that period. The default setting is 1.

## 8.10 WebSession Cleaner Service

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>

    <!-- ServiceInterval is in Minutes -->
    <add key="ServiceInterval" value="1" />

    <!-- RemoveFilesHoursOld is the number of hours ago
         that the files are to be removed.
         e.g. 168 hours = 1 week ago, so all files that
         are a week old and older will be removed. -->
    <add key="RemoveFilesHoursOld" value="168" />

  </appSettings>
</configuration>
```

Configuration Settings:

**Serviceinterval** – The interval, in minutes, that determines how often the service will run a check on web session data. The default setting is 1.

**Removefilehoursold** – Remove web session files that are at least x hours old. The default setting is 168 hours (7 days).

## 8.11 Sourcename.xml

```

<?xml version="1.0" encoding="ISO-8859-1"?>
<data>
  <row>
    <queuetypeid>DocDiscriminator</queuetypeid>
    <source>
      <sourcedata>
        <row>
          <sourcename>FOLDER</sourcename>
          <deviceserver>Scanner</deviceserver>
          <deletesimilarfiles>Yes</deletesimilarfiles>
          <timespan>00:00:00</timespan>
        </row>
      </sourcedata>
    </source>
    <imageinstr>
      <imageinstrdata>
        <row>
          <ocrautorotate>Yes</ocrautorotate>
          <ocrpagedes skew>Yes</ocrpagedes skew>
        </row>
      </imageinstrdata>
    </imageinstr>
    <autoindex>
      <autoindexdata>
        <row>
          <username>Administrator</username>
          <password></password>
          <autoindexinstructions>
            <autoindexinstructionsdata>
              <row>
                <progid>ktagAIDefault.AIDefault</progid>
                <autoindexinstruction>
                  <autoindexinstructiondata>
                    <row>
                      <drawer>Lost and Found</drawer>
                    </row>
                  </autoindexinstructiondata>
                </autoindexinstruction>
              </row>
            </autoindexinstructionsdata>
          </autoindexinstructions>
        </row>
      </autoindexdata>
    </autoindex>
    <deliveryinstructions>
      <deliveryinstr>
        <deliveryinstrdata>
          <row>
            <queuetypeid>ToKwiktag</queuetypeid>
            <deliverydata>
              <deliveryprovider>
                <deliverytypeid>1</deliverytypeid>
              </deliveryprovider>
            </deliverydata>
          </row>
        </deliveryinstrdata>
      </deliveryinstr>
    </deliveryinstructions>
  </row>
</data>

```

```

        <name>ToKwiktag</name>
      </deliveryprovider>
    </deliverydata>
  </row>
</deliveryinstrdata>
</deliveryinstr>
</deliveryinstructions>
<barcodesearch>
  <barcodesearchdata>
    <row>
      <symbology>I2OF5</symbology>
      <thispageonly></thispageonly>
      <requirecheckdigit>Y</requirecheckdigit>
      <barcodethreshold>20</barcodethreshold>
      <!-- spotfilter values: blank for default, 0=no filter, 1=1x1
filter, 2=2x1 filter. Most are 1, Oce 3165 uses 2.
-->
      <spotfilter></spotfilter>
      <!-- orientation values: blank for default, 0=Horizontal only,
1=Vertical only, 2=Horizontal and vertical, 3=Horizontal with significant
skew, 4=Vertical with significant skew, 5=Vertical and horizontal with
significant skew.
-->
      <orientation></orientation>
      <!-- quality values: blank for default or 0 thru 10. Zero default,
1 is worst image quality, 10 is best (theoretically). Some guidelines are:
1=FAX input, 10=First generation print, 7=2nd generation copy, 4=Microfilm
scan.
-->
      <quality></quality>
      <!-- indepth values: blank for none, 0=none, 1=Orientation,
2=Quality, 3=Both. WARNING: this parameter reads each page repetitively,
especially when there are really no barcodes on a page.
-->
      <indepth></indepth>
      <maxlength>9</maxlength>
      <minlength>5</minlength>
    </row>
  </barcodesearchdata>
</barcodesearch>
<trace>
  <tracedata>
    <row>
      <traceid>KwikTag</traceid>
      <loglevel>0</loglevel>
      <logtype>0</logtype>
      <loglocation>D:\Logs\sourcename_logs</loglocation>
    </row>
  </tracedata>
</trace>
<docdiscriminatorflow>
  <docdiscriminatorflowdata>
    <row>
      <mainflow>
        <mainflowdata>
          <row>

```

```

        <queuetypeid>BCR2</queuetypeid>
    </row>
    <row>
        <queuetypeid>AutoIndex</queuetypeid>
    </row>
</mainflowdata>
</mainflow>
<docflow>
    <docflowdata>
        <row>
            <progid>ktagDocLoc.DocLoc</progid>
        </row>
        <row>
            <progid>ktagStandardDoc.StandardDoc</progid>
        </row>
        <row>
            <progid>ktagValidateDoc.ValidateDoc</progid>
        </row>
    </docflowdata>
</docflow>
    <nextstep>1</nextstep>
</row>
</docdiscriminatorflowdata>
</docdiscriminatorflow>
<statistics>
    <statisticsdata />
</statistics>
</row>
</data>

```

#### Configuration Settings:

**Device Server** – The name of the Server the device runs on or the name of the device. This field is purely informational in nature and is optional to modify.

**Delete Similar Files** – Often scan devices will create a file in addition to the multi-page Tiff that is required by KwikTag. This option is turned on by default (Yes).

**Timespan** – This is for long timeouts between jobs. By default this is set to 00:00:00. The zeros represent Hours, Minutes, and Seconds (going from left to right). This should only be used if necessary. For example if a customer has to scan various different sizes of paper. The way this works is the documents are held in the input folder and the job is not processed until the timespan timeout has been reached. For example if the timespan is set to 00:02:00, 2 minutes, after the job has been scanned the FolderInputService will wait 2 minutes before taking the job. If more pages are scanned before the 2 minutes is up the FolderInputService will wait until it reaches the 2 minute timespan timeout.

**Ocrautorotate** – When ocrautorotate is set to Yes (default), the document will be rotated based on the orientation of the text. However if you are having issues with pages being rotated incorrectly, you can try setting this to No.

**Ocrpagedeskew** – Toggles on or off the deskewing of ocr document that are processed. This option is turn on by default (Yes).

---

**Username** – This is the name of a KwikTag user account that has permission to index into the specified autoindex drawer(s). This is set to Administrator by default.

**Drawer** – This is the drawer where document will be 'filed' into if the system is unable to read the barcode or find any index instructions for the document(s). By default this is set to Lost and Found.

**Symbology** – This is the symbology of the barcode being used such as I2OF5 or 3OF9. This option is set to I2OF5 by default. The valid symbology entries are:

ALL  
3OF9  
CODABAR  
I2OF5  
A2OF5  
128  
93  
2OF5  
UPCA  
UPCE  
EAN13  
EAN8  
POSTNET  
PDF417  
PATCH  
UCC128

**Thispageonly** – This tells the system to only look for a barcode on the page specified. This is blank by default. Usage: `<thispageonly>7</thispageonly>` only look for a barcode on page 7 of the document.

**Requirecheckdigit** – Toggles the use of searching for a checkdigit in the barcode. Typically you would only use this when using manufactured barcodes that were manufactured without requiring a check digit. This option is set to 'Y' by default.

**Barcodethreshold** – Any documents processed with a threshold below this number will not be considered a document. This option is set to 20 by default.

**Maxlength** – This is the longest any valid barcode can be. This option is set to 9 by default.

**Minlength** – This is the shortest any valid barcode can be. This option is set to 5 by default.

Note: Trace Id and Logging settings are optional, and should only be turned on to troubleshoot issues.

**Traceid** – A unique id used when logging is active. This is set to KwikTag by default.

**Loglevel** – Turns logging on and off. By default is this set to 0 (off).

**Logtype** – Specifies where to log, to a file or to the event log. This is set to 0 (event log) by default.

**Loglocation** – The path to write log files to. By default this is D:\Logs\Sourcename\_logs

### 8.11.1 Specifying a custom autoindex drawer

```
<autoindexdata>
  <row>
    <username>Administrator</username>
    <password></password>
    <autoindexinstructions>
      <autoindexinstructionsdata>
        <row>
          <progid>ktagAIDefault.AIDefault</progid>
          <autoindexinstruction>
            <autoindexinstructiondata>
              <row>
                <drawer>Autoindex</drawer>
                <retrievaltags>
                  <retrievaltagsdata>
                    <row>
                      <name>Added Field</name>
                      <value>{BARCODE}</value>
                    </row>
                    <row>
                      <name>Description</name>
                      <value>{FILENAME}</value>
                    </row>
                  </retrievaltagsdata>
                </retrievaltags>
              </row>
            </autoindexinstructiondata>
          </autoindexinstruction>
        </row>
      </autoindexinstructionsdata>
    </autoindexinstructions>
  </row>
</autoindexdata>
```

**Username** – This is the name of a KwikTag user account that has permission to index into the specified autoindex drawer(s). This is set to Administrator by default.

**Drawer** – This is the drawer where document will be 'filed' into if the system is unable to read the barcode or find any index instructions for the document(s). By default this is set to Lost and Found.

**Name** – This is the name of the index field in the drawer to use.

**Value** – This is the value you want for the name (index field) it is paired with. By default there are 2 reserved values, {BARCODE} and {FILENAME}. Using these will fill the fields with the value of the Barcode that KwikTag detects on the document or the File name of the document before KwikTag started processing it.

---

## 9 KwikTag Options<sup>5</sup>

### 9.1 Installing KwikTag Options and User Licenses

1. Obtain an updated customer code and install key
2. Run the KwikTag License Utility

### 9.2 Import

Note: With the release of KwikTag 3.4 Service Pack 1, Import is now included as part of the base KwikTag system.

#### 9.2.1 KwikTag Import Utility

1. Run ktagImportUtility.exe
2. Specify a drawer name
3. Select an Input File
4. Select your Output folder
5. Click OK

### 9.3 Export

1. Create a Share on the KwikTag Server for the Export Files (Export will only work when browsing to a Share in the Export interface)
2. Open the Admin client and configure Export to point to that share and verify the Export service running

### 9.4 Universal Delivery Provider (UDP)

1. Go to Delivery Settings of a drawer in the Admin Client
2. Select the checkbox for Enable Delivery
3. Browse to a directory the KwikTag Service has access to. This can be either local or a UNC path to share.
4. Test the connection
5. Apply the successful settings

### 9.5 Global Search

Note: With the release of KwikTag 3.5, Global Search is now included as part of the base KwikTag system.

## 10 Apply KwikTag Updates

- Apply latest System updates or Service Packs<sup>6</sup>

---

<sup>5</sup> These instructions only apply if you are installing KwikTag options not included in the base system.

<sup>6</sup> For updates to the KwikTag Server and/or Additional Components please refer to the corresponding readme file.

---

## 11 Standard Settings for Scanners

Technically KwikTag is scanner agnostic, which is to say that it can use images produced by any scan device provided it meets the following criteria:

- Outputs a Multi-Page Tiff file
- Outputs using one or more of the following methods:
  - Scan to FTP
  - Scan to email
  - Scan to network repository

The image processing engine can accept an image from any device as long as it is in the correct format and the density is set light enough for decent barcode recognition. The following are standard recommend settings for scan devices:

- B&W Text Bi-tonal Multi-Page Tiff
- 300 dpi
- CCIT Group 3 or Group 4 Compression (LZW Compression is not currently supported)

The following are basic steps for setting up a scan device to output to the KwikTag server using one of the previously mentioned scanning methods. For specific instructions on setting up your scan device to work with KwikTag refer to the Input Devices document included in the documentation section of the installation cd or contact support.

### **Scan to FTP**

To use Scan to FTP functionality the following steps need to be performed:

- Create an FTP virtual directory on the KwikTag Server that points to a device input folder (refer to section 16.7 for detailed instructions)
- Setup your scan device to output to the FTP virtual directory that was created on the KwikTag Server
- Scan a test document into KwikTag

### **Scan to email**

To use Scan to email functionality the following steps need to be performed:

- Create a POP3 email address on your mail server (the POP3 and SMTP protocols need to be enabled on the mail server)
- Setup the KwikTag email service to use the email account that was just created (refer to the KwikTag 3.5 Service Configuration Guide for detailed instructions for setting up and using the email service)
- Setup your scan device to send to the email account that was created and attaching the document to the e-mail
- Scan a test document into KwikTag

---

### **Scan to network repository**

To use Scan to network repository functionality the following steps need to be performed:

- Create a share on the KwikTag Server from a folder in the data directory (For example, share out D:\Input\device1 assuming you installed the data directories to the D:\ drive)
- Setup your scan device to output to the newly created network share
- Scan a test document into KwikTag

---

## 12 Setting up Windows Authentication for KwikTag

### 12.1 Windows Authentication for KwikTag : Configuration

**NOTE: If your server has multiple IP Addresses and web sites the IP address used for the KwikTag website MUST resolve to the NETBIOS name of the server in order for Windows Authentication to work.**

1. Change Directory Security for the KwikTag Website and KwikTagWS virtual directory
  - a. Turn off Anonymous Access
  - b. Turn on Integrated Windows Authentication
  - c. Apply changes to the KwikTag Website and all subdirectories
2. Edit Web.config
  - a. Remove the comments from the <authentication> and <identity> elements
  - b. Remove the comments from the <allow roles> element
  - c. Save your changes and close the Web.config. In a typical default installation this would be located in C:\Program Files\KwikTag\Website\KwikTagWS
3. <sup>7</sup>Create the following groups locally. These groups are case sensitive and must match the case and spelling of the group in KwikTag.
  - a. KwikTag Logon
  - b. KwikTag Guests
  - c. KwikTag Users
  - d. KwikTag Admins
4. <sup>8</sup>Modify the following Com + Packages and roles
  - a. Change the Identity of the KwikTag Logon Manager Package to run as a domain user and add that user to the local KwikTag Logon Group.
  - b. Add KwikTag Logon Group to Creator Owner Com + Role for the following packages:
    - i. KwikTag API
    - ii. ImageTag.KwikTag.API.BLL
    - iii. KwikTag AppLoader
    - iv. KwikTag Logon Manager
    - v. KwikTag Soap
    - vi. KwikTag WebLib
5. For Users that will access KwikTag, add the appropriate domain group(s) or user(s) to the local KwikTag groups. All groups or users must be in the local KwikTag Logon Group and one other local KwikTag Group. The Logon group is required for all groups and users to allow Logon access, and the additional group is used to define the permissions in KwikTag.
6. Additional Groups can be created in KwikTag to provide more flexibility for applying permissions. However, after creating the Group in KwikTag, and applying permissions for that group, a local Windows Group must be created with the same name, and the appropriate domain users and groups must be added to this local Windows Group.
7. Reboot server

---

<sup>7</sup> In a multi-server configuration you would set this up on the Web Server.

<sup>8</sup> In a multi-server configuration you may need to uninstall the WebLib Proxy from the DAL server and re-export and reinstall the proxy.

**NOTE: When Windows Authentication is enabled, it is not recommended that you logon to your KwikTag Server using KwikTag Authentication. If the logged on User has the proper permissions on the KwikTag Server, KwikTag Authentication will work, but the configuration was not designed to support both.**

## 12.2 Windows Authentication for KwikTag : Windows Rights & Com+ Package Roles

**NOTE:** Below are the requirements for the Windows User and Groups, and Com+ Packages. These are not additional steps to perform, but rather a snapshot of what a KwikTag System with Windows Authentication enabled should look like.

Windows Users and Groups:

1. Local Administrators Group:
  - a. ktuser
  - b. Domain\Domain Admins (group)
2. Local Users Group:
  - a. ktuser
  - b. ASPNET
  - c. Domain\Domain Users
  - d. NT Authority\Authenticated
  - e. NT Authority\Interactive

KwikTag Com+ Packages Identity and Roles:

1. KwikTag API – Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\IUSR\_Server
  - b. Server\ktuser
  - c. Server\KwikTag Logon (group)
  - d. NT Authority\Network Service
2. KwikTag AppLoader - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\IUSR\_Server
  - b. Server\ktuser
  - c. Server\KwikTag Logon (group)
3. KwikTag Cryptography - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\ktuser
4. KwikTag DAL - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\IUSR\_Server
  - b. Server\ktuser
  - c. NT Authority\Anonymous Logon
  - d. NT Authority\Network Service
5. KwikTag DBFinder - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\ktuser
  - b. NT Authority\Anonymous Logon
6. KwikTag Flow Manager - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:

- a. Server\ktuser
7. KwikTag ktagCryptography - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\ktuser
  - b. Server\Administrators
8. KwikTag Logon Manager - Package is run as domain user account with the following user accounts in the creator owner com+ role:
  - a. Server\ktuser
  - b. Server\KwikTag Logon (group)
  - c. NT Authority\Network Service
9. KwikTag Paper Gateway - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\ktuser
10. KwikTag Soap - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\IUSR\_Server
  - b. Server\ktuser
  - c. Server\KwikTag Logon (group)
  - d. NT Authority\Network Service
11. KwikTag Universal DP - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\IUSR\_Server
  - b. Server\ktuser
  - c. NT Authority\Anonymous Logon
  - d. NT Authority\Network Service
12. KwikTag WebLib - Package is run as local ktuser account with the following user accounts in the creator owner com+ role:
  - a. Server\Administrators
  - b. Server\IUSR\_Server
  - c. Server\ktuser
  - d. Server\KwikTag Logon (group)
  - e. NT Authority\Anonymous Logon
  - f. NT Authority\Network Service

## 13 Operating System Installation Instructions

These instructions are provided as guidelines and recommendations. If a company already has a standard build for server documentation verify it meets the minimum requirements outlined in section 1.

**Installations on 64-bit operating systems, Domain Controllers, and Microsoft Small Business Server are not supported.**

### 13.1 Windows Server 2003

**Installations on 64-bit operating systems, Domain Controllers, and Microsoft Small Business Server are not supported.**

#### 13.1.1 Windows Server 2003 Installation

1. Insert Windows Server 2003 disk in CD and power on Server and boot from CD when the option appears
2. Press Enter to continue
3. Type C to continue— Only applies when a new, 'clean' hard drive is used
4. Press F8 to accept license agreement
5. Esc to for a fresh Windows 2003 Server Installation
6. Choose create a partition and enter a size that is approximately 30% of the total hard drive space (this partition should never be less than 4096 (4 GB))—Press Enter
7. Highlight the C:\ partition and press enter to install Windows Server 2003 on that partition
8. Highlight NTFS format and press enter
9. Press Enter to Restart—It's not necessary to remove the CD from the CD-Rom Drive, just don't press a key when prompted to boot from CD.
10. Click Next
11. Regional Settings, Next
12. Name – Use appropriate naming convention
13. Company – Use appropriate naming convention
14. Licensing Per Server – refer to customer licensing information
15. Server Name – Use appropriate naming convention
16. When prompted for the Admin password use an appropriate password for the Admin password. I.e. if it's a Regression Server, so you would use the Regression Admin password.
17. Set Date and Time/Time Zone, clear Daylight Savings box if appropriate
18. Network Settings—Typical Settings
19. Make the computer a Workgroup member.

#### 13.1.2 Windows Server 2003 Configuration

1. Log on as Administrator
2. Manage Your Server
  - a. Check the checkbox for 'Do not display this page at logon.'
  - b. Close the dialogue window
  - c. Set Resolution to 800x600 or higher (choose appropriate setting for Video Card and Monitor)
3. Set View to Classic
  - a. Right Click Task Bar and select Properties
  - b. Click Start Menu Tab

- c. Select Classic Start Menu
  - d. [Customize]
  - e. Check the following checkboxes:
    - i. Display Administrative Tools
    - ii. Display Log Off
    - iii. Show Small Icons in Start menu
  - f. Uncheck the following checkbox:
    - i. Use Personalized Menus
4. Set IP Address
- a. Right Click My Network Places -> Properties
  - b. Right Click Local Area Connection -> Properties
  - c. TCP/IP -> Properties
  - d. Set IP Address
  - e. Set Subnet Mask
  - f. Set Gateway
  - g. Set DNS
  - h. Apply the settings and close the local area dialogue boxes
5. Join the domain—if applicable<sup>9</sup>
- a. Right click MY COMPUTER
  - b. Properties
  - c. Computer Name Tab
  - d. [Change]
  - e. Select DOMAIN and type {Domain Name}
  - f. Enter the Administrator username and password and click OK
  - g. [OK]
  - h. [OK]
  - i. [Yes]
  - j. When you come back from the reboot make sure you log into the domain and NOT the local machine
    - i. Note: Once you logon as another user you will need to repeat steps 2 & 3
6. Administrators Group configuration
- a. Right Click on My Computer
  - b. Select Manage
  - c. Local Users and Groups\Groups\Administrators. Verify that both the Local Administrator and Domain Administrator (if applicable) are in the Local Machines Administrators Group. Close Computer Management.
  - d. Create a Kwiktag specific user named ktuser and add to the local Admin group. (Use standard install password or one supplied by the customer) This account must have full Admin rights because it will run some services and com+ packages. (Username can vary if customer restrictions do not allow the name listed here, but there must be an account with Admin level rights to run Kwiktag specific components)
7. Format D:\ Drive<sup>10</sup>
- a. Click on Disk Management
  - b. Right-Click on CD-Rom Drive
  - c. Select Change Drive Letter
  - d. Set to H:
  - e. Right Click on Empty Space on Disk0

<sup>9</sup> Only join a domain when you are at the site where the KwikTag Server will be installed.

<sup>10</sup> You will use all of the remaining Hard Drive space for the D:\ Drive partition.

- 
- f. Select Create Partition
    - i. Primary NTFS Partition
    - ii. D:\ Drive
    - iii. Quick Format
    - iv. Volume Label: Data
  - g. Close Computer Management
  - 8. Create the directory D:\Logs
    - a. Right Click My Computer -> Explore
    - b. Click on the D:\ Drive on the left menu
    - c. Click File->New->Folder
    - d. Name the folder Logs and hit enter
  - 9. Copy the I386 directory from the Windows Server 2003 CD to D:\
    - a. Click the + by the H: Drive (on the left menu) to expand the contents menu
    - b. Right click and hold the I386 folder and drag it to the D:\ Drive
    - c. Release the button and select Copy here
  - 10. Set Performance Settings
    - a. Right Click My Network Places -> Properties
    - b. Right Click Local Area Connection -> Properties
    - c. Select File and Printer Sharing for Microsoft Networks -> Properties
    - d. Select "Maximize data through put for network applications"
    - e. [OK]
    - f. [OK]
    - g. Close the Network Places Properties Window
    - h. Right Click on My Computer -> Properties
    - i. Select Advanced Tab
    - j. Click on Startup and Recovery and set Timer to 5 Sec.
    - k. Uncheck the Automatically reboot checkbox.
    - l. Click OK
    - m. Do not restart
    - n. Click on Performance Options
      - i. Visual Effects Tab
        - 1. Select for best performance
        - 2. Apply
      - ii. Advanced Tab
        - 1. Processor scheduling - Programs
        - 2. Virtual memory - [Change]
          - a. D: - Custom Size: Enter 2X the memory of the system (Min and Max)<sup>11</sup>
          - b. C: - Custom Size: Enter 48 (Min and Max)
          - c. [Ok]
      - iii. [Ok]
    - o. Automatic Updates
      - i. Uncheck 'Keep my computer up to date...'
      - ii. [Apply]
    - p. Remote
      - i. Check 'Allow users to connect remotely to this computer'
      - ii. [Apply]
      - iii. [Ok]
      - iv. Do not reboot

---

<sup>11</sup> This size should not exceed 1024MB

11. Set the following services to Manual—Start/Programs/Admin. Tools/Services, double click to get options.
  - a. Alerter
  - b. Automatic Updates
  - c. Computer Browser
  - d. Distributed Link Tracking Client
  - e. Print Spooler
  - f. Windows Audio
  - g. Wireless Configuration

## 12. Reboot

### 13.1.3 Common Applications, Updates, Windows Components

1. Install WinZip 7.0 or later—registered license required (Optional)
2. Run The Register tool located on the installation CD (Copy the REG to the desktop then run it)
3. Set Screen Saver
  - a. Windows Server 2003 Screen Saver
  - b. 5 Min Timer
  - c. Password Protected
  - d. Power Setting
    - i. Click POWER button and set monitor to never.
4. Add/Remove Windows Components
  - a. [Start] -> Control Panel -> Add/Remove Programs
  - b. Add/Remove Windows Components
  - c. Select Accessories and Utilities
  - d. [Details]
    - i. Uncheck Communications
    - ii. Select Accessories
    - iii. [Details]
      - 1) Uncheck Character Map
      - 2) Uncheck Clipboard Viewer
      - 3) [Ok]
    - iv. [Ok]
  - e. Uncheck Internet Explorer Enhanced Security Configuration
  - f. Select Management and Monitoring
  - g. [Details]
    - i. Check Simple Network Management Protocol
    - ii. [Ok]
  - h. Uncheck Update Root Certificates
  - i. [Next]
  - j. [Finish]
  - k. [Yes] – if prompted to reboot

### 13.1.4 Common Configuration

1. Activate and Register Windows as appropriate

## 13.2 Setting up IIS for Windows 2003

### 13.2.1 IIS 6.0 Installation

1. [Start] -> Control Panel -> Add/Remove Programs
2. Add/Remove Windows Components
3. Select (highlight) Application Server
4. [Details]
  - a. Check Application Server Console
  - b. Check ASP .NET
  - c. Select (highlight) Internet Information Services (IIS)
  - d. [Details]
    - i. Check File Transfer Protocol (FTP) Service – only install if you are using FTP scan devices
    - ii. Check World Wide Web Service
    - iii. [Details]
      - 1) Check Active Server Pages
      - 2) [Ok]
    - iv. [Ok]
  - e. [Ok]
5. [Next]
6. [Finish]
7. Close Add/Remove Programs

### 13.2.2 IIS 6.0 Configuration

1. Web Site Properties Configuration
  - a. [Start] -> Administrative Tools -> Internet Services Manager
  - b. Delete the Default Website
  - c. Restart IIS
  - d. Right click Web Sites folder - properties
  - e. Web Site Tab
    - i. Active log format is W3C Extended Log File Format
    - ii. [Properties]
    - iii. Check the checkbox for "Use local time for file naming and rollover"
    - iv. Log file directory is D:\Logs
    - v. Click Advanced Tab
    - vi. Check all the checkboxes
    - vii. [OK]
  - f. Home Directory Tab
    - i. Uncheck "Index this resource"
    - ii. Check the checkbox for "Read"
    - iii. Execute Permissions should be Scripts only
    - iv. [Configuration]
      - 1) Mappings Tab
        - a) Remove the following extensions: .idc, .printer, .stm, .shtm, and .shtml
      - 2) Options Tab
        - a) Uncheck the checkbox for "Enable session state"
      - 3) [OK]
  - g. Directory Security

- i. Click [Edit] in the Anonymous access and authentication control section  
(If customer has security or other configuration requirements that prevent using IUSR as the anonymous account create an account that has the same rights/permissions as the IUSR and use this account)
- ii. Uncheck the checkbox for "Integrated Windows authentication"
- iii. [OK]
- h. [Apply]
- i. [Ok]

## 14 Microsoft SQL Server

**64-bit SQL server is supported if the SQL server is separate from any other KwikTag server. SQL server clusters are not supported.**

### 14.1 SQL Server 2005 Standard Installation

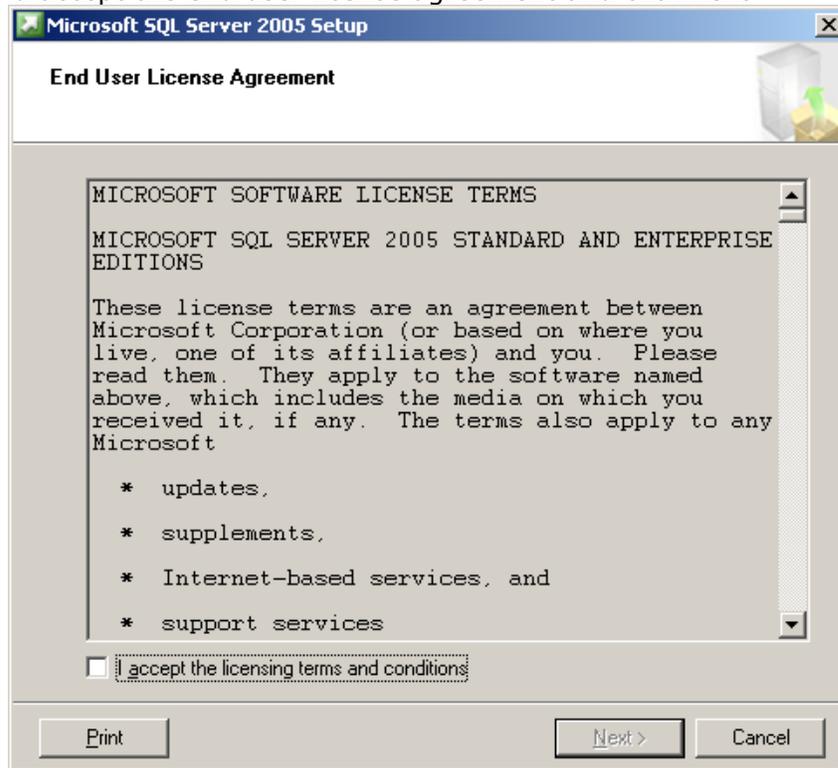
**64-bit SQL server is supported if the SQL server is separate from any other KwikTag server. SQL server clusters are not supported.**

1. Select "Server components, tools, Books Online, and samples" from the install section of the splash screen



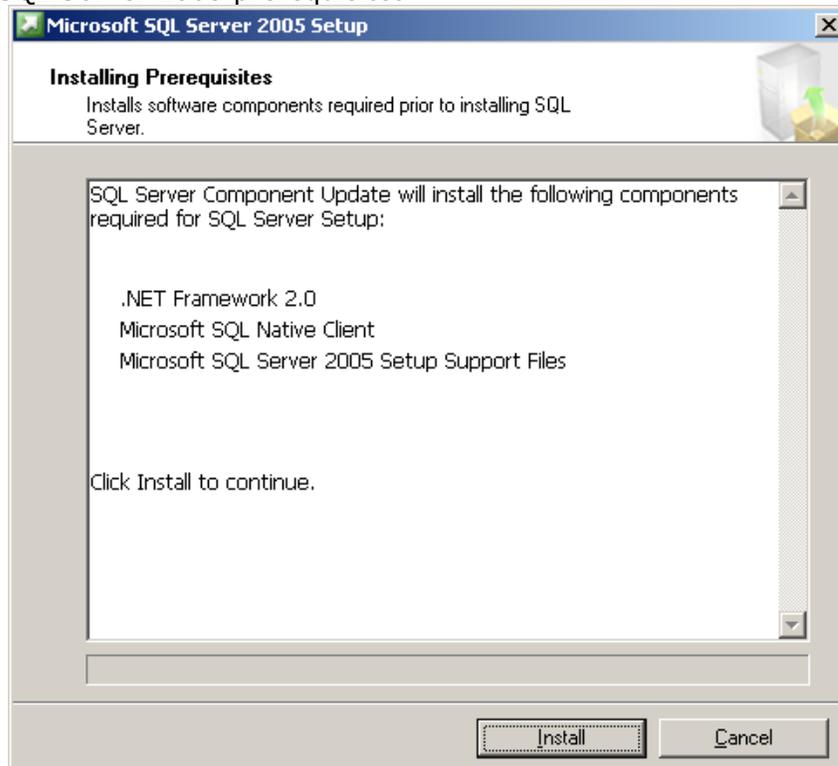
SQL Server 2005 Startup Splash Screen

2. Read and accept the end user license agreement and click next

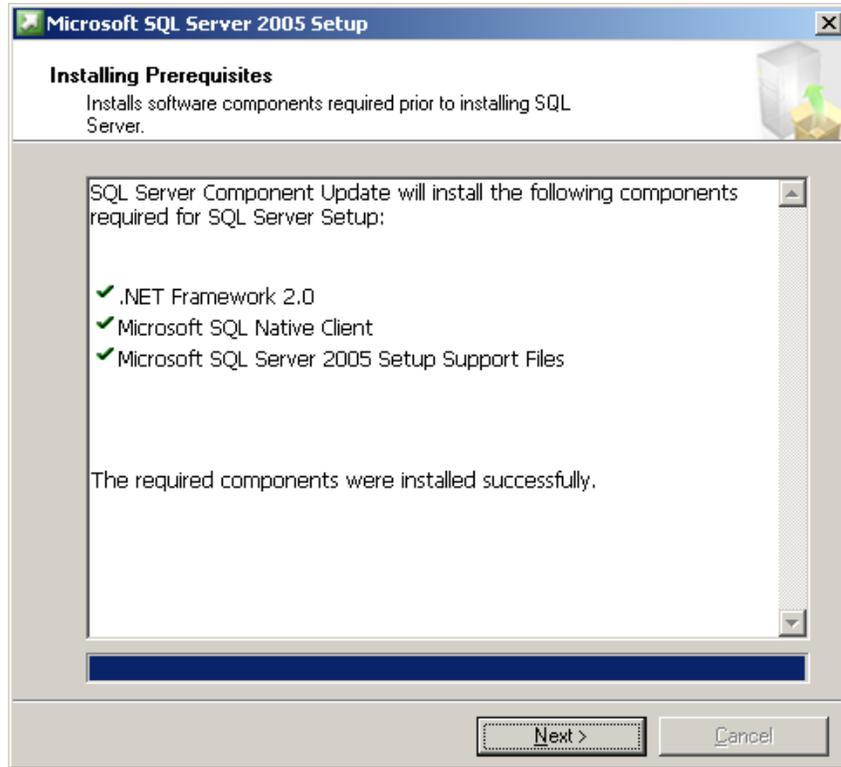


End User License Agreement

3. Install SQL Server 2005 prerequisites



Click "Install" to begin the installation of the prerequisites

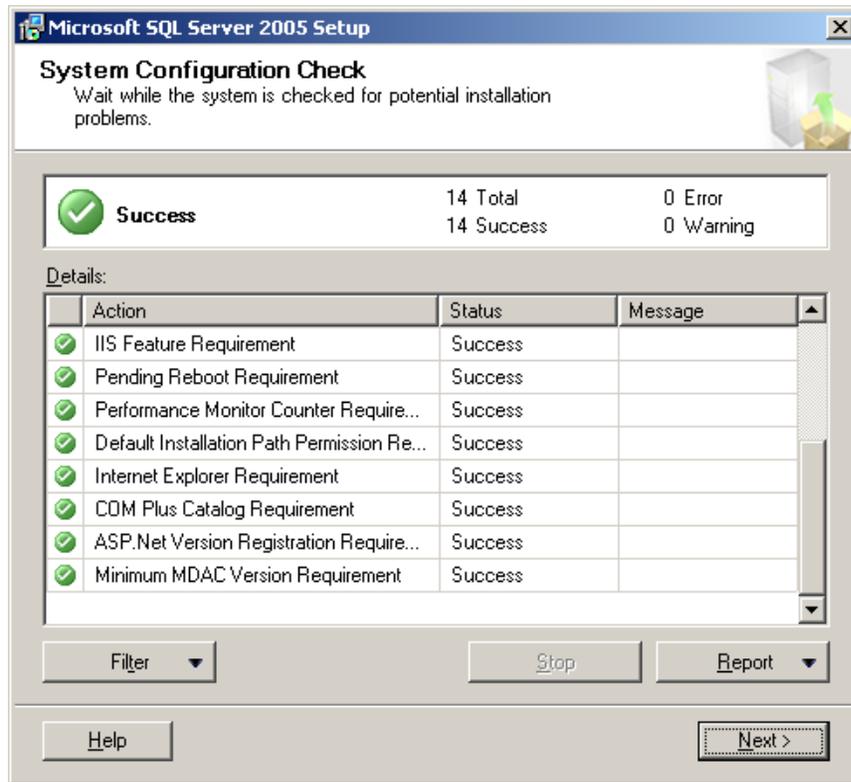


Click "Next" when prerequisite installation is finished to continue



SQL Server Installation Wizard Welcome Screen - Click Next

- The results of the system check the installation performed earlier are displayed on the "System Configuration Check" dialog screen. If any errors or warnings are discovered address them before continuing the installation



System Configuration Check Screen

5. Name: Use appropriate naming convention
6. Company: Use appropriate naming convention
7. CD Key: Insert Customer CD Key here

Microsoft SQL Server 2005 Setup

### Registration Information

The following information will personalize your installation.

The Name field must be filled in prior to proceeding. The Company field is optional.

Name:  
demo

Company:  
ImageTag, Inc.

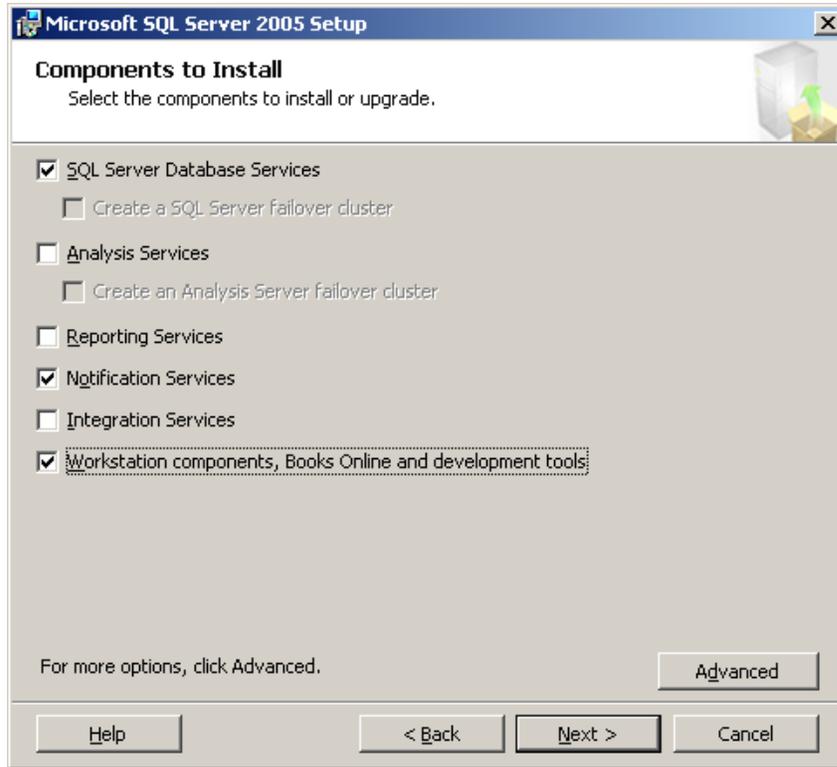
Please enter your 25 character Product Key. You can find this number on the yellow sticker in the CD liner notes or the CD sleeve.

\_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_ - \_\_\_\_

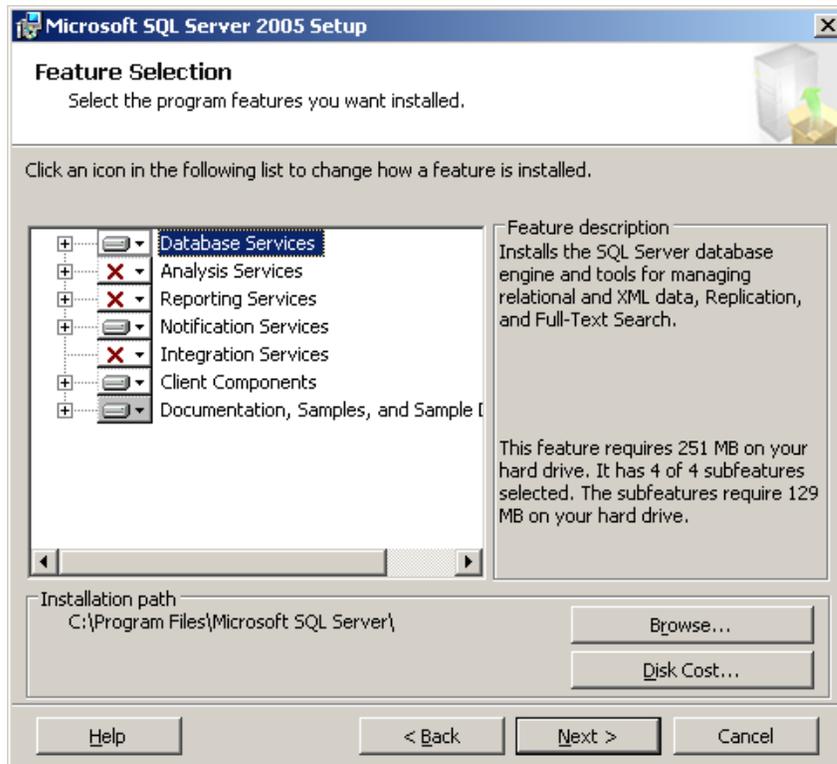
Help < Back Next > Cancel

Registration Information Screen

8. Select the following components to install:
  - SQL Server Database Services
  - Notification Services
  - Workstation components, Books Online, and development tools
9. Click advanced to display the Features and Sub Features

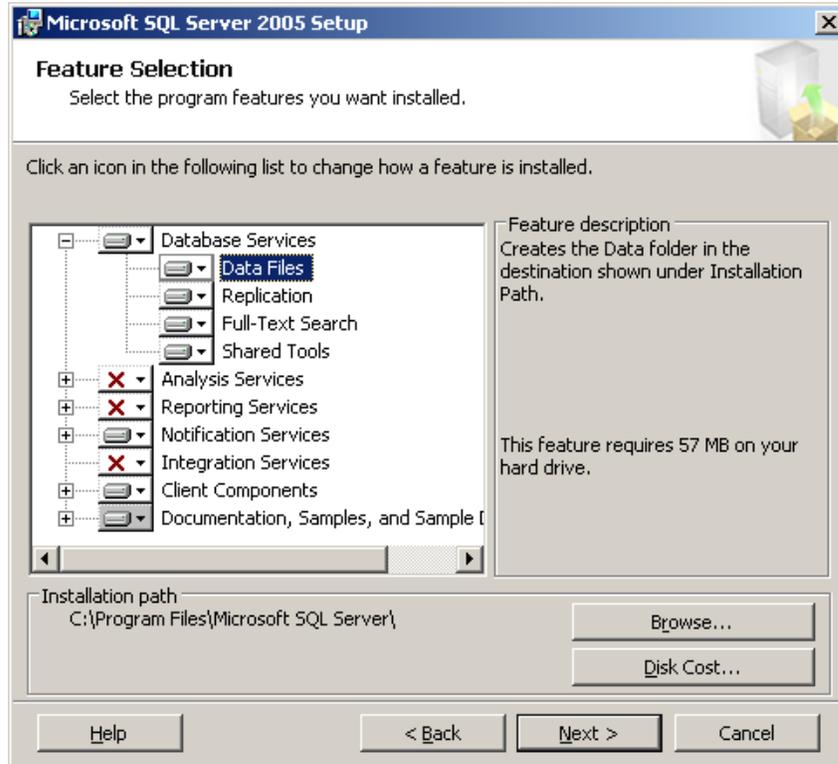


Components to Install Screen

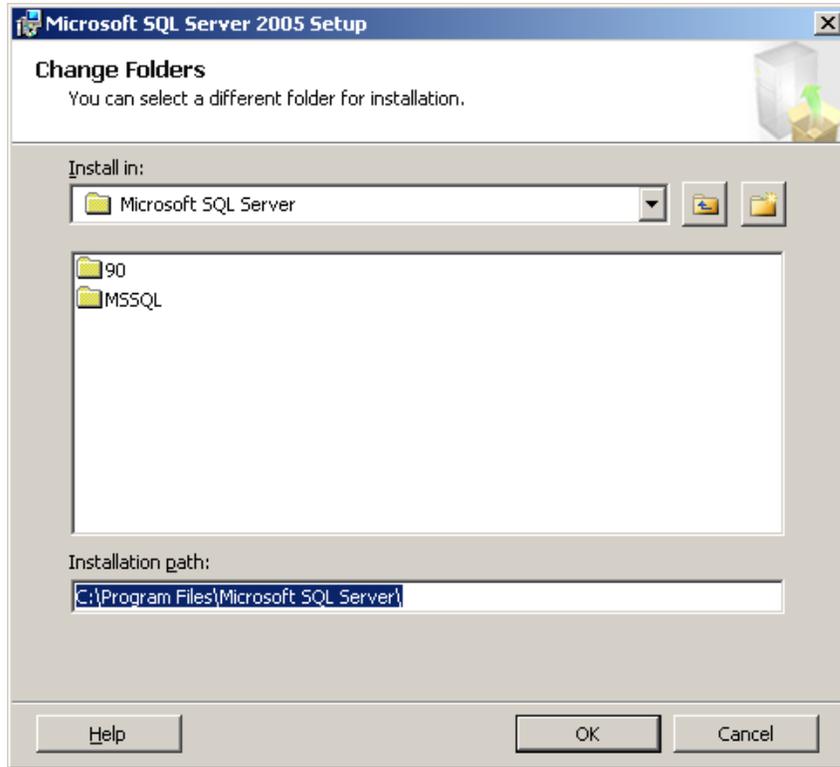


Advanced Components Installation Screen

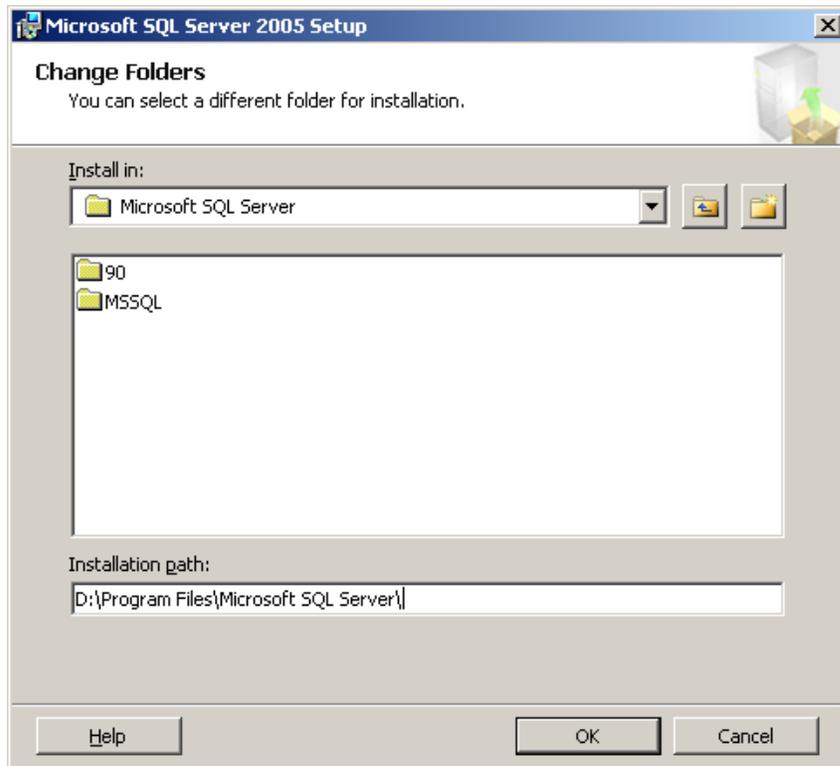
10. Expand "Database Services" and select the "Data Files" sub feature
11. Click browse and change the installation path to be on the D:\ drive (or other desired drive)
12. Click Next



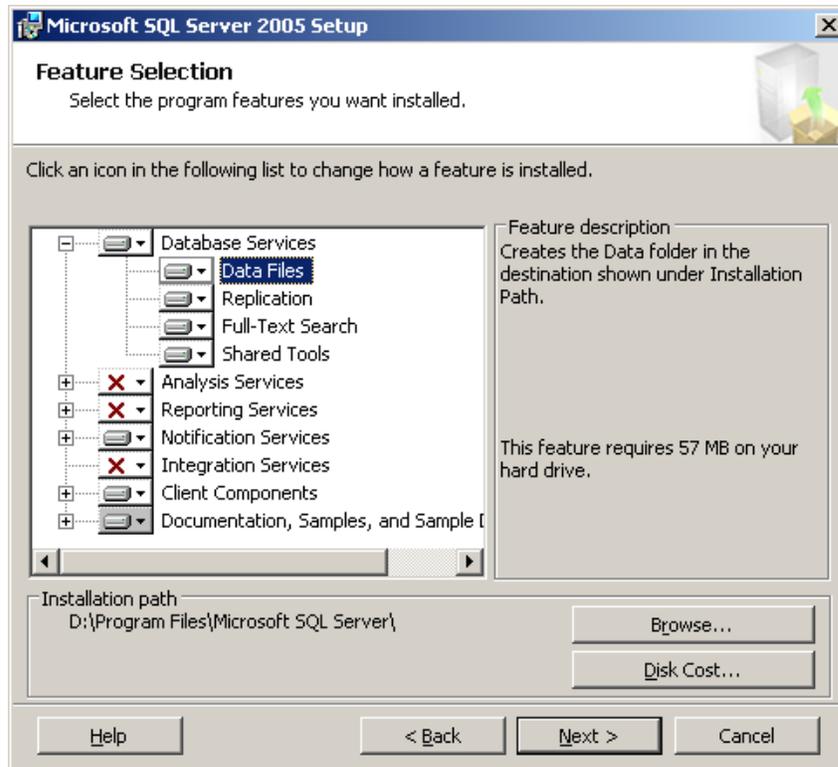
... select the "Data Files" sub feature



Change Folders Screen

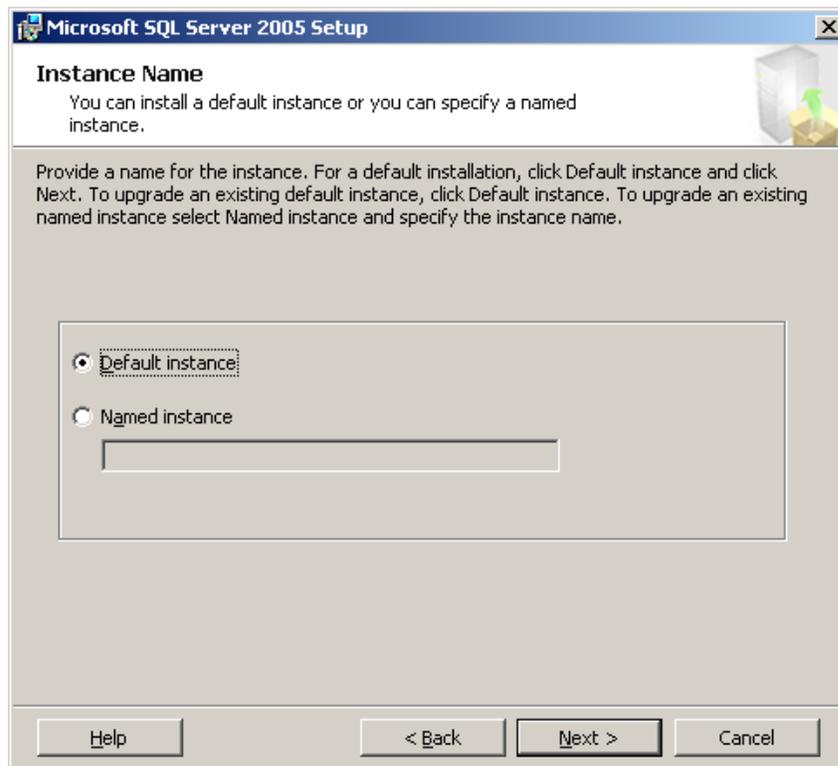


...change the installation path to be on the D:\ drive (or other desired drive)



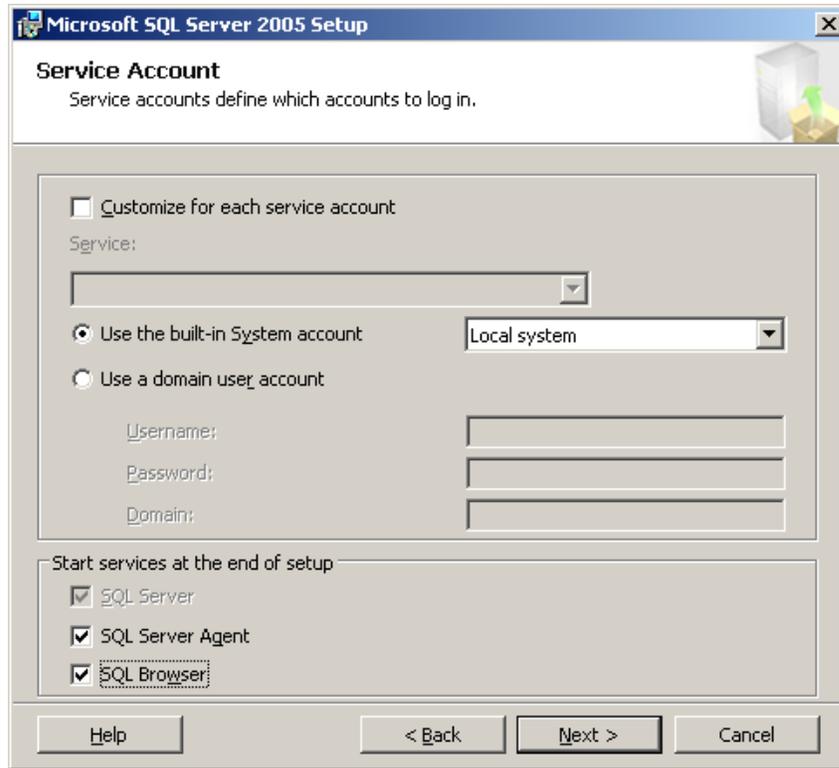
Data files sub feature installed to different path

13. Use the default instance name



Instance Name Screen

14. Use the "Local System" built-in system account
15. Select the following services to be started at the end of setup:
  - SQL Server
  - SQL Server Agent
  - SQL Browser



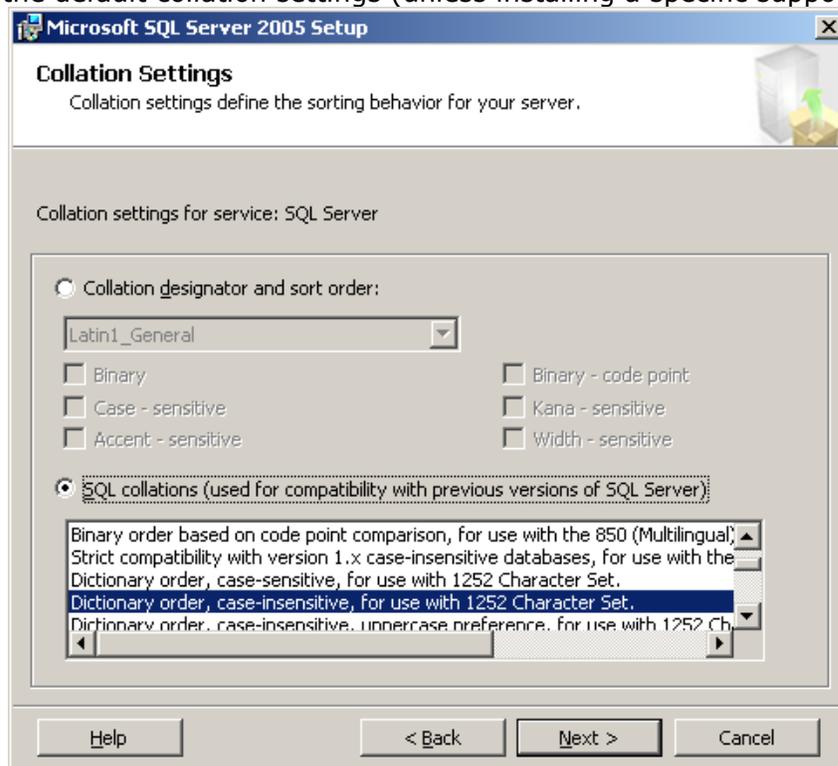
Service Account Screen

16. Select "Mixed Mode" authentication mode and enter a password for the 'SA' account

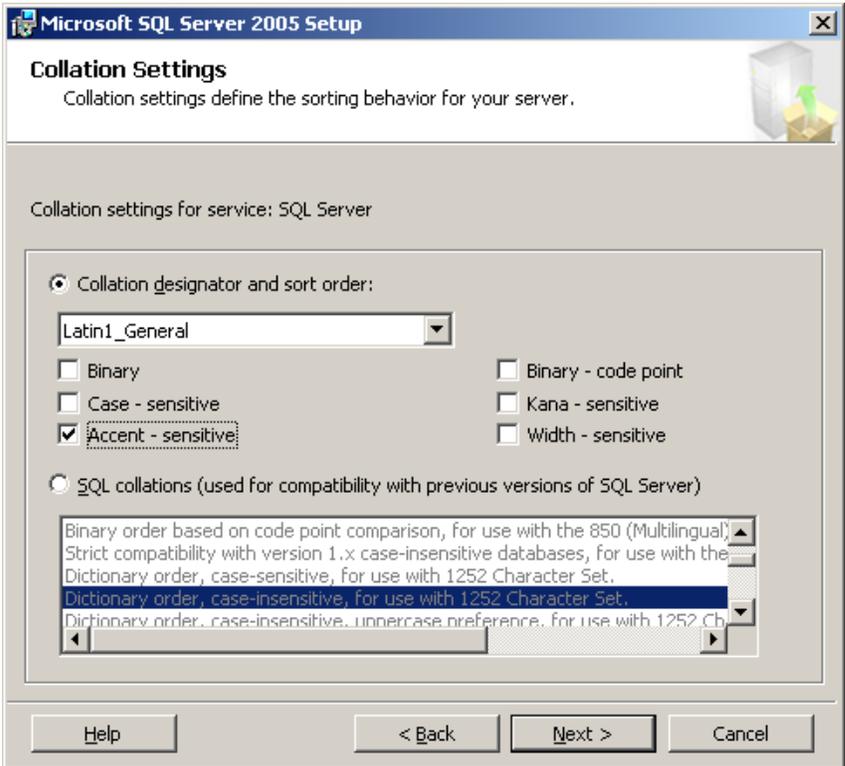


Authentication Mode Screen

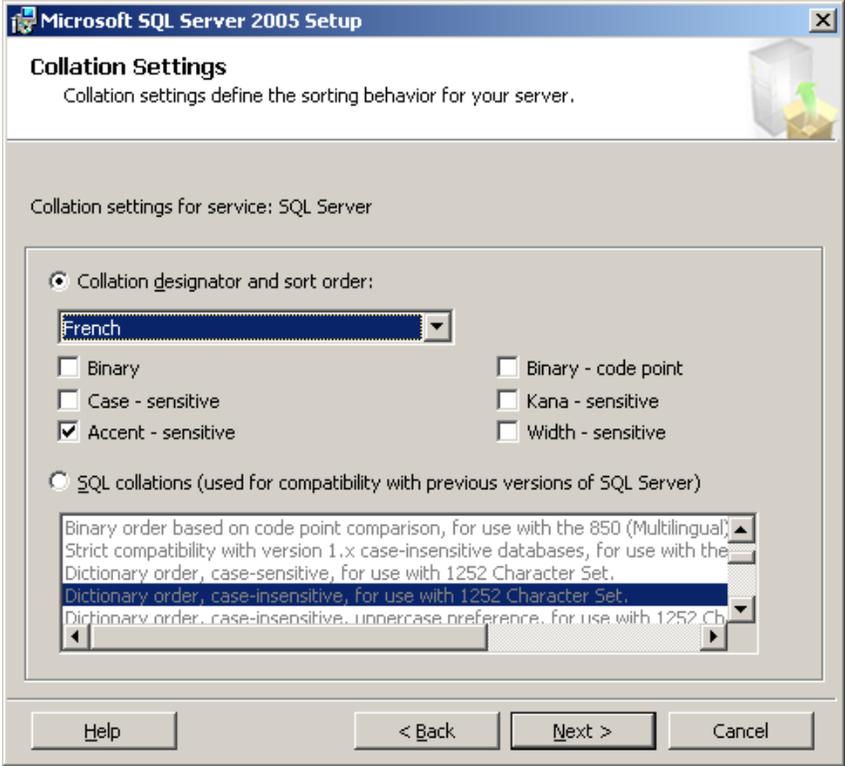
17. Accept the default collation settings (unless installing a specific supported collation)



Collation Settings Screen

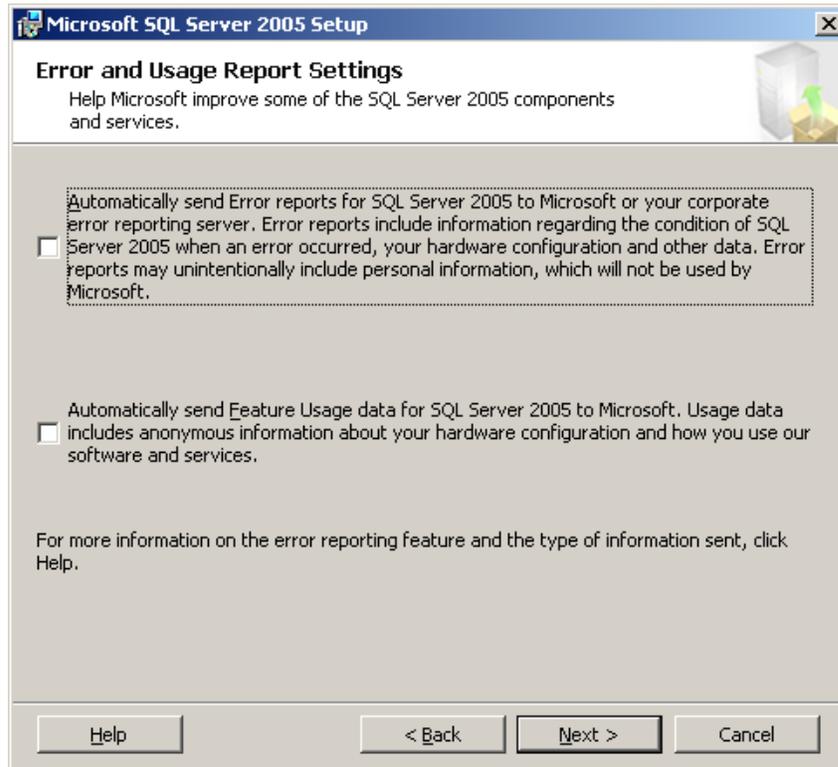


Latin1\_General\_CI\_AS Collation (Non-US English)



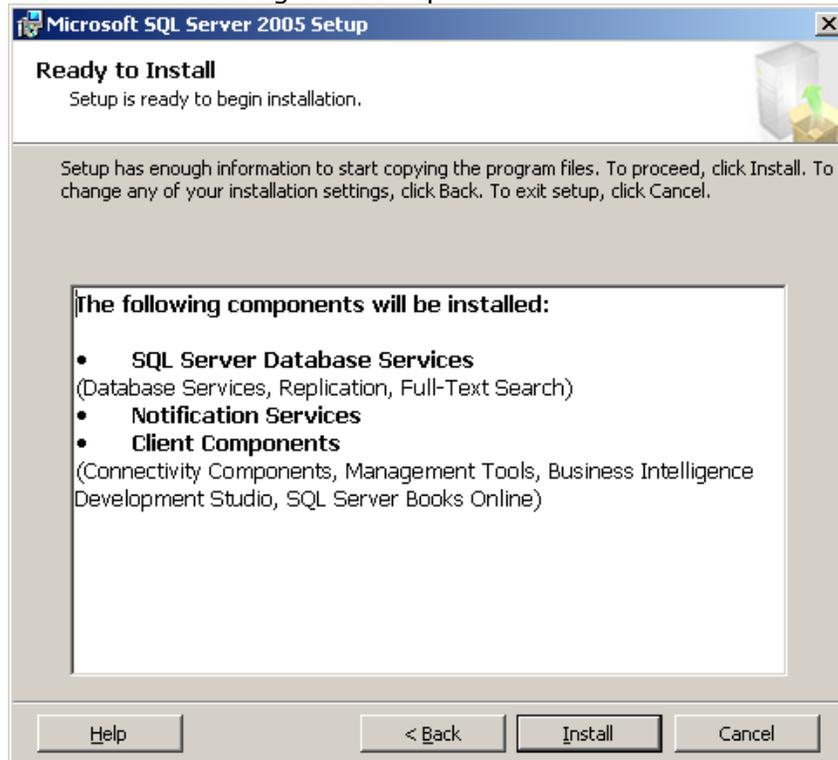
French\_CI\_AS Collation (French )

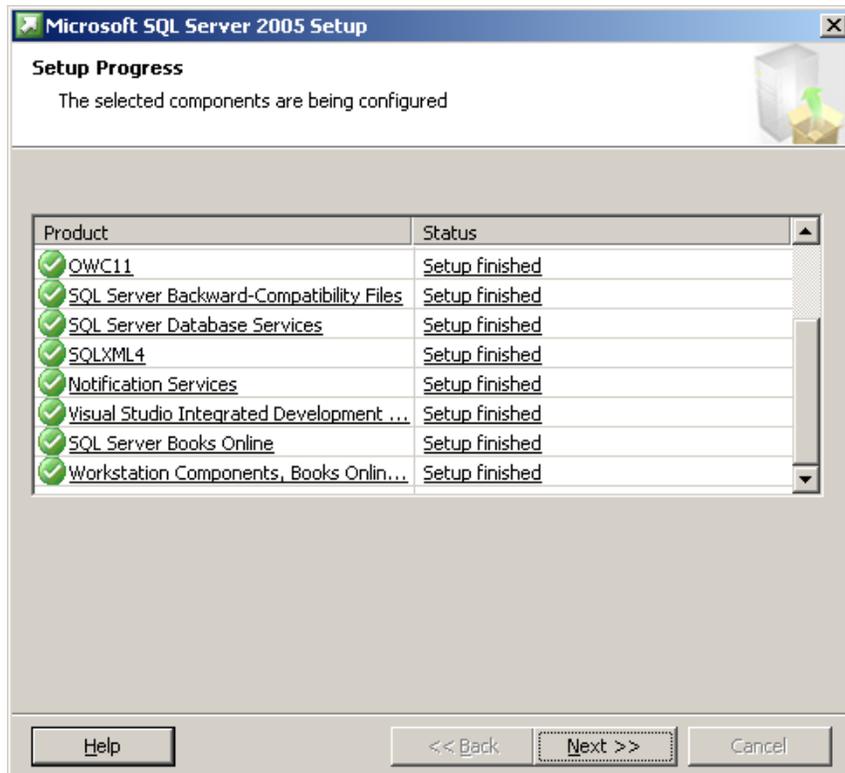
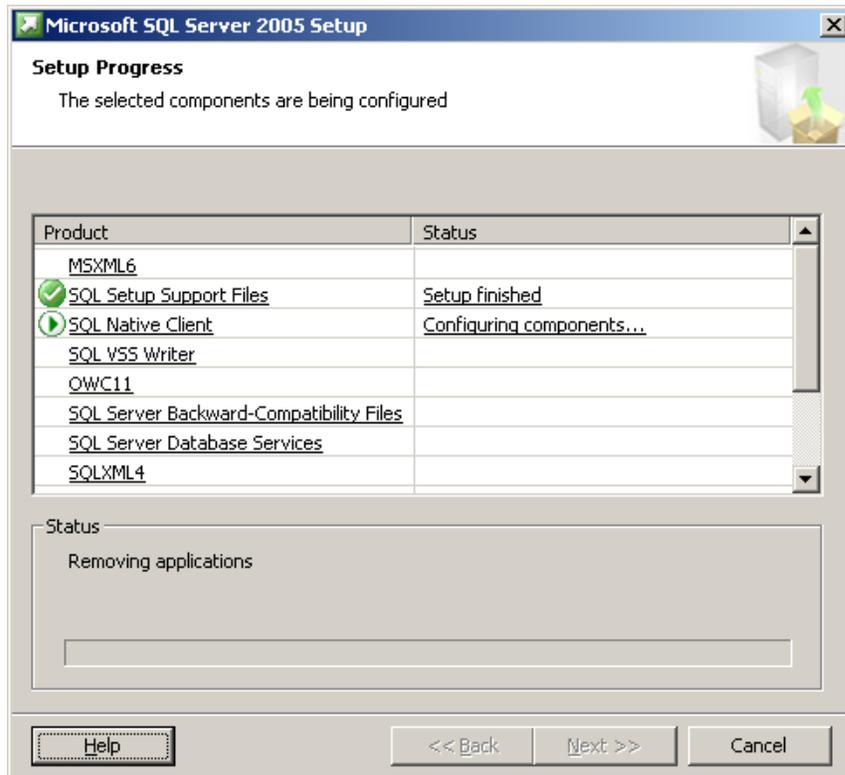
18. Do not select any of the error and usage reporting settings

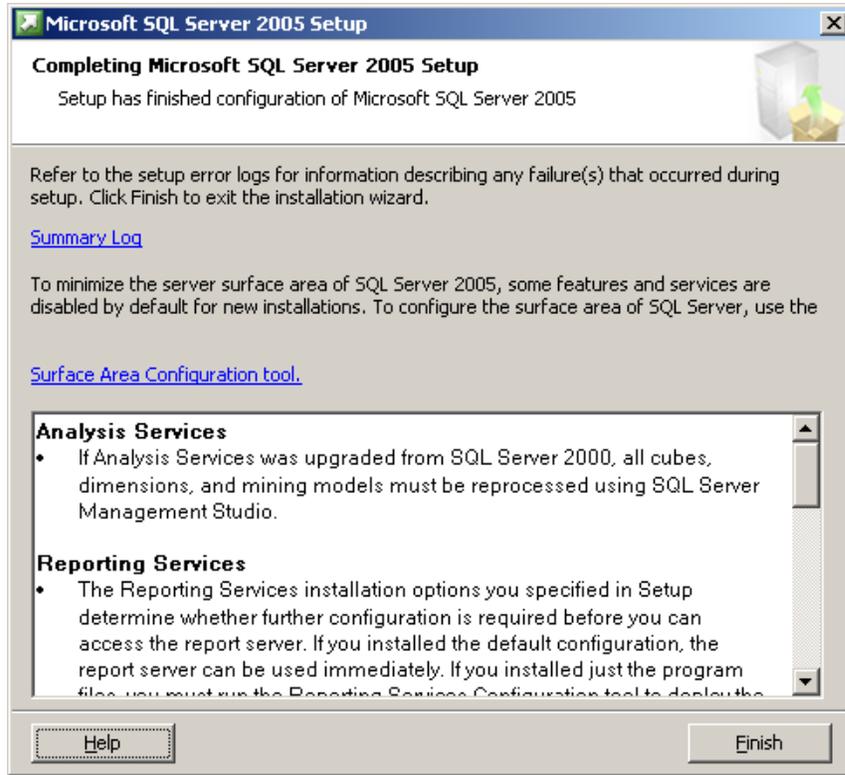


Error and Usage Report Settings Screen

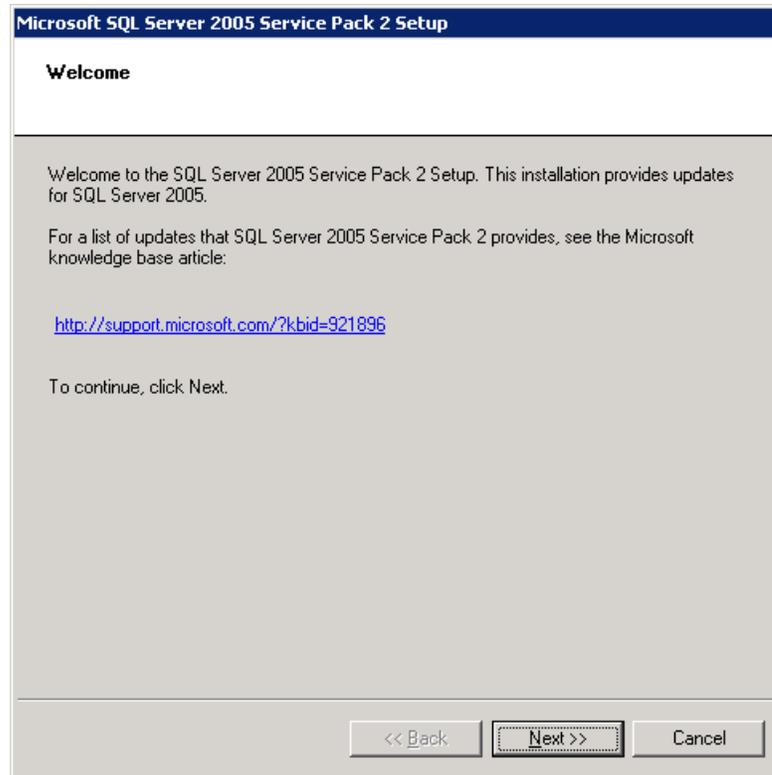
19. Verify the installation settings and complete the installation



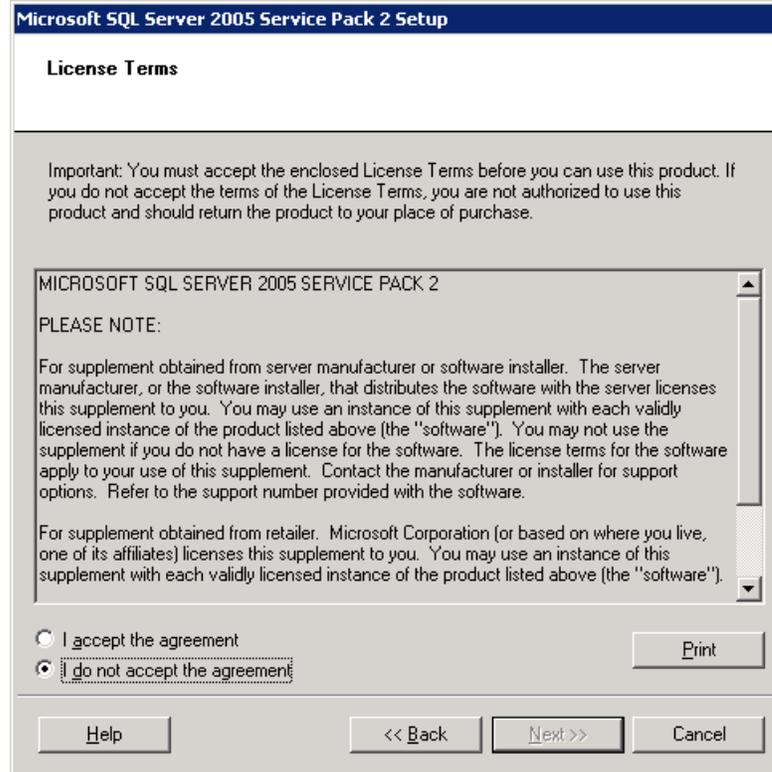




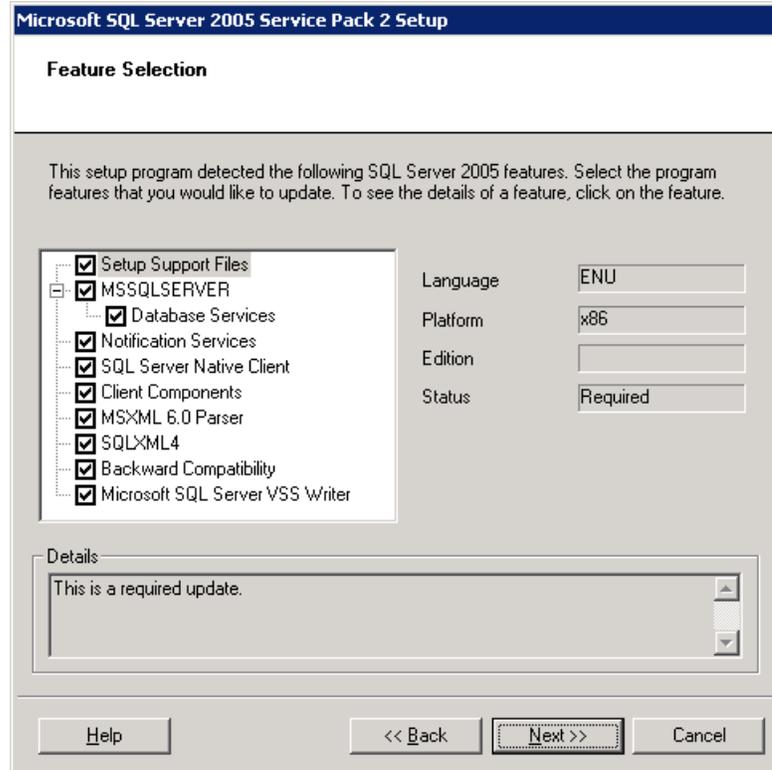
## 20. Install SQL Server 2005 Service Pack 2



SQL Server 2005 Service Pack 2 Welcome Screen



SQL Server 2005 Service Pack 2 end user license agreement



Feature Selection Screen

**Microsoft SQL Server 2005 Service Pack 2 Setup**

**Authentication**

Select the authentication mode and account for the instances to upgrade. You can choose to apply the settings to all instances or to a specific instance.

Apply selection to all instances

Instance Name:

Authentication:

User Name:

Password:

Product	Instance	Authentication	User name	Status
Database Servic...	MSSQLSERV...	Windows	IMAGETAG\jwri...	Success

Authentication Mode Screen

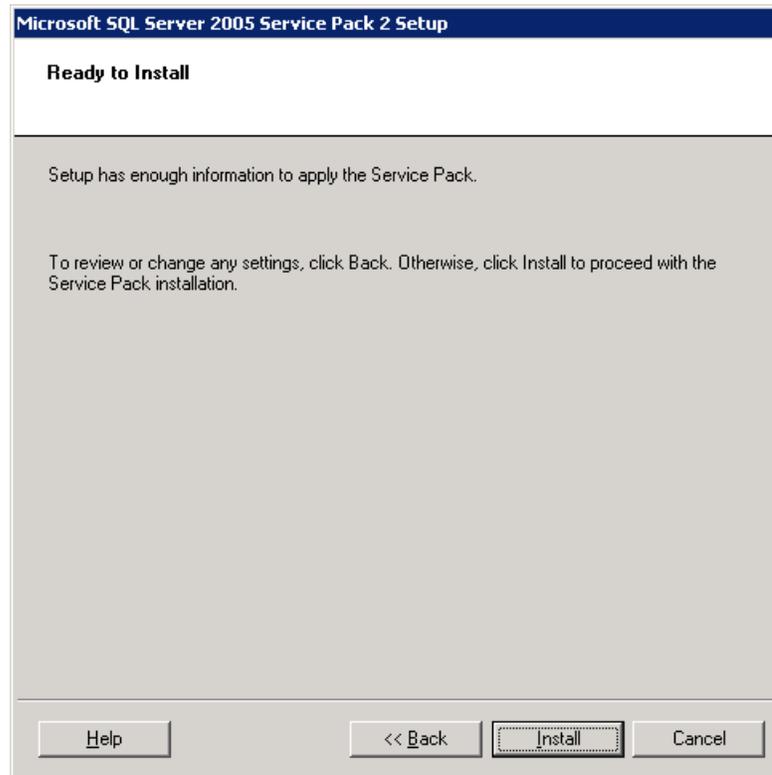
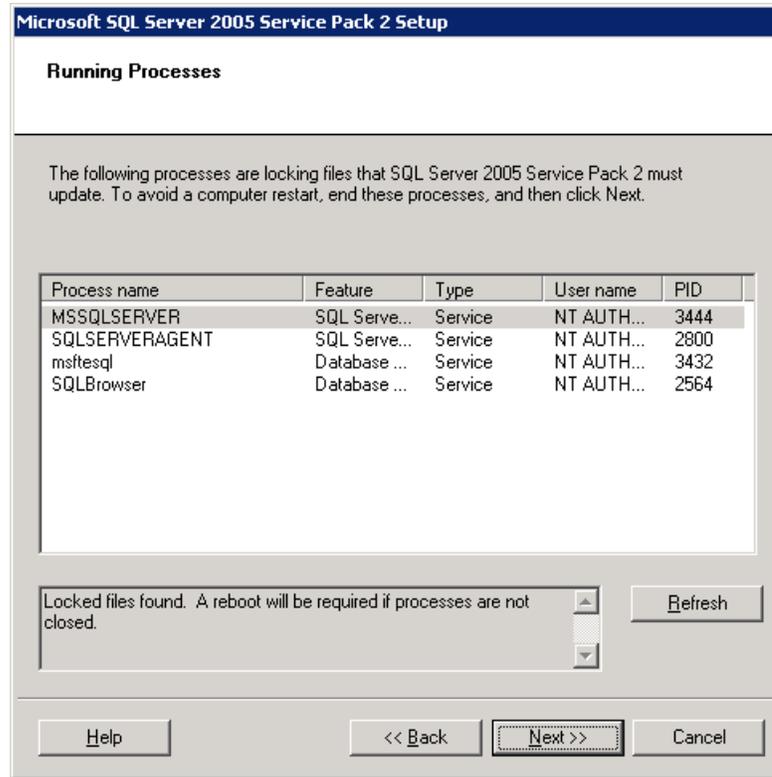
**Microsoft SQL Server 2005 Service Pack 2 Setup**

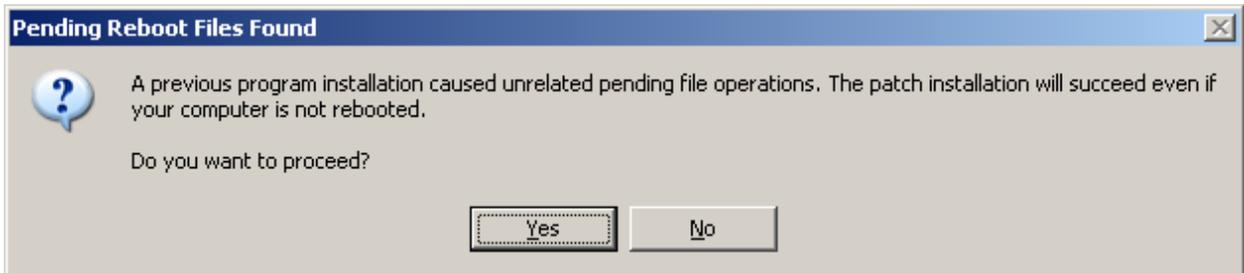
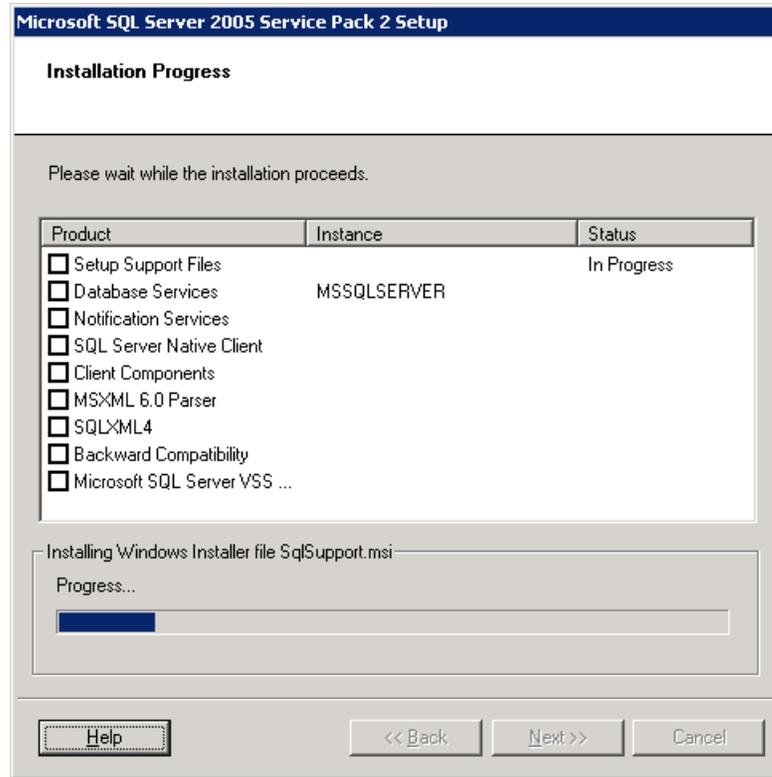
**Error and Usage Reporting Settings**

Automatically send Error reports for SQL Server 2005 Service Pack 2 to Microsoft or your corporate error reporting server. Error reports include information regarding the condition of SQL Server 2005 Service Pack 2 when an error occurred, your hardware configuration and other data. Error reports may unintentionally include personal information, which will not be used by Microsoft.

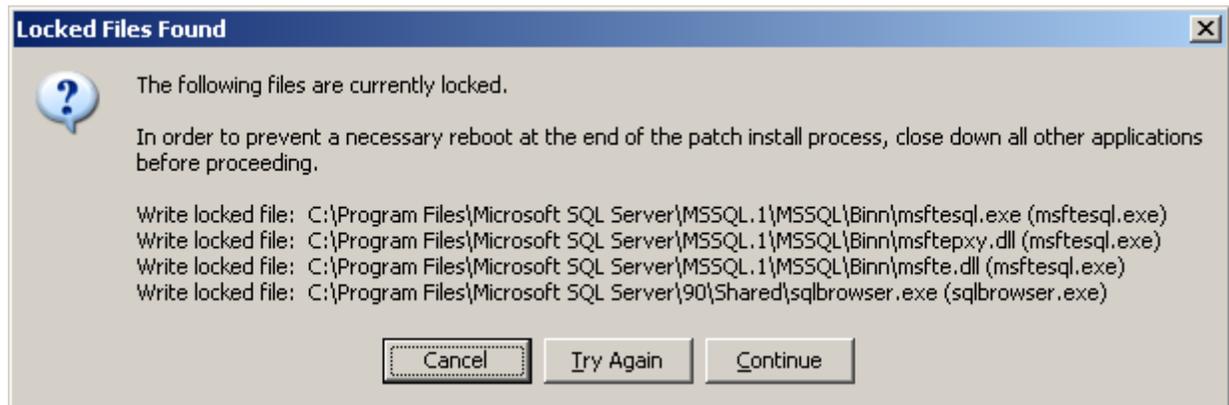
Automatically send Feature Usage data for SQL Server 2005 Service Pack 2 to Microsoft. Usage data includes anonymous information about your hardware configuration and how you use our software and services.

For more information about our privacy policy, sending error reports, or sending usage data, click Help.





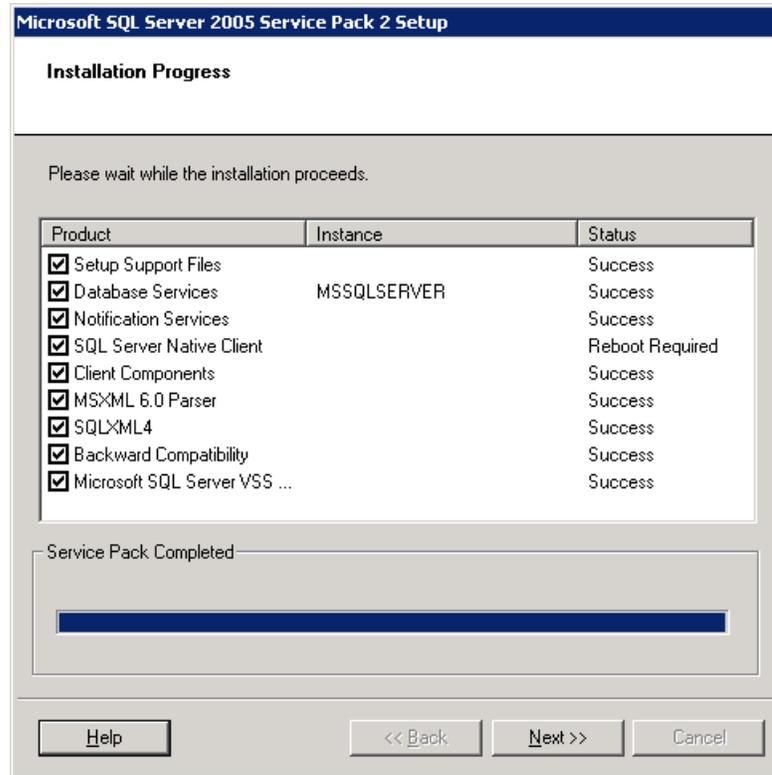
If you did not reboot before installing SP2 you will set this dialog, click yes to continue



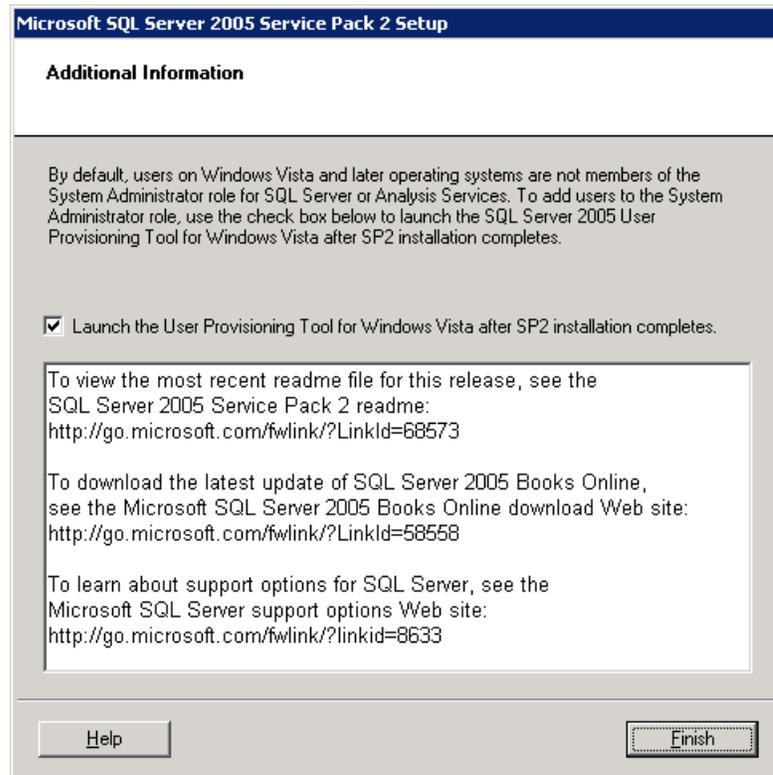
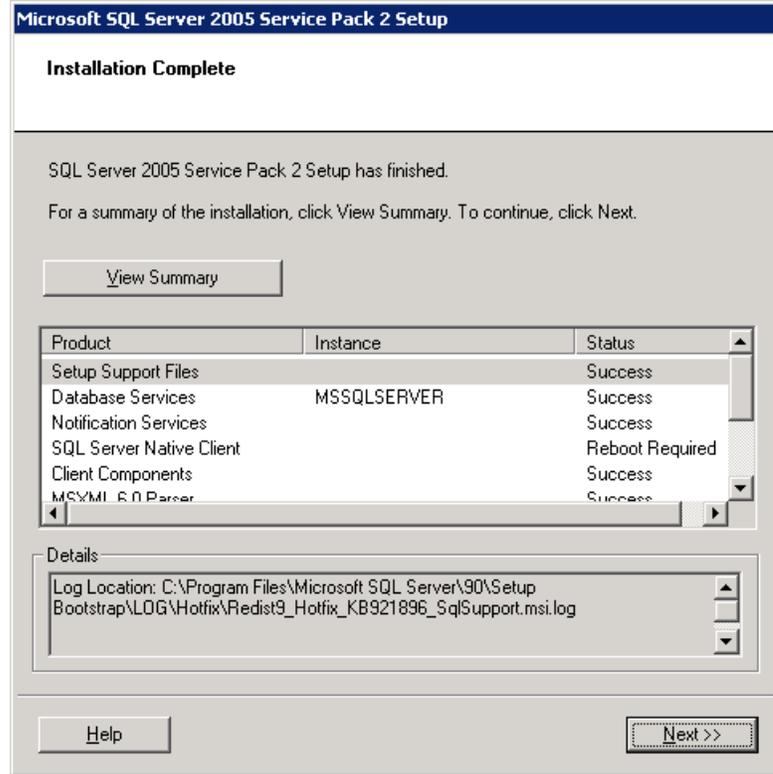
If SQL Services are running you will see this dialog, click continue to proceed with the installation of service pack 2



If you require a reboot to finish the installation of service pack 2 you will see this dialog

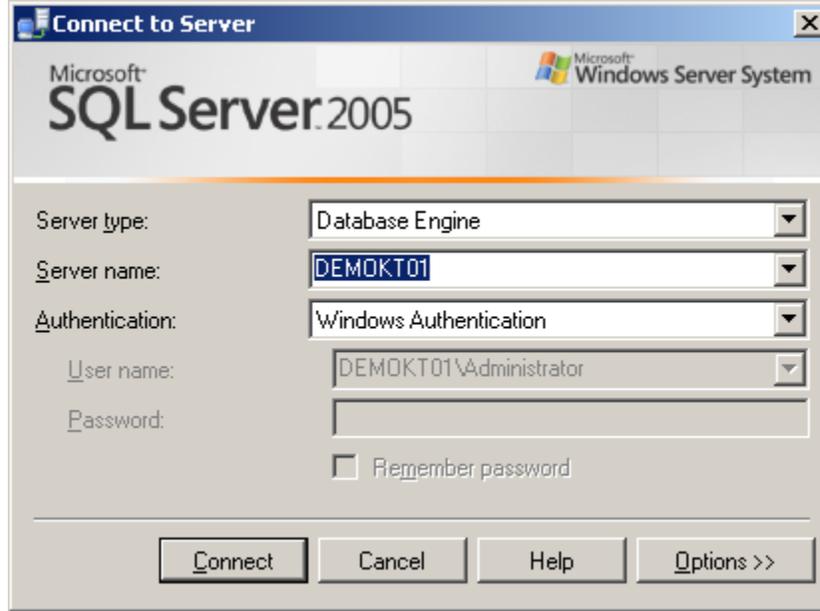


Installation Complete

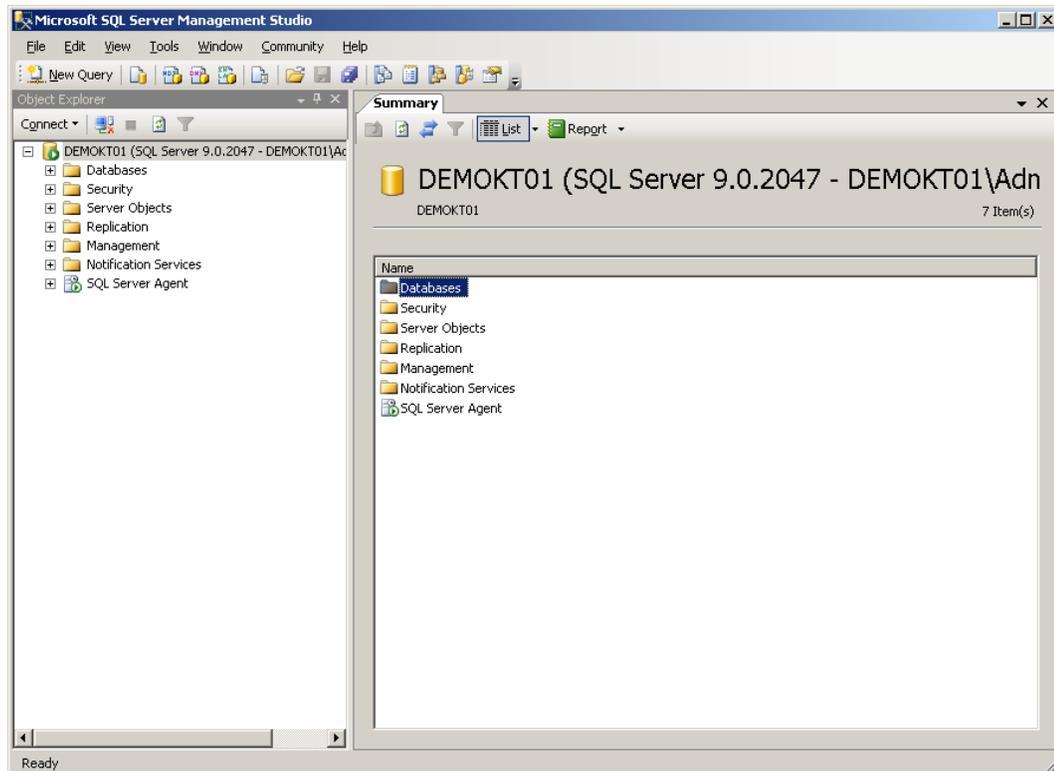


## 14.2 SQL Server 2005 Configuration

1. Start the SQL Server Management Studio and logon to the server using Windows or SQL Authentication

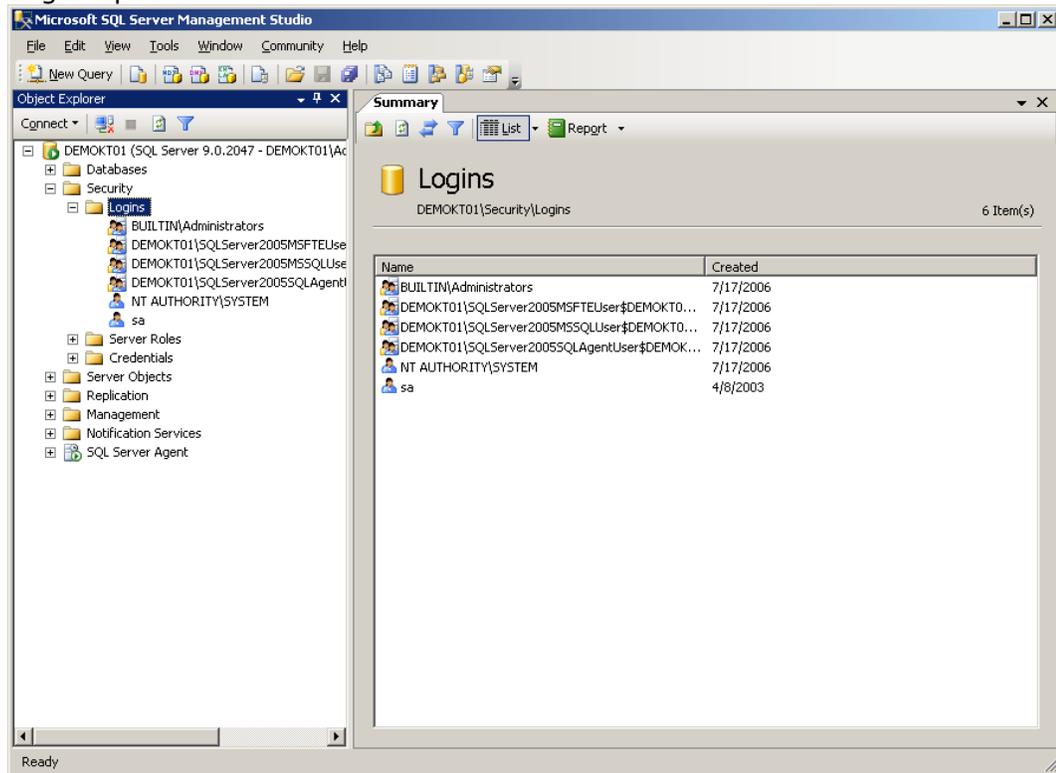


SQL Server 2005 Login Screen



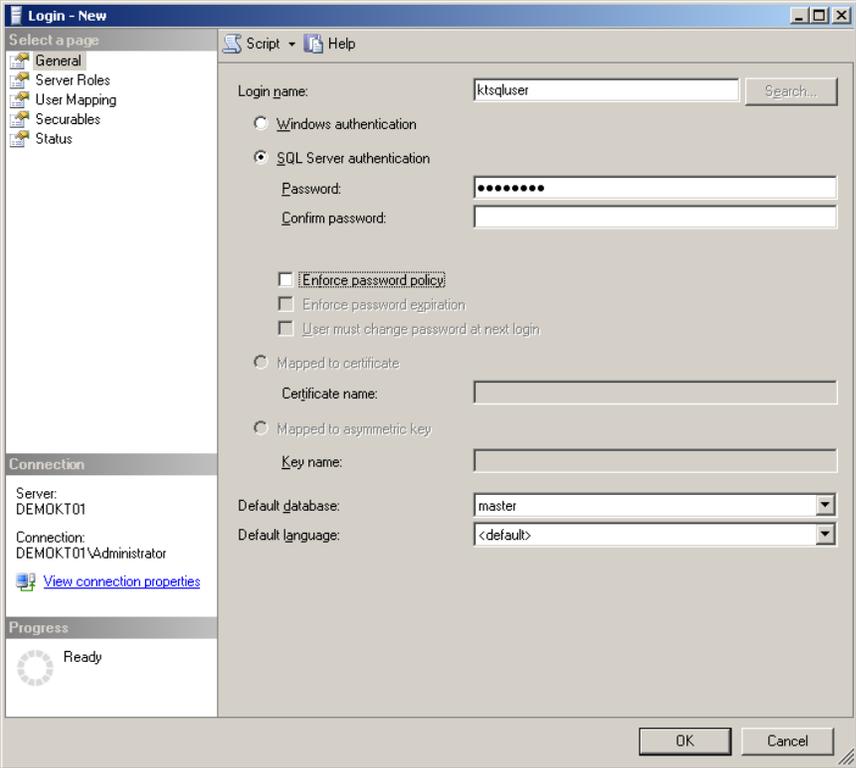
SQL Server 2005 Management Studio

2. Expand security and select the logins folder. Right click logins and select the 'New Login' option



... select the logins folder...

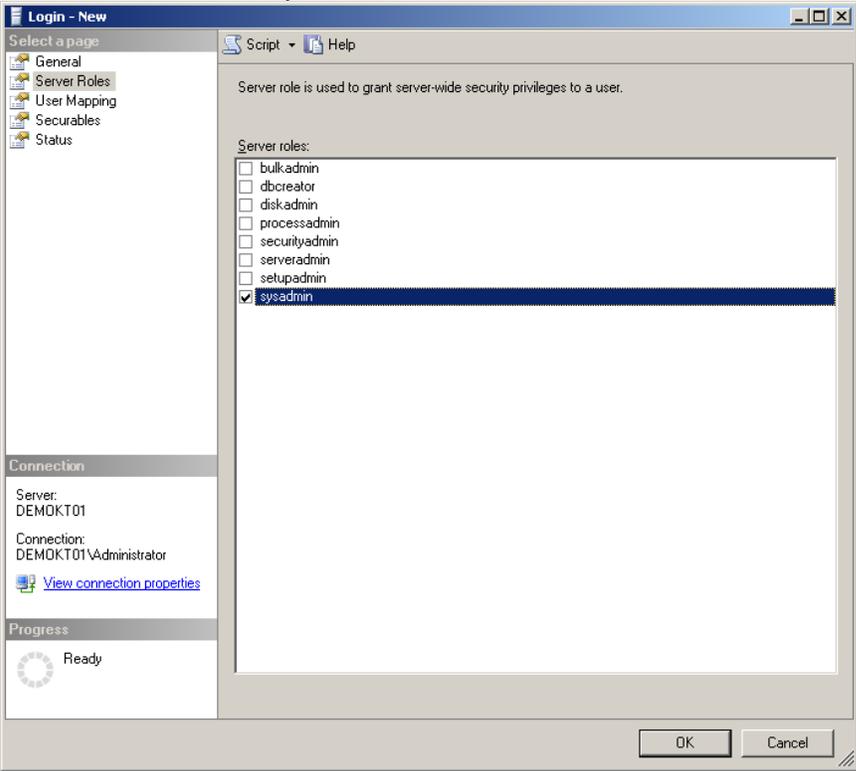
3. Create a new sql server account called ktsqluser with the following settings:
- General Settings:
    - SQL Server authentication
    - Uncheck 'Enforce password policy' (this option is only enabled if SQL 2005 is installed on Windows 2003 Server)
    - Default database : master
    - Default language : <default>



General Settings Screen

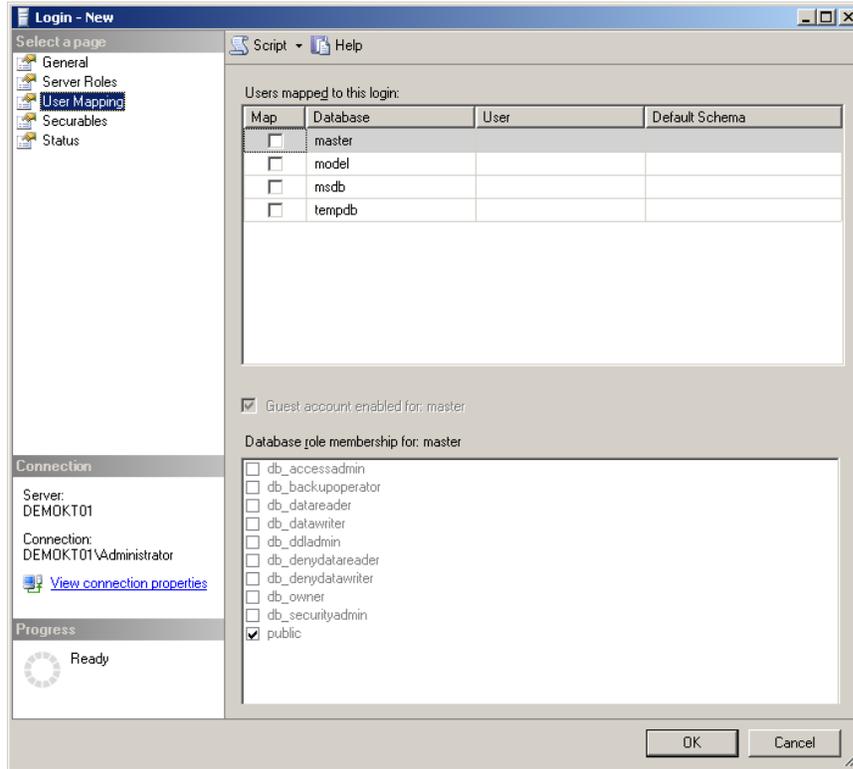
b. Server Roles

Check the 'sysadmin' server role



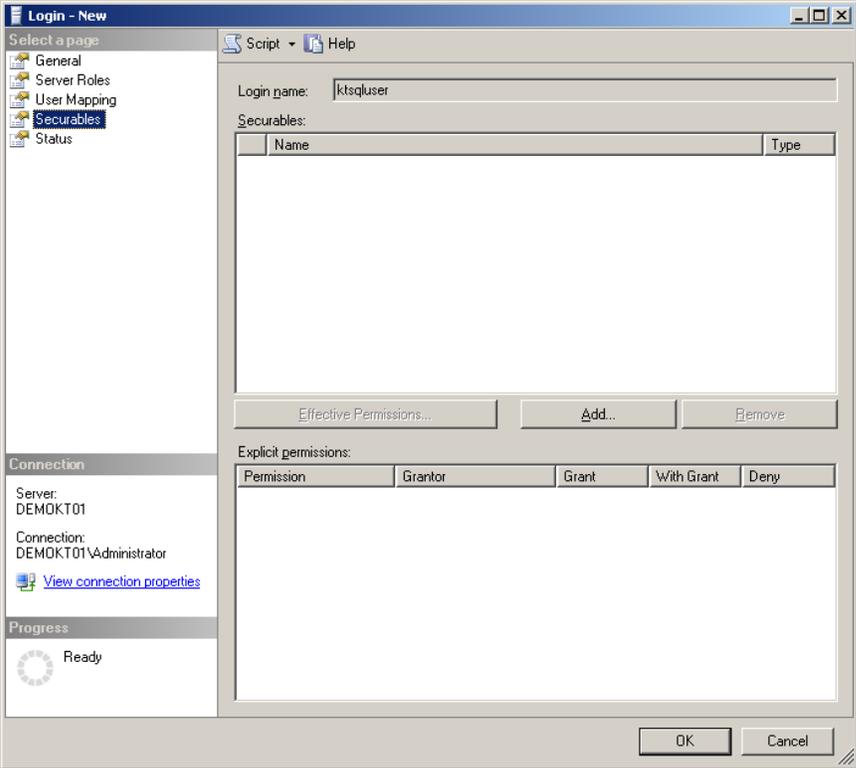
Server Roles Settings Screen

- c. User Mapping
  - Select the master database
  - Select the model database
  - Select the msdb database



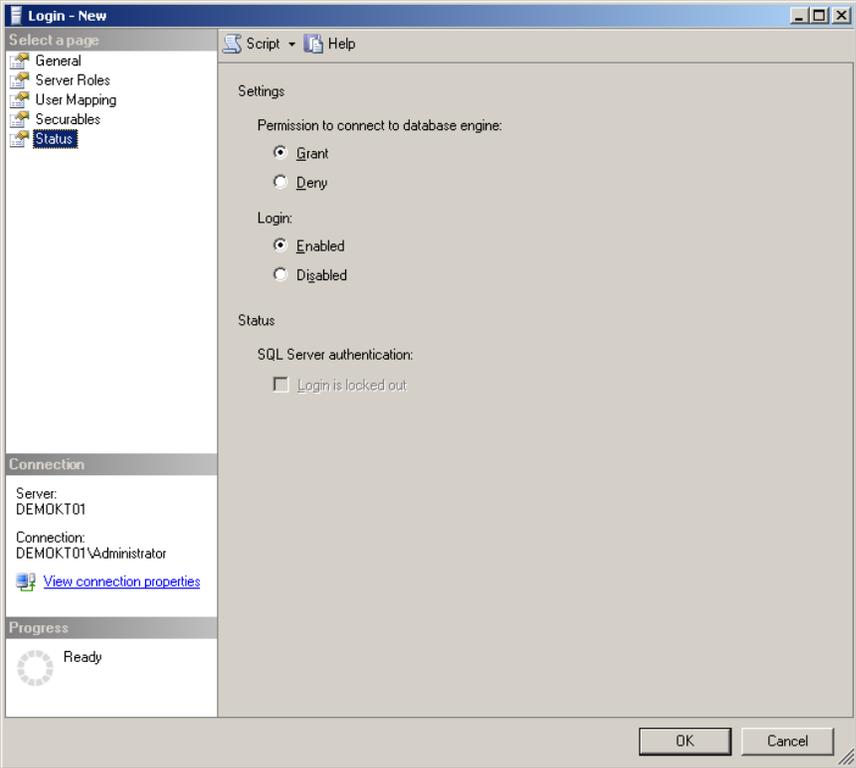
User Mapping Settings Screen

- d. Securables (No Change)



Securables Settings Screen

e. Status (No Change)



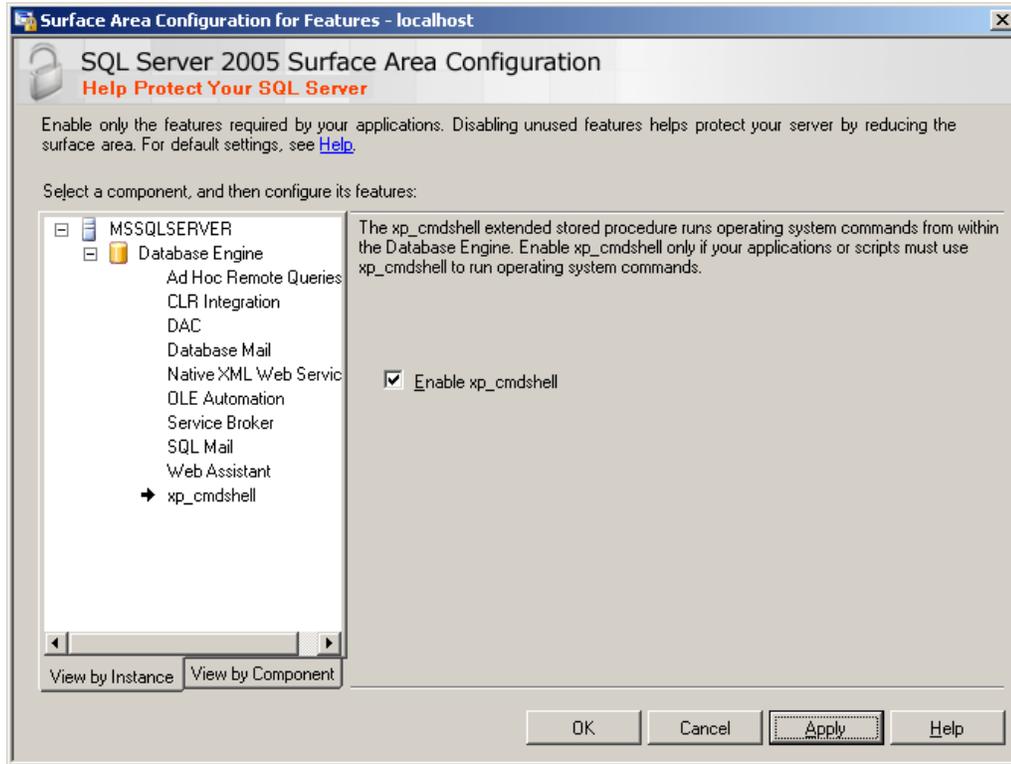
Status Settings Screen

2. Click 'Ok' to create the account
3. If you are using Server 2003 uncheck 'Enforce password policy' checkbox on the General settings for the sa account login
4. Open the SQL Server Surface Area Configuration tool from the SQL Server 2005 configuration tools start menu (Start\Programs\Microsoft SQL Server 2005\Configuration Tools\SQL Server Surface Area Configuration)



SQL Server 2005 Surface Area configuration

5. Select 'Surface Area Configuration for Features'
6. Select 'xp\_cmdshell', enable the feature and apply the change



Surface Area Configuration for Features

## 15 KwikTag Prerequisites

Prerequisites should only be installed after IIS &/or SQL has been installed

### 15.1 Installing .NET Framework 1.1 SP1

**This is only required if you are installing on a x64 sql server.**

The Microsoft .NET Framework 1.1 SP1 can be installed in two different ways, through Windows/Microsoft Update or by manual installation. If you choose to install the framework using Windows/Microsoft Update you will need to do a 'Custom' update and the framework can be selected in the 'Recommended' updates section. This section will cover the manual installation of the .net framework.

Before you install 1.1 SP1 you must be aware of a few things:

- What operating system am I installing on?
  - Windows 2003 x64 does not have the .net framework installed at all and you must install the 1.1 framework before you can install 1.1 sp1
- What do I need to install?
  - As stated previously, Windows 2003 x64 systems need to have the 1.1 .net framework installed, and then 1.1 sp1 can be applied
- Where do I download these from?
  - The following links are accurate as of the time of this writing:
    - The full 1.1 redistributable package (Windows 2003 x64) - <http://www.microsoft.com/downloads/details.aspx?FamilyID=262d25e3-f589-4842-8157-034d1e7cf3a3&DisplayLang=en>
    - Framework 1.1 SP1 (Windows 2003 x64) - <http://www.microsoft.com/downloads/details.aspx?familyid=A8F5654F-088E-40B2-BBDB-A83353618B38&displaylang=en>

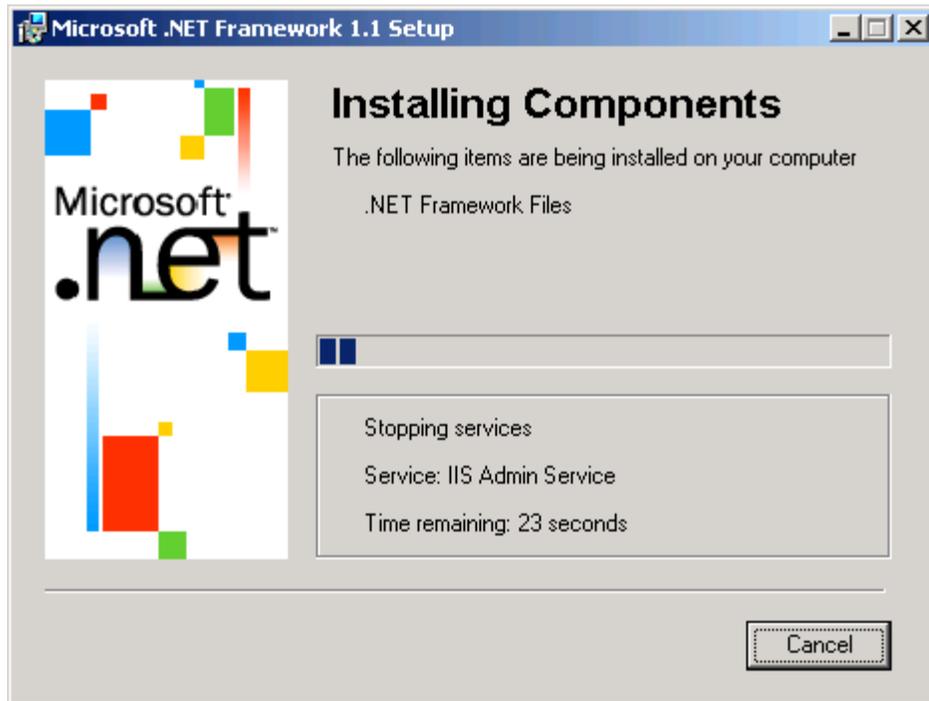
**NOTE:** There are 2 **different** versions of 1.1 sp1 listed above; One is only for x86 versions of Windows Server 2003 and the other are for Windows 2000 and XP systems. **Be sure you download and install the right patch for your system.**

The following are step by step instructions for installing the 1.1 .NET Framework and 1.1 SP1. These instructions already assume you have downloaded the appropriate files as previously stated.

- Step 1 – Double click the dotnetfx.exe to start the installation of the 1.1 framework. You will be asked if you want to install the 1.1 framework, click yes to continue
- Step 2 – A new dialog window is displayed called License Agreement. Select 'I agree' the Install button will become enabled, click it to begin the installation process



License Agreement Dialog

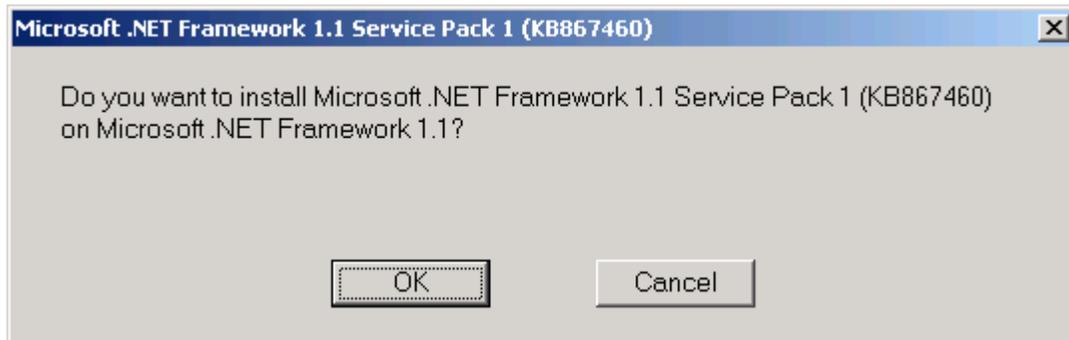


Installing Components Dialog

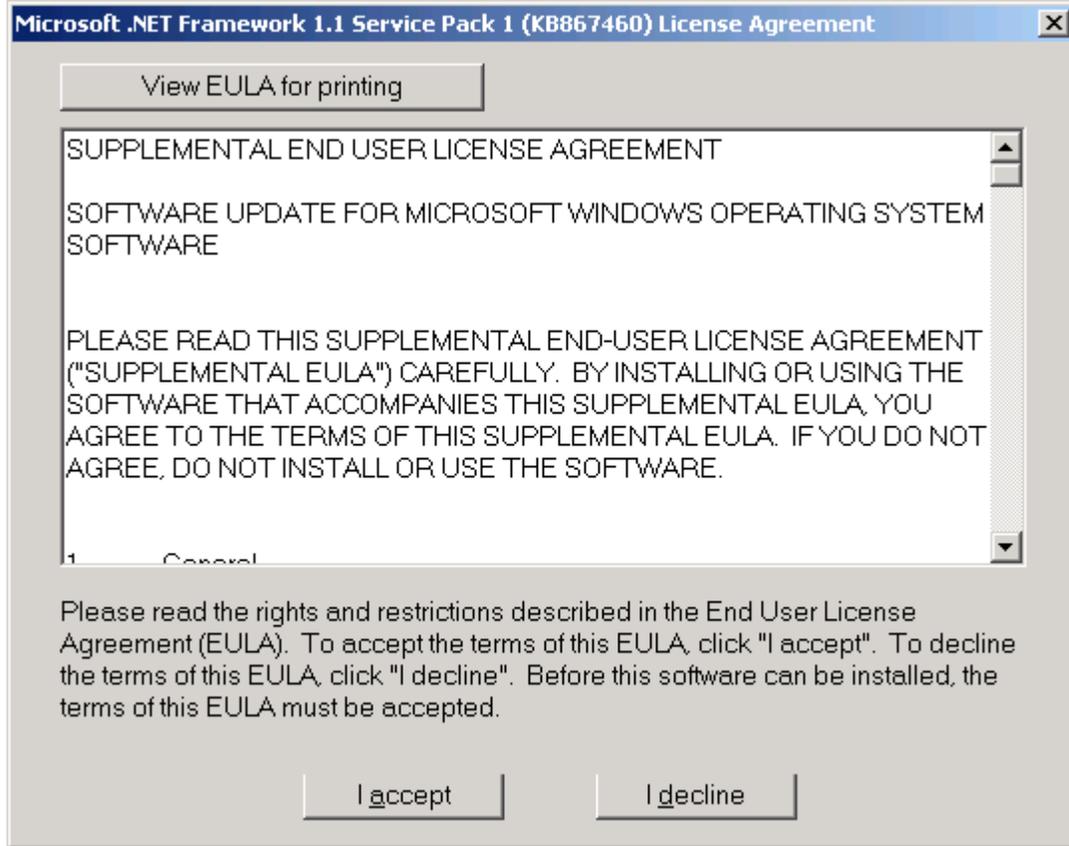
- Step 3 – Once installation is complete click the 'OK' button to finish the installation



- Step 4 - Double click NDP1.1sp1-KB867460-X86.exe
- Step 5 - You will be asked if you want to install 1.1 SP1 on 1.1, click 'OK' to continue the install



- Step 6 - A new dialog window is displayed called License Agreement. Select 'I accept' to begin the installation process
- Step 7 - A dialog for installing components will be displayed briefly. installation is complete click the 'OK' button to finish the installation



License Agreement Dialog



### 15.1.1 Installing KwikTag NS with a different Instance Name

1. Immediately after starting the install, and all files have been copied, go to Program Files\KwikTag Support and copy install\_ns.bat and uninstall\_ns.bat to another folder
2. Edit install\_ns.bat and REM out all of the commands
3. Quickly browse to Program Files\KwikTag\Messaging\Bin and make a copy of AddSubscriptions.vbs
4. The install will complete successfully, click Finish
5. Open the install\_ns.bat file in Notepad and change the Instance Name to the name you want. There are three places to change this: two after -name and one after NS\$
6. Save and close the file
7. Change the value of the <InstanceName> node to the name you want.
8. Save and close the file
9. Edit the AddSubscriptions.vbs file and change the InstanceName value to the name of the instance you are creating.
10. Save and close the file
11. Move the AddSubscriptions.vbs to the Program Files\KwikTag\Messaging\Bin
12. Remove all the REM statements from install\_ns.bat and add PAUSE as the final line (this lets you see the results in the command window)
13. Run install\_ns.bat

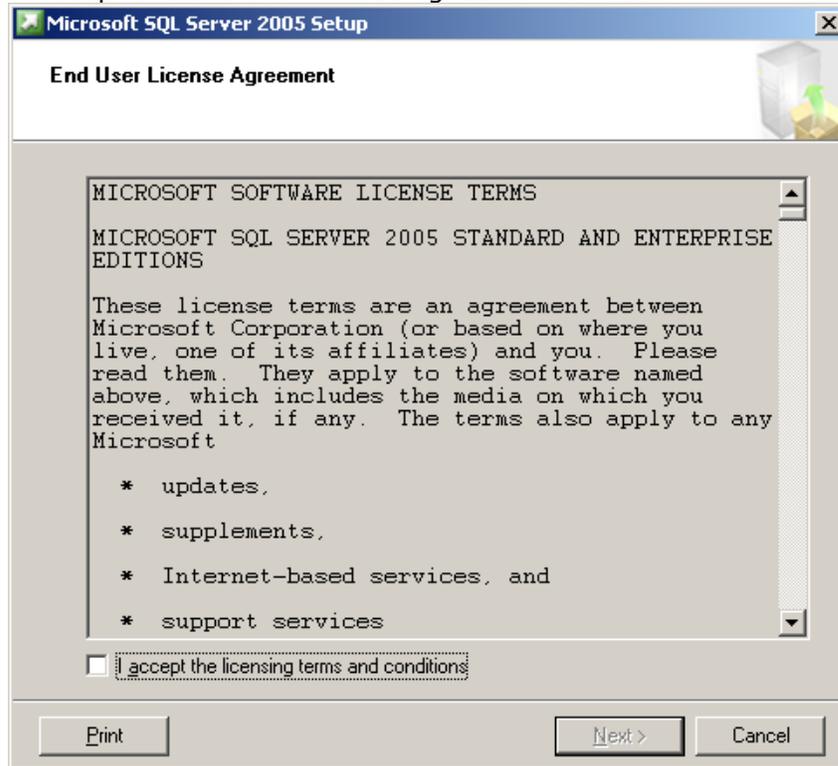
## 15.2 SQL Notification Services 9.0

1. Select "Server components, tools, Books Online, and samples" from the install section of the splash screen



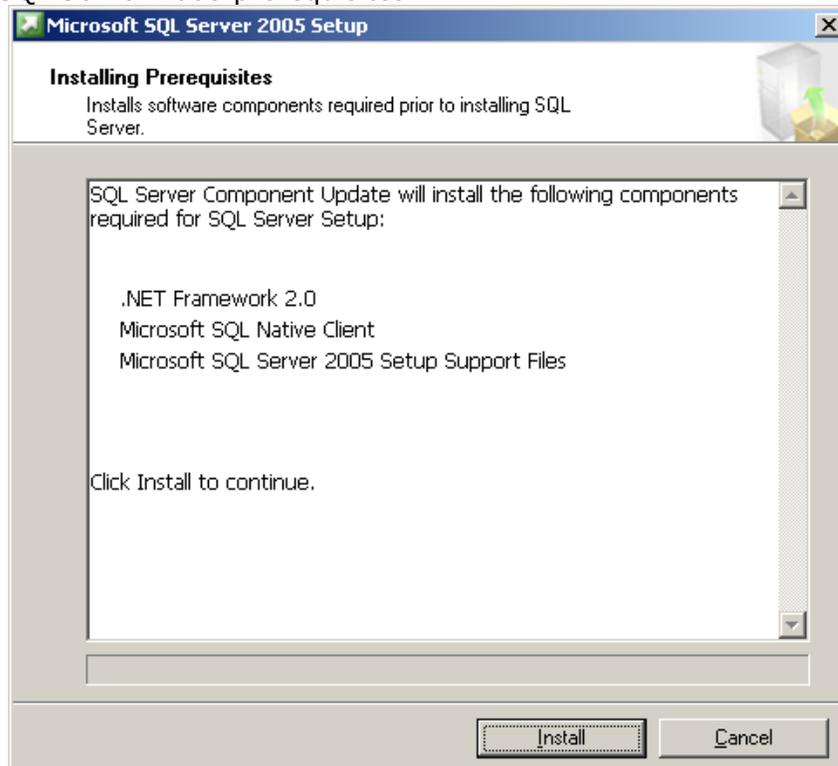
SQL Server 2005 Startup Splash Screen

2. Read and accept the end user license agreement and click next

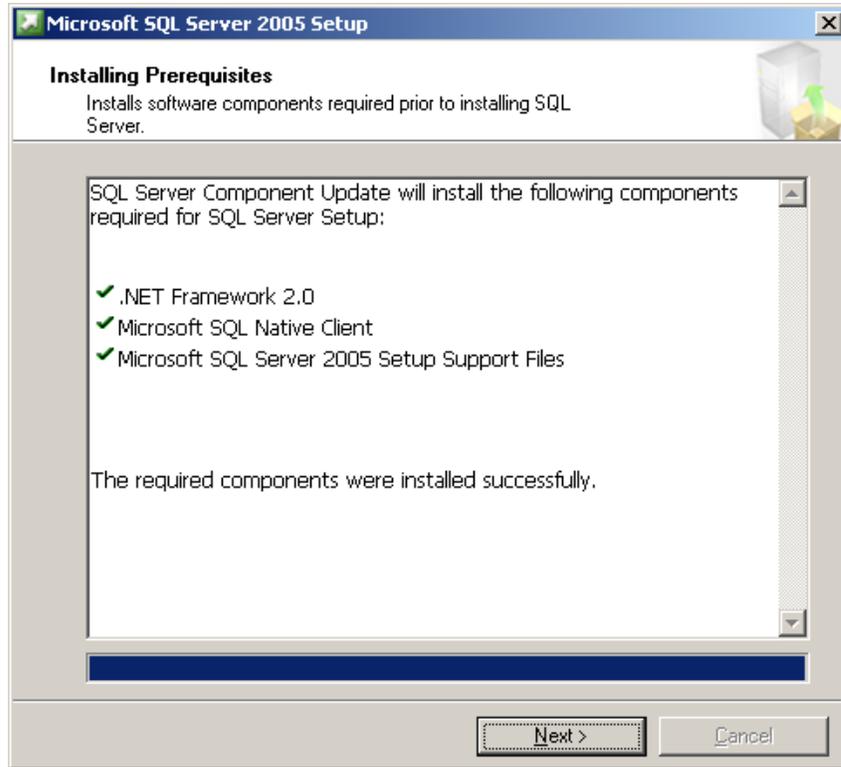


End User License Agreement

3. Install SQL Server 2005 prerequisites



Click "Install" to begin the installation of the prerequisites

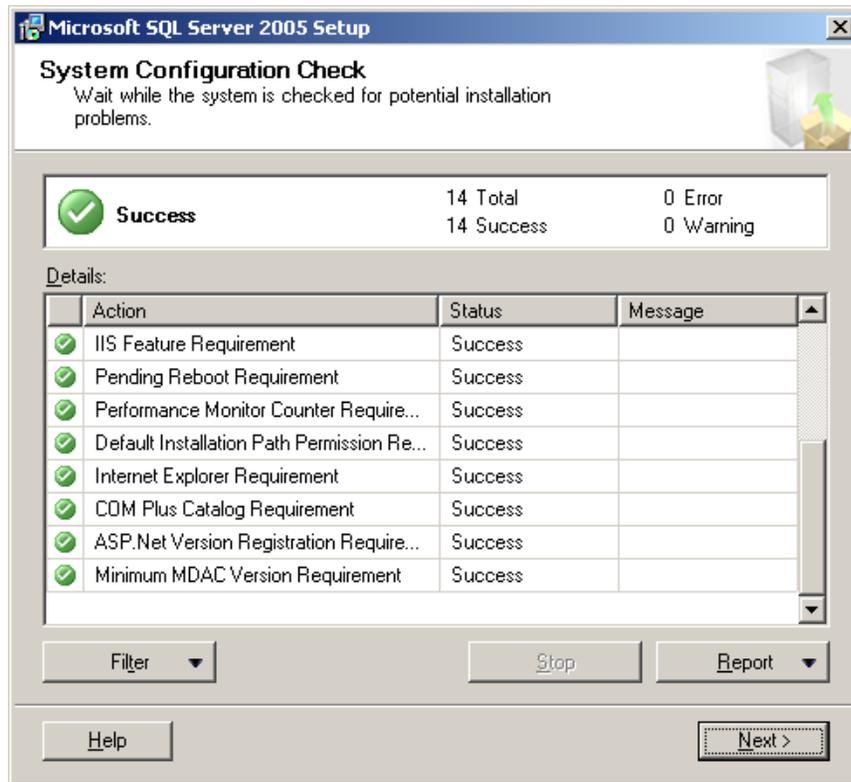


Click "Next" when prerequisite installation is finished to continue



SQL Server Installation Wizard Welcome Screen - Click Next

- The results of the system check the installation performed earlier are displayed on the "System Configuration Check" dialog screen. If any errors or warnings are discovered address them before continuing the installation



System Configuration Check Screen

5. Name: Use appropriate naming convention
6. Company: Use appropriate naming convention
7. CD Key: Insert Customer CD Key here

Microsoft SQL Server 2005 Setup

### Registration Information

The following information will personalize your installation.

The Name field must be filled in prior to proceeding. The Company field is optional.

Name:  
demo

Company:  
ImageTag, Inc.

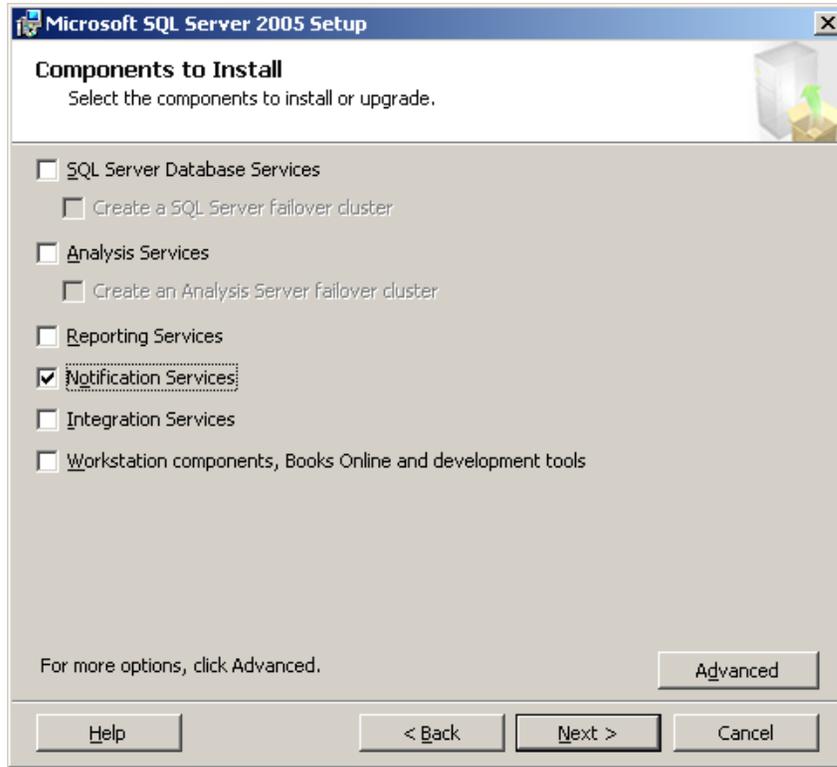
Please enter your 25 character Product Key. You can find this number on the yellow sticker in the CD liner notes or the CD sleeve.

□ - □ - □ - □ - □

Help < Back Next > Cancel

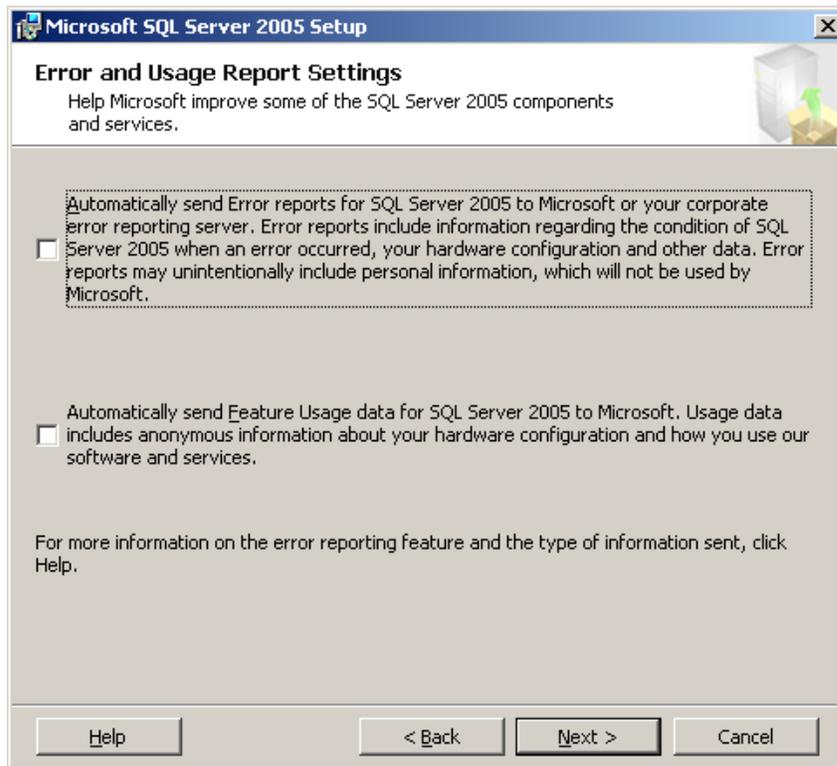
Registration Information Screen

8. Select the following components to install:
  - Notification Services



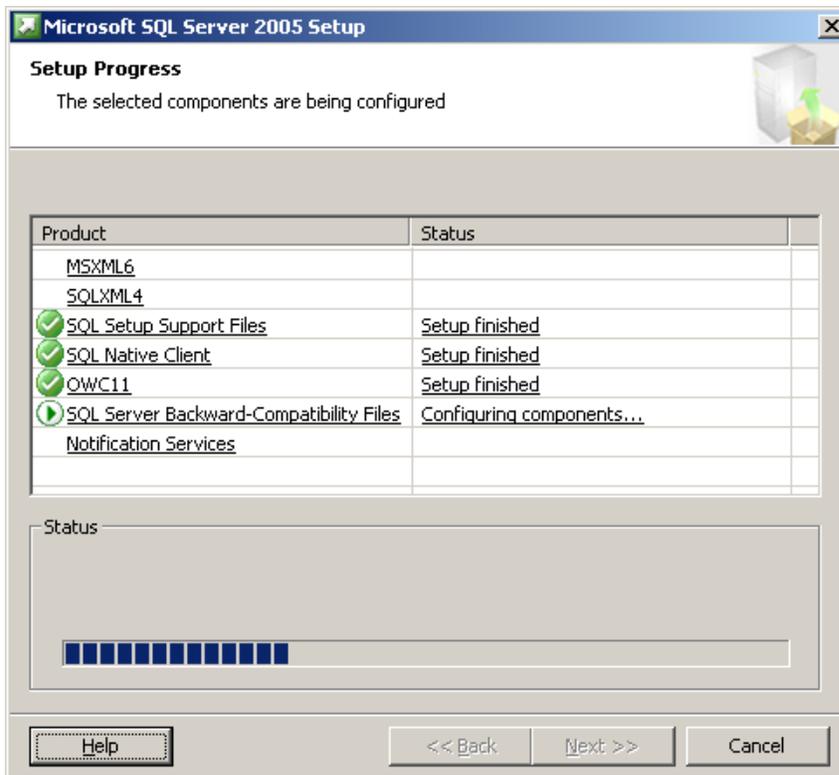
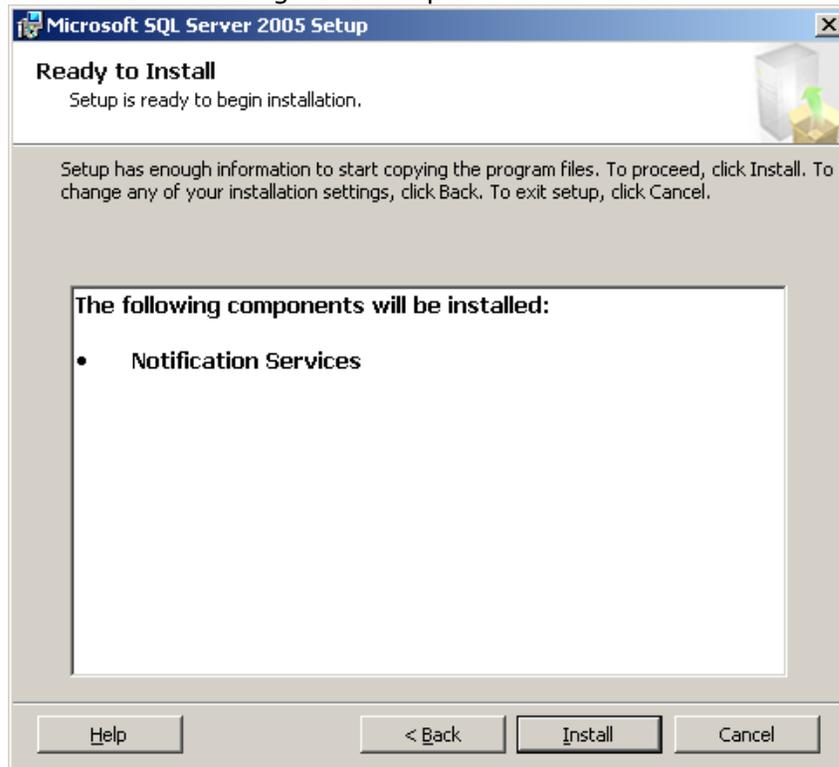
Components to Install Screen

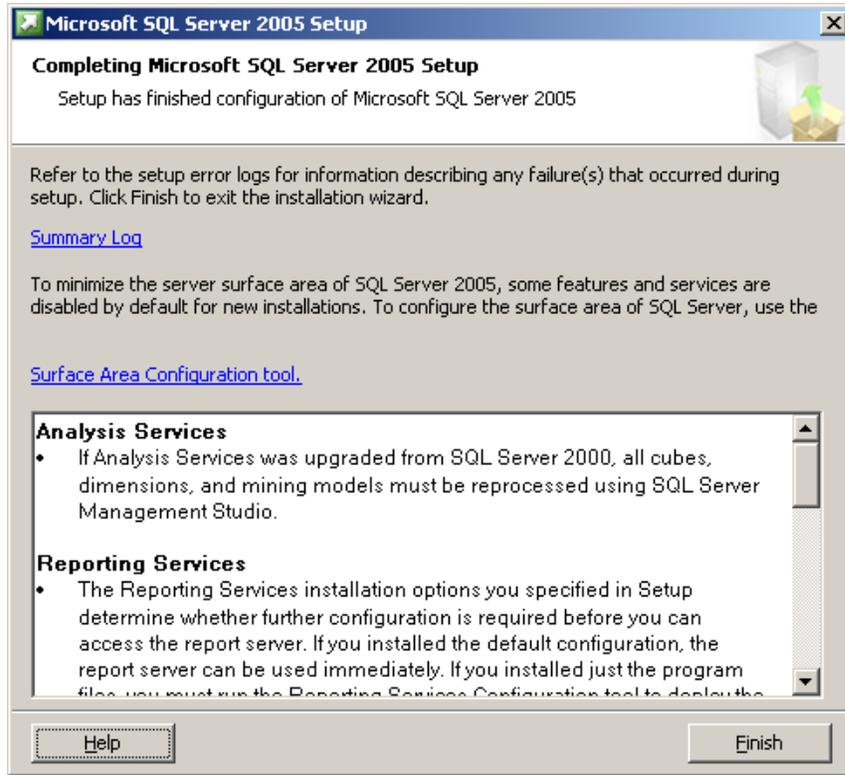
9. Do not select any of the error and usage reporting settings



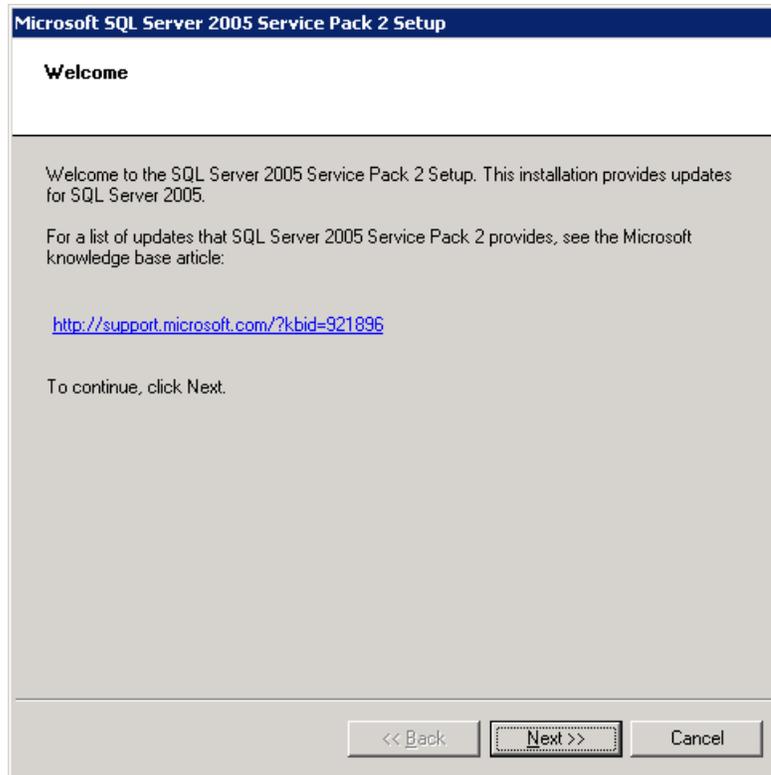
Error and Usage Report Settings Screen

10. Verify the installation settings and complete the installation

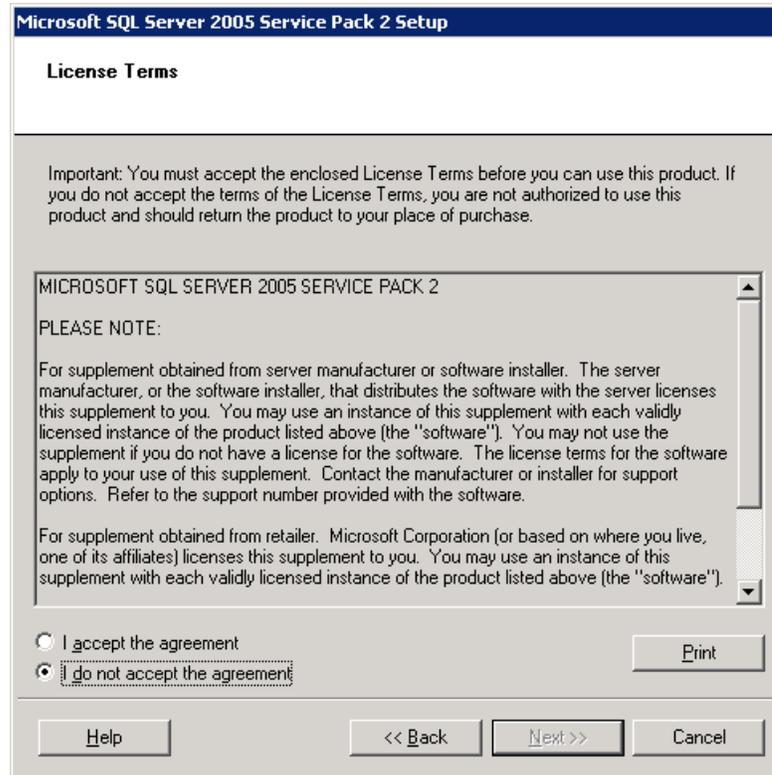




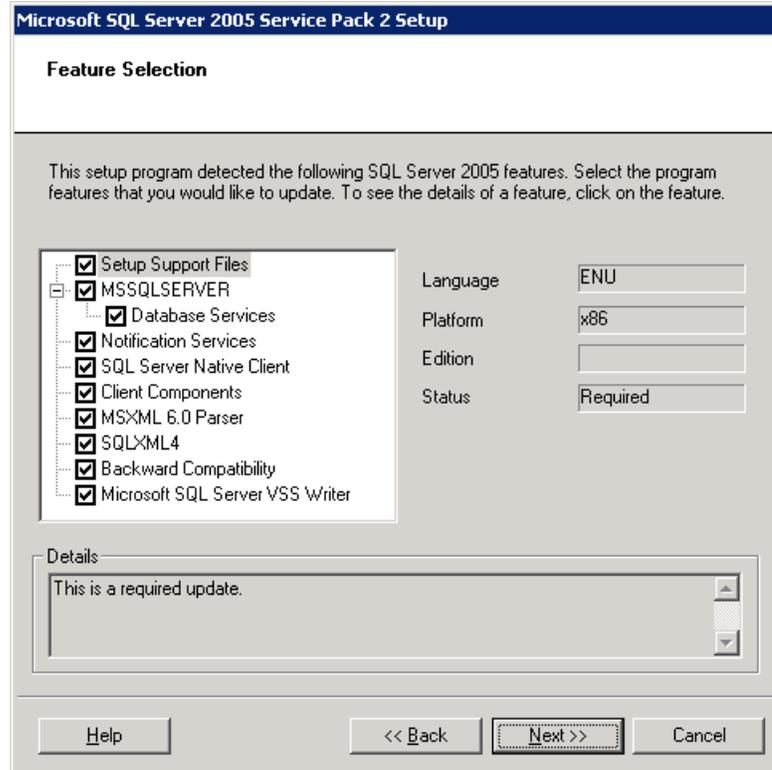
11. Install SQL Server 2005 Service Pack 2



SQL Server 2005 Service Pack 2 Welcome Screen



SQL Server 2005 Service Pack 2 end user license agreement



Feature Selection Screen

**Microsoft SQL Server 2005 Service Pack 2 Setup**

**Authentication**

Select the authentication mode and account for the instances to upgrade. You can choose to apply the settings to all instances or to a specific instance.

Apply selection to all instances

Instance Name:

Authentication:

User Name:

Password:

Product	Instance	Authentication	User name	Status
Database Servic...	MSSQLSERV...	Windows	IMAGETAG\jwri...	Success

Authentication Mode Screen

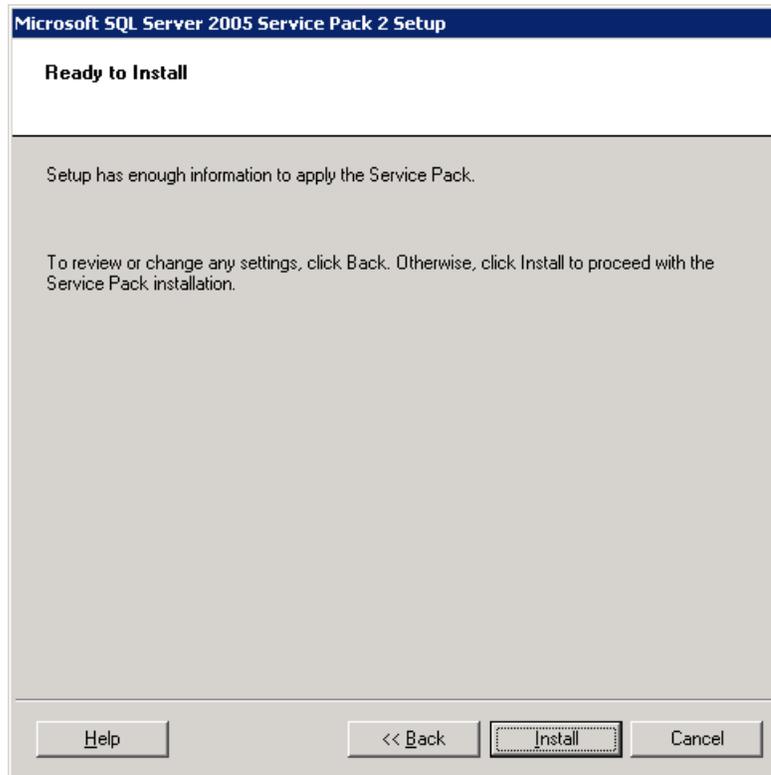
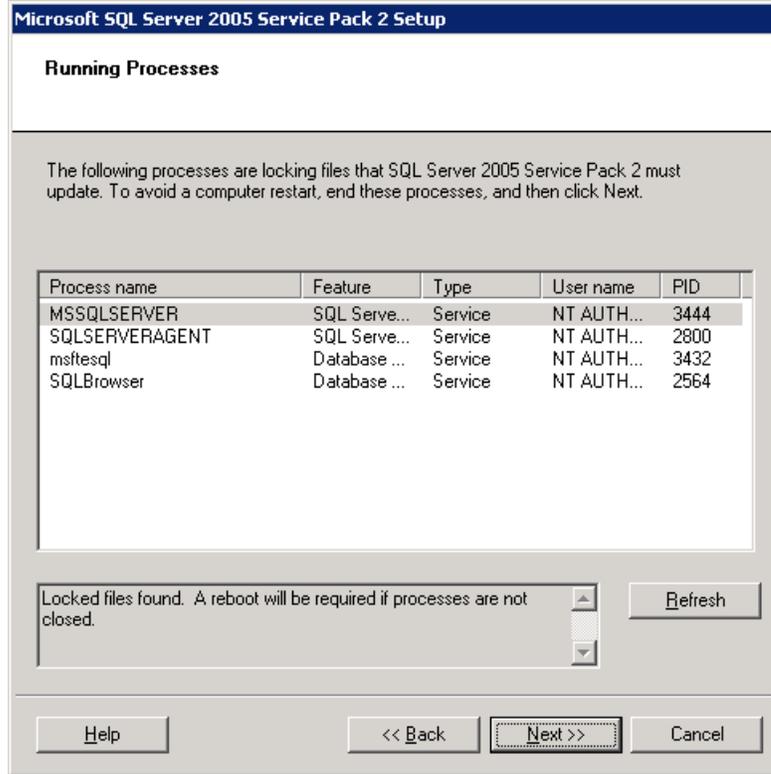
**Microsoft SQL Server 2005 Service Pack 2 Setup**

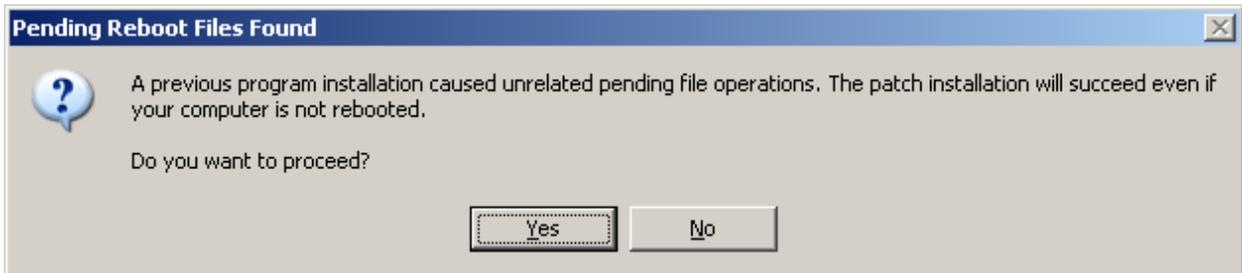
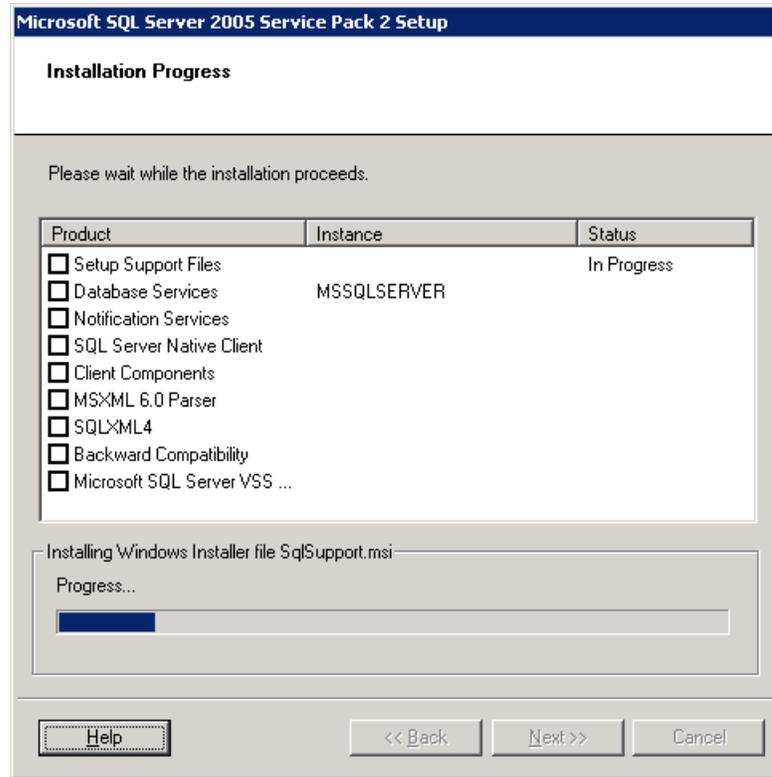
**Error and Usage Reporting Settings**

Automatically send Error reports for SQL Server 2005 Service Pack 2 to Microsoft or your corporate error reporting server. Error reports include information regarding the condition of SQL Server 2005 Service Pack 2 when an error occurred, your hardware configuration and other data. Error reports may unintentionally include personal information, which will not be used by Microsoft.

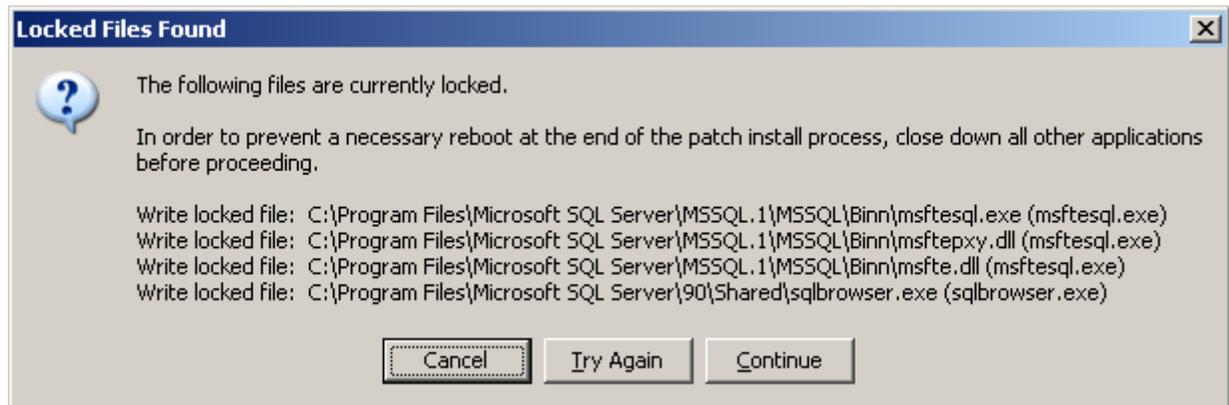
Automatically send Feature Usage data for SQL Server 2005 Service Pack 2 to Microsoft. Usage data includes anonymous information about your hardware configuration and how you use our software and services.

For more information about our privacy policy, sending error reports, or sending usage data, click Help.

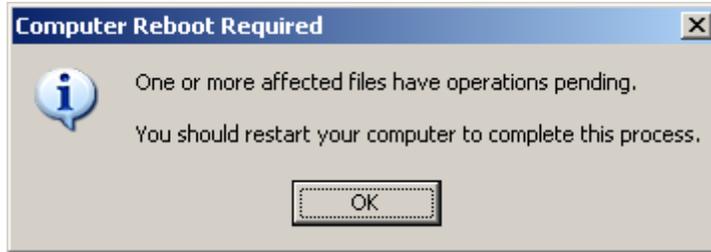




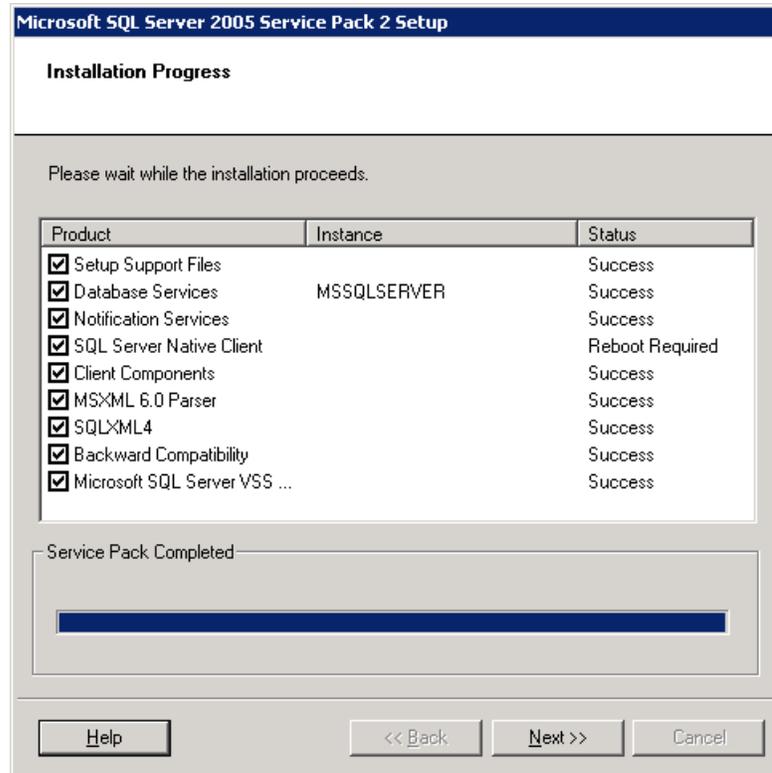
If you did not reboot before installing SP2 you will set this dialog, click yes to continue



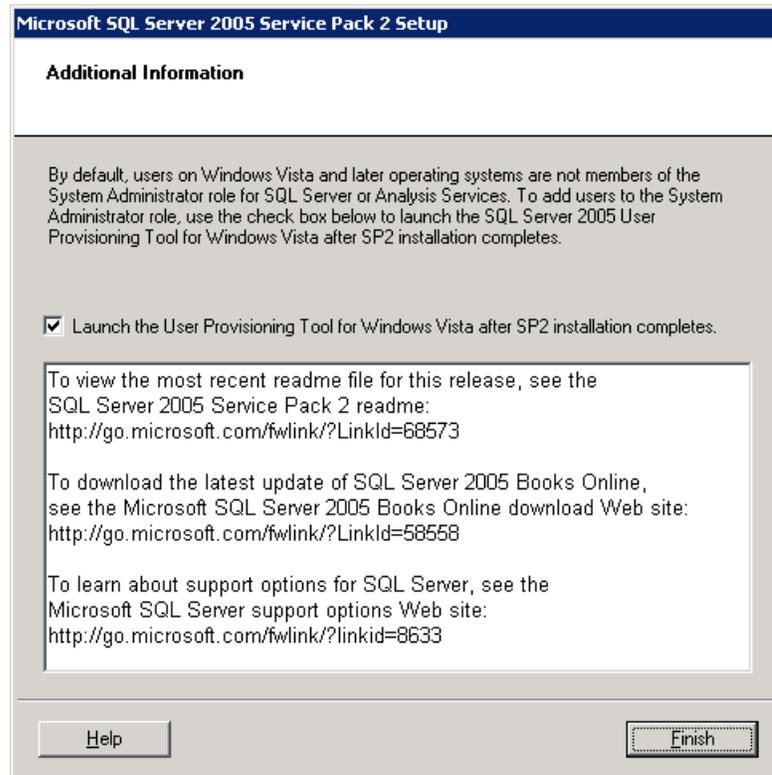
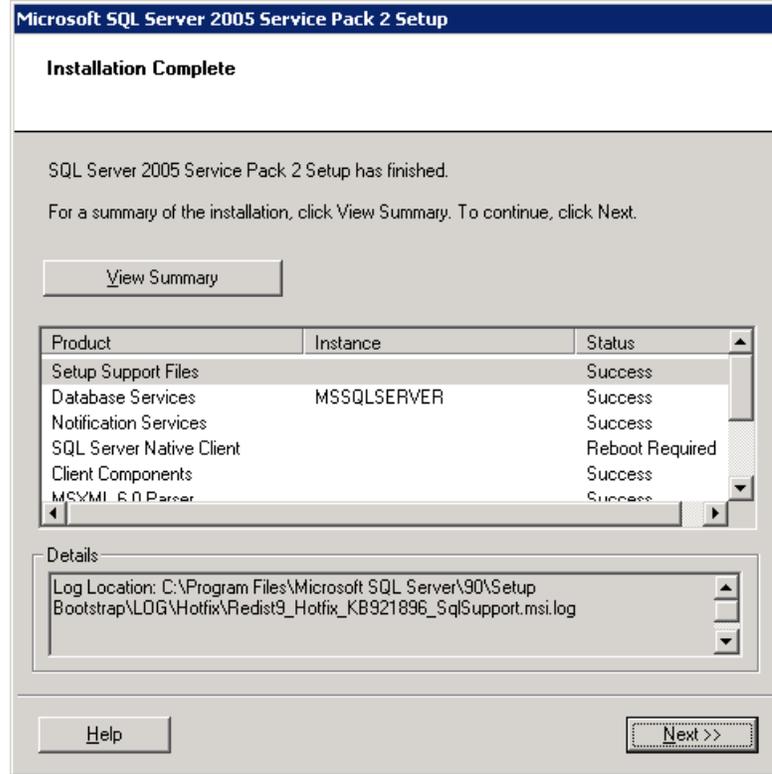
If SQL Services are running you will see this dialog, click continue to proceed with the installation of service pack 2



If you require a reboot to finish the installation of service pack 2 you will see this dialog



Installation Complete



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## 16 Security Settings

### 16.1 Windows Server 2003

#### 16.1.1 Introduction

This document details the security permissions that can be applied to a Kwiktag system to provide file level security. The following configuration is recommended for any Kwiktag system that will be accessible to an external network.

#### 16.1.2 Format Conventions and Definitions

**Root** – This usually refers to a drive, or the main directory being referred to. I.e. Give the local admins group full permissions at the root of C:/.

**Local** – This refers to the local machine. This is quite important as when you are joined to a domain, by default, the domain users are displayed so you will have to select the local machine from the dropdown list.

**[Text]** – This refers to a button.

**{Text}** – This refers to a server name. I.e. itkwiktag might show up like this....{itkwiktag}

#### 16.1.3 Account Security

1. Right click my computer
2. Select Manage
3. Expand Local Users and Groups and click on the Users folder
4. Right click the IUSR account and rename to Webuser
5. Right click the Webuser account and select properties
6. Verify that the checkboxes for User cannot change password and Password never expires are checked and set the standard password. Click [Apply]
7. Right click the Users folder and select new user
8. Username is Webappmgr
9. Fullname is Launch IIS Process Account
10. Description is Account for IIS to start out of process applications
11. Enter and confirm the standard password for this account
12. Uncheck the checkbox for User must change password at next logon
13. Check the checkboxes for User cannot change password and Password never expires
14. [Create]
15. [Close]
16. Add WebAppMgr to the IIS\_WPG Group
17. Create Group named ktService and add the internal Network Service and Local Service accounts
18. Close Computer Management
19. Click Start/Programs/Administrative Tools/Component Services
20. Expand Component Services
21. Expand Computers
22. Expand My Computer
23. Expand Com+ Applications
24. Right click IIS Out-Of-Process Pooled Applications and select properties

25. Click the Identity Tab
26. [Browse]
27. Select the local Webappmgr account
28. [Ok]
29. Enter and confirm the password
30. [Apply]
31. [Ok]
32. Open the KwikTag Soap Package
33. Open the Roles folder
34. Add WebAppMgr to the Creator Owner Role
35. Open the KwikTag API Package
36. Open the Roles folder
37. Add WebAppMgr to the Creator Owner Role
38. Change the IUSR account to Webuser in all KwikTag Com+ Application Roles where IUSR exists.
39. Close Component Services
40. Open the Internet Information Services Manager<sup>12</sup>
41. Right Click on Websites
42. [Properties]
43. Click the Directory Security Tab
44. [Edit]
45. In Anonymous Access click [Edit]
46. [Browse...]
47. Select the local Webuser account
48. Enter the password
49. Check the checkbox for Allow IIS to control password
50. Click [Yes] when the IIS WWW Configuration dialogue box comes up
51. [Ok]
52. [Ok]
53. [Apply]
54. [Ok]
55. [Ok]
56. Change the IIS Application Pools to run as WebAppMgr
57. Close the Internet Information Services Manager

#### 16.1.4 Setting NTFS Permissions

Setting NTFS permissions is very straightforward. The following is an example of how to set NTFS permissions for the C:\ Drive. The same process is used for the D:\ Drive and also for setting permissions on files and folders.

1. At the root of C:\ right click the C:\ drive and select the security tab
2. [Add]
3. Select the local machine from the dropdown menu
4. Multi-select the local administrators group and System
5. [Add]
6. [Ok]
7. Select the administrators group
8. Check the checkbox for Full Control
9. Select System
10. Check the checkbox for Full Control

---

<sup>12</sup> Steps 31 through 48 are only applied to the web server

11. Select the everyone group
12. [Remove]
13. [Advanced]
14. Check the checkbox for Reset permissions on all child objects...
15. [Ok]
16. You will get a message box telling you that the pagefile.sys is in use and cannot be written to...click [Ok]
17. [Ok]

### 16.1.5 Permissions Matrix

The following matrix provides the specific permissions that are required for a Kwiktag system to function. The detailed instructions are included above, but for reference the permissions are listed here in an easier to read format. For all permissions listed in the matrix you must click the Reset permissions on all child objects under the Advanced tab.

Directory	Account/Group	Permissions	Apply on to
C:\	Administrators, System, Creator/Owner	Full Control	This folder, subfolders, and files
	KtService	Read & Execute	This folder, subfolders, and files
C:\ Program Files\Common Files	Webuser, Webappmgr	Read & Execute	This folder, subfolders, and files
C:\ Program Files\Kwiktag	Webuser, Webappmgr, FTP	Read & Execute	This folder, subfolders, and files
C:\Windows	Webuser	Read & Execute	This folder, subfolders, and files
	Webappmgr	Full Control	This folder, subfolders, and files
C:\Windows\System 32\msdtc	KtService	Full Control	This folder, subfolders, and files
C:\Windows\System 32\inetsrv\ASPComp iledTemplates	IIS_WPG	Full Control	This folder, subfolders, and files
D:\	Administrators, System, Creator/Owner	Full Control	This folder, subfolders, and files
	KtService	Read & Execute	This folder, subfolders, and files
D:\Logs	Webuser, Webappmgr	Read & Execute, Write	This folder, subfolders, and files
D:\Kwiktag	Webuser, Webappmgr	Read & Execute, Modify	This folder, subfolders, and files
D:\Kwiktag\Input	FTP	Read & Execute, Write	This folder, subfolders, and files

## 17 Integration Notes

### 17.1 Named Instances

When installing any KwikTag or Microsoft components on a SQL Named instance the correct syntax for the SQL Server Name is *servername\instancename*

### 17.2 Com+ Packages

The following instructions assume that you have access to the Administrative Tools through the Start Menu Programs listing. If you do not, you can reach administrative tools by going through the control panel which is also available through the start menu.

Also, some of the following steps may differ slightly between OS versions. Major differences are documented.

#### 17.2.1 Creating Com+ Packages Manually

1. Open the Component Services MMC (Start -> Programs -> Administrative Tools -> Component Services)
2. Expand Component Services until you get to the COM+ Applications Folder
3. With the COM+ Applications Folder selected, click Action -> New -> Application, or you can right click the COM+ Applications Folder and select New -> Application. Either way should open the 'Welcome to the COM+ Application Install Wizard' dialog.
4. Click Next and you should be taken to the next dialog screen where you should have the following options:

- a. Install pre-built application(s)
- b. Create an empty application

Select create an empty application which we will add components to later.

5. After you have selected the type of application to build, you will then be taken to a dialog prompting you to name your package and to select an Activation Type.
  - a. **Enter a name for the new application:** The naming convention for KwikTag Com+ Applications is to prefix the package name with KwikTag and then add a descriptive name to that. For example the DAL Com+ package name would be KwikTag DAL
  - b. There are two activation types:
    - i. **Library application:** Components will be activated in the creator's process
    - ii. **Server application:** Components will be activated in a dedicated server process

We want the Com+ application to run as a dedicated server process, so select the Server application type if it is not selected by default.

6. Next we have to set the application identity. You have the following two options:
  - a. **Interactive User:** When a package is running as the interactive user, it will run as the current logged on user. This is bad for KwikTag, because it requires that the user be logged into the station at all times for the application to run.
  - b. **This User:** The application will run under the context of this user account regardless of if the user is logged in or not.

Select This User, and specify a user account to run the application. Usually this is the ktuser account.

7. Click Finish

## 17.2.2 Adding Com+ Components Manually

1. Open the Component Services MMC (Start -> Programs -> Administrative Tools -> Component Services)
2. Expand Component Services until you get to the COM+ Applications Folder
3. Expand the Com+ Application you want to add components to such as KwikTag DAL
4. Select the Components subdirectory
5. Select Action -> New -> Component, or you can right click the components folder and select New -> Component. Either way should open the wizard
6. Click Next and you should be taken to the next dialog screen where you should have the following options:
  - a. Install new component(s)
  - b. Import component(s) that are already registered
  - c. Install new event class(es)Select Install new component(s)
7. Next you will have to browse to the location of the files you want to add to the KwikTag DAL Application. For example C:\Program Files\KwikTag\Com Plus Applications\KwikTag DAL
8. Select the file(s) you want to add and click open
9. Click Next, then click Finish

## 17.3 Creating Com+ Roles Manually

Note: We currently use the CreatorOwner Role for our KwikTag Com+ Packages. This role already exists by default so currently there is no need to manually create a role.

1. Open the Component Services MMC (Start -> Programs -> Administrative Tools -> Component Services)
2. Expand Component Services until you get to the COM+ Applications Folder
3. Expand the Com+ Application you want to add components to such as KwikTag DAL
4. Expand Roles
5. Select Roles click Action -> New -> Role or you can right click the Roles folder and select New -> Role
6. Enter a name for the Role
7. Click OK

## 17.4 Adding Users and Groups to Com+ Roles

1. Open the Component Services MMC (Start -> Programs -> Administrative Tools -> Component Services)
2. Expand Component Services until you get to the COM+ Applications Folder
3. Expand the Com+ Application you want to add components to such as KwikTag DAL
4. Expand Roles
5. Expand CreatorOwner
6. Expand Users
7. Select Users click Action -> New -> User or you can right click the Users folder and select New -> User
8. Click the Object Types button and make sure that the check box for Groups is checked and click OK
9. Select another location if necessary

10. Enter a name and click Check Names. i.e. enter ktuser and click the Check Names button. If a match is found then the name will be underlined, if no match was found you will be prompted to try another name or location. Once you have entered a name(s) that you wish to add click OK and the user is now added to the CreatorOwner role for that Com+ Application.

## 17.5 Creating Com+ Proxies

1. Open the Component Services MMC (Start -> Programs -> Administrative Tools -> Component Services)
2. Expand Component Services until you get to the COM+ Applications Folder
3. Select the Com+ Package you want to proxy
4. Select Action -> Export or right click the application and select Export
5. Click Next on the 'Welcome to the Com+ Application Export Wizard' dialog
6. Click Browse to select a location and name for your Com+ Proxy. Such as C:\Program Files\KwikTag\Support\Proxies\KwikTag DAL Proxy. Once you click the Save button the .msi extension will automatically be appended to the file name
7. Select Application proxy
8. Click Next
9. Click Finish
10. There are now two new files in the C:\Program Files\KwikTag\Support\Proxies directory:
  - a. KwikTag DAL Proxy.msi
  - b. KwikTag DAL Proxy.cab
11. To install a proxy, copy these files to another machine and run the .msi file

Note: For proxying to work, the same user account must exist on both machines with the same password.

## 17.6 Creating an FTP Virtual Directory

1. Start/Program Files/Administrative Tools/Internet Services Manager on the KwikTag server.
2. Highlight Default FTP Site
3. Right click Default FTP Site
4. New/Virtual Directory
5. [Next]
6. Name the directory (DC is the standard name for Document Center for other devices choose a name that will help identify the device)
7. [Next]
8. [Browse] to the input directory for your input device (use the directory that ktagFolderInputSvc is using, by default it is d:\Kwiktag\input)
9. [Next]
10. Check the checkbox for Write
11. [Next]
12. [Finish]
13. Create an Account for FTP named ktFTPUser with the same rights/permissions as the IUSR account
14. Note this user and password for the input device configuration
15. Change the Security Account for the Default FTP site to use this account and password
16. Restart IIS

---

## 17.7 Manually installing the sql notification service instance for KwikTag

1. Open the support directory in C:\Program Files\KwikTag (assumes an installation to C:\)
2. Run install\_ns.bat (prior to running this you may edit this file to include pause commands to watch the installation process)
3. Run Upgrade34SP4NS.sql using query Analyzer

## 17.8 Manually installing a customized instance of SQL NS for KwikTag

NOTE: By customizing the SQL Notification Service instance from the default, when applying future updates you will need to use the 'Bypass update of SQL Notification Services' option and manually update after the installation. If the .bat files are not available in the ?:\Program Files\KwikTag\Support directory "template" copies can be found on the KwikTag CD

1. Edit the appConfig.xml located in C:\Program Files\Messaging\Config\KwikTag
  - a. Change the InstanceName from KwikTag to the desired name
2. Edit the install\_ns.bat located in the C:\Program Files\KwikTag\Support directory
  - a. Replace the KwikTag in the lines where -name KwikTag appears to match the InstanceName you specified in the appConfig.xml
  - b. Replace NS\$KwikTag to match the InstanceName you specified in the appConfig.xml
3. Edit the uninstall\_ns.bat located in the C:\Program Files\KwikTag\Support directory
  - a. Replace the KwikTag in the lines where -name KwikTag appears to match the InstanceName you specified in the appConfig.xml
  - b. Replace NS\$KwikTag to match the InstanceName you specified in the appConfig.xml
4. Edit the update\_ns.bat located in the C:\Program Files\KwikTag\Support directory
  - a. Replace the KwikTag in the lines where -name KwikTag appears to match the InstanceName you specified in the appConfig.xml
  - b. Replace NS\$KwikTag to match the InstanceName you specified in the appConfig.xml
5. Run install\_ns.bat
6. Edit Upgrade34SP4NS.sql
  - a. Change 'KwikTagNSMain' to your InstanceNameNSMain
  - b. Change 'KwikTagKwikTagMessages' to your InstanceNameKwikTagMessages

## 18 Checklists

### 18.1 Windows server 2003 minimum requirements

**Installations on 64-bit operating systems, SQL server clusters, Domain Controllers, and Microsoft Small Business Server are not supported.**

These are the minimum configuration settings required for KwikTag to function on Windows Server 2003. For detailed instructions for installing and configuring a Windows Server 2003 machine please refer to the following sections:

Section 13.1 – Windows Server 2003 OS Installation  
 Section 13.2 – Internet Information Services 6.0 Setup  
 Section 14.1– Installing and Configuring Microsoft SQL Server  
 Section 15 – Installing KwikTag Prerequisites

#### **Minimum required windows services**

**KwikTag works with default Windows installed services.**

- Com + Event System
- Com + System Application
- Cryptographic Services
- DHCP Client
- Distributed File System
- Distributed Transaction Coordinator
- DNS Client
- Error Reporting Service
- Event Log
- FTP Publishing Service (only if using FTP scan device)
- HTTP SSL (IIS dependency)
- IIS Admin Service (installed by IIS)
- All KwikTag Services (installed by KwikTag)
- Logical Disk Manager
- MSSQLSERVER (installed by SQL 2000)
- Net Logon
- Network Connections
- Network Location Awareness (NLA)
- NS\$KwikTag (installed by KwikTag)
- NTLM Security Support Provider
- Plug and Play
- Protected Storage
- Remote Procedure Call (RPC)
- Security Accounts Manager
- Server
- SNMP
- SQLSERVERAGENT (installed by SQL 2000)
- System Event Notification
- Task Scheduler
- TCP/IP NetBIOS Helper
- Terminal Services

- Windows Management Instrumentation
- Windows Time
- Workstation
- World Wide Web Publishing Service (installed by IIS)

### **Required local accounts for KwikTag**

- KwikTag requires a local windows user account that must be added to the local Administrators group and have "logon as batch job" and "logon as a service". The recommended name for this account is ktuser. Verify there is no Domain or local policy that overrides these settings.
- IUSR\_Servername and IWAM\_Servername must have "Access this computer from a network", "logon locally", and "logon as a batch job". Verify there is no Domain or local policy that overrides these settings. (Note: Both accounts are created with these rights by default during the IIS installation)

### **Minimum required file system permissions**

#### **KwikTag works with the default Windows Server 2003 installed permissions.**

Default Windows 2003 permissions are already more secure than previous default Windows permissions, but if advanced security is required, see the KwikTag Security section (16.2) for further security measures.

### **Internet Information Services 6.0 requirements**

#### **Minimum Required IIS Components**

- Application Server [Details]
  - Application Server Console
  - ASP.NET
  - Enable network COM+ access
  - Internet Information Services (IIS) [Details]
    - Common Files
    - FTP (only if using FTP Scan device)
    - Internet Information Services Manager
    - World Wide Web Service [Details]
      - Active Server Pages
      - World Wide Web Service

#### **Minimum Required IIS Configuration**

- Disable session state
- Anonymous access only

### **SQL Server requirements**

- SQL Server 2005 Standard (32-bit only, unless the SQL server is separate from other KwikTag servers)
- Mixed Mode authentication required
- SQL Auth User Account with the following permissions
  - Member of the System Administrators Role
  - Database Access – master database (public role needed)
  - Database Access – model database (public role needed)
  - Database Access – msdb database (public role needed)

- Supported SQL Collations
  - SQL\_Latin1\_General\_CP1\_CI\_AS
  - Latin1\_General\_CI\_AS
  - French\_CI\_AS

**Service Pack Requirements**

- Windows Server 2003 Service Pack 2
- SQL Server 2005 Service Pack 2