



METAMATION

Installation Guide

Document Reference : TSL-GUIDE-0127

DATE

8TH JANURARY 2007

CONTACT DETAILS

For further information please contact:

Touchstone Systems Ltd
Touchstone House
21 Monarch Close
Hatch Warren
Basingstoke
Hampshire
RG22 4XA

Telephone: +44 1256 470698

Email: support@touchstone-systems.co.uk

SPEC VERSION : V1.0



1 Copyright Notices

© 2005-2007 Touchstone Systems Limited All rights reserved. Metamation and the Metamation logo are registered trademarks of Touchstone Systems Limited. Other trademarks and brands are property of their respective owners.

The information in this document belongs to Touchstone Systems Limited. It may not be used, reproduced or disclosed without the written approval of Touchstone Systems Limited.

Notice of non-liability:

Touchstone Systems Limited is providing the information in this document to you on an "AS-IS" basis. Touchstone Systems Limited makes no warranties of any kind (whether implied or statutory) with respect to the information contained herein. Touchstone Systems Limited assumes no liability for damages (whether direct or indirect), caused or omissions, or resulting from the use of this document or the information contained in this document or resulting from the application or use product or service described herein. Touchstone Systems Limited reserves the right to make changes to any information herein without further notice.

2 Table of Contents

1	Copyright Notices	2
2	Table of Contents	2
3	Introduction to use	3
4	Prerequisites	3
5	Metamation Installation	4
6	IIS Web Site Access	8
7	Initial Logon and Demo Database Restore	8
8	Manual IIS configuration	9
9	Metamation Security Configuration	13
10	Common Installation Issues	16
10.1	Assembly not found error on initial start-up.....	16
10.2	Application Error Following Upgrade	17
10.3	Serial Number Entry Fails or Re-Only Error	17
10.4	Serial Number Entry Fails Due to locked security file	18
11	Further Installation Support	18



3 Introduction to use

This guide provides installation instructions for the Metamation application including system requirements, installation, configuration, security and common issues during installation. This document relates to the Trial and Full versions of Metamation, including all versions up to V1.24.

System Administrators or those wishing to install Metamation are strongly advised to follow the simple installation process in order to ensure successful deployment.

4 Prerequisites

Metamation is generally installed on a central Server to which web enabled clients attach. For trial or demo installations, Metamation can be installed on a stand alone PC or Laptop as required. The following system prerequisites are required to install Metamation:

Operating System

Metamation runs on Microsoft technology, therefore requires one of the following operating systems:

- Windows NT or XP
- Windows Server 2000, 2003, 2005 or 2007
- Windows Small Business Server

IIS, Tomcat or Apache

Metamation needs a web technology. The default installation will be carried out on a Windows IIS configuration, manual configuration can be carried out on Tomcat or Apache. Please refer to the separate Metamation Tomcat or Apache documents available from support@metamation.co.uk.

Versions of IIS support are 4.5 onwards, but V6 is suggested.

.NET Framework V2

Metamation requires Microsoft .NET framework V2. If this is not present on your server, this can be installed as part of the installation process.

Office Components

In order to allow the server to utilise information held within embedded Project plans and Excel spreadsheets, Microsoft Office 2003, 2003 (SP2) or 2007 should be present on the server. Only the server side components of Office need to be installed, but if in doubt, installation of standard office onto the Metamation server will provide the server components.

Database

Within the standard release of Metamation, either a SQL Server (2000, 2003 or 2005) needs to be installed or Oracle (9i or 10g). Trial versions of Metamation are provided with demo databases in SQL Server 2005 format.



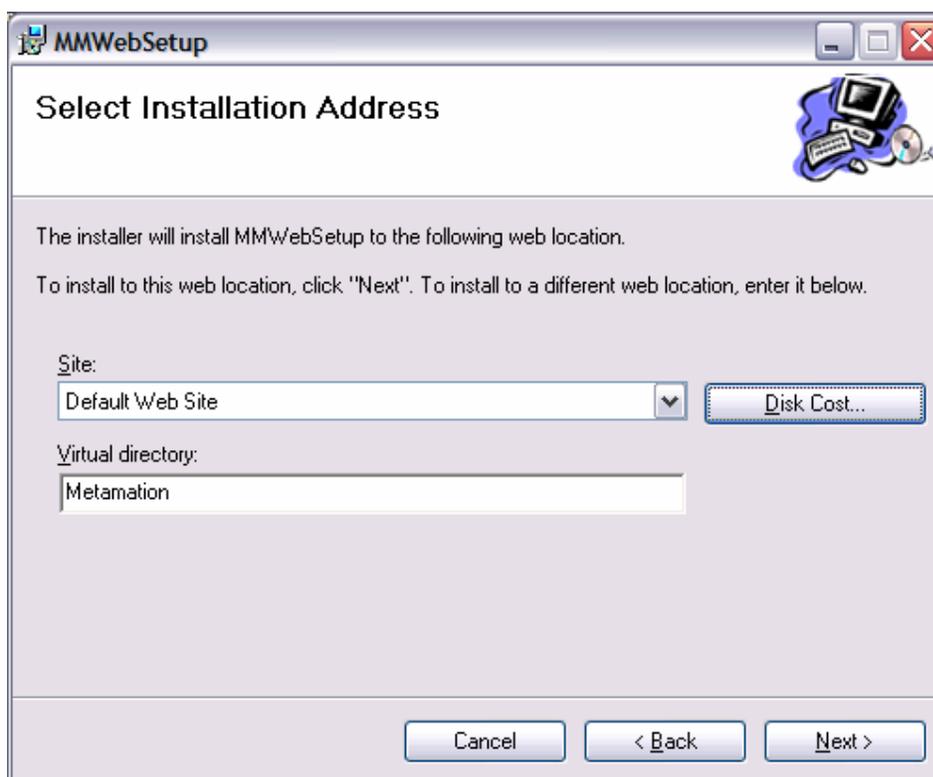
5 Metamotion Installation

When you receive the Installation ZIP file, you should have already unzipped the contents to a temporary location. To install the Metamotion application, run the **Metamotion.MSI** program – note, this may be called MMWebSetup.MSI under older releases.

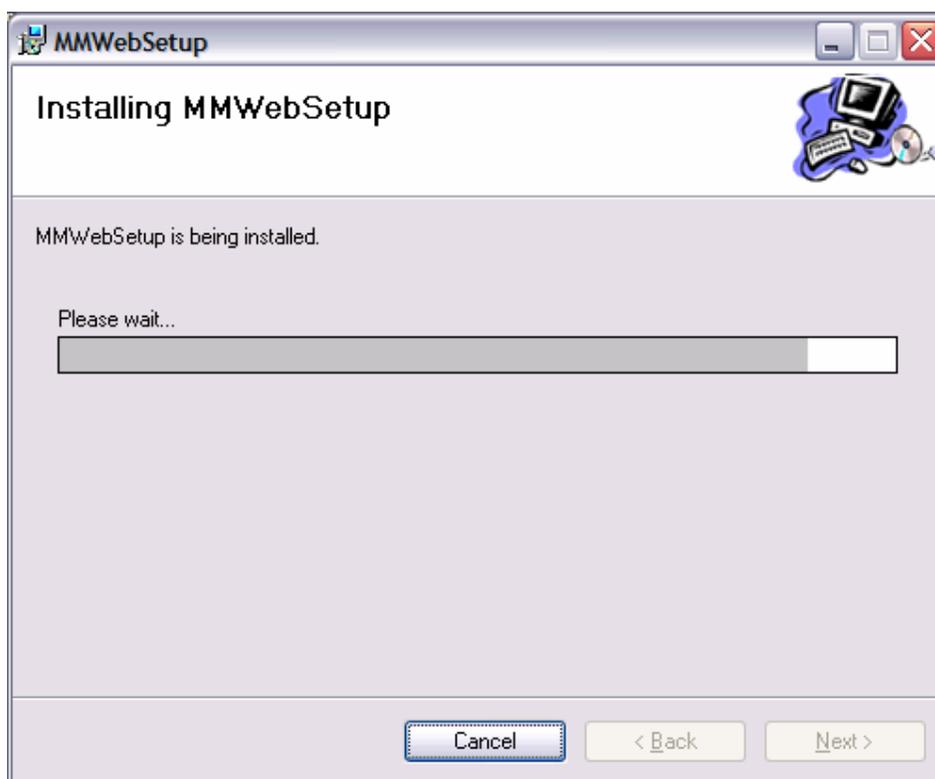
The introduction screen is presented as follows:



Select **Next** to continue. You will be asked for the Virtual Web Directory to be created. This should be set to Metamotion:



To continue the installation, press the **Next** button once to move on, and then press **next** again on the confirmation screen that you want to install. Installation will progress showing the progress as follows:



Towards the end of the installation, the following Details screen will be presented:

SMTP Detail	
SMTP Server	<input type="text"/>
Port	25

Metamation Database Server Details	
Server Name / IP Address	<input type="text"/>
Enter Database Name	Metamation
Username	<input type="text"/>
Password	<input type="text"/>

For Database Creation, you need to have DBA rights.

Proceed Exit Test Connection

Please enter the following information:



6 IIS Web Site Access

On the main server, the installation would have by default have created a Virtual directory (web site) on the Metamation application server with a name of Metamation. On the Metamation application server, a Metamation application icon would also have been created on the desktop.

The application can be accessed either through the start-up icon, or by starting up Internet Explorer and typing the following URL (web address):

http://your_server_name/Metamation

The same URL can be used by all client PCs to access Metamation.

7 Initial Logon and Demo Database Restore

When Metamation is first installed, the database created will be effectively blank, with only a single user created for initial access. This user will have the following credentials:

User Name = SUPER
Password = ELECTRIC

When logging in for the first time, it is strongly suggested that the SUPER user be amended using the user maintenance routine and the password changed to your standard administration password.

Where you want to take advantage of the demo database (a database of pre-defined document types, storage nodes, documents and users), you will need to manually restore the database as detailed below. Once you have finished with the demo database, the original blank database can be restored, or you can just add to the demo database with your real data.

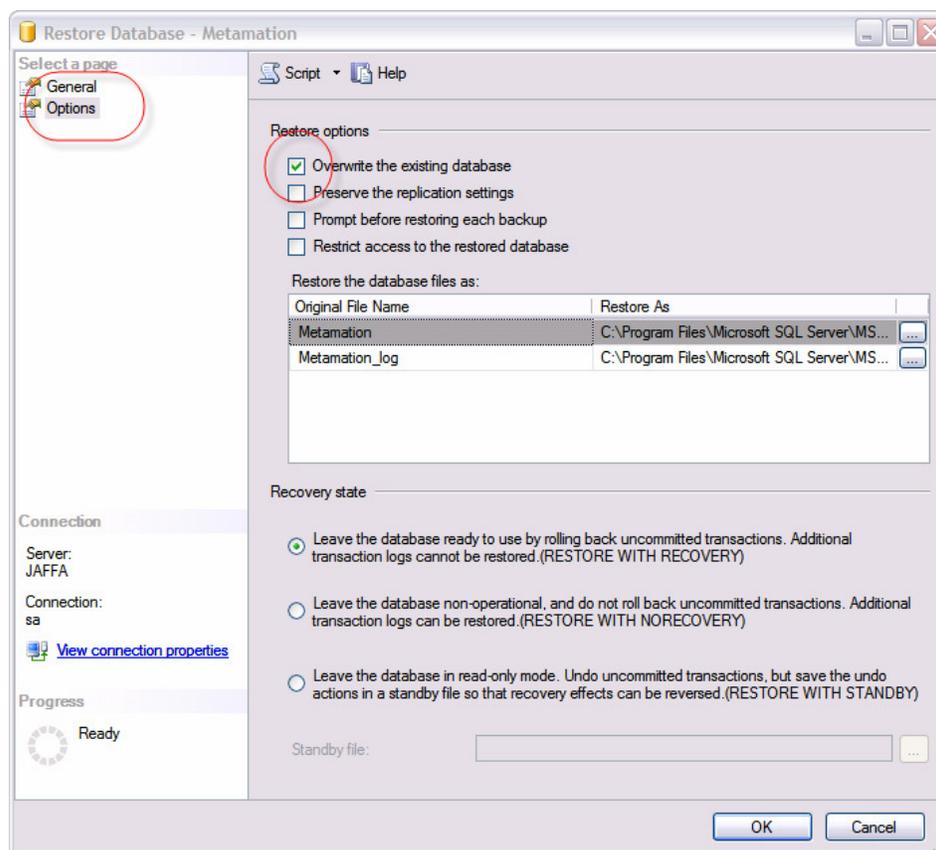
To limit the size of the supplied files, the demo database is only supplied in SQL Server format. If you would like the demo database in Oracle, please contact support@metamation.co.uk, and a database will be sent to you.

To restore the Database, use the SQL Server Management Studio to restore the database. The following instructions are for SQL Server 2005, but are very similar for previous versions of SQL Server:

- 1) Activate the SQL Server management console and login to the SQL Server database.
- 2) Using the explorer on the left panel, expand databases, and locate the database Metamation
- 3) Right hand click on the Metamation database, select the menu option **Tasks**, then the **Restore** menu option, and finally **Databases**.
- 4) From the pop-up Restore database window, select under Source to Restore, the From Device option, and then against the From device, then browse button ()



- 5) In the next pop-up Specify Backup window, Add a file then browse and select to the uncompressed Metamotion installation directory. The MetaDemo.BAK file should be selected for restore.
- 6) To restore the demo database, select the Restore button next to the selected database on the main restore screen.
- 7) Select options on the left hand panel, and then select the Tick box “Overwrite the database”. Finally, select the OK to restore the database:



Please refer to the separate “Metamotion Quick guide” which will take you through the main functions of Metamotion using the restored demo database.

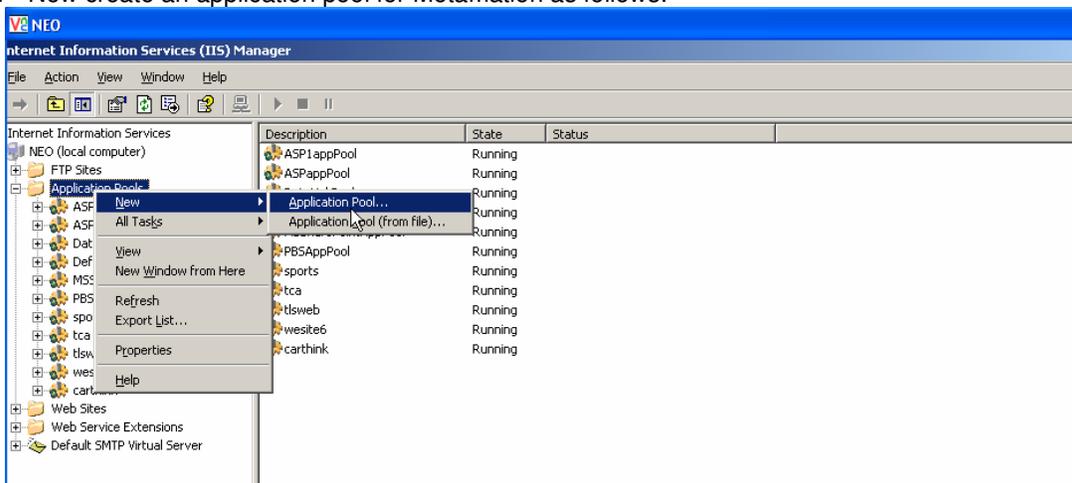
8 Manual IIS configuration

In the event that manual configuration of a Microsoft IIS virtual directory is required, the following steps can be carried out to install a virtual directory service to the installed Metamotion application. These steps would normally have been carried out as part of the standard installation process, but the created virtual application directory can be deleted and recreated if the application is required on a different server or drive.

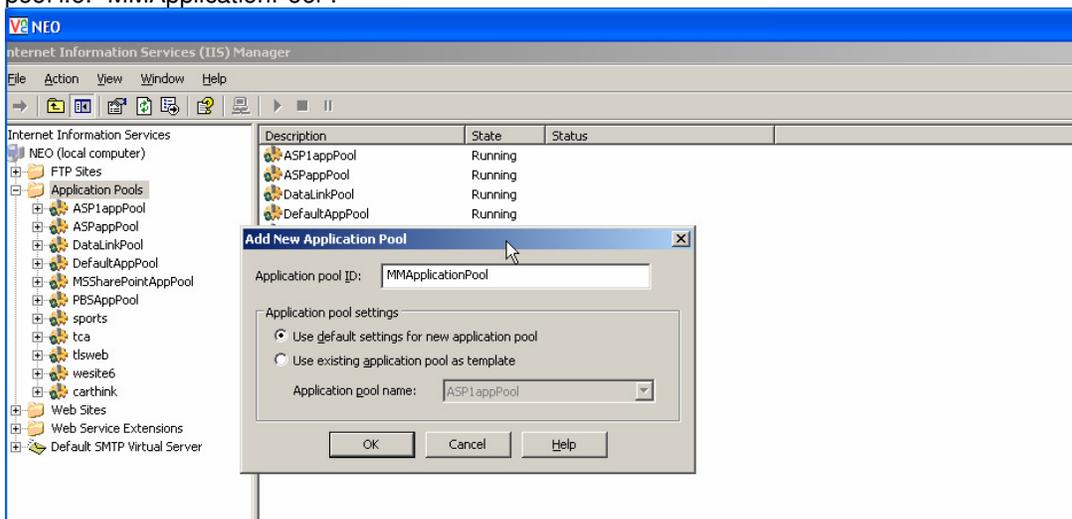
1. Create a physical folder on the any drive. i.e. D:\Metamotion.



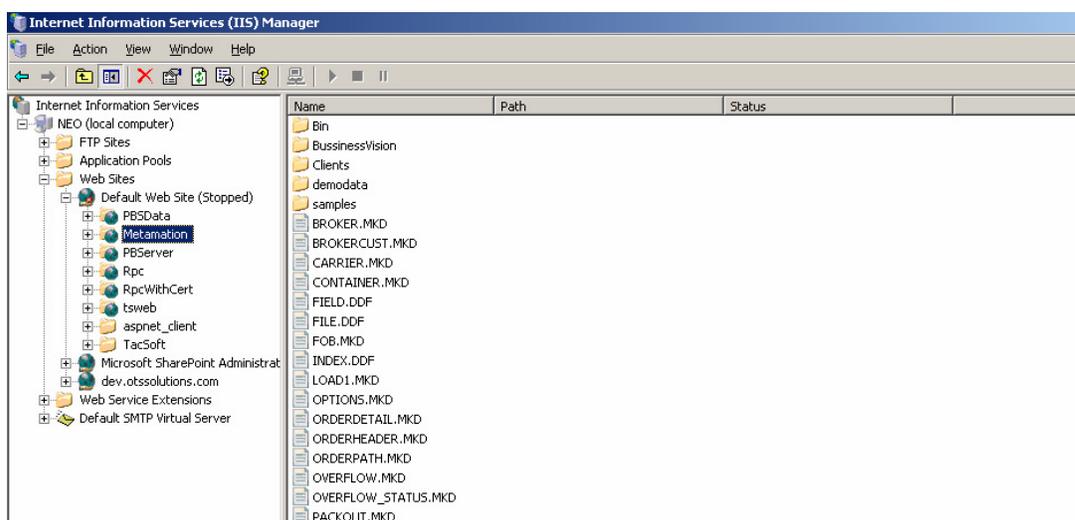
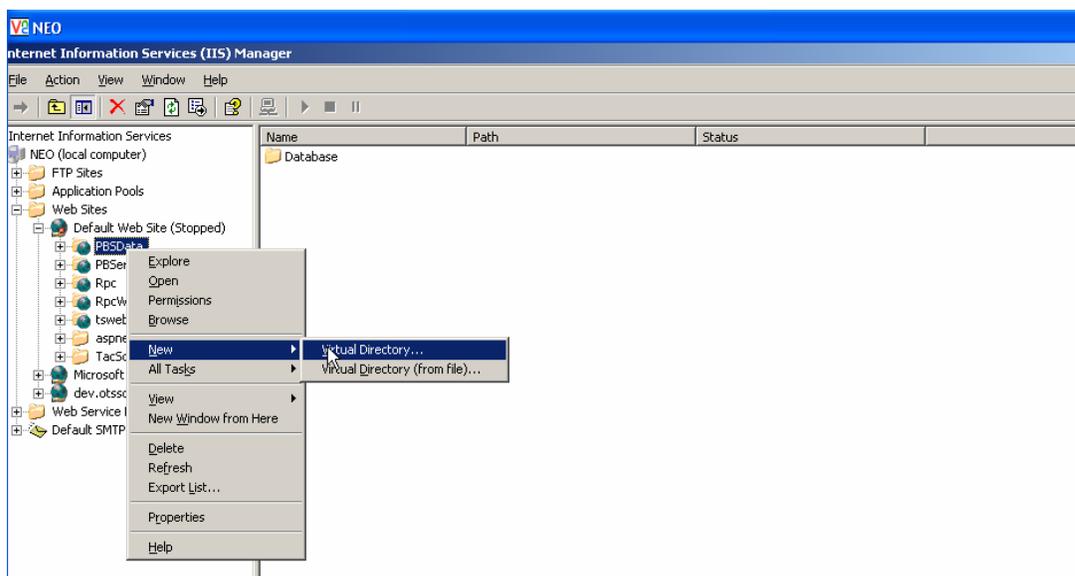
- Copy all the compiled source in physical folder created in step 1. **Note:** By default, the installation process would have installed the Metamation run-time objects within a Metamation directory under the systems C:\inetpub\wwwroot
- Open the Internet Information Service (IIS).
- Now create an application pool for Metamation as follows:



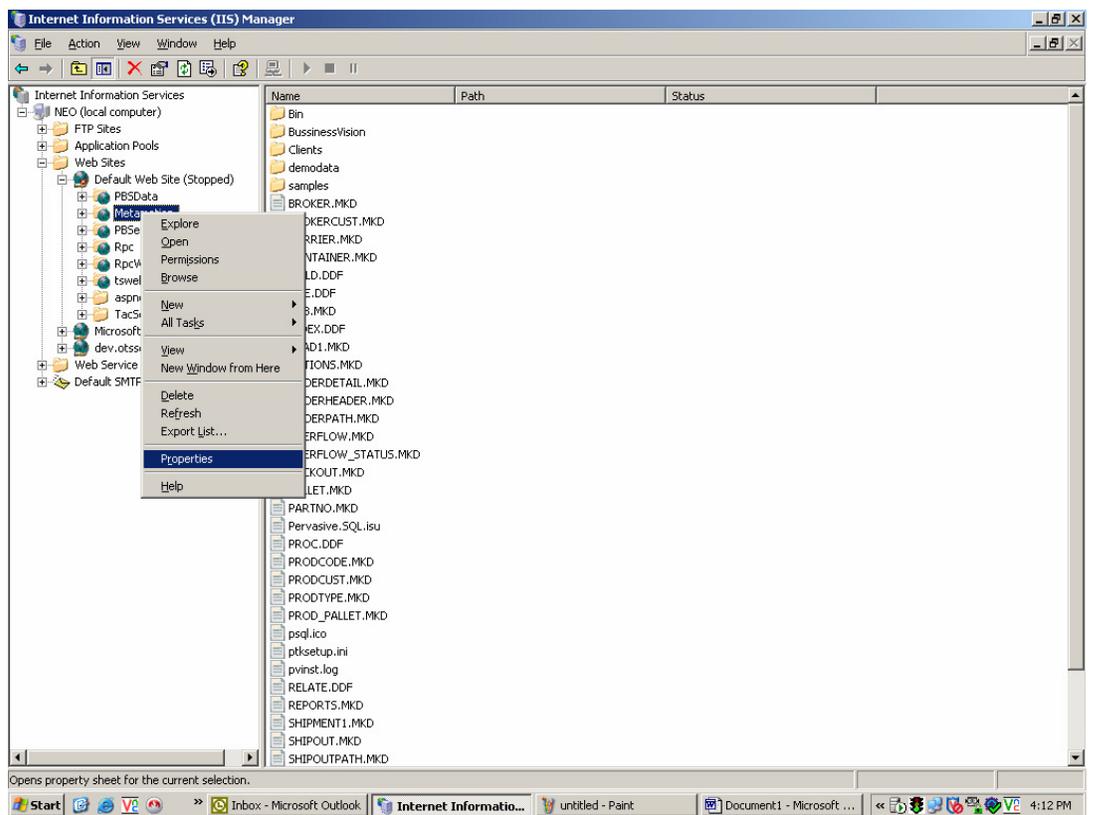
- Go to <Application Pools> ->New->Application Pool. Give a name to the application pool i.e. “MMApplicationPool”:



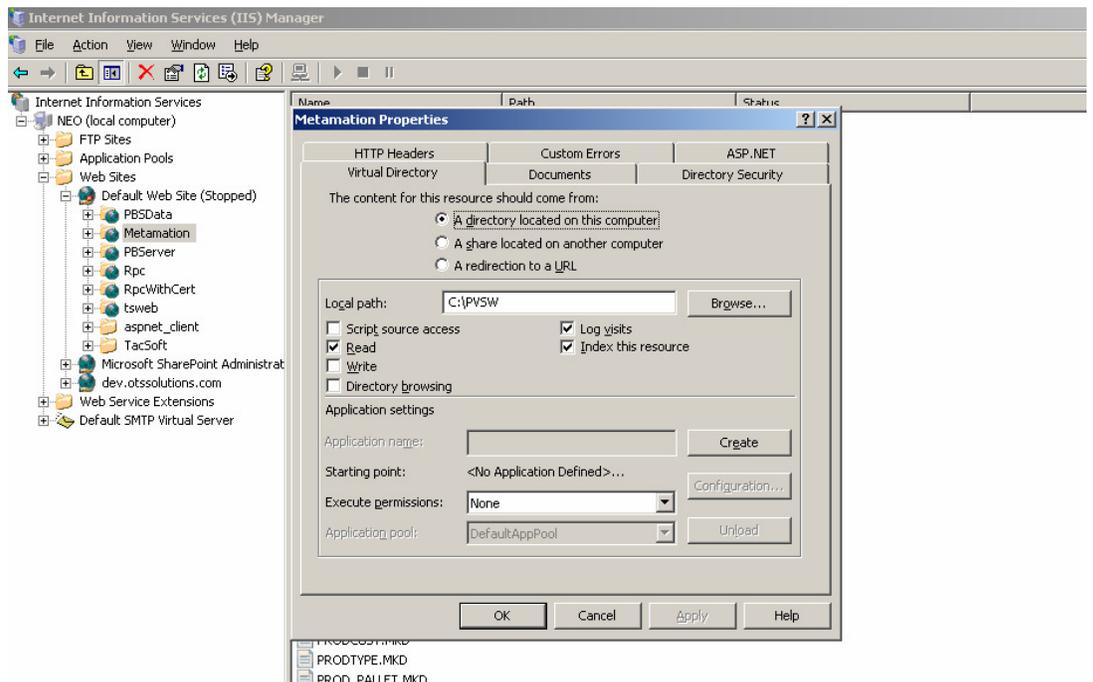
- Now create a virtual directory i.e. “Metamation” and map it to physical folder created in step 1 as follows:



7. Now select the virtual directory (i.e. Metamation) created in step 5 and right click mouser button to see the properties of the virtual directory:

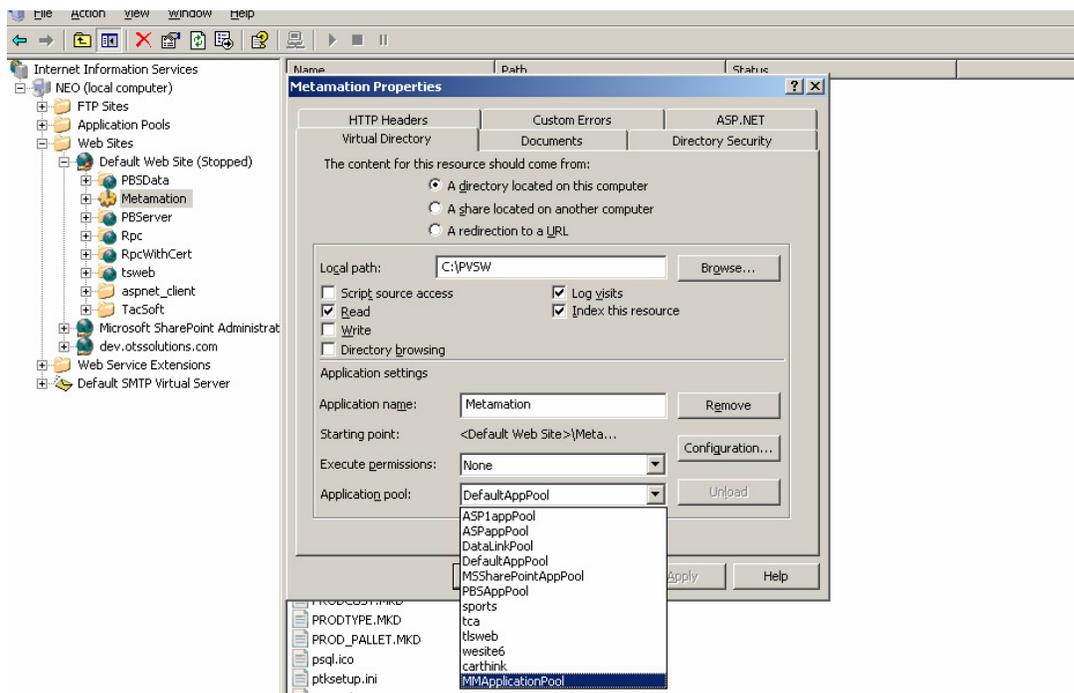


8. The properties window of the virtual directory (i.e. “Metamtion”) will be displayed as follows:





- Please refer the <Application Settings> section of the properties window. Now press <Create > button in order to create the application. Once application has been created then <Application Pool> drop down list is activated and you have to select the newly created application pool i.e. “MMApplicationPool” as follows:



- Now again we need to open the properties window of the virtual directory “Metamotion”. To open it, please follow the step 5. Now select <ASP.NET> tab of the properties window this time. In <ASP.NET VERSION> drop down list, please select “2.0.50727”.

9 Metamotion Security Configuration

The first time you run Metamotion, you will be required to enter licence information. This indicates to Metamotion if you are licensed to use the software, or if the software is being trialled. When the first user connects to the system, the following login security screen will be displayed:



The screenshot shows a web browser window displaying the Metamotion website. The page header includes the Metamotion logo and the text 'INFORMATION STORAGE & RETRIEVAL'. Below the header is a navigation menu with icons for Home, Search, and other functions. The main content area is divided into two sections. On the left, there is a photograph of a man in a suit sitting on a bench, holding a laptop. On the right, there is a 'Serial Key Processing' form. The form contains a 'Code' field with the value '55274-645-2006677-23542', a 'key' field with six empty textboxes, and two buttons: 'Ok' and 'Get Serial Key'. Three blue annotations with arrows point to these elements: one to the six textboxes, one to the 'Ok' button, and one to the 'Get Serial Key' button.

server response code (auto generated)

This button allows the user to fill information about the license and send the information to Touchstone system to get the serial key for the application

Ok button validates the serial key provided by the user and if the validation process returns true then only the user is redirected to the login page.

These six textboxes are provided to fill the serial key for the metamotion application. The serial key is provided by the Touchstone system

If you have a licence **key** string, enter the code in the space provided and press OK. If you have not been provided a licence key, use the Get Serial Key button to request a permanent or trial licence key. When you request a licence key, the following screen will be presented:



LICENSE INFORMATION

Response Code : 55274-645-2006677-23542

No of Concurrent users:

License Upto: (mm/dd/yyyy)

PERSONEL INFORMATION

First Name:

Last Name:

Email Address:

Re-type Email Address:

Company:

Address1:

Address2:

City:

State Province:

Zip Postal Code:

Country:

Phone:

Use this screen to fill out the relevant information including how many users you need and how long you need to try the software for. When complete, press the Submit button.

NOTE: It is important that your email address is correct as this is where your trial licence key will be sent to.

The submit will send the completed information to Touchstone Systems for automated licence key generation. You should receive a reply to your specified email address in a few minutes. If this email is not received, it means that your SMTP server has not despatched the licence information to us. In this situation, please email a copy of the screen or the same basic information to:

licence@touchstone-systems.co.uk

When you receive your licence code, please enter the key in the original licence screen. This licence screen is only displayed until a valid key has been entered or the trial has been completed.

Note: Touchstone Systems treats the information provided as confidential. This information is not sold or distributed outside of the Touchstone, and is not used for mailshots/blanket marketing.

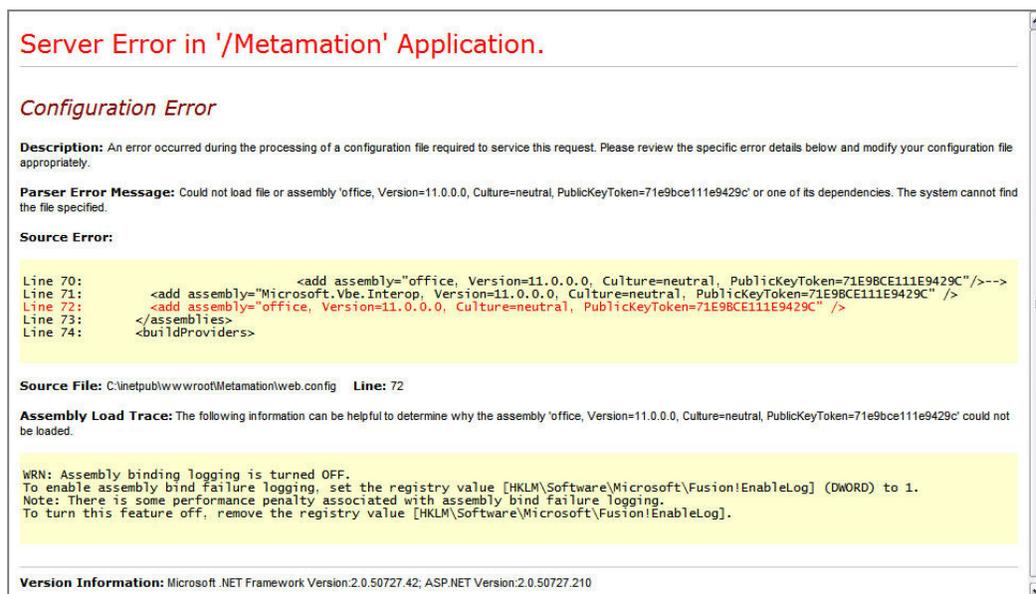


10 Common Installation Issues

The following section provides general guidance on issues you may encounter during installation. Where these do not overcome problems, please contact support@touchstone-systems.co.uk or visit the support web site at www.touchstone-systems.co.uk.

10.1 Assembly not found error on initial start-up

If any of the pre-requisites cannot be found, then on starting the application, an assembly error may be presented as follows:



Server Error in '/'Metamation' Application.

Configuration Error

Description: An error occurred during the processing of a configuration file required to service this request. Please review the specific error details below and modify your configuration file appropriately.

Parser Error Message: Could not load file or assembly 'office, Version=11.0.0.0, Culture=neutral, PublicKeyToken=71e9bce111e9429c' or one of its dependencies. The system cannot find the file specified.

Source Error:

```
Line 70:             <add assembly="office, Version=11.0.0.0, Culture=neutral, PublicKeyToken=71E9BCE111E9429C"/>-->
Line 71:         <add assembly="Microsoft.Vbe.Interop, Version=11.0.0.0, Culture=neutral, PublicKeyToken=71E9BCE111E9429C" />
Line 72:         <add assembly="office, Version=11.0.0.0, Culture=neutral, PublicKeyToken=71E9BCE111E9429C" />
Line 73:     </assemblies>
Line 74: <buildProviders>
```

Source File: C:\inetpub\wwwroot\Metamation\web.config **Line:** 72

Assembly Load Trace: The following information can be helpful to determine why the assembly 'office, Version=11.0.0.0, Culture=neutral, PublicKeyToken=71e9bce111e9429c' could not be loaded.

WRN: Assembly binding logging is turned OFF.
To enable assembly bind failure logging, set the registry value [HKLM\Software\Microsoft\Fusion!EnableLog] (DWORD) to 1.
Note: There is some performance penalty associated with assembly bind failure logging.
To turn this feature off, remove the registry value [HKLM\Software\Microsoft\Fusion!EnableLog].

Version Information: Microsoft .NET Framework Version:2.0.50727.42; ASP.NET Version:2.0.50727.210

The error shown above is specific to either Office or the wrong version of office being loaded on the application server. Options to resolve this error are either of the following:

Install missing Assembly

Depending on the error, you need to load the missing assembly as shown onto the Metamation application server. Once installed, simply re-start Metamation.

Comment out Assembly reference

If you are unable to install the missing application or assembly, you may decide to temporary comment out the assembly reference. To do, carry out the following actions:

- 1) Open up Windows File Explorer
- 2) Browse to the Metamation run-time directory (normally C:\inetpub\wwwroot\Metamation).
- 3) Open the Web.Config file located in the directory using either notepad or Wordpad
- 4) Go to the line with the assembly load error (in the above example, line 72)
- 5) Comment out the assembly reference by adding "<!--" at the start of the line,



and "-->" at the end of the line. i.e,...

```
<!--<add assembly="Microsoft.Office.Interop.Owc11,  
Version=11.0.0.0, Culture=neutral,  
PublicKeyToken=71E9BCE111E9429C"/>-->
```

6) Save the file and re-start the Metamation application

10.2 Application Error Following Upgrade

The installer creates a virtual directory "Metamation" in C:\Inetpub\wwwroot folder. If upgrading from a previous version and problems exist, there is possibly a sharing violation on the run-time files. Remove or rename the existing Metamation directory and re-install.

10.3 Serial Number Entry Fails or Re-Only Error

By default, the installation on IIS, Tomcat or Apache will create the web application and directory structure with the correct properties to allow the application to fully function. However, depending on the operating system, security settings and anti virus software installed, the properties may not have been correctly configured.

If errors are presented referencing files being read only (such as the Security directory or the Web.Config file), or entry of the serial number produces an error, manual setting of the application directory may need to be manually configured.

Security should be manually configured through the IIS, Apache or Tomcat solution, allowing full access to all users, as per open web application. However, this can also be performed quickly by the following:

- 1) Open up Windows File Explorer
- 2) Browse to the Metamation run-time directory (normally C:\Inetpub\wwwroot) so you can see the Metamation directory.
- 3) Right hand click the Metamation directory, and select properties
- 4) On the pop-up properties window, select the Security tab as follows:



5) For everyone, Allow Modify and Write Permissions. Ok the changes

10.4 Serial Number Entry Fails Due to locked security file

If during the entry of the Serial number screen, Metamotion reports that it cannot update security due to the locking or inability to write the MSA.DLL file, this is down to a sharing error on Windows Server 2000-2003 products. To correct this error, you need to perform the following:

- 1) Open up Windows File Explorer
- 2) Browse to the Metamotion run-time directory (normally C:\inetpub\wwwroot\Metamotion).
- 3) Locate within the Security directory the file MSA.DLL
- 4) Write hand click on the MSA.DLL and select CUT
- 5) Browse to any other directory on the server, right hand click in the directory and press Paste (this will move the file and by-pass Windows file locking)
- 6) Manually delete the moved MSA.DLL file, and re-try the entry of the provided security code

11 Further Installation Support

Metamotion and associated products (such as document scanning facilities, customer web portals, email portals etc are fully supported by Touchstone Systems Limited.

Standard support is provided between the hours of 9:00am and 5:30pm GMT, Monday to Friday, excluding public holidays. Support outside of the standard hours can be provided where required. These support hours are applicable to all methods of requesting support on Metamotion.



Methods of Support:

Phone support is provided by calling 0845 434 8949.

Email support is provided by detailing your questions or problem to support@touchstone-systems.co.uk. This email address should be used whenever further details are required by our support staff (such as screen shots, details of configurations, etc).

Web support is provided by accessing the on-line support site at www.touchstone-systems.co.uk/issues. This site provides the ability to log new issues or change requests, view details of support issues, software changes or releases, or to provide updates to existing issues.