



# Platform Installation/Upgrade

## *Admin Guide*

*Installation of DocuPhase 6.4 (or later)*

*Upgrade from 5.0 (or earlier)*

*Last Revised: October 21, 2020*

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## Revision History

Item #	Release #	Revision Date	Description	Tracking Notes
001	6.4	07/17/2020	Notes added about ODBC now being required for Progression.	DP-1637
000		07/15/2020	<b>ORIGINAL</b> The Installation and Upgrade Guide for 6.3 (and earlier) can be found within the 6.3 online help <a href="https://help.docuphase.com/6.3/Content/30_TPOC_Specific_PDFs/Accessing_Technical_and_TPOC-Specific_Documentation.htm#Configuration_and_Installation_Guides">https://help.docuphase.com/6.3/Content/30_TPOC_Specific_PDFs/Accessing_Technical_and_TPOC-Specific_Documentation.htm#Configuration_and_Installation_Guides</a>	DP-1258

## Client Support Services

DocuPhase is committed to providing quality service and support for its customers and partners. If you have questions or concerns regarding any aspect of the DocuPhase system, please don't hesitate to contact us.

### Who

As part of your Maintenance Program, a team of highly qualified and experienced Client Support Services team members is available to you for DocuPhase-related issues or questions you may have.

### What

The standard Client Support Agreement includes:

- Software updates and upgrades
- Telephone and email support during local business hours
- Remote connect support during local business hours

### When

You can contact Client Support Services during the following days and hours:

- Monday through Friday
- 8:00 AM EST to 5:00 PM EST

### How

You may:

- Email us at [support@DocuPhase.com](mailto:support@DocuPhase.com)
- Call us at (727) 441-8228
- Send a fax to (727) 444-4419
- Find additional support details at [www.DocuPhase.com/support](http://www.DocuPhase.com/support)



#### **IMPORTANT!**

- *Although Standard support does not include weekends, evenings, or holidays, you can still contact us for after-hours support for an additional fee. Please contact us (as noted above) for additional information or after-hours assistance.*
- *Enhanced support programs are available upon request.*



## Introduction

The information contained within this document provides you with all the basic information and details needed before, during, and after installation of the DocuPhase platform on a fresh server (i.e., a server on which DocuPhase has never been installed previously). Also included, is information about added system security, as well as upgrading (major vs minor) an existing version of DocuPhase.

## Purpose of this Guide

This Document is intended for the technical administrator who will be using the DocuPhase Installer or other specific installation processes. Procedural, conceptual, and important information and warnings are provided. Appendices have also been included to provide some foundational information that is not necessarily required for the installation, but may be of additional assistance.

### **IMPORTANT!**

- *The information in this document that references/shows prerequisites and installation refers to a “fresh” install (i.e., installation on a server that has not yet been used or prepared for the DocuPhase platform. If you are installing on a server that has been previously been prepared for DocuPhase, some screen images and options may appear differently than shown in this guide.*
- *As of version 6.1, the name of the iSynergy platform was changed to DocuPhase. For the purposes of this guide, references to “iSynergy” have been replaced by “DocuPhase”. However, until an upgrade/update is performed, depending upon the version of the platform being run, there may still be files and paths that refer to “iSynergy” and or “iDatix” (e.g., 5.1 = iDatix / 6.0 = iSynergy / 6.1 = docuphase).*

#### **For installations or upgrades:**

- *Be aware of any previously installed version and build of iSynergy/DocuPhase.*
- *When downloaded, the files and folders are downloaded into the same directory folder, and should remain that way. If for some reason you move these files, be sure that the DocuPhase Installer (.exe) and all of the associated MSI files are stored in the same folder, no matter where that folder is kept.*
- *For systems using Progression, ODBC (64bit) must be installed. A download file is included in the Prerequisites folder.*

#### **For upgrades:**

- *Users who have installed any version prior to 6.4 will notice that prerequisites for the installation of 6.4 have been reduced: making the preparations for installation faster and easier.*
- *Carefully review the Upgrade **WARNINGS** on page 14.*
- *When performing an any upgrade, be sure to make a copy of all custom configurations from the current installation: including Data Exchange config.xml, MI2.cfg, Xtractor files, iDox files, and ADIS database configuration\*.*
- *Application/component configuration files are located at: “C:\ProgramData\DocuPhase (or iDatix)\product folder”.*
- *If ADIS\* is in use, be sure to review the [DocuPhase ADIS Manager Admin Guide](#).*

## Pre-Installation/Upgrade Preparations

**BEFORE YOU BEGIN AN INSTALLATION OR UPGRADE** –please be sure to do all of the following:

- ✓ **Review and make sure all System Prerequisites and Requirements are met** - refer to the [DocuPhase Standard Requirements Specifications Guide for v6.4](#)
- ✓ **Install SQL Server and its required features** (including Full Text Search, enabling named pipes, TCP/IP Protocol, enable Mixed Authentication Mode).
  - Set the SQL Browser Service to Automatic
- ✓ **Prepare (detach) and perform a full back-up (to a safe location) of all stored data and config files**
- ✓ **Truncate transaction logs**, as appropriate
- ✓ **Make sure to use the DocuPhase service domain admin account**
- ✓ **Set Account Controller** (see page [Disable User Access Controls](#)) – see page 3
- ✓ **Download DocuPhase files from the DocuPhase ftp** – see **IMPORTANT** note below and page 4
- ✓ **Prepare the Server (for DocuPhase on MS Server 2016 SP1 or later)** - see page 5
- ✓ **Decide if you need to perform a manual installation or if you can use the DocuPhase Single Installer** - see page 17
- ✓ **Consider information for Upgrades vs New Installation** - see page 14

\*ADIS Service functionality is now part of DocuPhase Service.

## Disable User Access Controls



### BEST PRACTICE

Generally, almost anytime you add/install new programs onto your system, prompts appear to make sure you want to allow the program to make changes to your device. Because there are so many components being installed for the DocuPhase Platform, multiple prompts are displayed – one for each component.



Therefore, to make the installation more efficient, it is recommended that you change the Account Control Setting to “Never Notify” to prevent these confirmation prompts from coming up while the DocuPhase platform is installing. You can always go back and reset this option to its normal setting once DocuPhase has completely installed.

In the User Account Control Settings within the Control Panel:

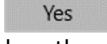


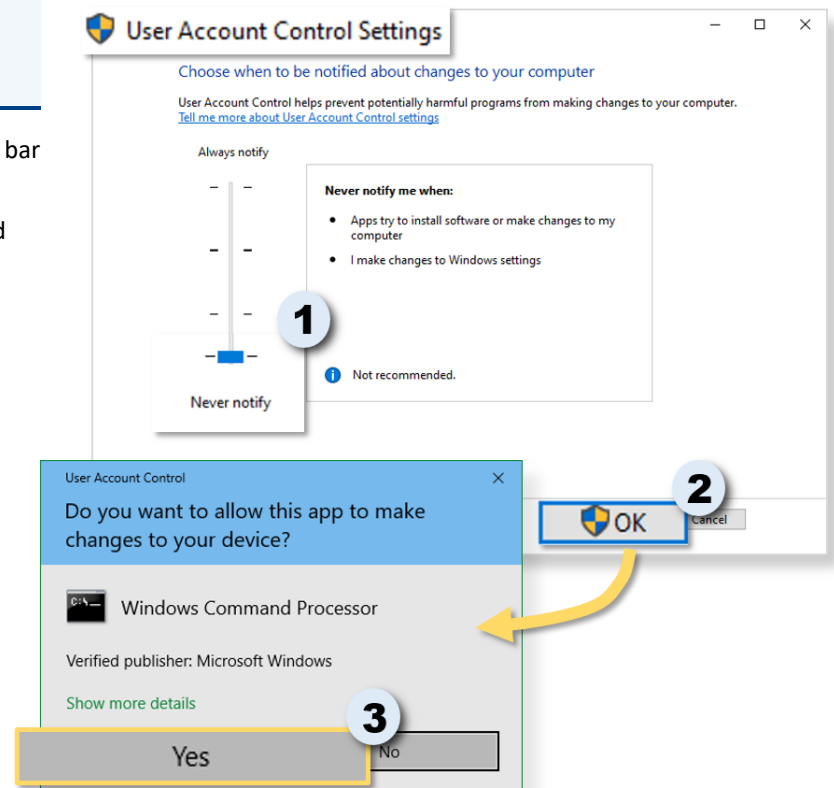
### TIP

You can also search for **User Account Control Settings**: from the **Start** menu.

- 1) Slide the **User Account Control Notification bar** (  ) to **Never Notify**.
- 2) Click  to complete the setting, and display the confirmation prompt.

In the prompt window:

- 3) Click  to confirm the changes, and close the prompt.



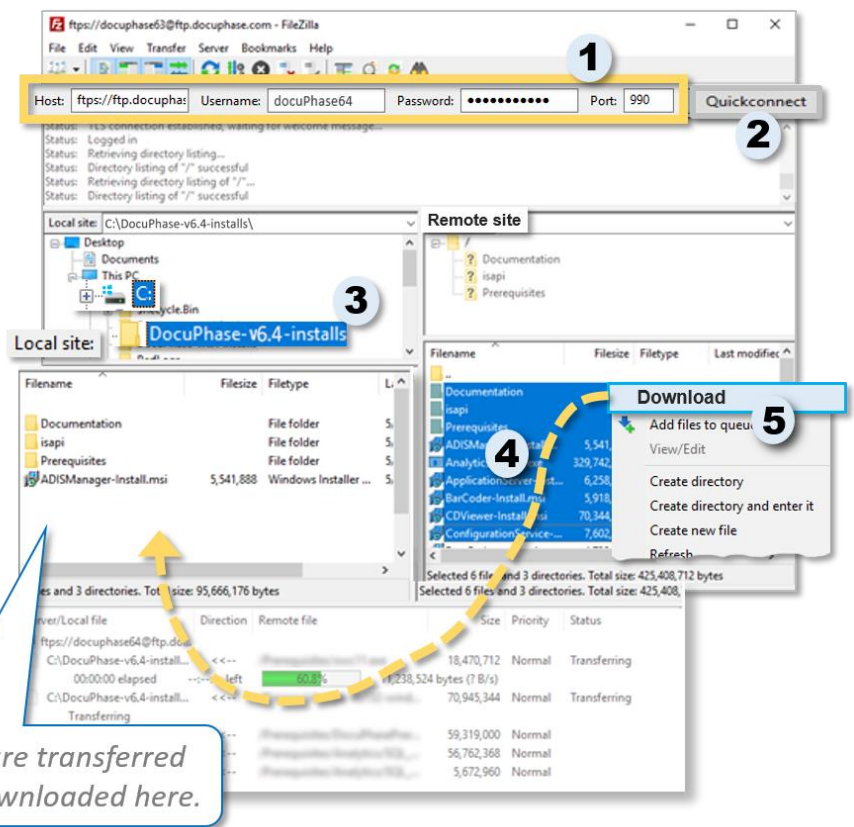
## Download Installation Files from DocuPhase FTP

In this process you will download the DocuPhase executable file, as well as the Prerequisite folder (and files) required for successful installation.

From within FTP client software (e., g., FileZilla, WinSCP, CyberDuck, etc.):

### NOTES

- For purposes of this document, images and steps reflect those in FileZilla. However, steps are basically the same in any FTP Client Software being used.
- The Username and Password used for accessing the DocuPhase ftp, depends upon the version of DocuPhase being downloaded and installed:
  - User names for v6.4 is “docuphase64”.
  - Use the current password that has been generated and applied for v6.4.



- For anyone outside DocuPhase who is performing an installation, please contact DocuPhase Tech Support ([support@docuphase.com](mailto:support@docuphase.com)) to obtain the correct password. Be sure to mention in the subject field that your request is for the password for the DocuPhase ftp (e.g., Please provide the ftp login credentials, etc).

#### In the fields named below:

- 1) Enter the following information:
  - ✓ **Host:** ftp.docuphase.com
  - ✓ **Username:** see **NOTES** above
  - ✓ **Password:** see **NOTES** above
  - ✓ **Port:** 990
- 2) Click **Quickconnect** to connect the DocuPhase ftp.

#### On the C: drive of the local site top box:

- 3) Create a new folder called “DocuPhase-v6.4-installs”.
  - This is where files are downloaded from the ftp client.

#### In the bottom, right corner of the Remote Site:

- 4) Select **ALL** the contents, then right-click to display a list of options.
- 5) Select **Download** to transfer the files to the local folder created above.
  - The transfer may take several minutes to complete.

## Prepare the Server (for DocuPhase on MS Server 2016 - SP1 and later)

Once you have downloaded the files from FileZilla (see previous page), you then need to **install the MS SQL and Java files (as described below)** from the **Prerequisite** folder.



### **IMPORTANT!**

*Some options in the configuration described here, have already been installed (by default via Microsoft). However, make sure that all options in the lists shown below are selected.*

## Install Server Requirements

From the Prerequisites folder downloaded from the ftp (as shown on previous page):

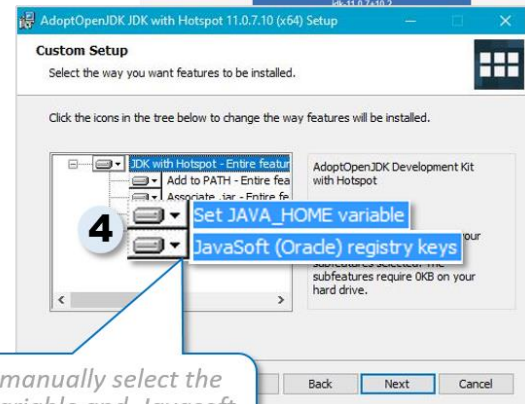
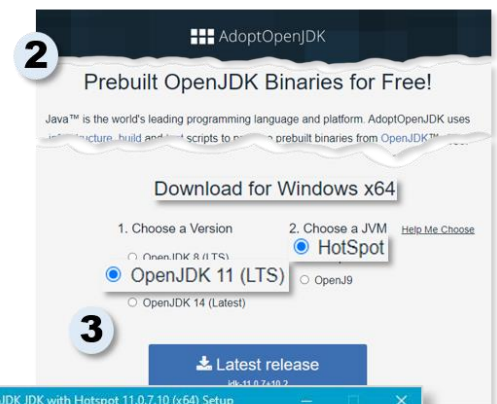
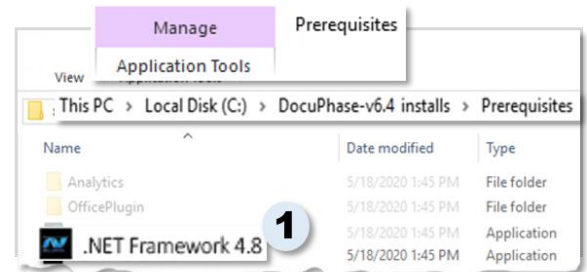
- 1) Install **.NET Framework 4.8**.

From the browser:

- 2) Go **adoptopenjdk.net** (i.e., <https://adoptopenjdk.net/?variant=openjdk11&jvmVariant=hotspot>).

From **adoptopenjdk.net**:

- 3) Download **OpenJDK** with the following options enabled:
  - ✓ OpenJDK 11 (LTS)
  - ✓ HotSpot options enabled.
- 4) Install the **JDK** files: manually selecting the following (as shown in the image here):
  - ✓ Java\_Home
  - ✓ JavaSoft during the Custom Setup.



*Be sure to manually select the JAVA\_HOME variable and Javasoftware (Oracle) registry keys options.*

## Configure IIS Server 2016 (and later)

IIS Configuration consists of the following processes:

- A) *Add Server Roles - see below*                      B) *Confirm and Install Configured IIS - see page 9*  
 C) *Add Features - see page 8*                         D) *Filtering Out IIS Server Response Headers (Optional) - see page 11*

### **!** **IMPORTANT!**

Some options in this configuration described here have already been installed by default by Microsoft (indicated with  or ) , However, make sure that all options in the lists shown below are selected.

### Select Installation Type, Destination Server, and Server Roles In the Server Manager.

- Go to **Manage** ► **Add Roles and Features** to display the corresponding wizard window.

- It may take a few moments for the Wizard to open as it collects system information.

#### In the Add Roles and Features Wizard:

##### On the Before You Begin screen:

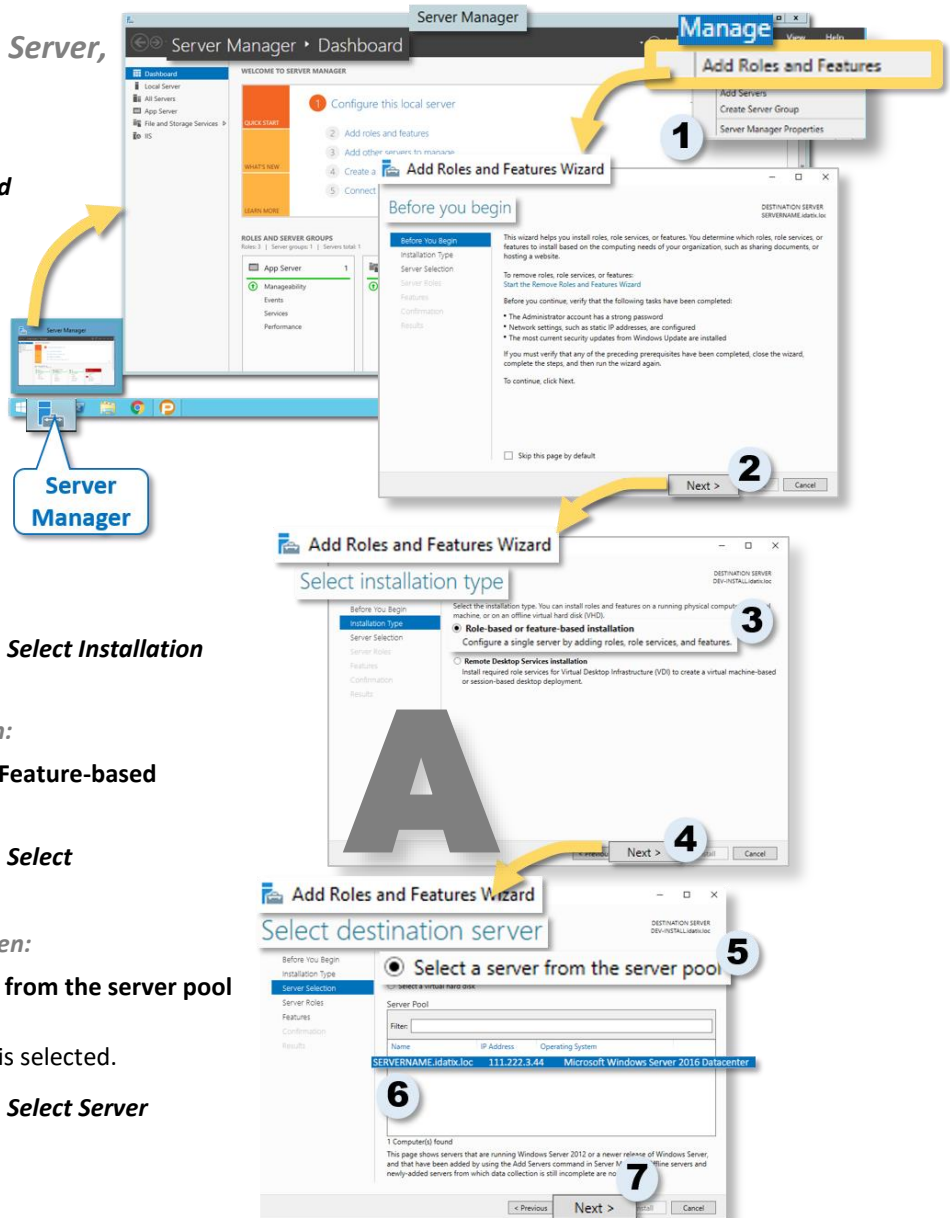
- Click **Next >** to display the **Select Installation Type** screen.

##### On the Select Installation Type screen:

- Make sure the **Role-based or Feature-based** installation option is selected.
- Click **Next >** to display the **Select Destination Server** screen.

##### On the Select Destination Server screen:

- Make sure the **Select a server from the server pool** option is selected.
- Make sure the **correct server** is selected.
- Click **Next >** to display the **Select Server Roles** screen.



IIS Configuration for Server 2016 and later ► A) Server Roles (continued on next page)



**IIS Configuration for Server 2016 and later ► A) Server Roles (continued)**
**On the Select Server Roles screen:**

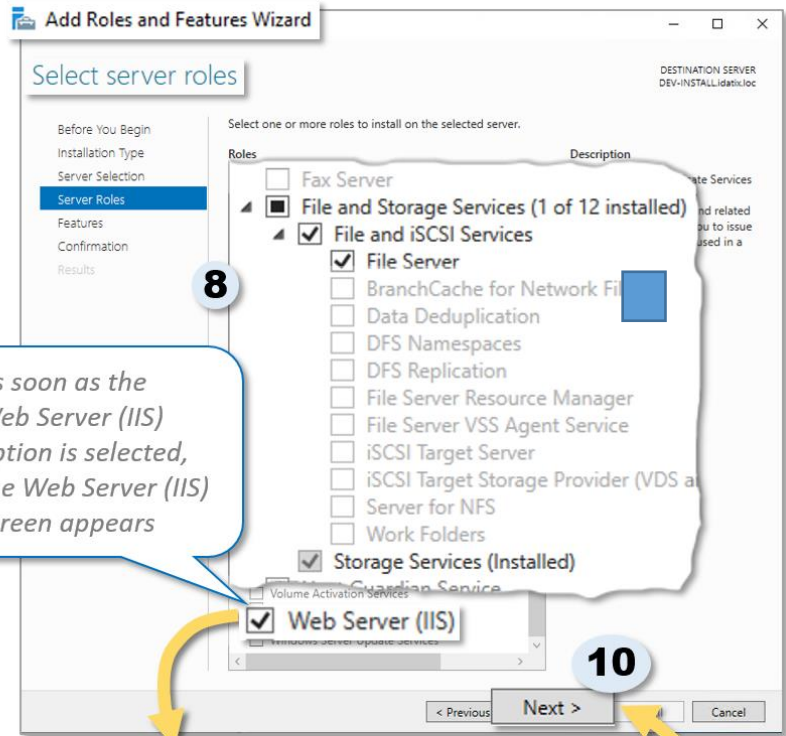
- 8) Select the **required IIS Server Roles** (as listed and shown here):
- ✓ File and Storage Services sub-options: File and iSCSI Services and File Server.
  - ✓ Web Server (IIS)\*

**NOTE**

As soon as you select the **Web Server (IIS)** option, a **Features** window immediately appears.

**In the Web Server (IIS) window:**

- 9) Make sure the **Include Management Tools** option is selected, then click **Add Features** to close the window, and return to the **Select server roles** screen.


**WARNING!**

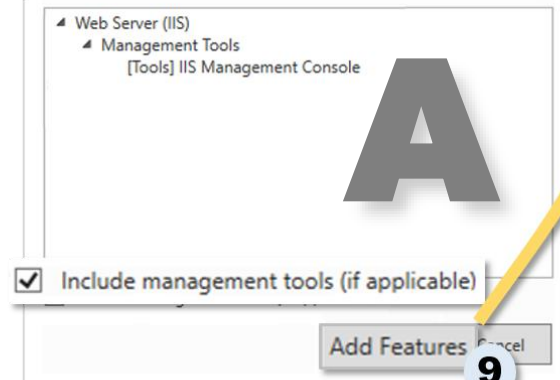
*DocuPhase does not recommend the installation of IIS 8 on any Server releases prior to Windows Server 2016.*


**IMPORTANT!**

- *All prerequisites must be in place on each server where you are running the installer. Keep in mind that each server has a specific role, and the prerequisites may differ from role to role.*
- *Successful installation is based on IIS and SQL being installed correctly.*

**Add features that are required for Web Server (IIS)?**

The following tools are required to manage this feature, but do not have to be installed on the same server.


**On the Select Server Roles screen:**

- 10) Click **Next >** to display the **Add features** screen.

*\*If this option was previously installed, please review related settings shown under Application Server ► Role Services on page 9.*

*IIS Configuration for Server 2016 and later (continued on next page)*

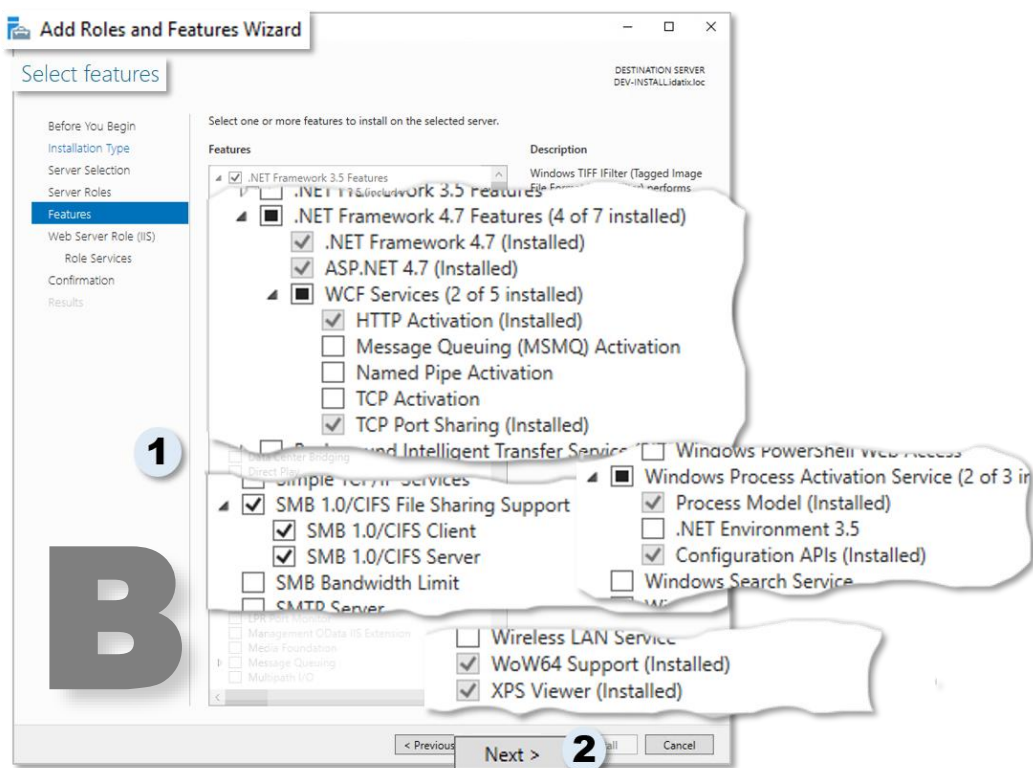
## IIS Configuration for Server 2016 and later (continued on next page)

### Add Features

Continuing in the Roles and Features Wizard (shown previously)

#### On the Select Features screen:

- 1) Select the **required Features** (as listed and shown here):
  - ✓ NET Framework 4.x Features, and sub-option ASP .NET 4.x\*
  - ✓ SMB/CIFS File Sharing Support, and sub-options
  - ✓ Windows Process Activation Service, and sub-options
  - ✓ WoW64 Support
  - ✓ XPS Viewer
- 2) Click Next > to display the **Web Server Roles (IIS)** screen.



#### NOTE

If Web Server Roles for IIS has been previously installed, you won't see the associated screen as the next section. Instead, you'll see the Confirm and Install window (see page 10).

\*Where x refers to the version being installed; the version in the list varies according the Server being used.

IIS Configuration for Server 2016 and later (continued on next page)

*IIS Configuration for Server 2016 and later (continued on next page)*
**Web Server Role (IIS) and Role Services**
*Continuing in the Roles and Features Wizard (shown previously) –*

**NOTE**

If Web Server Roles for IIS has been previously installed, you won't see the associated screen. Instead, you'll see the Confirm and Install window (see page 10).

**On the Web Server Role (IIS) screen:**

- 1) Click **Next >** to display the Role Services screen.

**On the Role Services screen:**

- 2) Select the **required Role Services** (as listed and shown here):

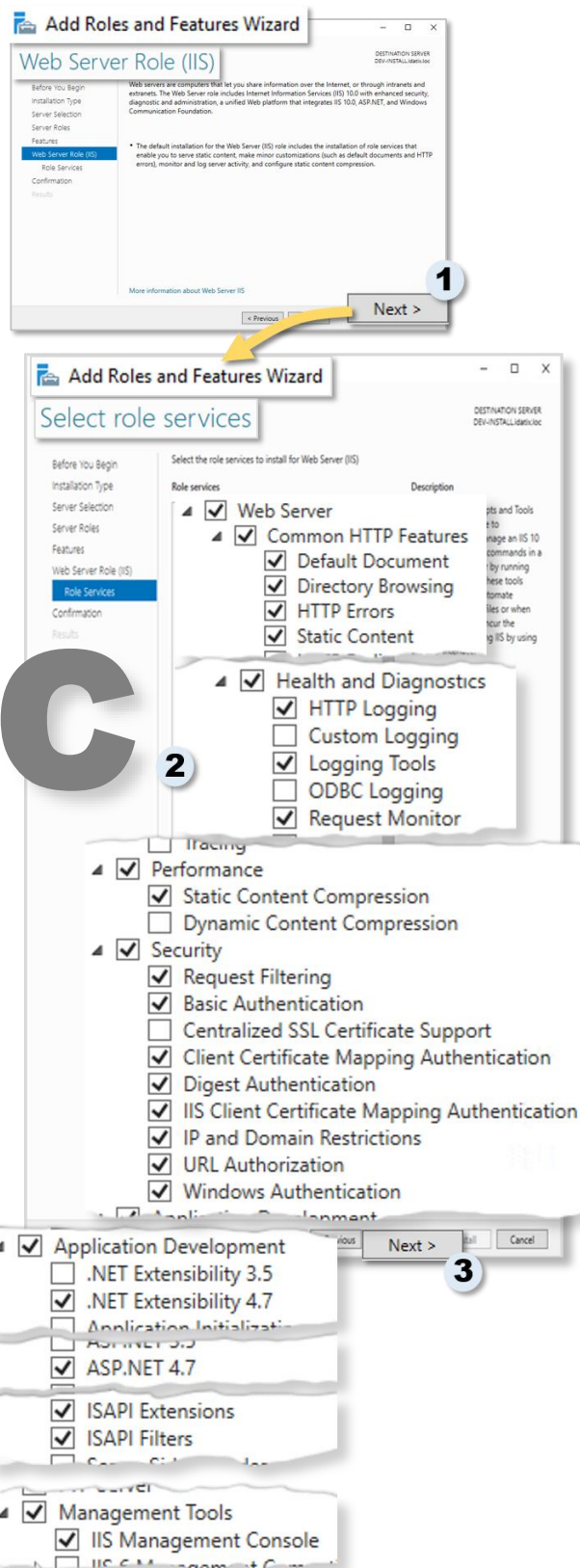
- ✓ Web Server and the following sub-options:

- Common HTTP Features
  - + Default Document
  - + Directory Browsing
  - + HTTP Errors
  - + Static Content
- Health and Diagnostics
  - + HTTP Logging
  - + Logging Tools
  - + Request Monitor
- Performance
  - + Static Content Compression
- Security
  - + Request Filtering
  - + Basic Authentication
  - + Client Certificate Mapping Authentication
  - + Digest Authentication
  - + IIS Client Certificate Mapping Authentication
  - + IIS and Domain Restrictions
  - + URL Authorization
  - + Windows Authentication
- Application Development
  - + .NET Extensibility 4.7
  - + ASP .NET 4.7
  - + ISAPI Extensions
  - + ISAPI Filters

- ✓ Management Tools

- IIS Management Console

- 3) Click **Next >** to display the **Role Services** screen.


*IIS Configuration for Server 2016 and later (continued on next page)*



## Confirm and Install Configured IIS

### On the Confirmation screen:

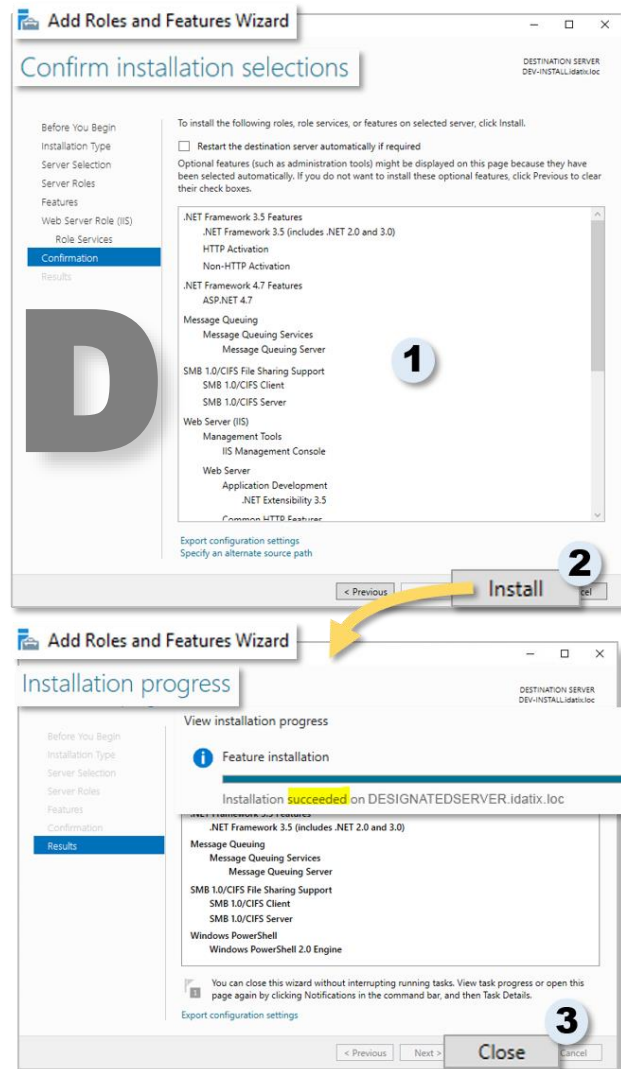
- 1) Make sure all settings (as described above) appear correctly and completely in the list.
  - You can use to return to previous screens to make any changes, as needed.

### Once you have confirmed that all settings are complete and correct:

- 2) Click **Install** to begin the installation.
  - Once the installation has been completed, the Finish screen appears.

### On the Finish screen:

- 3) Click **Close** to complete the installation process and close the wizard.



## IIS Configuration for Server 2016 and later (continued on next page)

### Filtering Out IIS Server Response Headers (Optional)

The filtering of headers (i.e.) provides layer of security on systems using IIS: preventing RFC Requests from divulging information that could in any way allow any unwanted access to files or data. Once you perform this procedure, all "server" headers are filtered out for any responses to "Get requests" for static, non-DocuPhase resources (e.g., css, images, js files, etc.). In other words, Requests going directly to the IIS (rather than thru DocuPhase) need to be hidden in responses.



#### **IMPORTANT**

##### *What Information might at Risk?*

- *The Server header is the most common header on a website, and is defined in the RFC. Header fields contain information about the software used by the origin server to handle requests. Additionally, the field may contain multiple product tokens and comments identifying the server and any significant sub-products.*
- *Particular Web Server applications run on the server include common values point to Microsoft IIS, NginX or Apache. This means that the specific software version of the server might allow the server machine to be more vulnerable to attacks, particularly against software that is known to contain "security holes". Server implementers are encouraged to make this field a configurable option.*



#### **BEST PRACTICE**

*This process is **not required**, but it is **highly recommended** because of the added security it provides: especially since many vendors don't make it easy to change the value of the header or let alone remove it completely.*



#### **EXAMPLE**

Request headers	Request body	Response headers
Key	Value	
Response	HTTP/1.1 200 OK	
Content-Type	text/html	
Last-Modified	Thu, 26 Feb 2015 19:32:28 GMT	
Accept-Ranges	bytes	
ETag	"3764daf4fa51d01-0"	
<b>Server</b>	<b>Microsoft-IIS/8.5</b>	
Date	Thu, 26 Feb 2015 20:09:15 GMT	
Content-Length	701	



#### **NOTES**

*This procedure only needs to be done once on any version, and can be applied to any version of DocuPhase. However, if your version of DocuPhase is upgraded, the procedure needs to be completed for the newer version.*

**IIS Configuration for Server 2016 and later ► E) Filtering Out IIS Server Response Headers (continued on next page)**
**To Configure the Filter**

- 1) Install the URL Rewrite Extension (found here: <https://www.iis.net/downloads/microsoft/url-rewrite>).
  - During installation, this appears as Web Platform Installer. Only install the minimum options.


**Once the URL Rewrite Extension is installed:**

- 2) Go to the **IIS Manager**, and select the name of the site (DocuPhase, DataService, etc.) to display its **Home** page.


**IMPORTANT!**

It is important to perform the next steps at the site level in order to secure all sub-sites.

**On the Home page for the selected site:**

- 3) Double-click on  to display the **URL Rewrite** screen.

**In the Actions pane of the URL Rewrite screen:**

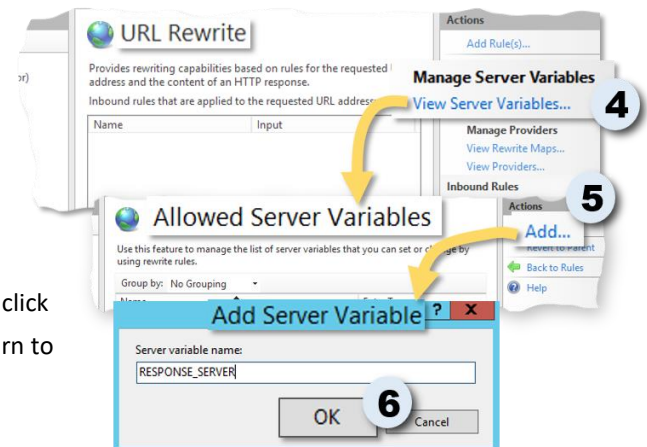
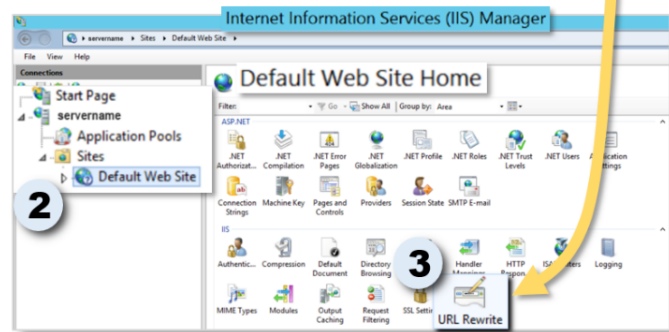
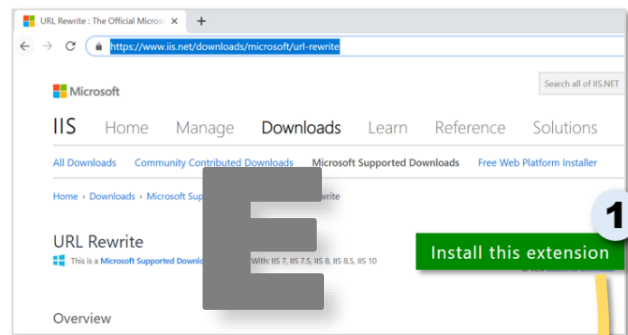
- 4) Click on the **Server Variables** option to display **Allowed Server Variables** screen.

**In the Actions pane of the Allowed Server Variables screen:**

- 5) Click on **Add...** to display **Add Server Variable** dialog.

**In the Add Server Variable dialog:**

- 6) Enter the Server Variable Name as `RESPONSE_SERVER`, and click **OK** to close the dialog box, save the variable, and return to the **Allowed Variables** screen.



IIS Configuration for Server 2016 and later ► E) Filtering Out IIS Server Response Headers (continued on next page)

7) Click **Back to Rules** to return to the **URL Rewrite** screen.

In the **Actions** pane of the **URL Rewrite** screen:

8) Click **Add Rules...** to display the **Add Rule(s)** dialog.

In the **Outbound Rules** section of the **Add Rule(s)** dialog:

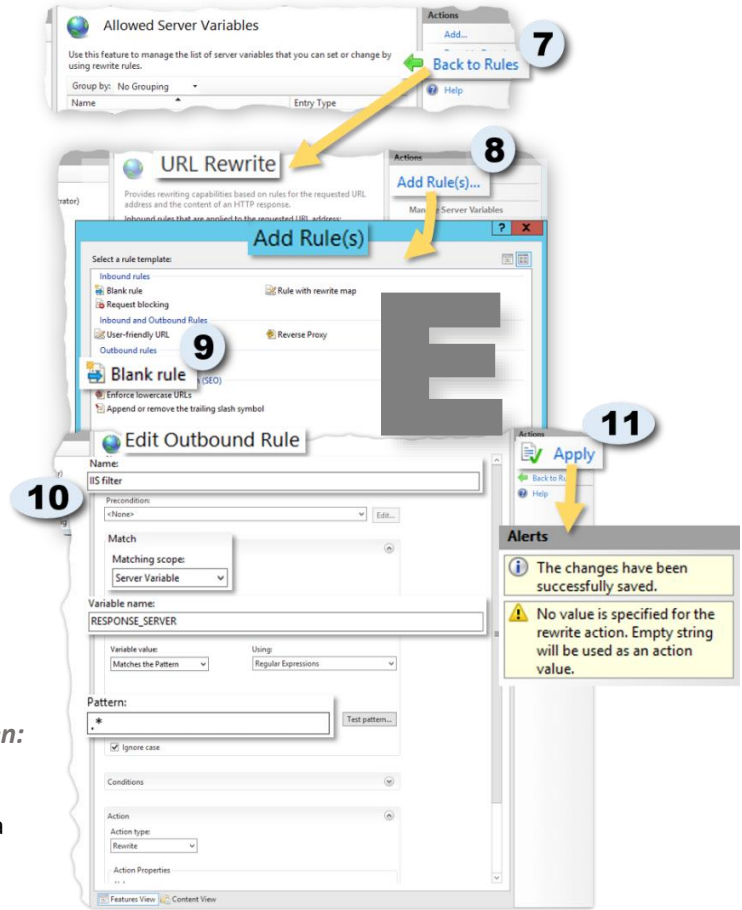
9) Double-click on **Blank rule** to display the **Edit Outbound Rule** screen.

In the fields of the **Edit Outbound Rule** screen:

- 10) Enter/Select the following:
- ✓ **Name:** whatever name you choose (e.g., IIS Filter).
  - ✓ **Matching Scope:** Server Variable
  - ✓ **Variable Name:** RESPONSE\_SERVER
  - ✓ **Pattern:** .\* (i.e., period, asterisk)

In the **Actions** pane of the **Edit Outbound Rule** screen:

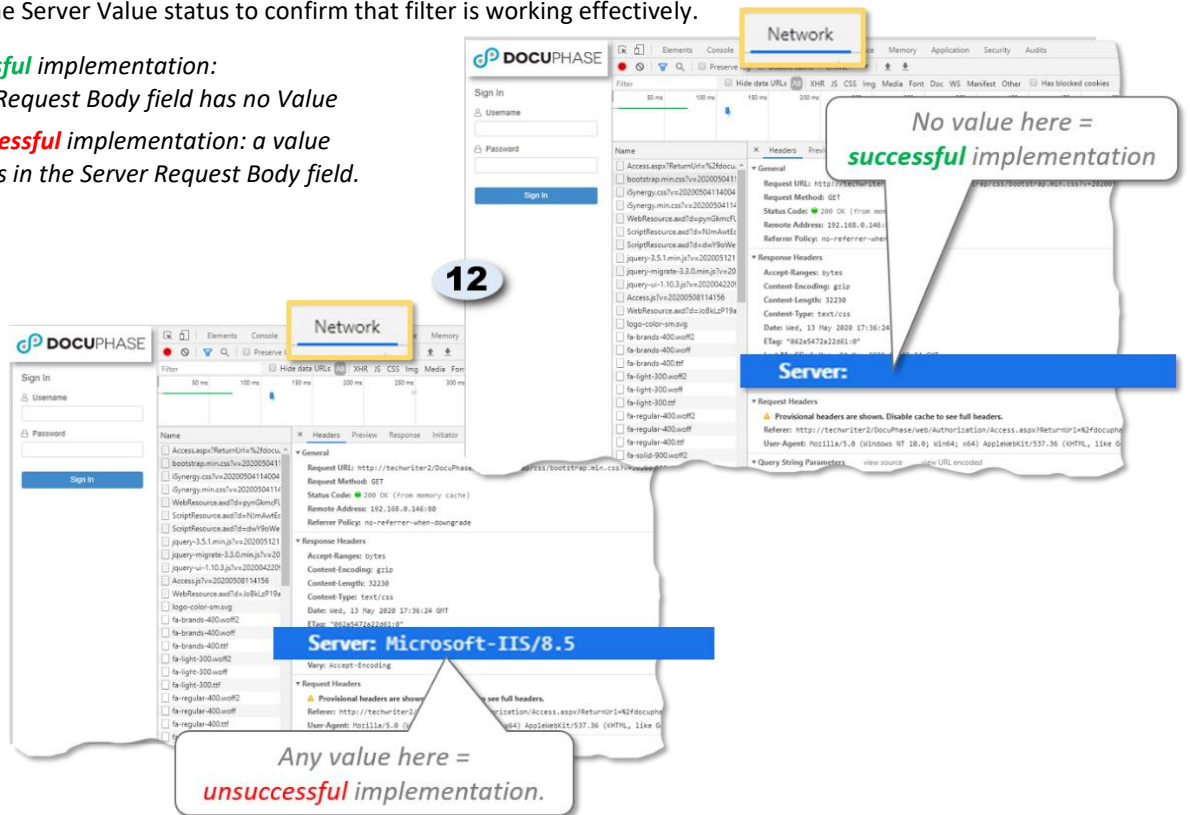
11) Click **Apply** to save/add the rule (that now appears on the **URL Rewrite** screen), and display a confirmation.



On the **Network** tab of the **DocuPhase Developer Tools** screen:

12) Check the **Server Value** status to confirm that filter is working effectively.

- **Successful implementation:** *Server Request Body field has no Value*
- **Unsuccessful implementation:** *a value appears in the Server Request Body field.*



## Upgrade (vs New Installation) Considerations

While the Process in performing an upgrade is very similar (but not identical) to that of a new installation, there are special procedures and considerations to take into account for both major and minor upgrades.



### **WARNINGS**

When upgrading to 6.4, **DO NOT UNINSTALL** any previously installed requirements/components. Some of those items are not included in the 6.4 installation, but may be required for the continued use of other applications installed on the system (e.g., Microsoft).

Only add new items as listed in the Error! Reference source not found. [of the DocuPhase Standard Requirements Specification Guide](#) (e.g., OpenJDK, .NET Framework 4.8, etc)..

**BEFORE STARTING THE UPGRADE PROCESS**, ensure all of the following:

- The Progression Engine **MUST** be allowed to complete the processing of all items in the queue.
- All users must be logged out of the system so that uploading and processing of documents has stopped. To confirm that no incomplete items are remaining in the queue, check the QueuedDocumentEvents and QueuedWorkItemEvents tables to see if waiting tasks appear in either place; if items do appear, do not proceed with the upgrade until no items appear.
- Once tasks no longer appear in either table (as noted above), it is advisable to continue to wait several minutes to ensure that the Progression Engine does not generate more tasks from items it is processing.
- From within DocuPhase, go to Administration ► Progression Console to confirm that no more items (i.e., Queue Items, Recovery Items, or Active Threads) are in the queue.
- When all items are completed, stop the Progression Engine before proceeding with a safe system upgrade.

**FAILURE TO COMPLY WITH THE ABOVE PROCESS COULD RESULT IN LOSS OR CORRUPTION OF DATA/TASKS.**



### **IMPORTANT!**

- Be sure to review all pre-requisites and requirements as explained beginning on page 2. Users who have installed any version prior to 6.4 will notice that prerequisites for the installation of 6.4 have been reduced: making the preparations for installation faster and easier.
- Client-side lookups via ODBC must remain configured in x32. However, all 6.4 server-side components now use x64 instead of x32 (thus requiring x64 ODBC - mostly due to LEAD). This means that II Server-side lookups via ODBC must be configured in x64, including the following: Barcode, Data Exchange, iDox, Progression, and Xtractor
- Remember, if you are performing an SSL installation, you must install SSL PRIOR to testing. Also, see the [SSL Guide for more information](#).
- While the DocuPhase application forces the browser to use the most current static (CSS, JavaScript) resources, the following should be taken into account for the HTML5 Viewer:
- When upgrading to a new version of DocuPhase, **ALL Users** should **clear their browser cache** AFTER the upgrade is installed and BEFORE accessing the DocuPhase.

Please make sure that users are aware of this essential requirement, as well as how to avoid possible confusion or problems when they begin to use the latest DocuPhase release.

- Backed up configuration files are intended for the prior production DocuPhase/iSynergy environment only; therefore, they **MUST BE** compared to the newly installed configuration files to identify what needs to be changed. when performing a minor upgrade (such as 6.4.1 to 6.4.5), when necessary (e.g., if SAML or PDFTouchUp has been configured) you can replace new config files with the existing config files that you backed up prior to the upgrade
- If the system being upgraded is running version 5.0.0 or earlier, the existing version must be manually uninstalled (via the Programs window in the Control Panel) before the new version can be installed. Therefore, be sure to follow this requirement prior to running the DocuPhase Installer.
- Not all versions allow you to jump to the next full version, please review the chart shown below to make sure you follow the correct upgrade step or jump.



### **NOTE**

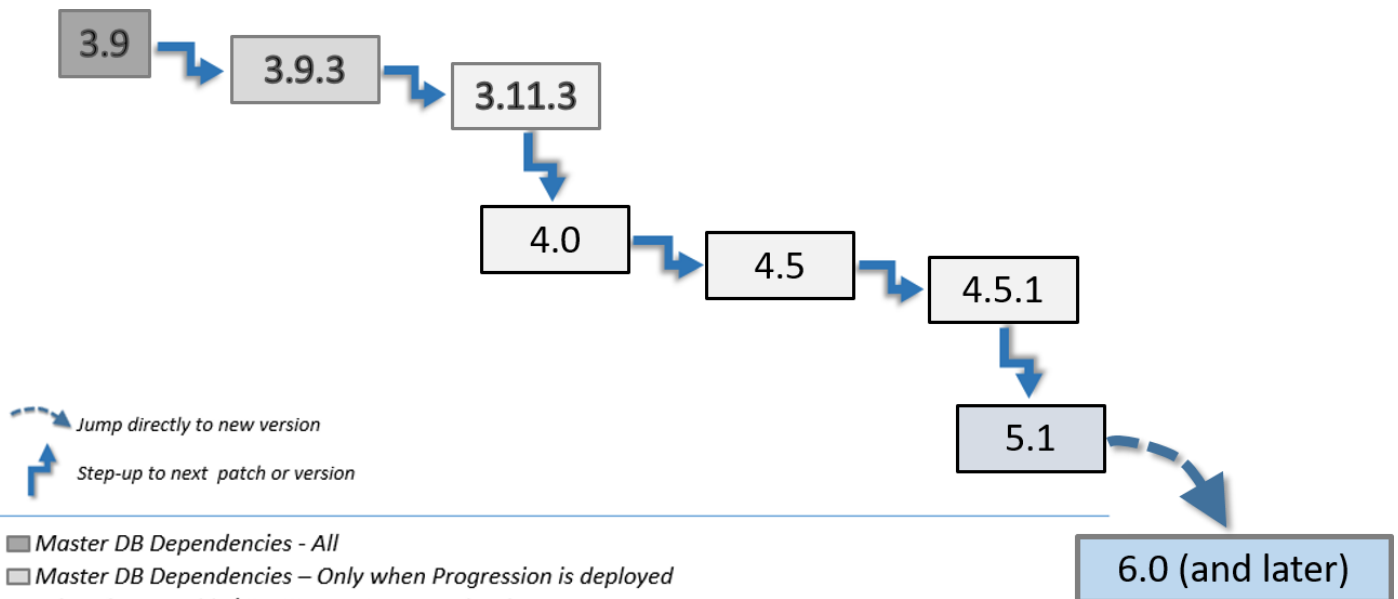
Analytics Installer automatically installs the Analytics prerequisites (listed above). Please refer to the Analytics Installation Guide for additional information, as the DocuPhase Installer is not used to install/uninstall/upgrade Analytics.

Upgrade (vs New Installation) Considerations (continued on next page)



*Upgrade (vs New Installation) Considerations (continued)*
**Make Sure You Follow the Correct Upgrade Step or Jump**

Confirm the version currently used on the system, then follow the arrows to find out what upgrade/patch must be applied next.



- Master DB Dependencies - All
- Master DB Dependencies – Only when Progression is deployed
- Migration Capable/NO Master DB Dependencies
- Migration Capable/NO Master DB Dependencies – No patches required/Jumps directly to next full version
- Current Version - No patches required/Jumps directly to next full version

*Upgrade (vs New Installation) Considerations (continued on next page)*

### *Upgrade (vs New Installation) Considerations (continued)*

## **Upgrading**

Upgrades (aka Major upgrades) are signified by a change in any of the first three (3) digits of the product version (e.g., from 5.1.0 to 6.0, 5.0.5 to 5.1.0, 5.1.0 to 5.1.1, etc.). Before performing an upgrade (vs initial/new installation), be sure to review the information below and complete any procedures provided.

### Upgrading from Specific Versions

#### **Upgrading from Version 5.1.0 (or later)**

In this case, the DocuPhase Installer automatically uninstalls the existing version, then installs the upgraded version.

#### **Upgrading from version 5.0.0 (or Earlier)**

If the system being upgraded is running version 5.0.0 or earlier, the existing version must be manually uninstalled (via the Programs window in the Control Panel) before the new version can be installed. Therefore, be sure to follow this requirement prior to running the DocuPhase Installer.

### Upgrading from All Versions

Before performing an upgrade (vs initial/new installation of) from ANY version to another, be sure to complete the following procedure:

- 1) Check the **Control Panel** to determine which DocuPhase/iSynergy core components are currently installed.
- 2) Stop All **DocuPhase/iSynergy Windows Services**.
- 3) Backup the configuration files on the computer.
  - ✓ DocuPhase product/component configuration files are located at: following default installation directory (or to the installation directory used by your organization):
    - *If upgrading from a **version prior to 6.1**: Program Files (x86)\iDatix*
    - OR**
    - *If upgrading from **6.1 or later**: Program Files (x86) \DocuPhase and Program Files\DocuPhase)*
  - ✓ Desktop Application Config-files have a file name pattern of: name.exe.config (e.g., FullTextManager.exe.config)
  - ✓ Web application component configuration files are identified as web.config
  - ✓ Application/component configuration files are located at: “C:\ProgramData\DocuPhase (or iDatix)\product folder”
  - ✓ Config-files and Service Config-files have a file name pattern of **name.config**, **name.cfg**, or **name.xml**

## Using DocuPhase Single Installer vs Manual Installation – Minimum Installation

The Single Installer uses a Wizard and allows you to select which Cores and Components you want to include in the installation. However, manual installation (i.e., installing individual msi files) must be done carefully. In addition, you need to make sure that either way, you don't install anything that doesn't need to be installed (e.g., if iAlerts isn't going to be used, don't install it). There are specific guidelines as to what the minimum installations should be performed (page 47 for Minimum Install details).



### **BEST PRACTICE**

*It is highly recommended that only the minimum DocuPhase Platform Cores and Components be installed - see page 47 for Minimum Install details.*

## Automatic/Required Sequence of Component Installation

- |  |   |
|--|---|
| 1) DocuPhase Database Install/Upgrade        | 25) DocuPhase Base Components                     |
| 2) DocuPhase Database                        | 26) License Manager                               |
| 3) Workflow Automation Cores                 | 27) DocuPhase Service                             |
| 4) Progression Design Service                | 28) DocuPhase Legacy Viewer                       |
| 5) Progression Notifier                      | 29) ScanDox (includes its Upload Manager/Service) |
| 6) Progression Server                        | 30) Analytics                                     |
| 7) Progression Service                       | 31) DocuPhase Optional Components                 |
| 8) Progression Studio                        | 32) ADIS* Manager                                 |
| 9) iForms                                    | 33) Barcoder                                      |
| 10) Forms Database                           | 34) iAlerts Manager / iAlerts Service             |
| 11) Forms Service                            | 35) iLink   |
| 12) Forms Server (see Important! note above) | 36) Xtractor Designer / Xtractor Service          |
| 13) Public Forms Service                     | 37) Data Exchange Service                         |
| 14) DocuPhase Server Components              | 38) Full Text Manager / Full Text Service         |
| 15) Application Server                       | 39) iDox Designer / iDox Service                  |
| 16) Document Server                          | 40) MI2 Plug-In                                   |
| 17) DocuPhase Server                         | 41) Fax Pre-Process Plug-In                       |
| 18) Install Server                           | 42) Import Mapper                                 |
| 19) License Server                           | 43) iRetention Manager                            |
| 20) Configuration Service                    | 44) PDF Creator                                   |
| 21) Search Service                           | 45) TIFF Overlay                                  |
| 22) Security Service                         | 46) Roleback Manager                              |
| 23) Data Service                             | 47) DBPurge                                       |
| 24) DocuPhase Viewer                         |   |

## Office Add-ins

No matter which method you use to install DocuPhase (Single Installer or Manual), Microsoft Visual Studio Tools for Office Runtime 2010 **must be manually installed**

*\*ADIS Service functionality is now part of DocuPhase Service.*



## The DocuPhase Installer Process/Wizard

Once you have reviewed and performed any pre-install preparations (including any manual installations), you can then use the DocuPhase Single Installer Wizard. The DocuPhase Installer was created to consolidate and simplify the steps required to perform installations, uninstalls, and upgrades of multiple Components on client systems.

This is achieved by allowing you to select targeted Cores and/or Components from a checklist, then input data for each category of selected Components that is then propagated across multiple corresponding MSI files – thus accelerating setup and deployment.

The basics of this tool are that it...

- ✓ is a centralized installer
- ✓ is designed in Wizard-style Format
- ✓ provides roadmap-like status on the left side of the screen (non-navigational)
- ✓ automatically uninstalls any previous version (i.e., 5.1 or later) of the MSI files before it installs any newer version.



### **WARNING!**

*Use caution when performing a Repair installation of any DocuPhase Cores and/or Components. This Process actually reinstalls any missing or corrupt files, or registry keys. Any customized settings (as noted in the procedures described in this Document) may be reset to default values. Please confirm that all necessary customizations are set/reset during the Repair Process.*



### **NOTES**

- You can always install/uninstall individual MSI files without using the DocuPhase Installer. This may be preferable when only one or two MSI files need updating.
- The DocuPhase Installer does NOT install/uninstall or upgrade “Analytics”. All previous versions of Analytics must still be uninstalled via the Control Panel. All new versions must be installed manually using the Analytics-Install .exe (executable) file.

## A) Welcome

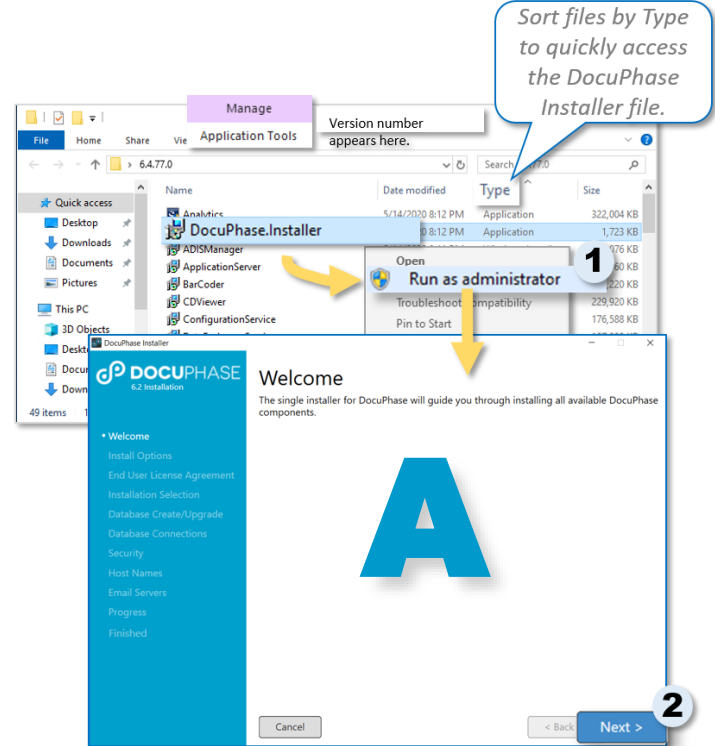
- 1) Locate and right-click on the **DocuPhase.Installer.exe** file to display a list of options, then select **Run as Administrator** to display the **Welcome** window.



### TIP

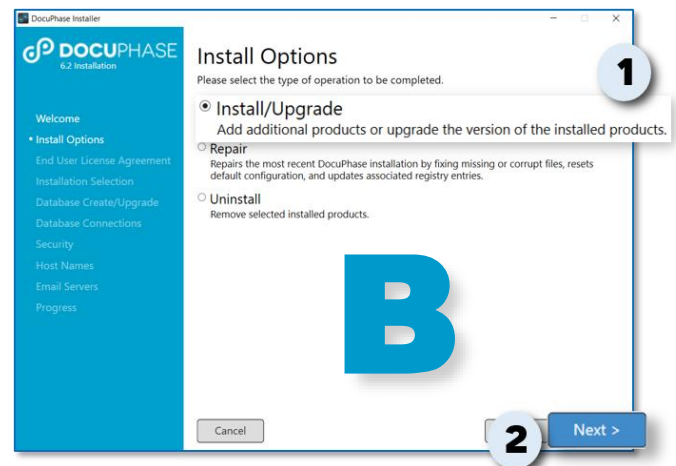
Sort files by Type to quickly access the DocuPhase Installer file.

- 2) Click **Next >** to display the **Install Options** window.



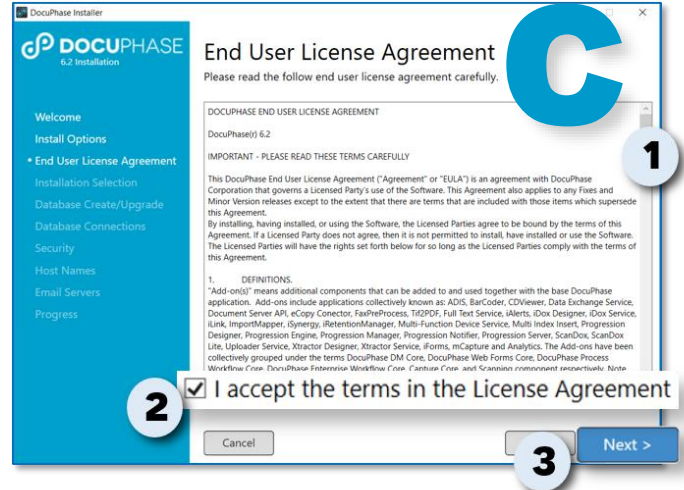
## B) Install Options

- 1) Select the appropriate option (i.e., **Install/Upgrade**).
- 2) Click **Next >** to display the End User License Agreement.



## C) End User License Agreement (EULA)

- 1) Review the **EULA**.
- 2) Click on the checkbox (  ) to accept (  ) the terms of the agreement.
  - *Installation cannot be initiated until the terms of the agreement have been accepted.*
- 3) Click  to display the **Installation Selection** window.



## D) Installation Selection

This window allows you to select all of the available Cores and Components within the DocuPhase system\*. However, you can also choose only specific Cores and/or Components as well.



### **IMPORTANT!**

*If there are any msi component files missing from the installation folder, a warning appears on the Installation Selection window to recommend that you ensure that the missing files are not essential to the installation. Verify whether or not the missing files are required for the installation currently being performed, then...*

- *If the missing files **ARE REQUIRED** for the installation, cancel the installation, copy the files into the location of the single installer, and restart the installation.*

**OR**

- *If the missing files are **NOT REQUIRED**, click OK to close the warning, then continuing with the installation regardless of missing files.*



### **NOTES**

- *You can accept the default Installation Directory Path for Cores and/or Components available for installation – However, you can also change this location prior to installation. See page 38 for details.*
- *While it's possible for you to set most any Installation Directory Path, it is **HIGHLY RECOMMENDED** that you **DO NOT** choose a local drive (C:) for this purpose.*
- *Selecting (  ) a parent Core or individual Component(s) means that it is going to be included in the Installation option selected on the Installation Options window (i.e., Installed, Repaired, or Uninstalled) – page 19 for more information.*
- *The subsequent screens that appear once your selections are made depend completely upon what cores/components you are installing. Therefore, you may not see some of the screens as shown on the following pages.*

*D) Installation Selection (continued on next page)*

### D) Installation Selection (continued)

To select all:

- 1) Click on the checkbox (  ) next to **Cores** to select all items (  ) for installation.

**AND/OR**

To select some Core sets without selecting them all:

- 2) Click on the checkbox (  ) next to the name of the **Core** to be installed (  ).

**AND/OR**

All Cores and Components selected

Specific Core and corresponding Components selected

See Appendix A for information about changing the Installation Directory Path for Parent Cores or individual components.

Only Specific Components selected

To select individual Components:

- 3) Click on the checkbox (  ) next to name of the **Component** to be installed (  ).

When all settings have been made:

- 4) Click  to display the next screen according to the selections you made for installation.

*\*This does not include the DocuPhase Analytics component, as it must be installed manually – see NOTES on page 18 for more information.*

## E) Database Create/Upgrade

If you have selected any Database Cores or Components, these settings are displayed to allow you to create or update a database.

### NOTES

- The information entered/selected here is passed to the corresponding database .exe Desktop application for installation. Once the MSI installs the Database desktop .exe program, the data from this screen is used by the program to create or upgrade the associated database.
- If the Progression and/or Forms database is selected the corresponding settings as described below are available for editing because that data is required by the creation/upgrades of those databases.
- For anyone outside the DocuPhase Staff performing an installation, and unsure of the credentials that need to be entered on the screen shown below, please contact DocuPhase Tech Support ([support@docuphase.com](mailto:support@docuphase.com)) to obtain/confirm the correct credentials.

### For Each Specified Server

#### In the Server/Instance field:

- 1) Make sure the correct **Server** is shown for the location at which the database resides (or will reside).

**OR**

Enter the name of the **Server** into which you are logged.

#### In the Authentication Mode field:

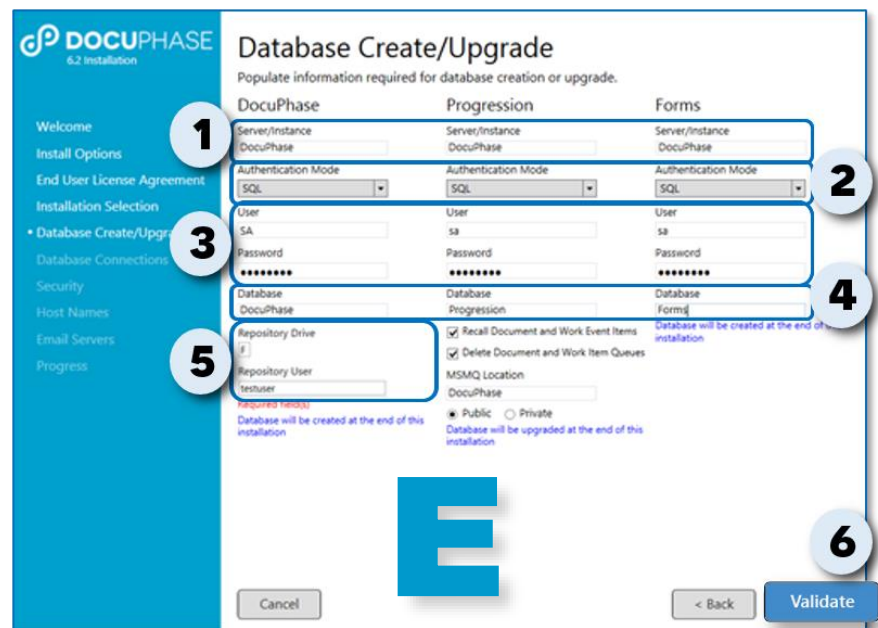
- 2) Make sure to leave the **SQL Server** default setting in place.  
*This is required for authentication purposes.*
- 3) Enter the corresponding **SQL User** (name) and **Password**.

#### In the Database field:

- 4) Make sure the correct **Database** name is shown for the database to be created/updated.

**OR**

Enter the correct name of the correct **Database**.




### WARNING!

*While the DocuPhase database name defaults to "DocuPhase", if you are upgrading the database, make sure to enter the database name used for previous versions (i.e., "isynergy", "espeed", etc.).*

- 5) Enter the drive letter of the **Repository**, as well as the **Repository User** name you want to use for the installation.



### NOTE

*The Repository User name should be the name of an existing user.*

E) Database Create/Upgrade (continued on next page)

### E) Database Create/Upgrade (continued)

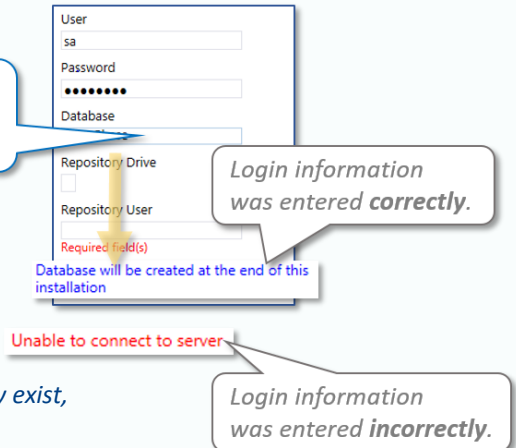
When all settings have been made:

- 6) Click **Validate** to confirm that all settings you have made are valid within the system.
- Once the information is validated, click **Next >** to display the next screen according to the selections you made for installation

#### **TIPS**

- Once all settings are completed correctly, a confirmation appears at the bottom of the corresponding database information fields. However, if the system does not recognize the information entered/selected in the fields, an error appears.
- If everything is valid, but the database you entered is new, then a confirmation message appears to let you know a Database will be created at the end of the installation. If you know that the database should already exist, make sure you have entered the correct name for it.

Enter login information, then click here.



The screenshot shows a configuration window with the following fields and messages:

- User:** sa
- Password:** masked with dots
- Database:** (empty)
- Repository Drive:** (checkbox)
- Repository User:** (empty)
- Required field(s):** (red text)
- Database will be created at the end of this installation:** (blue text)
- Unable to connect to server:** (red error message)

Callouts from the tips section point to these elements:

- A blue callout points to the Password field: "Enter login information, then click here."
- A white callout points to the Database field: "Login information was entered **correctly**."
- A white callout points to the error message: "Login information was entered **incorrectly**."

## F) Setting Up Database Connections

When you select any DocuPhase, Progression, or Forms server components that requires a database connection, this screen appears and require you to set up corresponding database connections (as shown in the previous section of this guide). And, as with the Database Creation/Upgrade Process, are propagated across multiple MSI files: eliminating the need to set connection settings for each selected Core and/or Component (as described on page 20 of this guide).



### NOTES

- The DocuPhase Database settings described below, are always available for editing because it is required for anything else being installed/repaired/uninstalled. However, the Progression and Forms settings are only available for editing if you have selected that relate specifically to Progression or Forms (e.g., Workflow Automation Core and/or any of its components, Electronic Forms Core and/or all of its components, etc.).
- For anyone outside the DocuPhase Staff performing an installation, and unsure of the credentials that need to be entered on the screen shown below, please contact DocuPhase Tech Support ([support@docuphase.com](mailto:support@docuphase.com)) to obtain/confirm the correct credentials.

### For Each Specified Server

#### In the Server/Instance field:

- 1) Make sure the correct **Server** is shown for the location at which the database resides (or will reside).

**OR**

Enter the name of the correct server.

#### In the Authentication Mode field:

- 2) Select the connection authentication method you want to use.

#### If you are using Windows authentication:

Skip to step 5.

**OR**

#### If you are authenticating via SQL Server:

- 3) Enter the corresponding SQL **User** (name) and **Password**.

#### In the Database field:

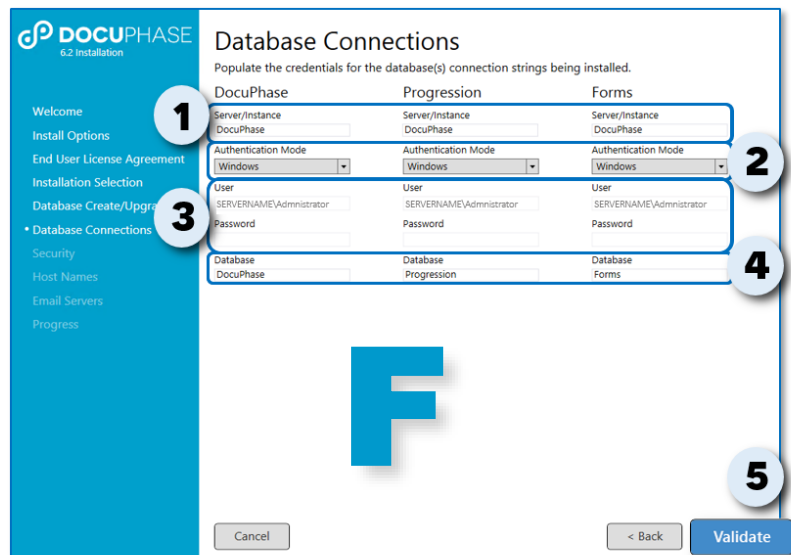
- 4) Make sure the correct **Database** name is shown for the database to be connected/authenticated.

**OR**

Enter the correct name of the Database.

- 5) Click **Validate** to confirm that all settings you have made are valid within the system.

- Once the information is validated, click **Next >** to display the next screen according to the selections you made for installation.




### WARNINGS!

- While the DocuPhase database name defaults to “DocuPhase”, if you are upgrading the platform, make sure to enter the database name that has been used for previous versions (i.e., “isynergy”, “espeed”, etc.).
- If one of the specified databases does not already exist on the SQL server, and you did not select the associated database core component to install the database, an error appears to let you know that the database does not exist. When this occurs, the installation cannot be completed.

However, when one of the specified databases does not already exist on the SQL server, but you DID select the associated database core component to install the database, a message appears to let you know that while the database does not exist, one will be created during the installation Process.



## G) Security

The User Name (domain\user and password –or– system account) is assigned to different web component application pool identities. It is also assigned to Windows services as the “logon account”.



### **WARNING!**

*Entering an incorrect DocuPhase Sysadmin Password will result in Documents not being retrieved in DocuPhase.*



### **IMPORTANT!**

DocuPhase Clients are responsible for creating and maintaining their own service accounts. Service Accounts are required to run specific DocuPhase services. Please refer to the [DocuPhase Standard Requirements Specification Guide](#) for more information.

The domain service account must have "logon as a service" permissions granted, so that it can be configured to run DocuPhase Windows services. It is also suggested to grant the domain service account "logon as a batch job" permissions so that the account can be used to run batch jobs and scheduled tasks.



### **NOTE**

*For anyone outside the DocuPhase Staff performing an installation, and unsure of the credentials that need to be entered on the screen shown below, please contact DocuPhase Tech Support ([support@docuphase.com](mailto:support@docuphase.com)) to obtain/confirm the correct credentials.*


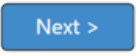


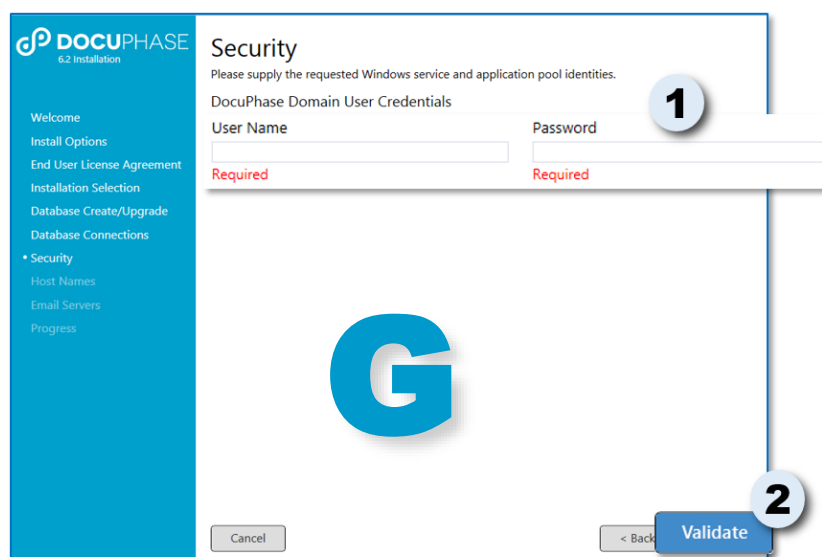
### **TIP**

*The System account values may be one of the following: localservice, localsystem, networkservice or applicationpoolidentity.*

- 1) Enter the appropriate domain **User Name** (i.e., Domain\username) and **Password** or system account assigned to a web component's application pool identity and/or Windows service login account

*Once all correct entries have been made:*

- 2) Click  to make sure the information is valid.
  - Once the information is validated, click  to display the next screen according to the selections you made for installation.



The screenshot shows the DocuPhase 6.2 Installation Security screen. On the left is a blue sidebar with a navigation menu including: Welcome, Install Options, End User License Agreement, Installation Selection, Database Create/Upgrade, Database Connections, Security (selected), Host Names, Email Servers, and Progress. The main content area has the title 'Security' and the instruction 'Please supply the requested Windows service and application pool identities.' Below this is the section 'DocuPhase Domain User Credentials' with two input fields: 'User Name' and 'Password'. Both fields are marked as 'Required' in red text. A large blue 'G' logo is centered on the screen. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Validate'. A circled '1' points to the 'Next >' button, and a circled '2' points to the 'Validate' button.



## H) Host Names

This information entered in this window is used to update config table entries, web.config, and app.config url entries.



### **WARNINGS!**



- *If the named server requires SSL, make sure the server that is entered matches the server certificate. If they do not match, server access errors may occur while running an application.*
- *It is recommended that the fully qualified domain name of the server be used for the host name. For HTTPS (SSL) configurations, the fully qualified domain name is required, and the FQDN must match the certificate domain name in order for SSL to work properly.*
- *The DocuPhase Installer always and automatically attempts to determine whether or not the server information entered requires SSL. If on the rare occasion it is unable to make this verification, the following warning message appears on the Host Names screen:  
"Unable to determine http or https for this server".*
- *If this warning appears, you can still continue the installation by enabling https option: thereby, changing all of the host server urls to https: allowing them to then be recognized by the system.*

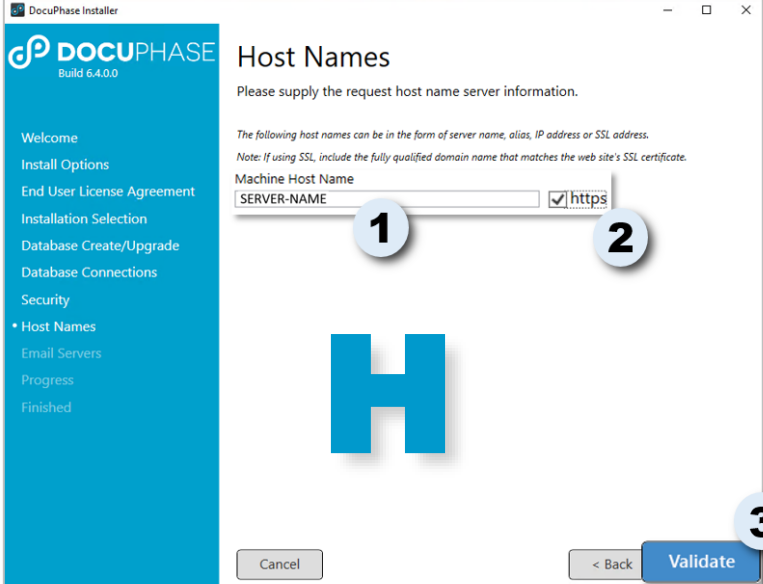
*In the Machine Host Name field:*

- 1) Enter the **Host Name** for the server (Machine) into which you are currently logged.
- 2) Enable (  ) the **https** option, if applicable to the named server.

**AND/OR**

*Once all entries have been made:*

- 3) Click  to make sure the information is valid.
  - *Once the information is validated, click  to display the next screen according to the selections you made for installation.*

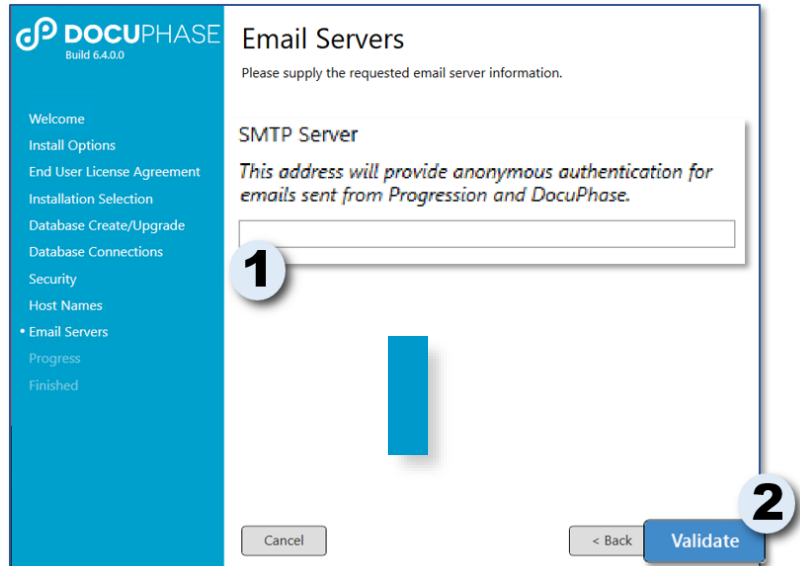


## I) Email Servers

When you enter the Simple Mail Transfer Protocol (SMTP) address, the system provides anonymous authentication for emails sent from Progression and DocuPhase via Search Results.

### In the SMTP Server field:

- 1) Enter the email address that will be used to send emails as described above.
- 2) Click **Validate** to make sure the information is valid.
  - Once the information is validated, click **Next >** to display the next screen according to the selections you made for installation.



**DOCUPHASE**  
Build 6.4.0.0

Welcome  
Install Options  
End User License Agreement  
Installation Selection  
Database Create/Upgrade  
Database Connections  
Security  
Host Names  
• Email Servers  
Progression  
Finished

### Email Servers

Please supply the requested email server information.

#### SMTP Server

*This address will provide anonymous authentication for emails sent from Progression and DocuPhase.*

**1**

**2**

Cancel < Back **Validate**



### NOTE

If emailing and/or Progression won't be used in the current system, you can leave the fields here blank, and just click **Validate**, click **Next >** to go to the next screen of the Install Wizard.

## J) Status, Progress, & Exit

This window provides a status of the installation of any/all of the Cores and Components you selected (as shown on page 20 of this guide). You can monitor the overall progress of the installation, as well as the core-by-core/component-by-component status. Once the installation is finished, a message appears and the Install button changes to an Exit button.



### WARNING!

**DO NOT** try to stop or restart the system once you've clicked , since it may cause issues with the installation.



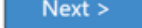
### NOTE

The DocuPhase Database settings described below, are always available for editing because it is required for anything else being installed/repaired/uninstalled. However, the Progression and Forms settings are only available for editing if you have selected that relate specifically to Progression or Forms (e.g., Workflow Automation Core and/or any of its components, Electronic Forms Core and/or all of its components, etc.).

When you are ready to begin the Installation of the selected items:


- 1) Click  to begin the installation.

When the installation is complete (100%):

- 2) Click  to display the **Finished** window (with a prompt asking to confirm you want to close the Installer).
- 3) Click **Yes** to close the Installer.

**OR**

Click **No** if you want to use the **Installation Log** link to review/confirm installation information.

- 4) Click  to close the DocuPhase Installer.

Component	Progress	Status
ADISManager	100%	Installed
ApplicationServer	100%	Installed
CDViewer	100%	Installed
ConfigurationService	100%	Installed
DataExchangeService	100%	Installed
DataService	100%	Installed
DesktopManager	100%	Installed
DocumentServer	100%	Installed
DocuPhaseLegacyViewer	100%	Installed
DocuPhaseServer	100%	Installed
DocuPhaseService	100%	Installed
DocuPhaseViewer	100%	Installed
FastProcess	100%	Installed
LicenseManager	100%	Installed
LicenseServer	100%	Installed
MTP...	100%	Installed



### IMPORTANT!

If you have performed an SSL installation, you must install SSL PRIOR to testing. Also, see the [SSL Configuration and Implementation Guide for more information](#).



### BEST PRACTICE

Verify the installation by using the procedures described on page 40 for Post Installation Checks.



### NOTE

You may need to add licenses after the install is complete.

For information on adding licenses, please refer to [Managing User Licenses in the 6.4 online help](#).

## Post Install Checks

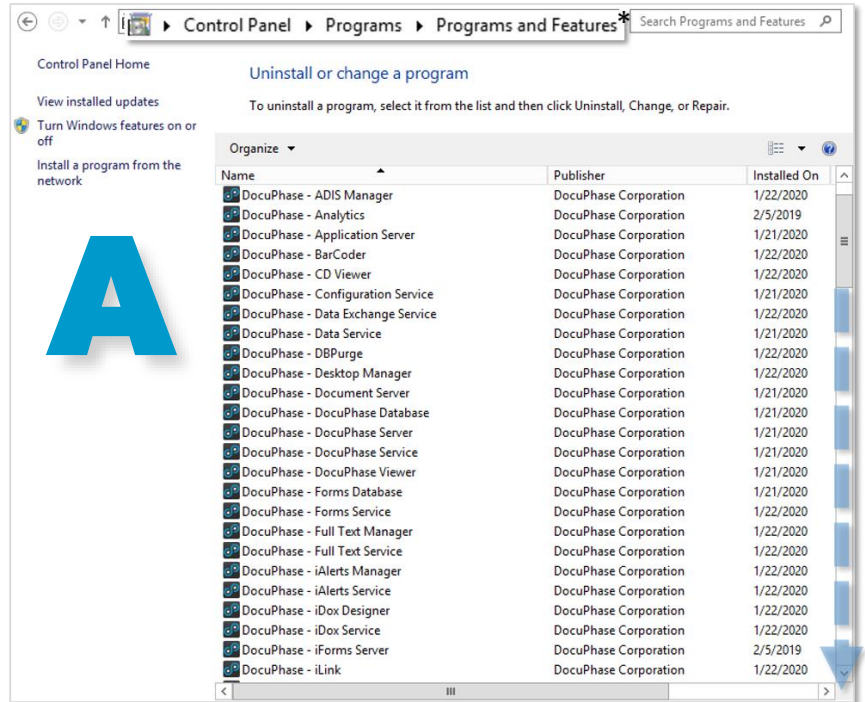
Once the installation Process has been completed and you have exited the DocuPhase Installer, it's a good idea to do some post installation verifications:



**If you have performed an SSL installation, you must install SSL PRIOR to testing. Also, see the [SSL Guide for more information](#).**

### A) Make sure All Components and Correct Versions Were Installed

Go to **Control Panel ▶ Programs\*** to confirm that all the selected components were installed with the correct version.



*\*This path may vary depending upon the version of Windows you are using on your system.*

## B) Check the Installation Logs

It's a good idea to check these logs if/when an error occurs during installation to make sure that all the selected Cores and Components appear in the list:

- 1) Go to DocuPhase installer log at:  
**C:\Users\username\AppData\Local\Temp**
- 2) Review the list of log files there to make sure everything you selected is shown.
  - *The log file names are formatted as follows: DocuPhase\_Installer\_yyyymmddhhmss.log*

*If a Core or Component is missing from the list:*

- 3) Run the DocuPhase Installer making sure to select the missing component.

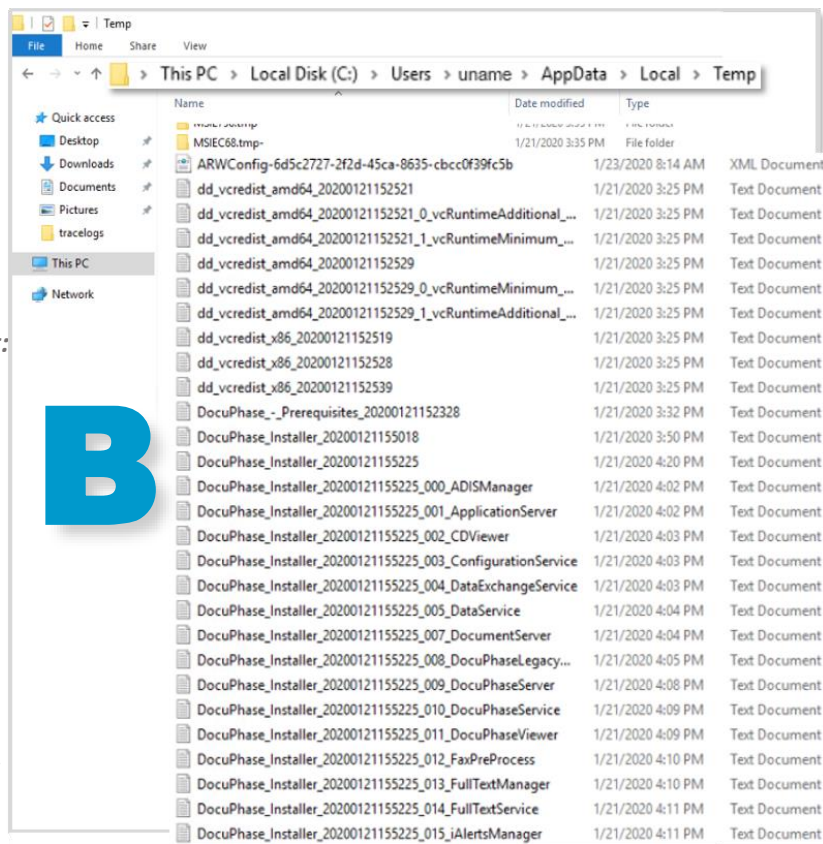
**OR**

Install the individual MSI for the missing component.

**OR**

*If you see all selected components in the list:*

Continue on to the next part of the Post Install Checks (as shown on next page).



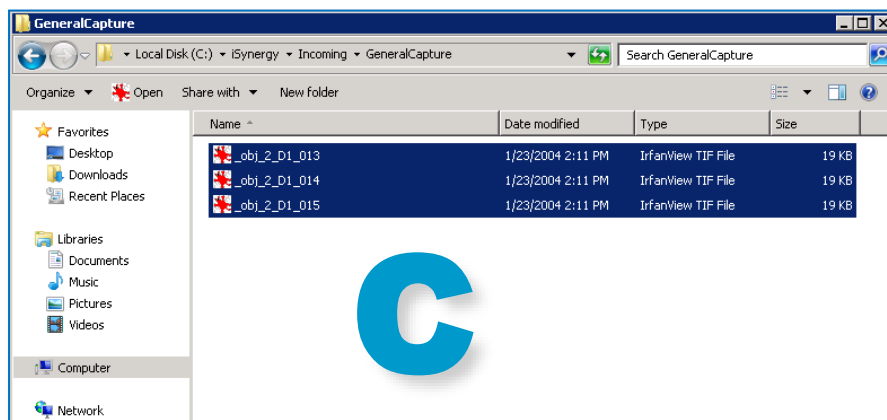
## C) Check Capture and Viewer

Make sure you can upload, as well as view Documents.

- 1) Open DocuPhase and login.

*Within Windows Explorer*

- 2) Go to **C:\DocuPhase (or iSynergy)\Incoming\GeneralCapture**
- 3) Add a couple of files to the general capture Incoming folder.
- 4) Make sure that the **DocuPhase Service** is running, and that the files moved to DocuPhase.



*Once the files leave the GeneralCapture Incoming folder:*

- 5) Search the *General Capture* application in DocuPhase for all statuses.  
*The Documents added should appear in the results set and load in the Viewer.*

*\*This path may vary depending upon the version of Windows you are using on your system.*



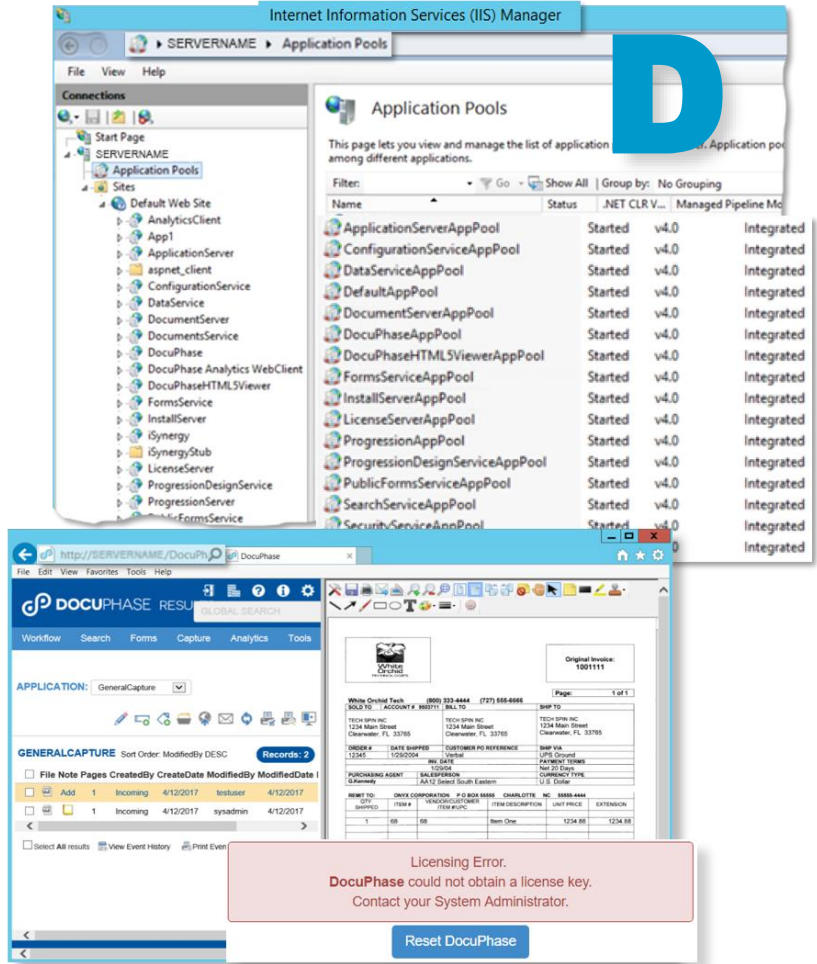
## D) Verify App Pool and Web Services Are Installed in IIS

After installing all of the Web Applications and Components:

- 1) Open the **IIS Manager** from either the **Control Panel** or **Server Manager**.
- 2) Review the application pools and applications shown in **IIS Manager**.
- 3) Make sure that all selected DocuPhase, **Progression**, and **Forms Core** Components are displayed.

If all necessary web services are listed under **IIS Manager**:

- 4) Open a supported browser and type in the DocuPhase address (e.g., <http://<YourServerName>/DocuPhase>).
  - The DocuPhase page appears and displays a licensing error; this is expected, as the licensing has not yet been applied.
  - Please see [Managing User Licenses in the DocuPhase 6.4 online help](#).

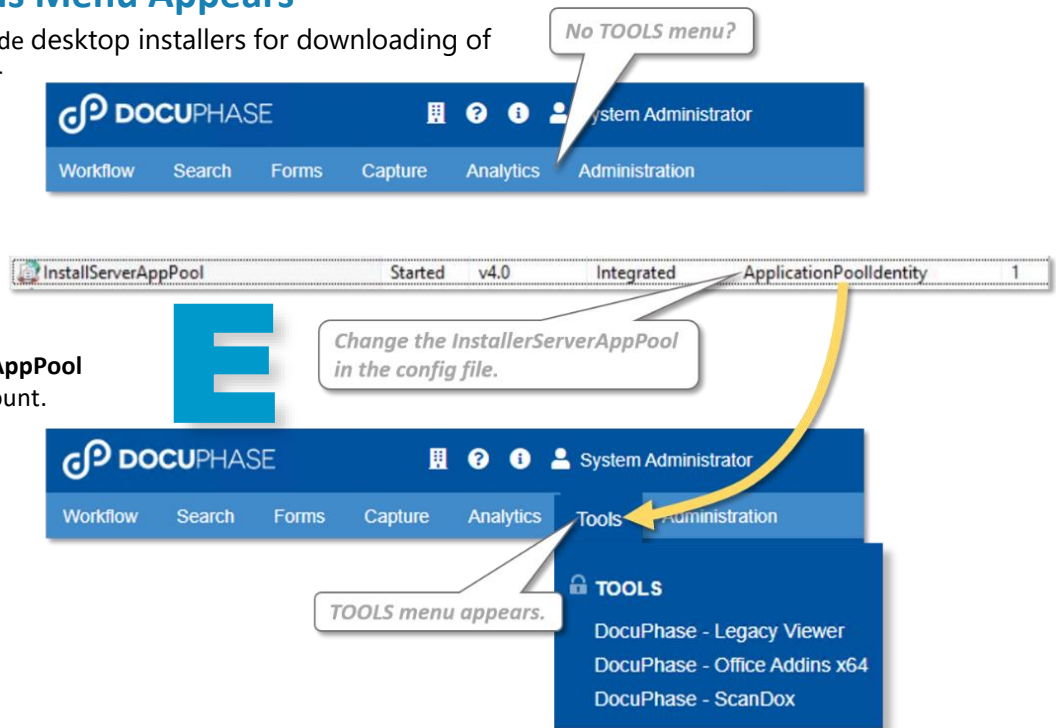


## E) Make Sure the Tools Menu Appears

If the system install is meant to include desktop installers for downloading of components such as ScanDox or xTractor, make sure that the **Tools** menu appears in the header.

If the **Tools** menu **DOES NOT** appear:

Change the **InstallerServerAppPool** to the windows service account.



## Unattended Workstation (Silent) Installation (Legacy Viewer and ScanDox Only)

Unattended Workstation Installation may also be referred to as a “silent install” (i.e., the installation of a program that generally involves the use of a file of predefined answers without requiring user intervention to select options or click **Next** at the end of each step). End-users are unaware a silent installation since it is performed automatically, over the network, while users are not active.

For the DocuPhase Platform, only the Legacy Viewer and ScanDox may be silently installed.



### NOTES

- The procedures shown in this section of this guide apply to DocuPhase version 5.0 (or later), unless otherwise specified.
  - These commands can be combined into a batch file to be broadcast via automated, simultaneous deployment software to multiple workstations: preparing each targeted workstation for the next release. Please refer to the deployment software documentation ([https://en.wikipedia.org/wiki/Software\\_deployment](https://en.wikipedia.org/wiki/Software_deployment)) for more information about silent installation.
- The Viewer referred to in this section is the DocuPhase Legacy Viewer (aka known as the Heavy Weight Viewer). The HTML5 Viewer (introduced in version 6.0) incorporates full-functionality for viewing and annotation. Because it is server-based, the HTML5 Viewer does not require any workstation installation.

## Legacy Viewer Silent Install/Upgrade

The following information applies to a new installation or an upgrade (from version 6.1 or earlier).

### Unattended Legacy Viewer Installation Instructions



### IMPORTANT!

- Before upgrading the DocuPhase Legacy Viewer, be sure all data is saved and backed up, then make sure that the DocuPhase browser is closed on the workstation.
- If UAC is enabled, Command Prompt must be used as “Run as administrator”.

- 1) Copy or extract the **DocuPhaseLegacyViewer-Install.msi** from the **DocuPhaseLegacyViewer.CAB** file to the location from which you will be running the installation.



### NOTE

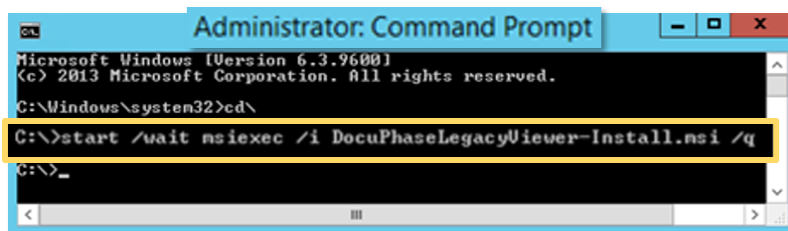
Uninstalling the Legacy Viewer does not require the **DocuPhaseLegacyViewer-Install.msi** file.

From Command Prompt (see **IMPORTANT** note above):

- 2) Enter one of the following applicable commands:

#### Install Legacy Viewer

```
start /wait msieexec.exe /i DocuPhaseLegacyViewer-Install.msi /q
```



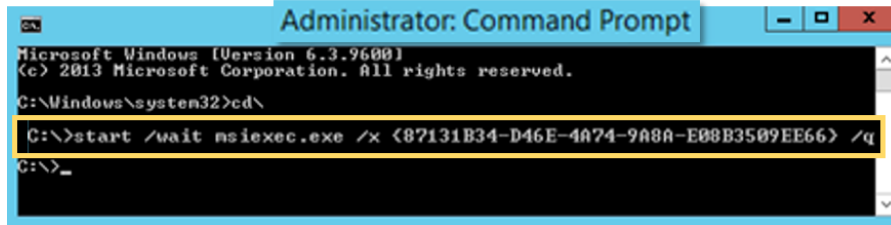
Unattended Legacy Viewer Installation Instructions (continued on next page)

### Unattended Legacy Viewer Installation Instructions (continued)

OR

#### Silent Uninstall Command

```
start /wait msixec.exe /x {87131B34-D46E-4A74-9A8A-E08B3509EE66} /q
```



#### NOTE

The sequence after /x is the legacy viewer product code that applies to the current version.

### Unattended Legacy Viewer Upgrade from version 5.1 -6.1

#### ! IMPORTANT!

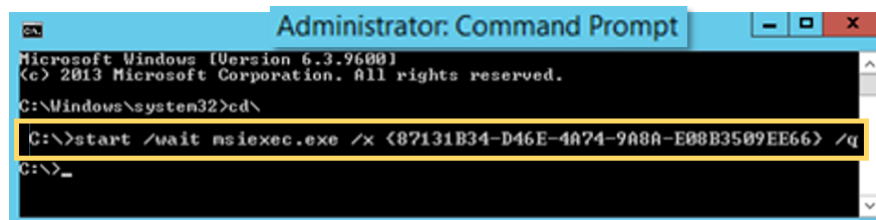
- Before upgrading the DocuPhase Legacy Viewer, be sure all data is saved and backed up, then make sure that the DocuPhase browser is closed on the workstation.
- If UAC is enabled, Command Prompt must be used as "Run as administrator".

- 1) Copy or extract the **DocuPhaseLegacyViewer-Install.msi** from the **DocuPhaseLegacyViewer.CAB** file to the location from which you will be running the upgrade.

From Command Prompt (see **IMPORTANT** note above):

- 2) Enter the following command to automatically uninstall versions 5.1 -6.1, and install the current version.

```
start /wait msixec.exe /i DocuPhaseLegacyViewer-Install.msi /q
```



#### NOTE

The sequence after /x is the Legacy Viewer product code that applies to the current version.

Legacy Viewer Silent Install/Upgrade (continued on next page)



## Unattended Legacy Viewer Upgrade from version 5.0 (or earlier)

### ! IMPORTANT!

- Before upgrading the DocuPhase Legacy Viewer, be sure all data is saved and backed up, then make sure that the DocuPhase browser is closed on the workstation.
- The first thing that must be completed prior to upgrading from version 5.0 (or earlier) is the uninstallation of the current Legacy Viewer via a “response” file (“.iss”). The response file differs depending on what version of the Viewer being uninstalled. Please refer to page 43 for more information about using the .iss files.
- If UAC is enabled, Command Prompt must be used as “Run as administrator”.

#### For the currently installed Legacy Viewer Version (5.0 or earlier)

- 1) Copy or extract the currently installed **iSynergyClient.exe** from the **iSynergyClient.CAB** file to the location from which you will be running the upgrade.

From Command Prompt (see **IMPORTANT** note above) from the directory in which the currently installed version of **iSynergyClient.exe** is located:

- 2) Enter the following command to uninstall the current Legacy Viewer:

```
Start/wait iSynergyClient -removeonly -s -f1"<FullPath>###-iSynergyClient-uninstall.iss" -f2"<FullPath>uninstall.txt"
```

#### With the following Command Line parameters:

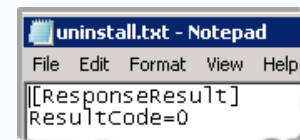
**-f1 = full path to the response file (###-iSynergyClient-uninstall.iss)**

- Where ### is the iis version number being uninstalled (i.e.; 500, 452, 451, etc. -see page 43).
- The image below shows an example of the command code for the Silent uninstall of version 4.5.1 Legacy Viewer.



### NOTES

- “-f2” is an optional path to the output log file. If the path contains a directory name, the directory must already exist or no log file is generated.  
A successful uninstallation results in `ResultCode=0`. If `ResultCode` is not zero, make sure the command is typed correctly and that the response file (.iss) is at the specified path.
- Paths entered must be “Full” paths and not “Relative”. If a relative path is entered, the Legacy Viewer will not uninstall.



- 3) Perform a silent install of the current version, as described on page 32.

## ScanDox Silent Install/Upgrade

The following topics address the different unattended procedures required for the installation or update of the ScanDox integrated data and document capture module.

### Unattended ScanDox Installation Instructions

#### **!** **IMPORTANT!**

- Before upgrading ScanDox, be sure all data is saved and backed up, then make sure that the Upload Manager and ScanDox are closed on the workstation.
- If UAC is enabled, Command Prompt must be used as “Run as administrator”.

From Command Prompt (see **IMPORTANT** note above) from the directory in which the ScanDox-Install.msi is located:

Enter one of the following applicable commands:

#### Silent Install Command for ScanDox

```
start /wait msixec.exe /i ScanDox-Install.msi
AUTHSERVER_HTTP_FLAVOR=http DOCUPHASE_AUTH_SERVER=servername /q
```

With Command Line parameters (case sensitive):

```
AUTHSERVER_HTTP_FLAVOR = http or https
DOCUPHASE_AUTH_SERVER = Replace "servername" with your DocuPhase
authentication server name (no quotes).
```

OR

#### Silent Uninstall Command



#### **NOTE**

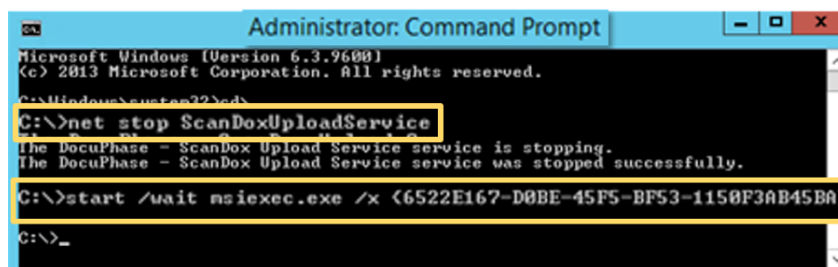
Uninstalling ScanDox does not require the ScanDox-Install.msi file.

```
net stop ScanDoxUploadService
start /wait msixec.exe /x {6522E167-D0BE-45F5-BF53-1150F3AB45BA} /q
```



#### **NOTES**

- The sequence after /x is the ScanDox product code that applies to the current version.
- The image below shows an example of stopping the ScanDoxUploadService and then silent uninstall of version 5.0 (or later) ScanDox.



```
Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
C:\Windows\system32\cmd.exe
C:\>net stop ScanDoxUploadService
The DocuPhase - ScanDox Upload Service service is stopping.
The DocuPhase - ScanDox Upload Service service was stopped successfully.
C:\>start /wait msixec.exe /x {6522E167-D0BE-45F5-BF53-1150F3AB45BA} /q
C:\>_
```

ScanDox Silent Install/Upgrade (continued on next page)

## Unattended ScanDox Upgrade from version 5.1 – 6.1

### ! IMPORTANT!

- Before upgrading ScanDox, be sure all data is saved and backed up, then make sure that the Upload Manager and ScanDox are closed on the workstation.
- If UAC is enabled, Command Prompt must be used as “Run as administrator”.

From Command Prompt (see **IMPORTANT** note above) from the directory in which the ScanDox-Install.msi is located:

Enter one of the following applicable commands:

#### Silent Install Command for ScanDox

```
net stop iDatixUploadService
```

For version 5.1 - 6.0 type:

```
net stop ScanDoxUploadService
start /wait msixec.exe /i ScanDox-Install.msi
AUTHSERVER_HTTP_FLAVOR=http DOCUPHASE_AUTH_SERVER=servername /q
```

For version 6.1 type:

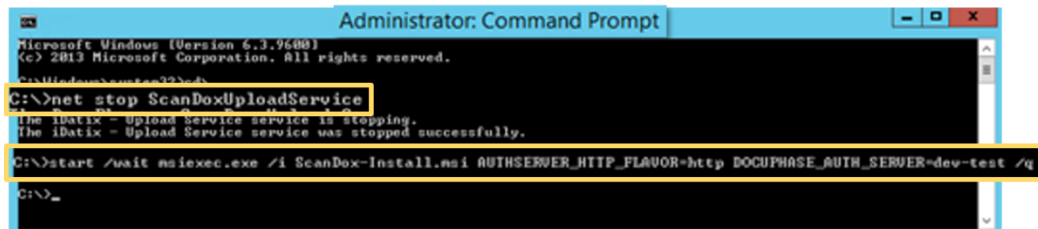
- The above command automatically uninstalls versions 5.1-6.1, and install the current version.

With Command Line parameters (case sensitive):

```
AUTHSERVER_HTTP_FLAVOR = http or https
DOCUPHASE_AUTH_SERVER
```

- The image below is an example of stopping the iDatixUploadService, then silent ScanDox upgrade from version 5.0 (or later).

Where AUTHSERVER\_HTTP\_FLAVOR is entered as http or https (as appropriate to the environment), and where DOCUPHASE\_AUTH\_SERVER is replaced by the DocuPhase authentication server name (no quotes).



```
Administrator: Command Prompt
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.
C:\Windows\system32\cmd.exe
C:\>net stop ScanDoxUploadService
The iDatix - Upload Service service is stopping.
The iDatix - Upload Service service was stopped successfully.
C:\>start /wait msixec.exe /i ScanDox-Install.msi AUTHSERVER_HTTP_FLAVOR=http DOCUPHASE_AUTH_SERVER=dev-test /q
C:\>
```

## Unattended ScanDox Upgrade from version 5.0 (or earlier)

### ! IMPORTANT!

- Before upgrading ScanDox, be sure all data is saved and backed up, then make sure that the Upload Manager and ScanDox are closed on the workstation.
- The first thing that must be completed prior to upgrading from version 5.0 (or earlier) is the uninstallation of the currently installed version of ScanDox via a “response” file (“.iss”). The response file differs depending on what version of the ScanDox being uninstalled. Please refer to page 44 for more information about using the .iss files.
- If UAC is enabled, Command Prompt must be used as “Run as administrator”.

### For the currently installed ScanDox Version (5.0 or earlier)

- 1) Copy or extract the copy the currently installed **ScanDox-Install.exe** to the location from which you will be running the upgrade.

From Command Prompt (see **IMPORTANT** note above) from the directory in which **ScanDox-Install.exe** is located:

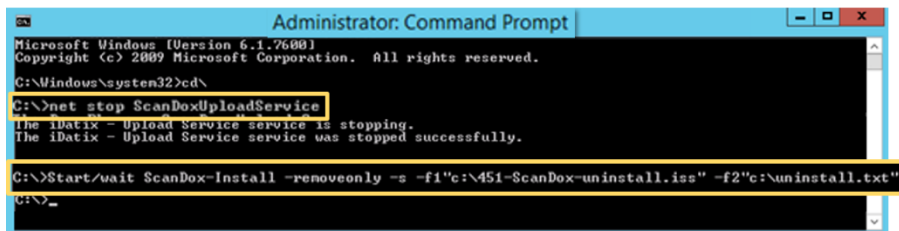
- 2) Enter the following command to uninstall the currently installed version of ScanDox:

```
net stop iDatixUploadService
Start/wait ScanDox-Install -removeonly -s -f1"<FullPath>###-
ScanDox-uninstall.iss" -f2"<FullPath>uninstall.txt"
```

**-f1 = full path to the response file (###-ScanDox-uninstall.iss)**

### With the following Command Line parameters:

- Where ### the ScanDox version you are uninstalling (i.e.; 500, 452, 451, etc. -see page 44).
- The image below shows an example of the command code for stopping the iDatixUploadService, then silent uninstall of version 4.5.1 ScanDox.



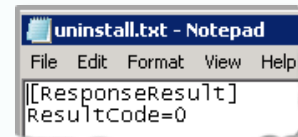
```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Windows\system32>cd\
C:\>net stop ScanDoxUploadService
The iDatix - Upload Service service is stopping.
The iDatix - Upload Service service was stopped successfully.

C:\>Start/wait ScanDox-Install -removeonly -s -f1"c:\451-ScanDox-uninstall.iss" -f2"c:\uninstall.txt"
C:\>_
```

### NOTES


- “-f2” is an optional path to the output log file. If the path contains a directory name, the directory must already exist or no log file is generated.  
A successful uninstallation results in ResultCode=0. If ResultCode is not zero, make sure the command is typed correctly, and that the response file (.iss) is at the specified path.
- Paths entered must be “Full” paths and not “Relative”. If a relative path is entered, ScanDox will not uninstall.



- 3) Perform a silent install, as described on page 35.

## Appendices

### Appendix A – Changing the Installation Directory and/or Path

If you don't want to install selected Cores and/or Components at the default directory, you can either enter the drive letter to select a new drive and/or enter or select a new path (via browse option: ) to install the files at a different location.



#### **WARNING!**

*Use extreme care when making changes to any Core Installation Path as this change will affect any Components that fall under the selected Core(s). If you select all Cores (as shown below), all Cores and all Components will be installed at the entered/selected directory path..*



#### **IMPORTANT!**

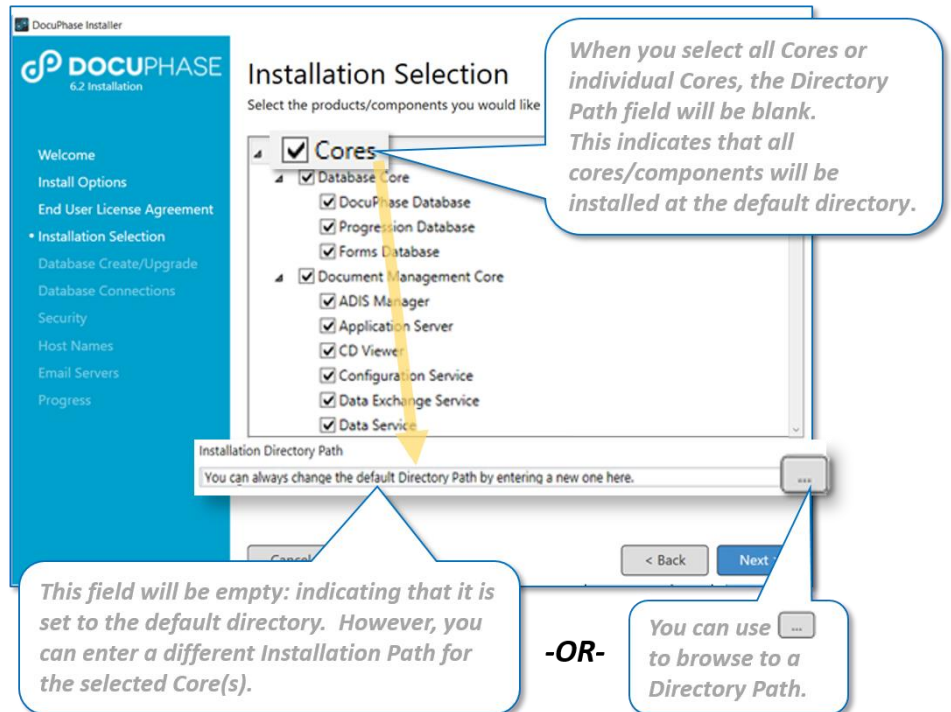
*While it's possible for you to set most any Installation Directory Path, it is **HIGHLY RECOMMENDED** that you **DO NOT** choose a local drive (C:) for this purpose.*

#### A1) Changing the Installation Drive Installation Directory or Path for Cores

When you highlight or click on any Core item (whether it's all Cores or specific Cores like Database Core and/or Document Management Core, etc.) the Installation Directory Drive and/or Path field remains empty. This means that the selected Cores and Components will all be installed at the default directory. However, you can either enter or browse to select a different path.

The image below provides the basic information you need to be able to review and/or change Core Installation Directories and/or Paths, as needed.

Prior to making changes, please review the **WARNING** and **IMPORTANT** notes shown above.



**Installation Selection**  
Select the products/components you would like


- Cores
  - Database Core
    - DocuPhase Database
    - Progression Database
    - Forms Database
  - Document Management Core
    - ADIS Manager
    - Application Server
    - CD Viewer
    - Configuration Service
    - Data Exchange Service
    - Data Service

Installation Directory Path  
You can always change the default Directory Path by entering a new one here.

*When you select all Cores or individual Cores, the Directory Path field will be blank. This indicates that all cores/components will be installed at the default directory.*

*This field will be empty: indicating that it is set to the default directory. However, you can enter a different Installation Path for the selected Core(s).*

**-OR-**

*You can use  to browse to a Directory Path.*



#### **TIP**

*To view individual default directories, click on/highlight a Component to display its default directory (see the next page for more information).*

## Appendix A – Changing the Installation Directory Path (continued)

### A2) Changing the Installation Directory Drive/Path for Parent Cores or Individual Components

When you highlight (or click on) any individual Component its default Installation Directory Path appears at the bottom of the window. This path changes depending upon the Component that is highlighted; selected Cores and Components are installed at the default directory, unless you make a change.

The image below provides the basic information you need to be able to review and/or change only a Component Installation Directory Paths, as needed. Prior to making changes, please review the **WARNING** and **IMPORTANT** notes shown at the top of page 38.



#### NOTES

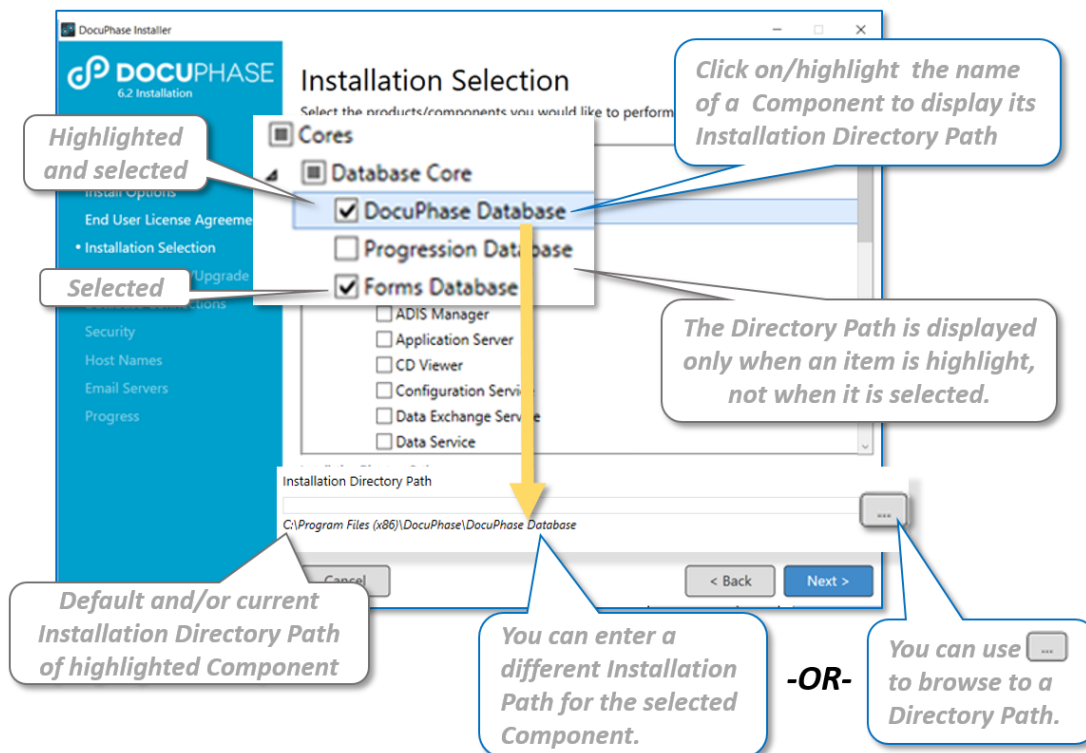
You can change...

- just the installation drive (versus the whole path) by entering the drive letter only (e.g., D).
- any component installation directory, except for the DocuPhase Legacy Viewer.
- the directory back to the default installation path by clearing the Core value (so that it is blank). This causes the component installation directory to revert to its original location.



#### TIP

In order to see the Default Directory Path for a Component, you need to highlight it (see example below).



The screenshot shows the 'DocuPhase Installer' window at the 'Installation Selection' step. The 'Database Core' is expanded, showing 'DocuPhase Database' and 'Forms Database' as selected components. The 'Installation Directory Path' field at the bottom displays 'C:\Program Files (x86)\DocuPhase\DocuPhase Database'. Callouts provide the following instructions:

- Highlighted and selected:** Points to the 'DocuPhase Database' component name.
- Selected:** Points to the 'Forms Database' component name.
- Click on/highlight the name of a Component to display its Installation Directory Path:** Points to the 'DocuPhase Database' component name.
- The Directory Path is displayed only when an item is highlight, not when it is selected.** Points to the 'Installation Directory Path' field.
- Default and/or current Installation Directory Path of highlighted Component:** Points to the text 'C:\Program Files (x86)\DocuPhase\DocuPhase Database' in the path field.
- You can enter a different Installation Path for the selected Component.** Points to the text input area of the path field.
- OR-** Points to the ellipsis button next to the path field.
- You can use ... to browse to a Directory Path.** Points to the ellipsis button next to the path field.

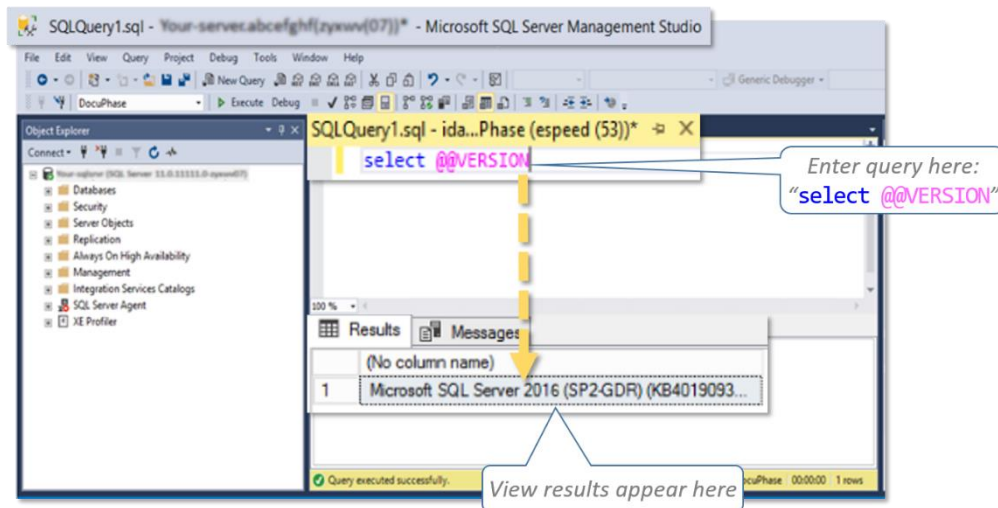


## Appendix B – Finding Out which Version of SQL Server Is in Use

If you are unsure of the version of SQL currently running on a server, you can use the following process to find out.

*In the query field of the MS SQL Server Management Studio:*

Enter the following query to display the current version of SQL being run: `select @@VERSION.`



## Appendix C – Reviewing and Resolving Script Errors

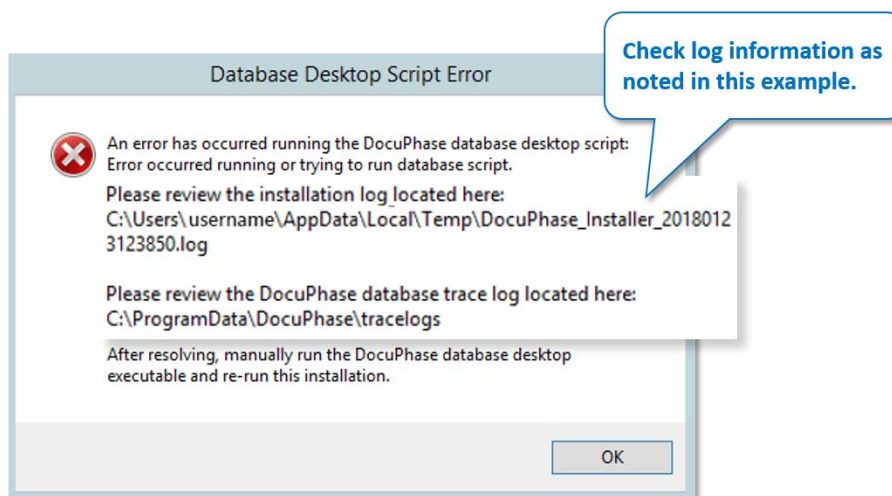
If a “Database Create/Upgrade”-typescript error occurs during the installation Process, you may see a message like the one below. If this occurs, please read the information provided within the error message, as it will give you direction on where to look to find the cause of the error.



### TIP

When reviewing log files as suggested in the Script Error message, use **Edit ► Find** to search for the word “ERROR”, and quickly find any errors.

- 1) Review the error to find out what log(s) to review.
- 2) Resolve the issue as noted in the log(s).
- 3) Run the DocuPhase database desktop exe file (manually), and re-run the installation to make sure that everything is installed.



## Appendix D – Using AdoptJDK11 Upgrade Workaround for Installed 6.4 iForms

If there are issues with iForms after having upgraded AdoptJDK11 since the most recent installation/upgrade of DocuPhase, you'll need to perform the following steps correct the problem (see **IMPORTANT!** note on page 5 for more information).

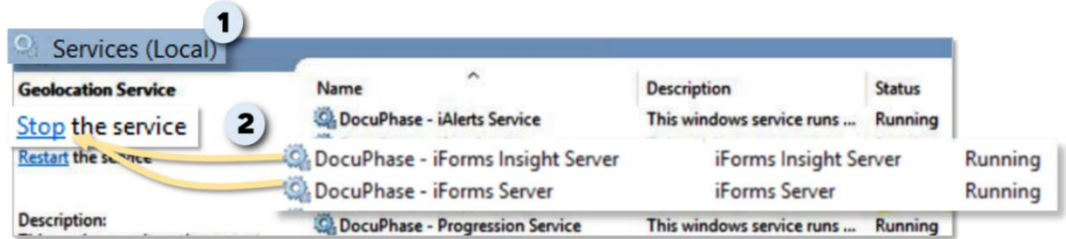


### TIP

While you can use the Installer to uninstall, then re-install the iForms Core and its components, the procedure outlined below is more efficient for this purpose.

From Microsoft Management Console or via the Control Panel:

- 1) Go to **Windows Services**.
- 2) Find and stop (if they are running) both **iForms Windows Services**:



- ✓ iForms Insight Server
- ✓ iForms Server

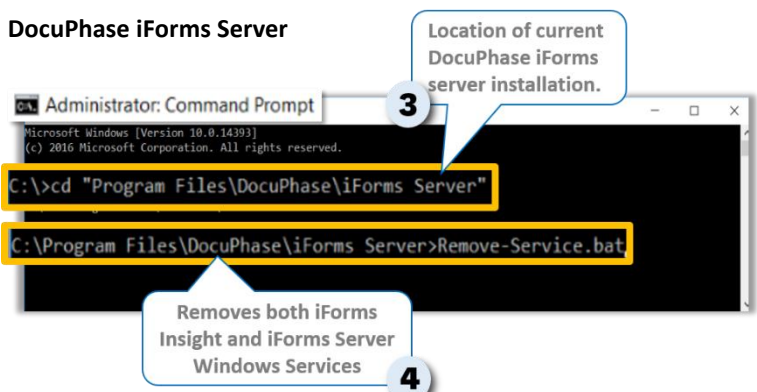
In the Windows Administrator Command Prompt:

- 3) Change the directory (cd) of the folder in which **DocuPhase iForms Server** is installed.



### TIP

Commonly, this is `c:\Program Files\DocuPhase\iForms Server`; however, it may have been installed at a different location.

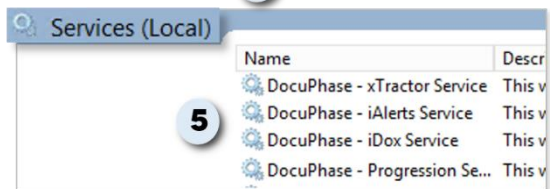


On the next line in Command Prompt:

- 4) Enter **Remove-Service.bat**, then press Enter. to remove both the **iForms Insight** and **iForms Server Windows Services**.

In Microsoft Management Services Console:

- 5) Make sure neither **iForms Windows Services** appear in the list.



### NOTES

If either (or both) of the iForms Windows Services still appear in the Microsoft Management Services Console, go back to the Administrator Command Prompt and enter the corresponding command line as shown below, then press Enter to manually delete the service(s):

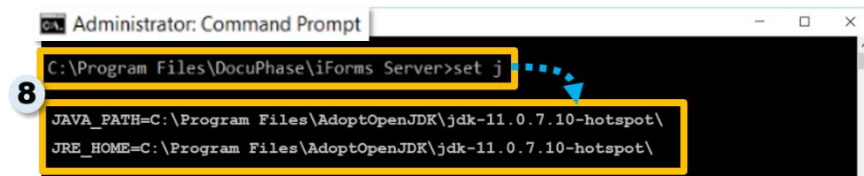
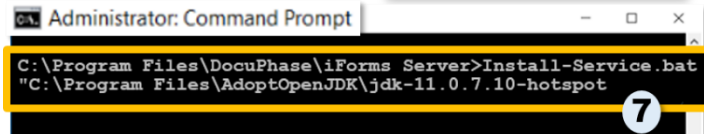
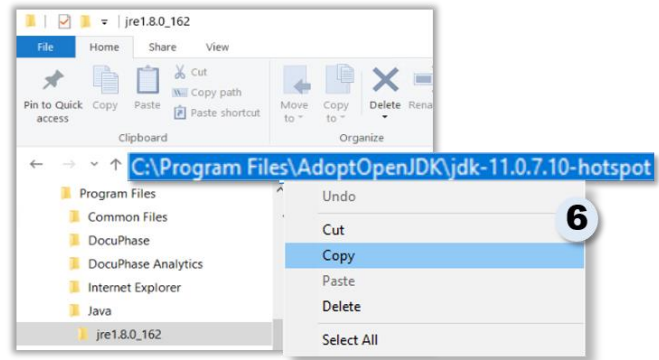
- `sc delete FormsInsightWindowsService`
- `sc delete FormsWindowsService` just the installation drive (versus the whole path) by entering the drive letter only (e.g., D).

**Appendix E – AdoptJDK11 Upgrade Workaround for Installed 6.4 iForms (continued)**

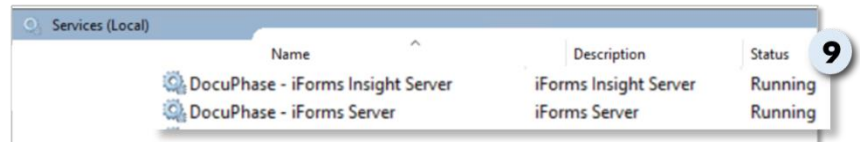
- 6) Find and copy the directory path of the folder in which **AdoptJDK11** was installed.

**In the Administrator Command Prompt**

- 7) Enter **Install-Service.bat**, followed by the AdoptJDK11 path you copied (see step 6 and Example above) to re-install the iForms Windows Services, then press Enter.
- 8) Enter **set j**, then press Enter to display the revised/corrected **JAVA\_PATH** and **JRE\_HOME** environment paths.


**In Microsoft Management Services Console:**

- 9) Make sure that **iForms Insight Forms Service** and **iForms Service** are both running.



## Appendix E – Using Response .iss Files (for Unattended Workstation Installation)

Iss “response” files supply the answers to the questions typically asked during a manual uninstall required in preparation of certain product upgrades. This appendix provides the information for the required Uninstall response files (.iss) used when performing the silent uninstallation of the Legacy Viewer and/or ScanDox for version prior to 5.1: this uninstallation is necessary in preparation for the upgrade/installation of versions 5.1 (or later).



### **WARNING!**

*Response files are specific to the product and version being silently uninstalled. Take care to make sure to use the correct version response files to ensure a successful uninstallation.*

### Uninstall.iss Files for the Legacy Viewer

The following example shows a full-function Legacy Viewer uninstall command for the 451-iSynergyClient-uninstall.iss file used to provide the proper sequential responses to each uninstall dialog question: allowing the procedure to progress unimpeded.



```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
Z:\>c:
C:\>Start/wait Isynergycient -removeonly -s -f1"c:\451-iSynergyClient-uninstall.iss" -f2"c:\uninstall.txt"
C:\>_
```

#### [400-iSynergyClient-uninstall.iss](#)

*Response File Content:*

```
[{3829C65D-7366-4103-B66B-F89515C76CBB}-DlgOrder]
Dlg0={3829C65D-7366-4103-B66B-F89515C76CBB}-MessageBox-0
Count=2
Dlg1={3829C65D-7366-4103-B66B-F89515C76CBB}-SdFinish-0
[{3829C65D-7366-4103-B66B-F89515C76CBB}-MessageBox-0]
Result=6
[{3829C65D-7366-4103-B66B-F89515C76CBB}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

#### [450-iSynergyClient-uninstall.iss](#)

*Response File Content:*

```
[{D8949C37-5303-41C5-B8AF-0E616CAF53CB}-DlgOrder]
Dlg0={D8949C37-5303-41C5-B8AF-0E616CAF53CB}-MessageBox-0
Count=2
Dlg1={D8949C37-5303-41C5-B8AF-0E616CAF53CB}-SdFinish-0
[{D8949C37-5303-41C5-B8AF-0E616CAF53CB}-MessageBox-0]
Result=6
[{D8949C37-5303-41C5-B8AF-0E616CAF53CB}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

[Appendix F - Response .iss Files](#) ► [Uninstall.iss Files for the Legacy Viewer](#) (continued on next page)

**Appendix F - Response .iss Files ► Uninstall.iss Files for the Legacy Viewer (continued)****451-iSynergyClient-uninstall.iss**

*Response File Content:*

```
[{7A459966-2041-4FBE-9B3C-00654DFE0124}-DlgOrder]
Dlg0={7A459966-2041-4FBE-9B3C-00654DFE0124}-MessageBox-0
Count=2
Dlg1={7A459966-2041-4FBE-9B3C-00654DFE0124}-SdFinish-0
[{7A459966-2041-4FBE-9B3C-00654DFE0124}-MessageBox-0]
Result=6
[{7A459966-2041-4FBE-9B3C-00654DFE0124}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

**452-iSynergyClient-uninstall.iss**

*Response File Content:*

```
[{1C68FF58-91ED-45C4-87B1-5544221D8DFD}-DlgOrder]
Dlg0={1C68FF58-91ED-45C4-87B1-5544221D8DFD}-MessageBox-0
Count=2
Dlg1={1C68FF58-91ED-45C4-87B1-5544221D8DFD}-SdFinish-0
[{1C68FF58-91ED-45C4-87B1-5544221D8DFD}-MessageBox-0]
Result=6
[{1C68FF58-91ED-45C4-87B1-5544221D8DFD}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

**500-iSynergyClient-uninstall.iss**

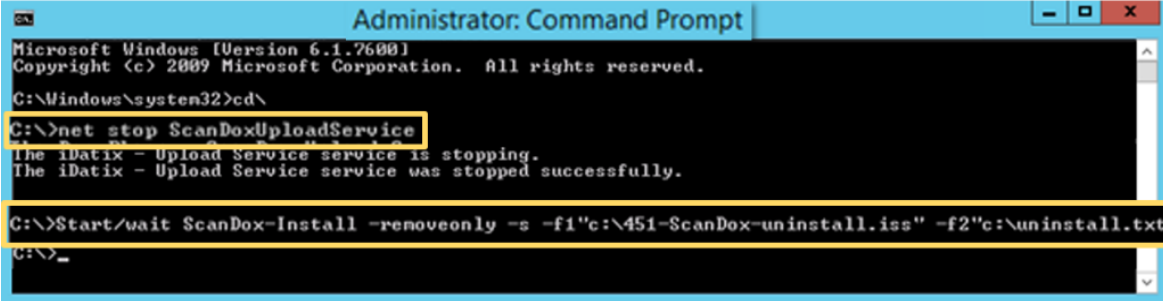
*Response File Content:*

```
[{127CE77D-637A-4C67-9715-870C69A6D397}-DlgOrder]
Dlg0={127CE77D-637A-4C67-9715-870C69A6D397}-MessageBox-0
Count=2
Dlg1={127CE77D-637A-4C67-9715-870C69A6D397}-SdFinish-0
[{127CE77D-637A-4C67-9715-870C69A6D397}-MessageBox-0]
Result=6
[{127CE77D-637A-4C67-9715-870C69A6D397}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

## Appendix F - Response .iss Files (continued)

### ScanDox Uninstall.iss Files

The following example shows a ScanDox uninstall command for the 451-ScanDox-uninstall.iss file used to provide the proper sequential responses to each uninstall dialog question: allowing the procedure to progress unimpeded.



```
Administrator: Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Windows\system32>cd\
C:\>net stop ScanDoxUploadService
The iDatix - Upload Service service is stopping.
The iDatix - Upload Service service was stopped successfully.

C:\>Start/Wait ScanDox-Install -removeonly -s -f1"c:\451-ScanDox-uninstall.iss" -f2"c:\uninstall.txt"
C:\>_
```

#### [400-ScanDox-uninstall.iss](#)

Response File Content:

```
[{A52FA160-5999-4869-B7DE-591C3FF0BA2E}-DlgOrder]
Dlg0={A52FA160-5999-4869-B7DE-591C3FF0BA2E}-MessageBox-0
Count=2
Dlg1={A52FA160-5999-4869-B7DE-591C3FF0BA2E}-SdFinish-0
[{A52FA160-5999-4869-B7DE-591C3FF0BA2E}-MessageBox-0]
Result=6
[{A52FA160-5999-4869-B7DE-591C3FF0BA2E}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

#### [450-ScanDox-uninstall.iss](#)

Response File Content:

```
[{77747D30-ACEE-4D04-BB6C-5C7072513CAF}-DlgOrder]
Dlg0={77747D30-ACEE-4D04-BB6C-5C7072513CAF}-MessageBox-0
Count=2
Dlg1={77747D30-ACEE-4D04-BB6C-5C7072513CAF}-SdFinish-0
[{77747D30-ACEE-4D04-BB6C-5C7072513CAF}-MessageBox-0]
Result=6
[{77747D30-ACEE-4D04-BB6C-5C7072513CAF}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

Appendix F - Response .iss Files ► Uninstall.iss Files for ScanDox (continued on next page)



**Appendix F - Response .iss Files ► Uninstall.iss Files for ScanDox (continued on next page)****451-ScanDox-uninstall.iss**

*Response File Content:*

```
[{F2DE555B-0736-4ABB-BFA9-FB1513D510B4}-DlgOrder]
Dlg0={F2DE555B-0736-4ABB-BFA9-FB1513D510B4}-MessageBox-0
Count=2
Dlg1={F2DE555B-0736-4ABB-BFA9-FB1513D510B4}-SdFinish-0
[{F2DE555B-0736-4ABB-BFA9-FB1513D510B4}-MessageBox-0]
Result=6
[{F2DE555B-0736-4ABB-BFA9-FB1513D510B4}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

**452-ScanDox-uninstall.iss**

*Response File Content:*

```
[{6E132035-15E8-4F30-BCC1-6E81189CE3C0}-DlgOrder]
Dlg0={6E132035-15E8-4F30-BCC1-6E81189CE3C0}-MessageBox-0
Count=2
Dlg1={6E132035-15E8-4F30-BCC1-6E81189CE3C0}-SdFinish-0
[{6E132035-15E8-4F30-BCC1-6E81189CE3C0}-MessageBox-0]
Result=6
[{6E132035-15E8-4F30-BCC1-6E81189CE3C0}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

**500-ScanDox-uninstall.iss**

*Response File Content:*

```
[{D63AFEDF-398B-406A-94EF-10B3FACDE23C}-DlgOrder]
Dlg0={D63AFEDF-398B-406A-94EF-10B3FACDE23C}-MessageBox-0
Count=2
Dlg1={D63AFEDF-398B-406A-94EF-10B3FACDE23C}-SdFinish-0
[{D63AFEDF-398B-406A-94EF-10B3FACDE23C}-MessageBox-0]
Result=6
[{D63AFEDF-398B-406A-94EF-10B3FACDE23C}-SdFinish-0]
Result=1
bOpt1=0
bOpt2=0
```

## Appendix F – Ensuring Minimum MSI Installations

The following listing includes the minimum Core and Component Installations needed.

BASIC MSIs	DM/ App Server	Forms	Progression	Capture Optional
DocuPhaseDatabase.msi ProgressionDatabase.msi	ApplicationServer.msi ConfigurationService.msi	iFormsServer.msi iFormsService.msi	ProgressionServer.msi ProgressionService.msi SearchService.msi	FullTextManager.msi FullTextService.msi
iFormsDatabase.msi	DataService.msi DocumentServer.msi DocuphaseServer.msi DocuPhaseService.msi DocuPhaseViewer.msi LicenseServer.msi SecurityService.msi LicenseManager.msi  InstallServer.msi  WorkflowService.msi*	PublicFormsService.msi	ProgressionDesignService.msi ProgressionStudio.msi	iDoxDesigner.msi iDoxService.msi iLink.msi ImportMapper.msi OfficeAddinsx64.msi ScanDox.msi xTractorDesigner.msi xTractorService.msi

Desktop Tools Optional	User Management Optional	Notifications Optional	Remote Data Optional	Report
BarCoder.msi CDViewer.msi DBPurge.msi DesktopManager.msi iRetentionManager.msi RolebackManager.msi	ADISManager.msi GDISService.msi	iAlertsManager.msi iAlertsService.msi ProgressionNotifier.msi	DataExchangeService.msi SpeedLoader.msi PDFCreator.msi	Analytics.exe

 Dependent msi pairs

\*Workflow service is required if/when running Progression on a separate server.

## Appendix G – Enabling Phone Home Licensing (LicenseChecker)

The Phone Home Licensing service perpetually sends automatic, daily API calls (to the DocuPhase license database) to validate the expiration date: making it possible for DocuPhase to renew or upgrade a license without client interaction. Upon installation of DocuPhase 6.4, Phone Home Licensing (LicenceChecker) is disabled by default. If Phone Home Licensing needs to be implemented, use the following process shown below.

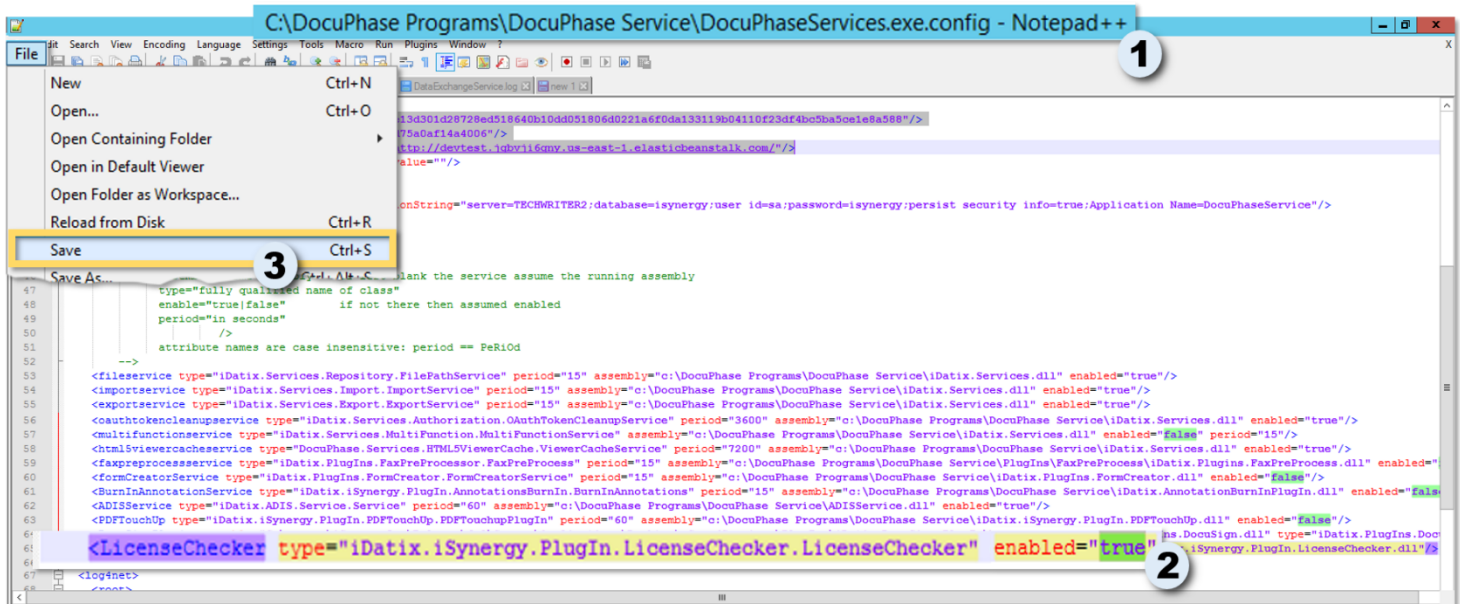


### **IMPORTANT!**

*Be sure client confirmation for use of Phone Home Licensing has been established before enabling the setting as shown below.*

#### *In Notepad++:*


- 1) Open the **DocuPhaseServices.exe.config** file (usually located at C:\DocuPhase Programs\DocuPhase Service\).
- 2) Locate **LicenseChecker** line, then set “enabled” flag to “true”.
- 3) Save the file to enable the **Phone Home Licensing** service.



## Appendix H – Changing Java Virtual Memory (JVM) for iForms

When the iForms component of DocuPhase is installed on an exceptionally large system, it may be necessary to increase the Random Access Memory allocated to Java Virtual Memory (JVM) to prevent an Application error, and to ensure iForms' optimum performance. Follow the steps below assign more RAM to Java (i.e. if system resources permits), but only as needed.

### On your local device:

- 1) Go to **Task Manager** ► **Performance** ► **Memory** to determine the total available RAM (and make a note of it).
- 2) Open **regedit** .
- 3) Navigate to Computer\HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Apache Software Foundation\Procrun 2.0\iFormsServer\Parameters\Java.

### From the Java Parameters list:

- 4) Right-click on **JvmMs** to display a list of options.

### From the list of options

- 5) Select **Modify** to display the **Edit DWORD** dialog.

### In the Edit DWORD dialog for JvmMs (minimum):

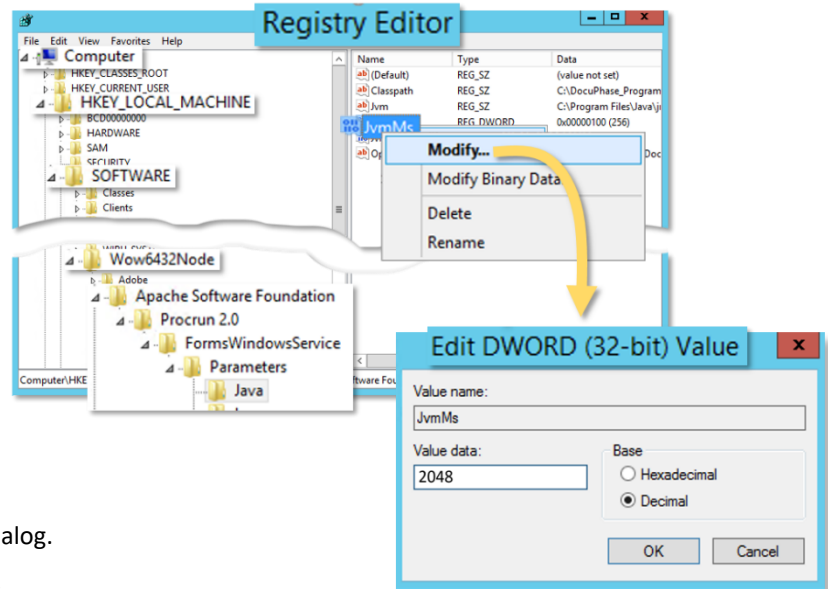
- 6) Select the **Decimal** option.

### In the Value Data field:

- 7) Enter the value of **25% of the available RAM** determined in step 1 above (e.g., "2048" – see Example below), then click **OK**.
- 8) Repeat steps 4-6 for **JvmMx (maximum)**.

### NOTES

- The default JVM upon installation of DocuPhase is 1gb min (JvmMs) and 3gb max (JvmMx).
- The Rule of Thumb for systems running a large number of Forms: allocate a quarter of the available RAM. Confirm this via Task Manager/ Performance/ Memory.



### EXAMPLE

If you have installed DocuPhase on an all-in-one install box, you should allocate 25% of RAM to JVM, as shown in the following example:

Total RAM = 32 GB | 25% = 8

- If: JVM min = 2 GB and JVM max= 8 GB
- Then, input Value Data is JVM min = 2048 and JVM Max = 8192

- 9) Restart **IIS** and **iForms** Service.