

## Setup Instructions

Updated 10/2/2017

### Permission Prerequisites

Before we begin it's prudent to ensure we have proper access to do what we need. This may involve various accounts, machines, and possibly teams. Be sure the following permissions are available before continuing:

#### SQL Server

- Ability to restore a database
- SQL Server authenticated user with full permission to the database (SELECT, INSERT, DELETE, UPDATE, and EXECUTE)

#### Windows Server

- Ability to manage IIS, including setting up new AppPools and Sites
- Ability to write to at least one folder that IIS can also read and write to

#### Permission Checklist

- Access SQL Server
- Restore SQL Server Database
- Create SQL Server Login OR Verify SQL Server Login has full access to restored DB
- Access Windows Server
- Unzip files to writable folder
- Create 1 new AppPool in IIS
- Create 1 new site in IIS
- Verify the Windows Server can connect to SQL Server via credentials in step 4
- Install Windows Service

#### Other

- Access to an SMTP server
- Optional - to utilize the mapping feature your firewall must allow access to the Google maps API

### IIS Configuration

Make sure that the mp4 extension will be served as MIME type 'video/mp4'. This can be set in the IIS configuration panel under 'Mime Types'.

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## Manifest

The Causelink Enterprise package contains the following files and folders:

config\  
contents\  
database\  
Causelink Enterprise Installer.exe  
Causelink Enterprise Setup Instructions.pdf (this document)  
Causelink Enterprise Upgrade Instructions.pdf

The database folder has a single SQL Server backup file. The backup was generated from a SQL Server 2012 instance, and thus requires SQL Server 2012 or greater to restore. This should be your first step. If you are upgrading from a previous version there may be additional .sql upgrade scripts to run.

The contents folder houses:

**CLEService** contains a windows service vital to application function and health. **DiagnosticTool** is a command-line application capable of performing basic maintenance and upgrade tasks. **www** holds all of the web files needed to run the application under IIS 7 or greater. These folders will be copied to your machine as part of the installer process.

If you are upgrading from a previous version, please refer to the Causelink Enterprise Upgrade Instructions document.

The Causelink Enterprise Installer application is in charge of performing a full setup on your server. The first screen will gather information about your environment. The following screen will install the components and notify you of any errors.

## Before you begin

Causelink Enterprise is delivered in a zip format package. Make sure you “Unblock” the zip package before unpacking by right-clicking the .zip, choosing Properties and then click the Unblock button if it is visible. **This is critical to the success of the application install.**

## Step 1: Configure the Database

The Causelink.bak file is a standard database backed up from a SQL Server 2012 instance. Open your SQL Server Management Studio from the database server. Copy Causelink.bak onto the local machine if it’s not already there. Right-click “Databases” under the server name in the left pane, then choose “Restore Database...”. Fill out

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the dialog appropriate to your environment and click okay. We recommend setting the database name to “Causelink”, but there’s no real restriction on that.

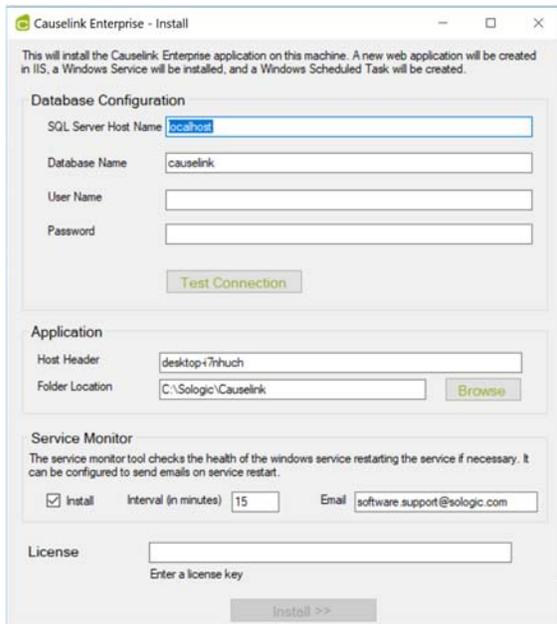
Once the database is restored we need to configure a particular user to manage this database. It’s good practice to create a separate SQL Server login, but whatever fits your network needs is fine. The only real requirement is that we *make a SQL Server user who has full rights to the Causelink database*.

Let’s test this setup: visit the web server where you intend to host the Causelink Enterprise application. Open a SQL Server Management Studio instance from there. Use the SQL Server credentials you set up during this step. Can you log into the database? Are you able to view all the tables?

Did it work? If not, you might need to check that remote connections to your database are enabled and the SQL Server user has permission to connect remotely. Other common problems are bad credentials, or the user has no access to the Causelink database.

## Step 2: Run the Installer

Run the Causelink Enterprise Installer.exe application.



Here is a complete breakdown of the fields:

### SQL Server Host Name

This is the IP address or hostname of the SQL Server we’ll be connecting to.

### Database Name

The database name we set up in the previous step. By default and recommendation this is “Causelink”.

### User Name

The SQL Server login user name.

### Password

The SQL Server login password.

**You must test the connection at this point in order to proceed.**

## Host Header

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Most setups take the form of `sologic.yourdomain.com` where 'yourdomain.com' is replaced by your corporate domain. You can enter any value you like here, but *your DNS entries must be set accordingly to point to this server*. For instance if we set up `causelink.example.com` then every user on the network must be able to ping `causelink.example.com` and have the IP address of the server returned. By default this is simply the computer name.

## Folder Location

Select or type in a folder on this machine where the application will be installed. Several sub folders will be created in this directory. By default it is 'C:\Sologic\Causelink', but any folder will do.

## Service Monitor

If checked, the application will install a scheduled task that will check ever *Interval* minutes that the software is functioning properly, and will send an email to the specified *Email* address if there is a problem. By default, Sologic's support team is specified, but any email address will work.

## License

You must enter a valid license key to continue. Your contact at Sologic should be able to provide this to you. Alternatively, you can send an email to `software.support@sologic.com`.

Click 'Install >>' to continue. The application will attempt to:

- 1.) Configure the database with your settings
- 2.) Enable MSMQ if it is not enabled.
- 3.) Install the web application into IIS. This includes creating an AppPool and setting up a new website.
- 4.) Install the windows service. The service will show up under the standard windows services panel as "Causelink Enterprise".
- 5.) Install the DiagnosticTool application so that the app can be used from the command-line, including running this tool with parameter "Index.Rebuild" so that the Lucene Index is rebuilt. This will spawn a new windows so you can see the progress of this step.

If any error occurs, the Installer tool will stop at that point and report where it failed. You may then view the latest log file inside the "InstallerLogs" folder that is created when this Installer is run.

## InstallerLogs

The "InstallerLogs" folder is created at the same location as the "Causelink Enterprise Installer.exe" when you first run the Installer. This folder will contain a

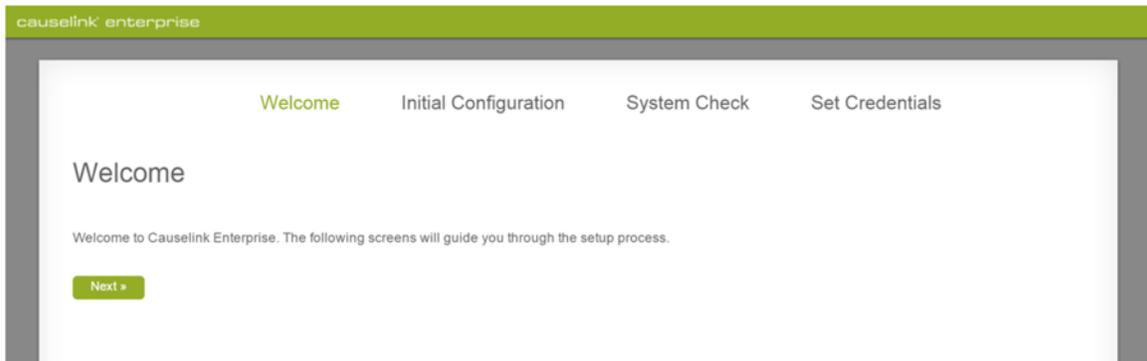
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file for each time the Installer Tool is run, using the naming convention “log\_{timestamp}.txt”.

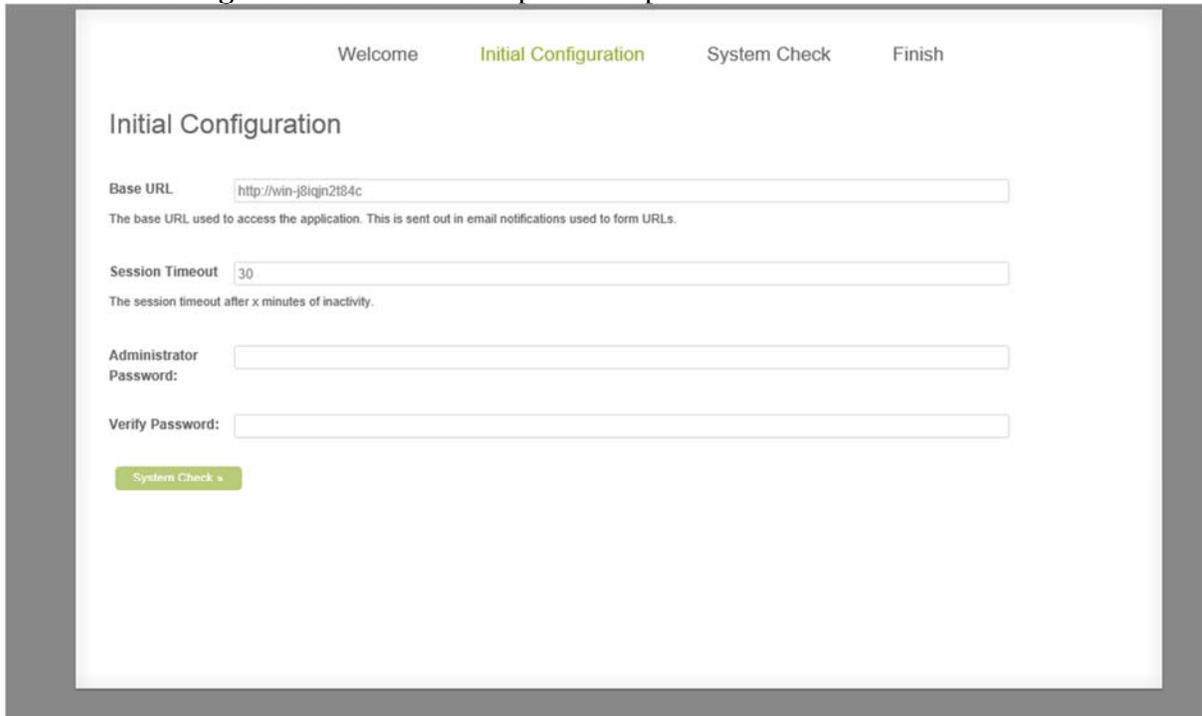
Each log file contains timestamps for when it begins and ends each step and will show detailed error messages should there be a problem.

## Step 3: Run the Web Application for the First Time

The application will guide you through the setup process:



The initial configuration sets some important options:



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## Base URL

This value controls where email links will point, and what URL users will see to set up accounts. By default, it uses the current base URL. This should work in most cases.

## Session Timeout

This value determines how long a user remains inactive before their session times out. The default of 30 minutes should suffice in most cases.

## Administrator Password

This will set the account for a highest-level privilege account – a user in the IT role. This account will allow you to configure all aspects of Causelink. The default user name for this account is 'admin'.

After continuing on from this screen the system will perform a status check:



Assuming all's good from here you can log in. You're set up!

**Note:** it is recommended that you set up a process to backup your Causelink Enterprise database daily and to keep backups for 14 days.

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## External Data

There are a few points at which data may be sent outside the network. All points are configurable and/or optional.

## Service Monitor

As described by this document, the service monitor email address may be configured during setup, or by visiting the Scheduled Tasks panel, and modifying the CLE Service Monitor task (assuming it's been set up).

## Google Maps

Google maps integration may be toggled on or off in the Admin -> System Settings panel. It is off by default.

## Diagnostic Data

If your users encounter an application error, they have the option of sending an error report with obfuscated data and non-identifying information to Sologic. This can be changed by executing the following commands against the SQL Server database:

```
DELETE FROM ClientConfiguration WHERE Name='system.diagnosticRecipient';  
INSERT INTO ClientConfiguration VALUES(NEWID(), 'system.diagnosticRecipient',  
'changethis@yourorg.com', 0);
```