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# Installing Intellicus DotNet Client on Windows

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**Dated: April 2014**

## **Acknowledgements**

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: <http://www.intellicus.com/acknowledgements.htm>

**Contents**

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<b>Pre-Installation Instructions .....</b>	<b>1</b>
Hardware Pre-requisites.....	1
Application Program Pre-requisites .....	1
<b>Installing Intellicus.....</b>	<b>2</b>
<b>Post-Installation Instructions.....</b>	<b>15</b>
Configuring Intellicus portal on IIS 7: .....	17
Configuring Intellicus portal on IIS 6: .....	20
Configuring Intellicus portal on IIS 5: .....	24
Security Modes of tool.....	27
<b>Uninstalling Intellicus .....</b>	<b>29</b>

## Pre-Installation Instructions

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This chapter provides information that you need to know before installing Intellicus. It will help avoid problems during the installation process.

### Hardware Pre-requisites

The following resources are minimally required on a candidate machine to install Intellicus.

- **Operating System:** Windows 2000/2003, XP, Vista , 7
- **Memory:** 256 MB of RAM or more
- **Storage Space:** 1 GB or more

### Application Program Pre-requisites

#### Server Machine

The following application programs are required on the machine where Intellicus is installed.

- User may need to have **WinZip** installed on the machine.
- **IIS version 5 or higher** should be available on the machine.
- **.NET Framework** should be installed. Intellicus supports **.NET Framework version 2.0** to **.NET Framework version 4.0**.
- The person working on installation must have administrative privileges on the machine.

#### End User Machine

The following application programs are required on the machine where Intellicus is accessed through web.

- Internet Explorer 7.0 or above, or Mozilla Fire fox 3 or above browser application.
- Plug-ins/applications for opening MS Excel, MS Word and PDF format files.

## Installing Intellicus

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The Intellicus product CD is setup for automatic run. However, it is also possible to install Intellicus manually.

If you have downloaded Intellicus from the Intellicus website, unzip the downloaded file to get the setup.exe.



**Important:** You must have Administrator Privileges on the machine on which it is being installed.

Double-click the `setup.exe` file. This invokes the installation wizard that guides you through the installation process. Here, installation program starts configuring windows installer. After the configuration is over, the welcome screen of the installation wizard is displayed.



**Note:** In case you have already installed this application on the computer, a message box would prompt to uninstall Intellicus. If not then next step shows up.



**Tip:** To abort the installation process, at any stage of installation, you can click the **Cancel** button.

Figure 1 shows the **Welcome Screen**. Click the **Next** button to proceed. **License Agreement** screen appears.

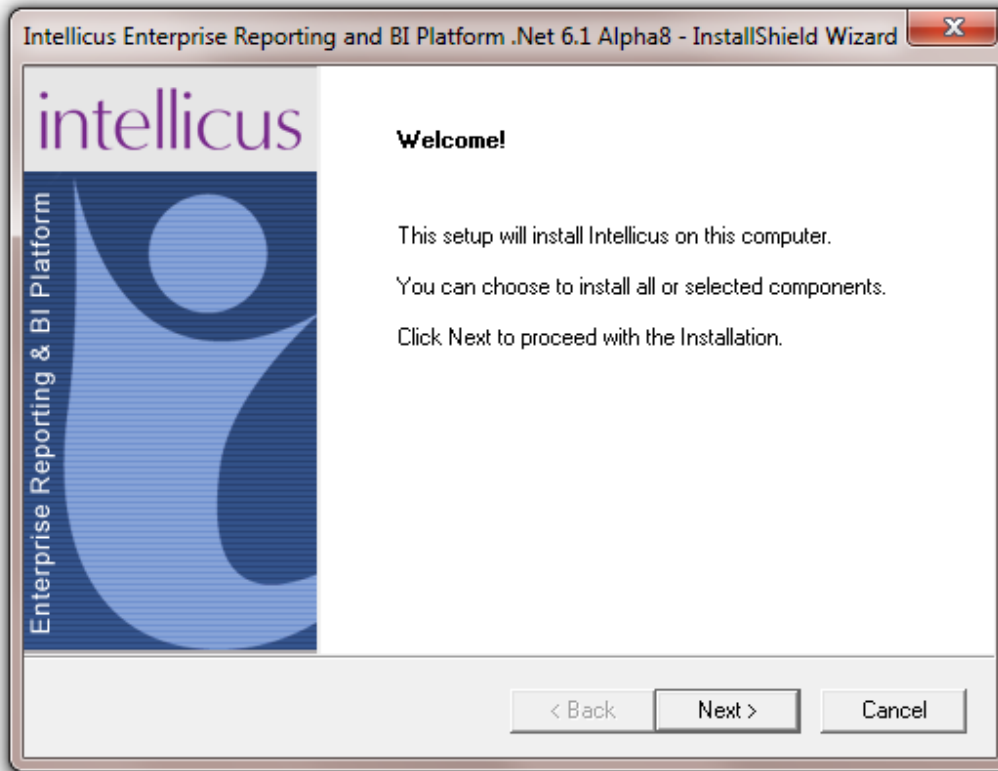


Figure 1: Welcome Screen

Figure 2: shows the **License Agreement** screen

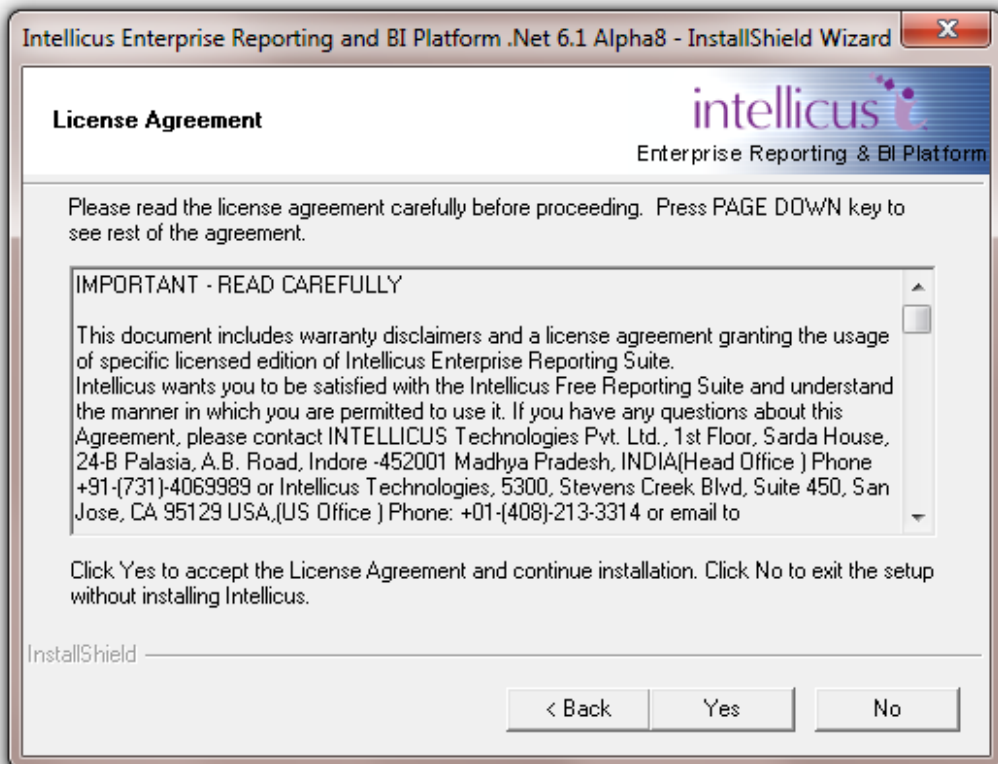


Figure 2: Welcome Screen

Read the License Agreement. If you agree, then click **Yes** button to proceed to the **Customer And Usage Details** screen.

Figure 3 shows the **Customer Information** Screen.

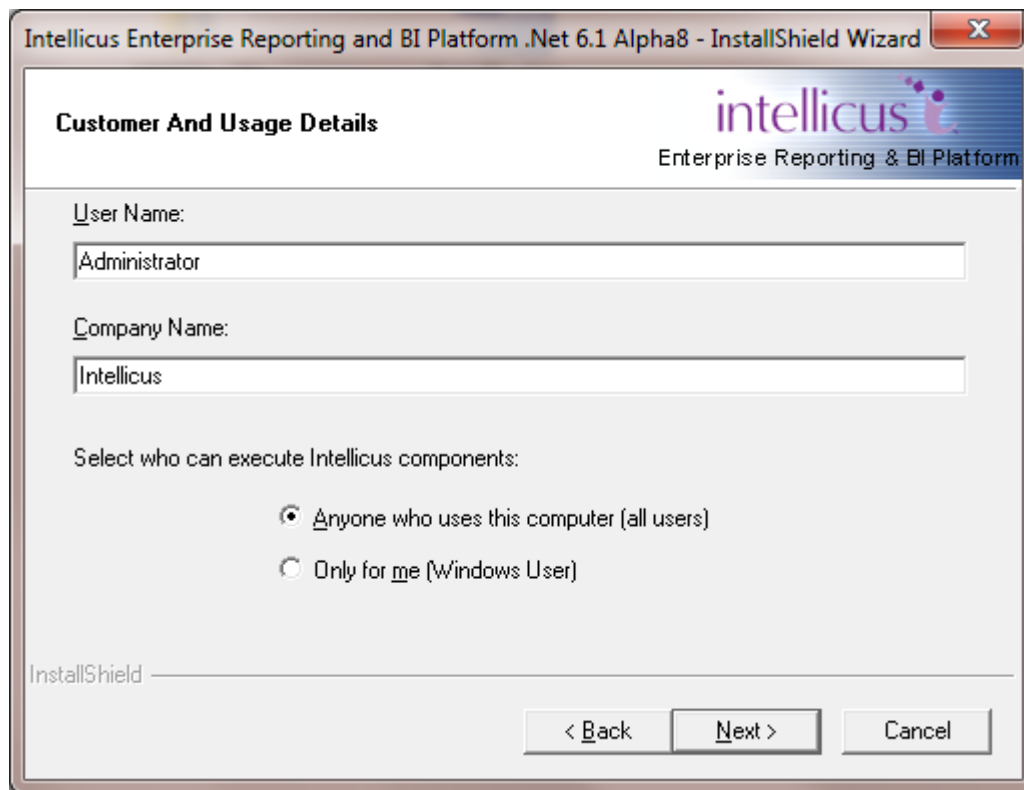


Figure 3: Customer Information

## User Name/ Company Name

Please specify the User Name and the Company Name.

User has an option to install this application for use by either all users (Select Anyone who uses this computer) or only by the administrator (Select only for me).

Click **Next** to move onto the next screen.

Figure 4 shows **Installation Options** screen.

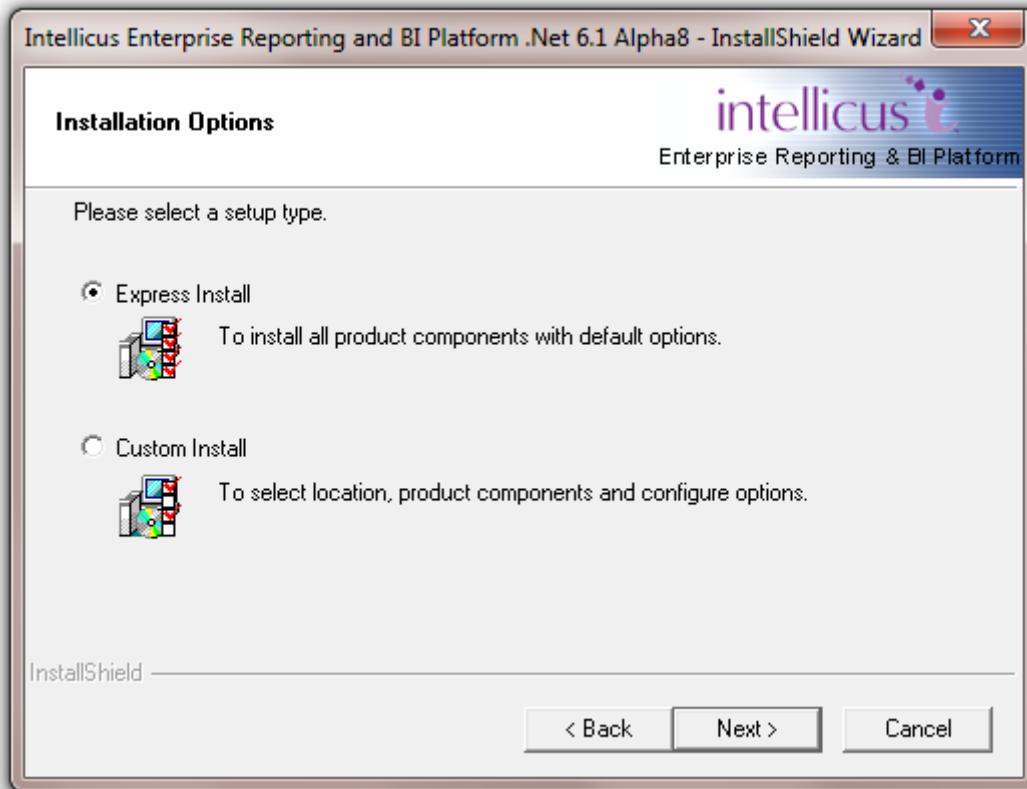


Figure 4: Installation Options

## Express Install

Select this option to:

- Install all the components of Intellicus.
- Install Intellicus at the default location set in the installation program.

## Custom Install

Select this option to:

- Select the components to Install.
- Select the location to install Intellicus.

Click **Next** to proceed to **Installation Location** screen.



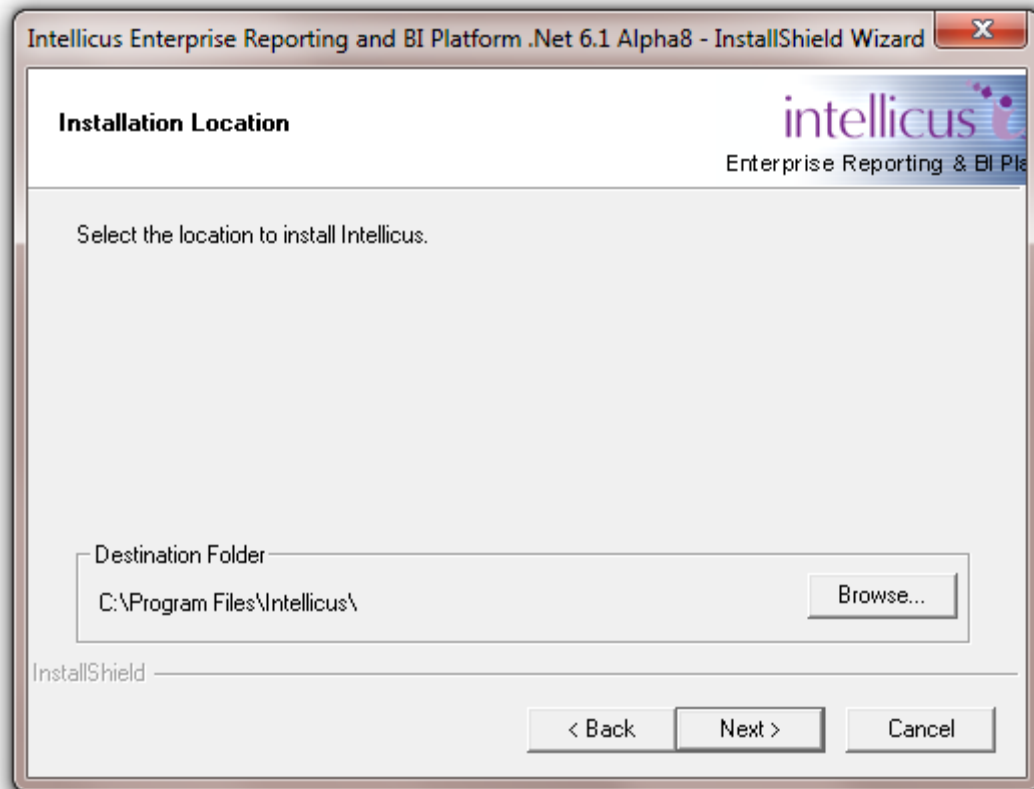


Figure 5: Option to change the destination folder

By default, the application is installed at path: C:\Program Files\Intellicus. User has the option to either go with the default destination location or specify a different destination (installation) location. Click **Browse** and specify the destination location to change it.

When you click **Browse** button, **Choose Folder** screen appears. On this screen, you may specify path in the **Path** area. If you do not remember the path, you can also select it from **Directories** area.

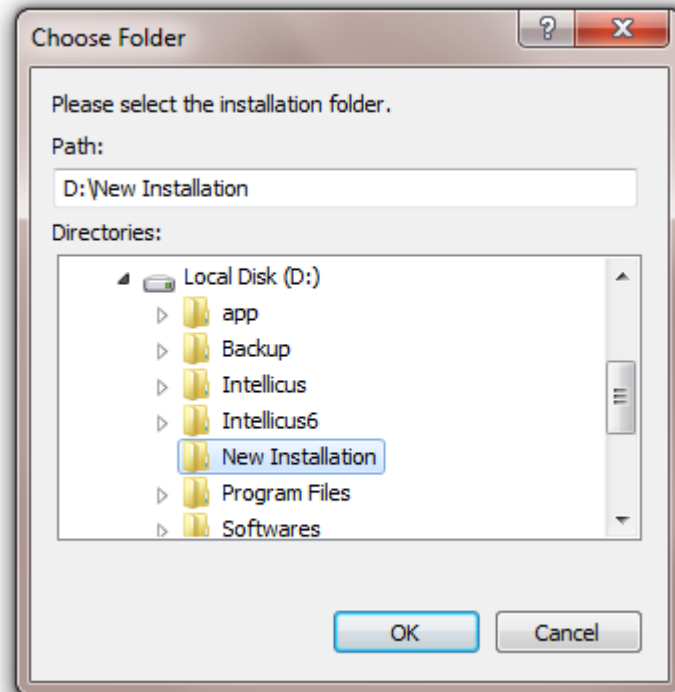


Figure 6: Specifying Installation folder

Specify path in **Path** area or select path by double-clicking and opening respective folders within **Directories** area. Selected path will appear in **Path** area.

Click **OK** to select the path for installation. Click **Next** to go onto the **Select Components to Install** screen.

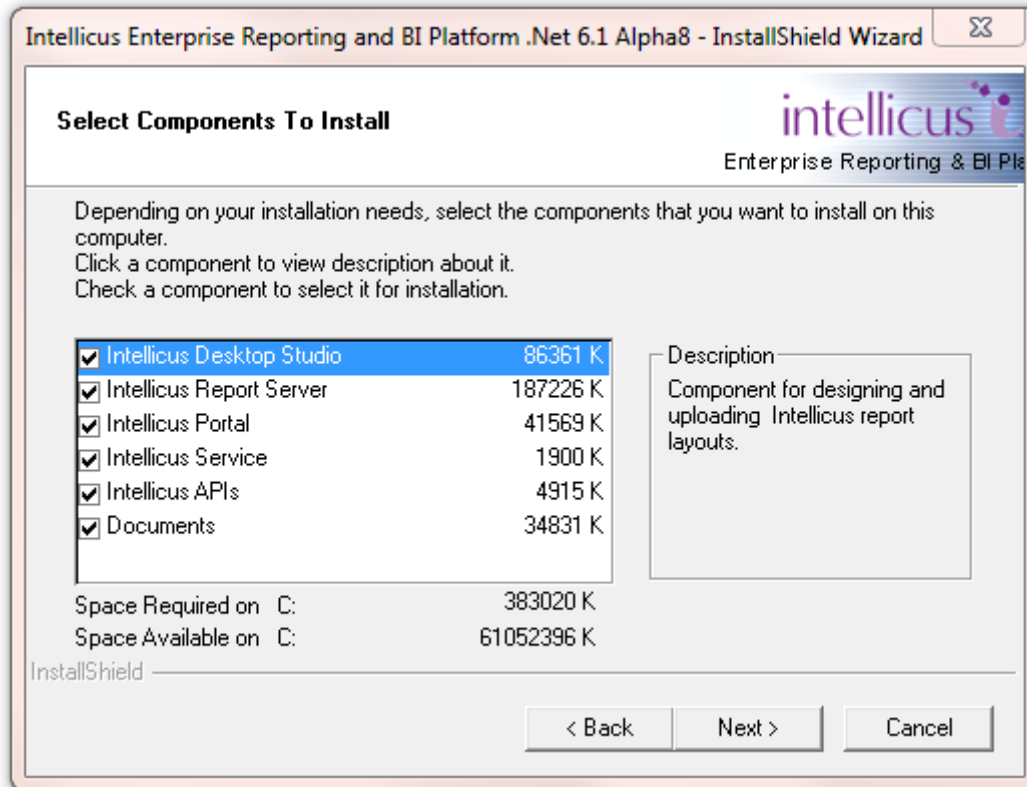


Figure 7: Select one or more components to install

Select one or more components by selecting respective check boxes as shown in Figure 7.



**Tip: Select Components to Install** screen also displays the required and available hard disk space for the selected components. You can utilize this information to judge the system requirements.

Clicking **Next** will open up **Configuring Port Numbers** screen.

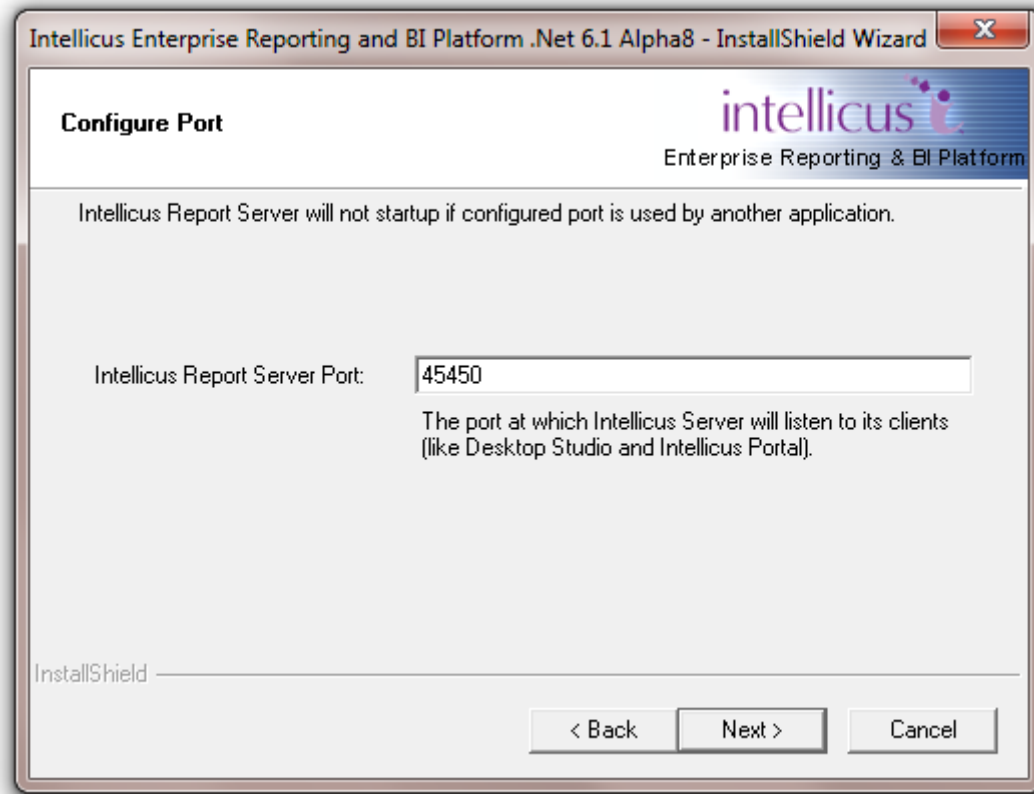


Figure 8: Configuring port numbers

For Intellicus **Report Server Port**, specify a port number that is presently unused on this computer.



**Important:** Intellicus will not startup if a port specified here is already in use by other application on this computer. These port numbers can be re-configured at any point of time after Installation is complete.

Click **Next** after specifying port numbers.

Upon clicking **Next** button,

- In case of Express setup: **Review The Installation Preferences** screen will open up.
- In case of Selective setup: **Configuring Timeout Values** screen will open up.



**Important:** If you had already installed at the default path or custom path, setup will open up **Configure Overwrite Options** screen.

Intellicus does not remove some of the folders after un-installation so that you can backup the configuration files. If you have made configuration changes during the previous installation, on **Configuration Overwrite Options** page, you can select the files that setup should replace.

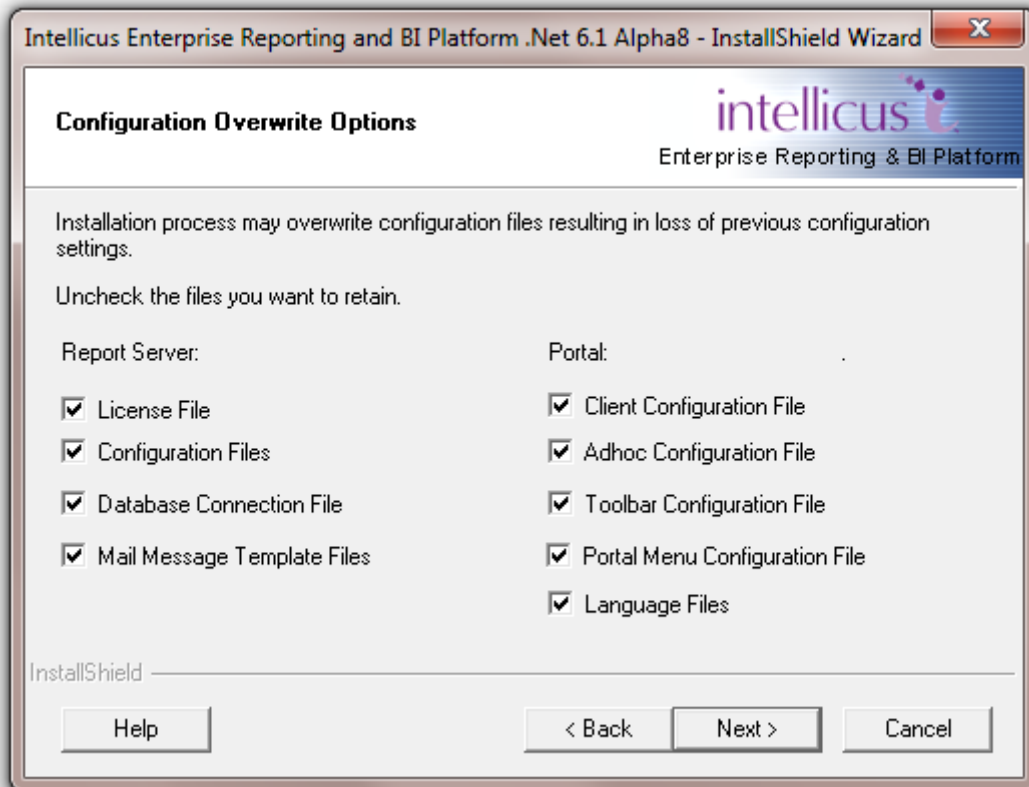


Figure 9: Select the files that setup should replace

Click **Next** to proceed.

Upon clicking **Next** button,

- In case of Express setup: **Review The Installation Preferences** screen will open up.
- In case of Custom setup: **Configuring Timeout Values** screen will open up.

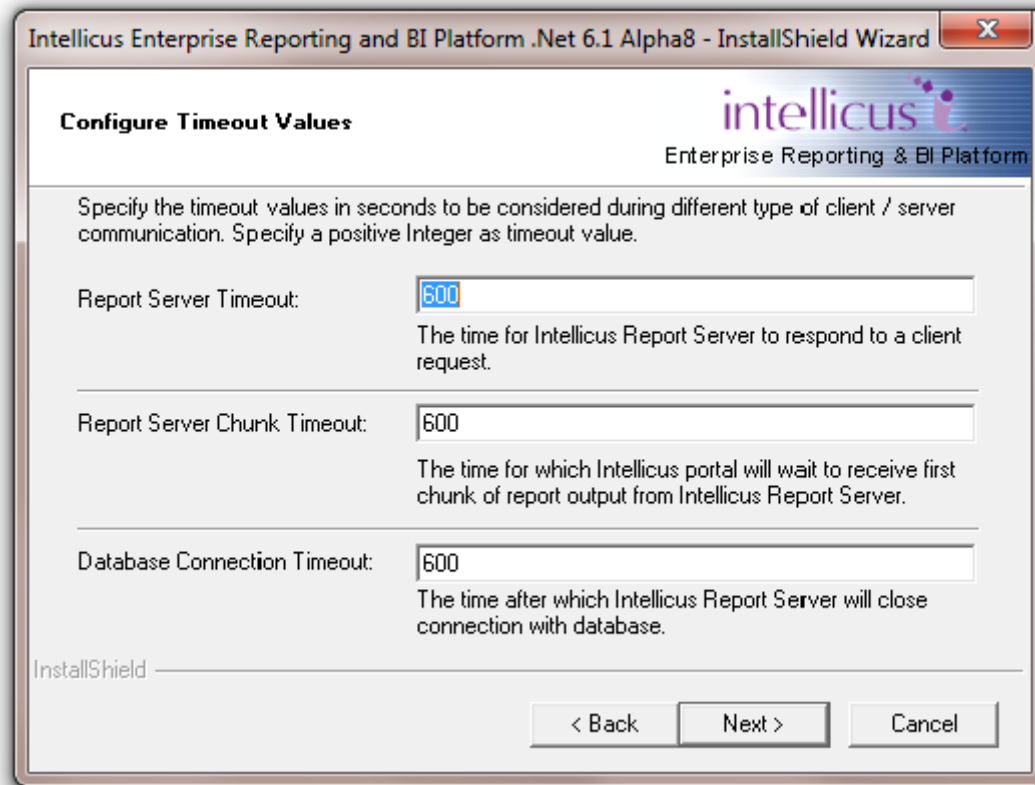


Figure 10: Configuring Timeout Values

Three timeout values are set on this screen. These are specified in seconds:

- **Report Server Timeout:** This is the maximum time within which Intellicus Report Server should respond to a client request. Default: 600.
- **Report Server Chunk Timeout:** This is the maximum time for which Intellicus portal will wait to receive first chunk of report output from application's Report Server. Default: 600.
- **Database Connection Timeout:** This is the time after which the database connection will be closed.



**Important:** These values can be re-configured at any point of time after Installation is complete.

After specifying timeout values, click **Next** button to proceed to **Review the Installation Preferences** screen.

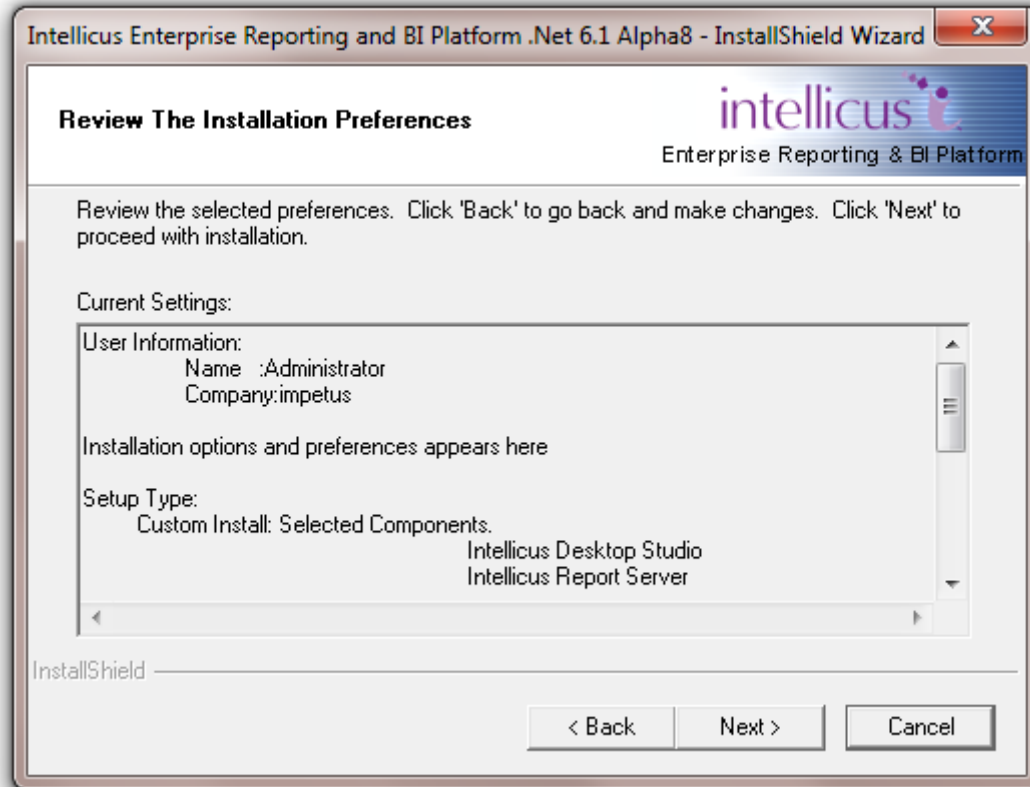


Figure 11: Review the installation preferences screen

Verify the information that is provided. Click **Back** to go back and change any settings if required.

Click **Next** to go onto the **Installation Progress** screen.

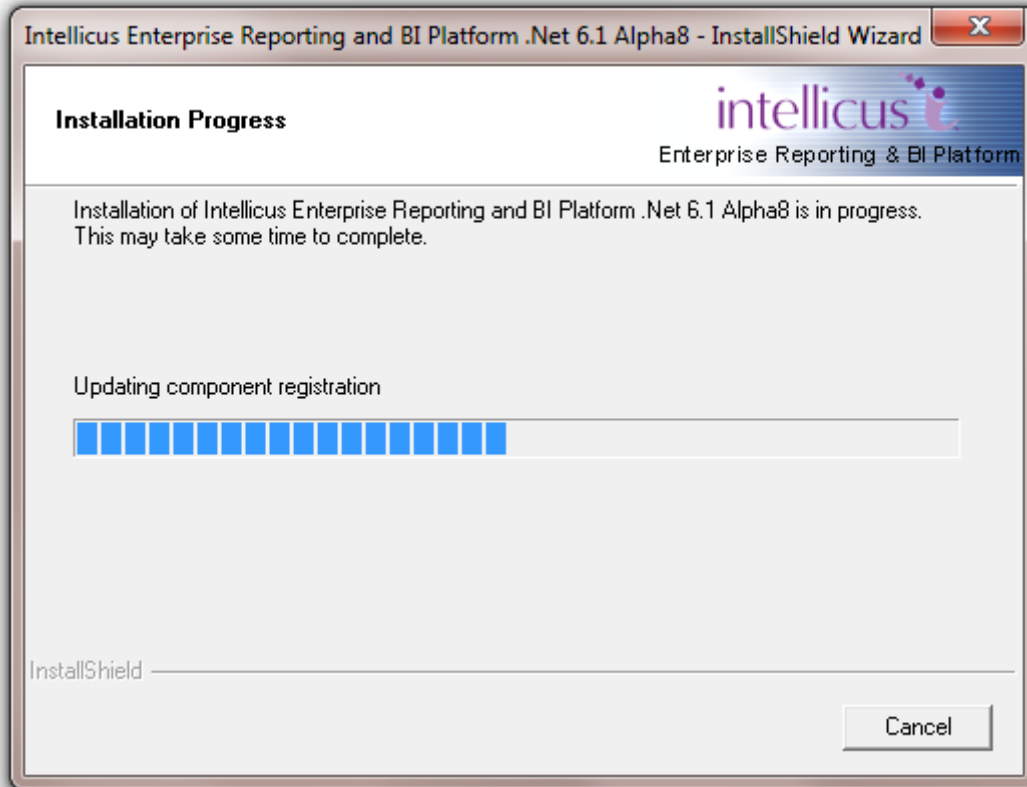


Figure 12: Installation Progress screen

After the installation is complete, **InstallShield Wizard Complete** screen will popup.



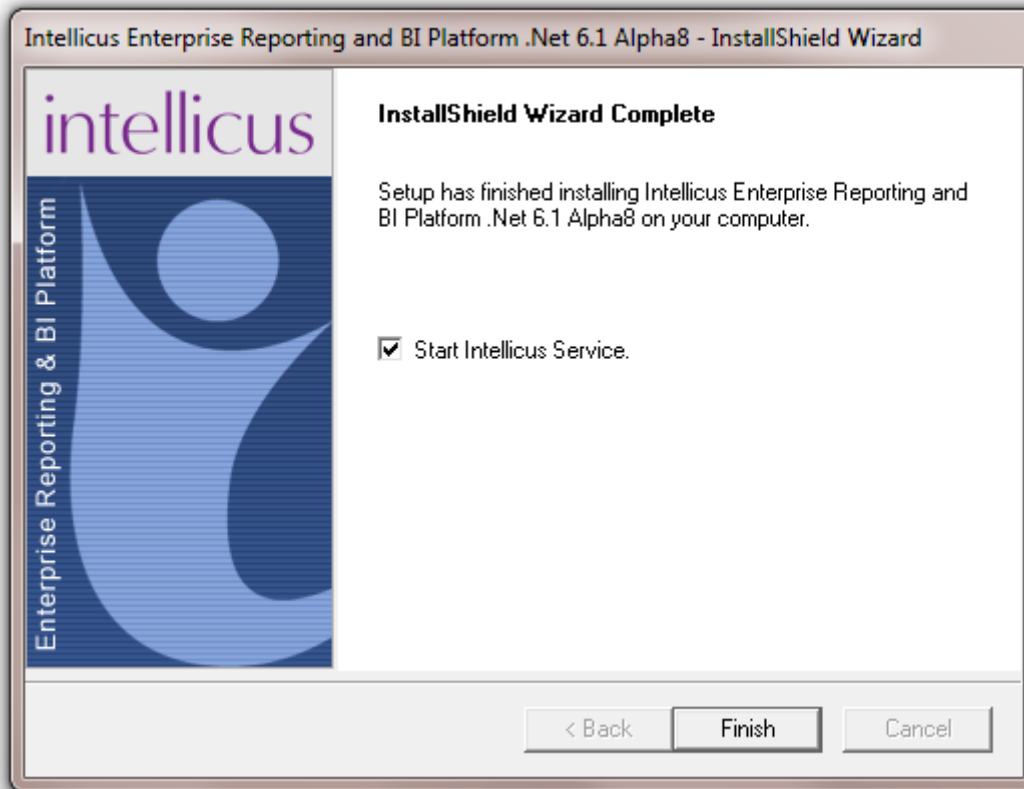


Figure 13: Installation Wizard Complete

Check **Start Intellicus Service** checkbox to startup application's Service. This service will startup the Intellicus Server.

## Post-Installation Instructions

The installation process creates the following folders in the installation folder:

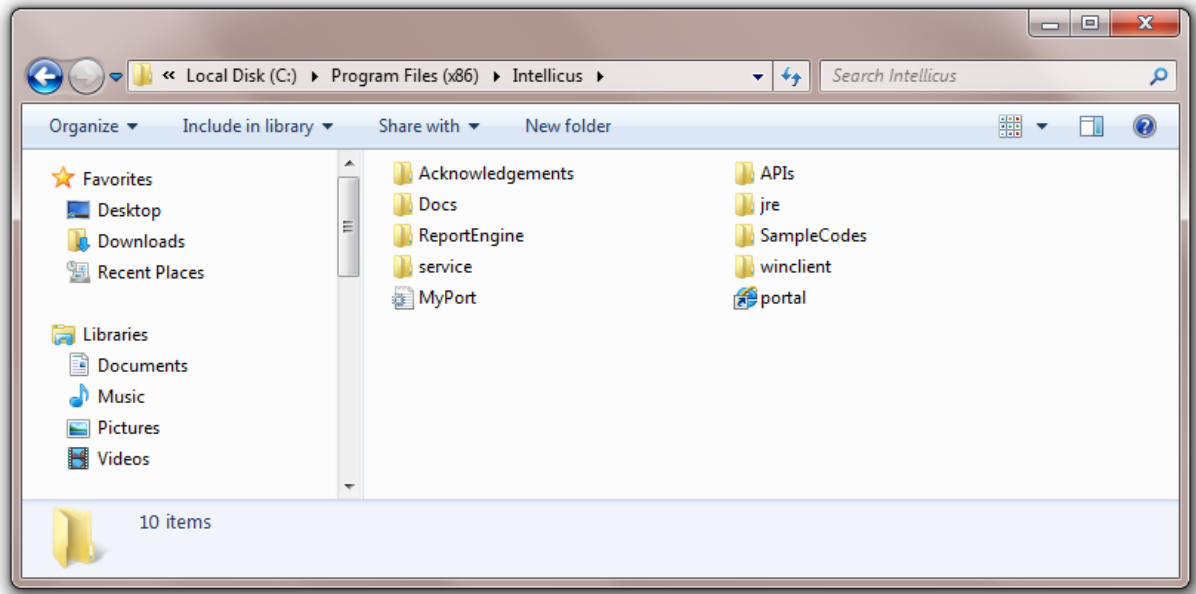


Figure 14: Application's Folder Structure

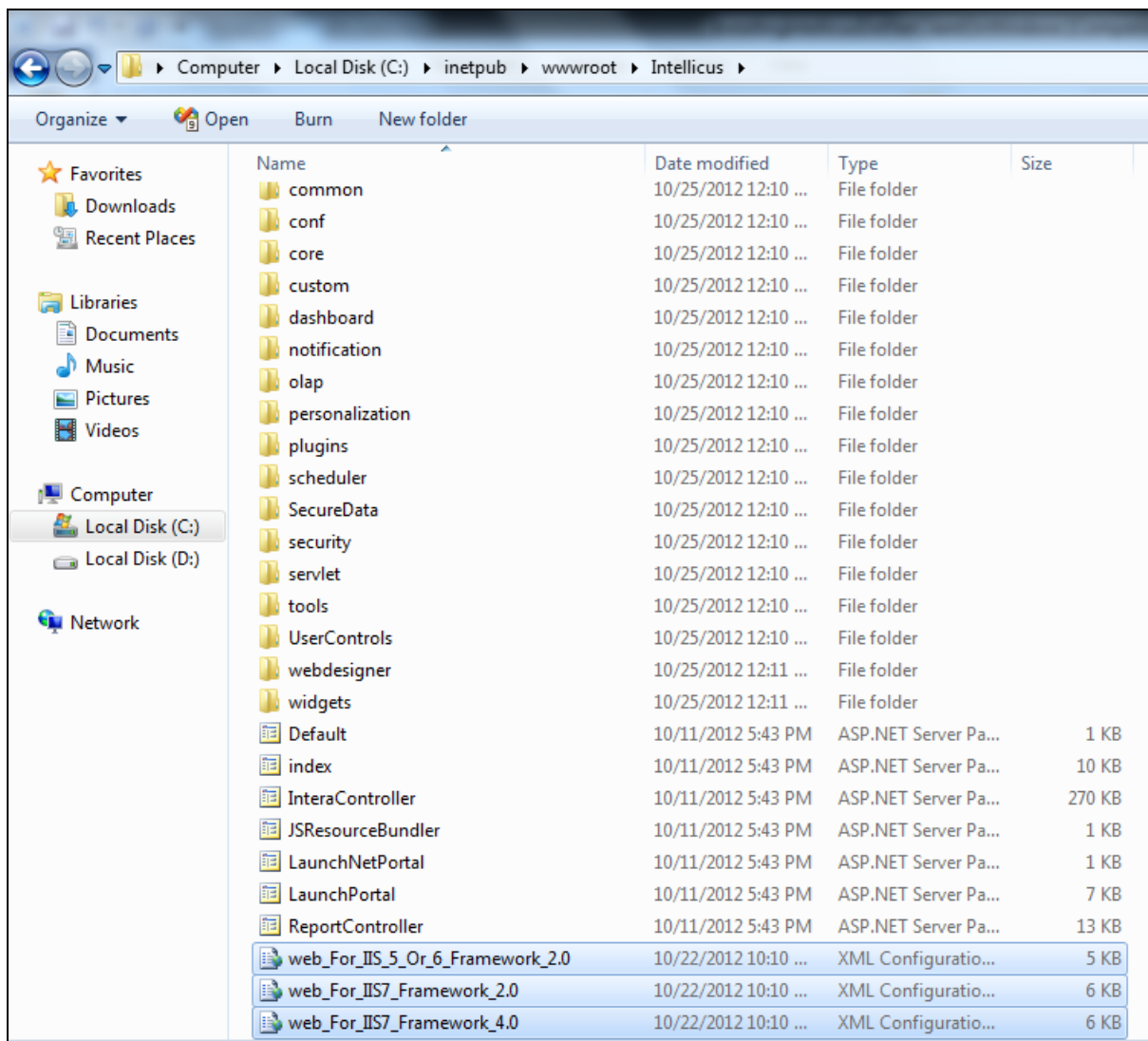


Figure 15: Intellicus Web Application Folder

You can start using our Web-based Reporting Suite immediately after the installation.

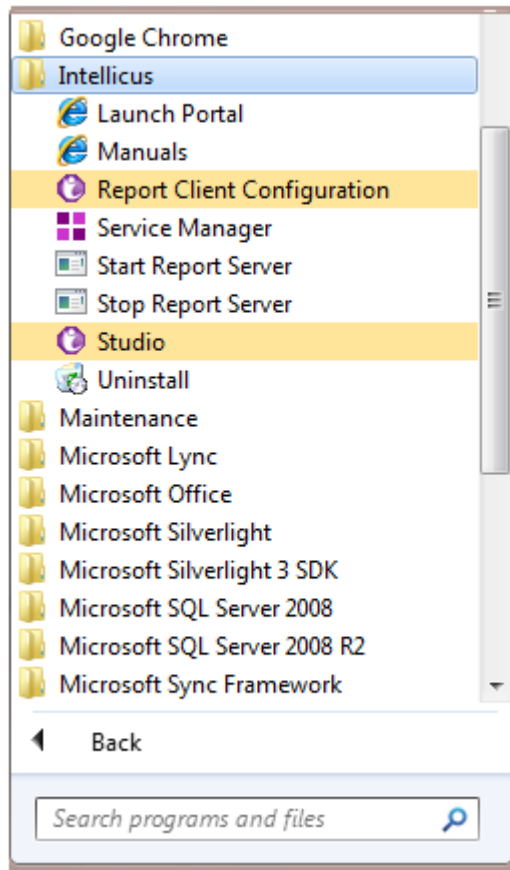


Figure 16: Options in application menu

You have option to start Report Server immediately after installation.

If not started during installation,

- To start Report Server, click Start > Programs > Intellicus > Start Report Server.

The Report Server will now start automatically when you restart the machine.

The service icon appearing in system tray indicates running-status of the servers.



Figure 17: The service icon on system tray

### Configuring Intellicus portal on IIS 7:

1. Intellicus web portal can read/write contents from file system, hence read and write permission needs to be provided to IIS worker process account on following Intellicus web application sub-folders.
  - a. <Intellicus web application root path>/**client** (refer Figure 18)
  - b. <Intellicus web application root path>/**SecureData** (refer Figure 18)

- c. <Intellicus web application root path>/**webdesigner** (refer Figure 18)
- d. <Intellicus web application root path>/**Log4NetConfig.xml** (refer Figure 18)



**Note:** The Default IIS worker process account for IIS 7 is IIS\_IUSRS.

IIS worker process account name can be identified by checking the identity property of application pool under which Intellicus application is running (refer Figure 19).

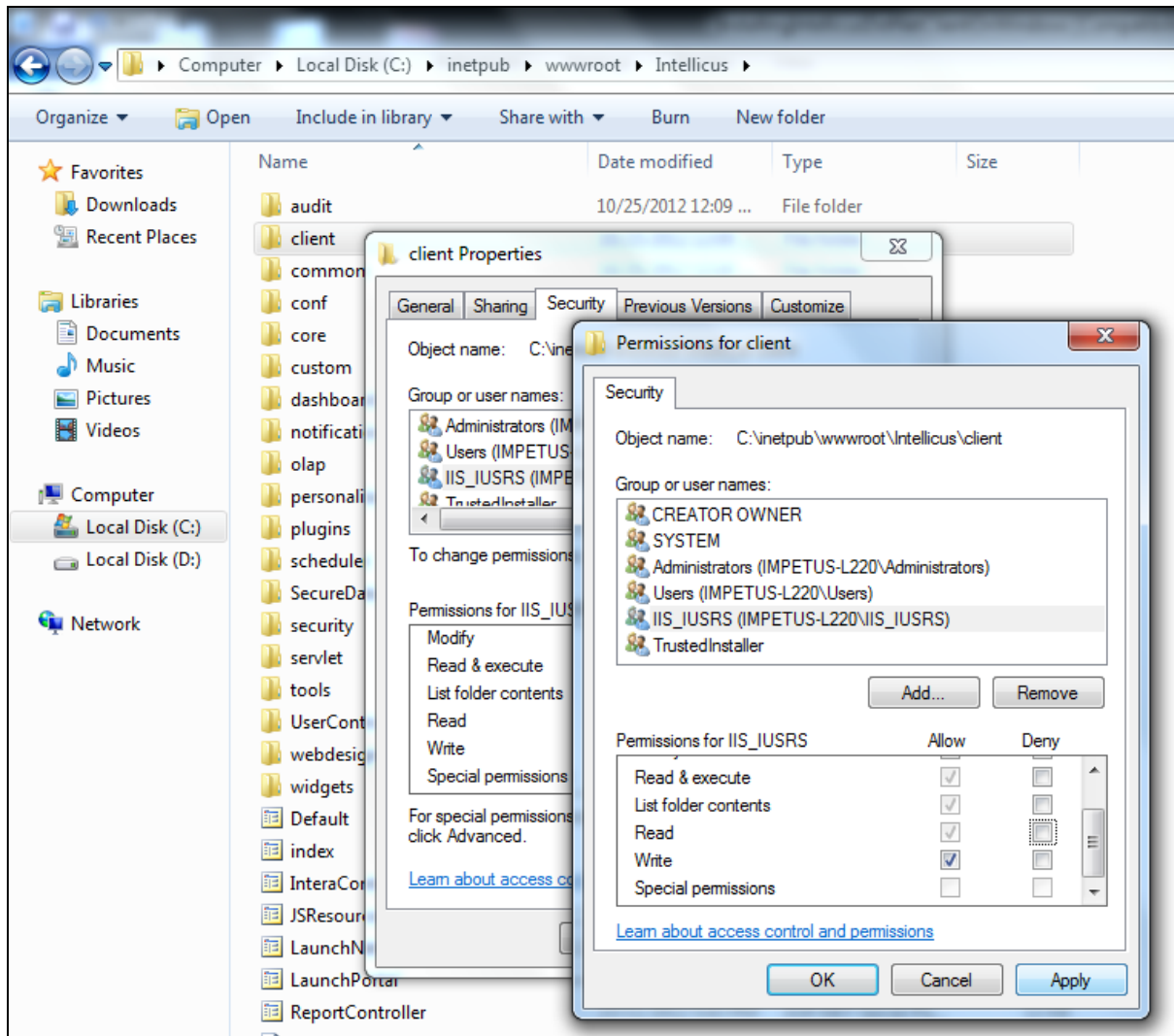


Figure 18: Granting Access Permissions

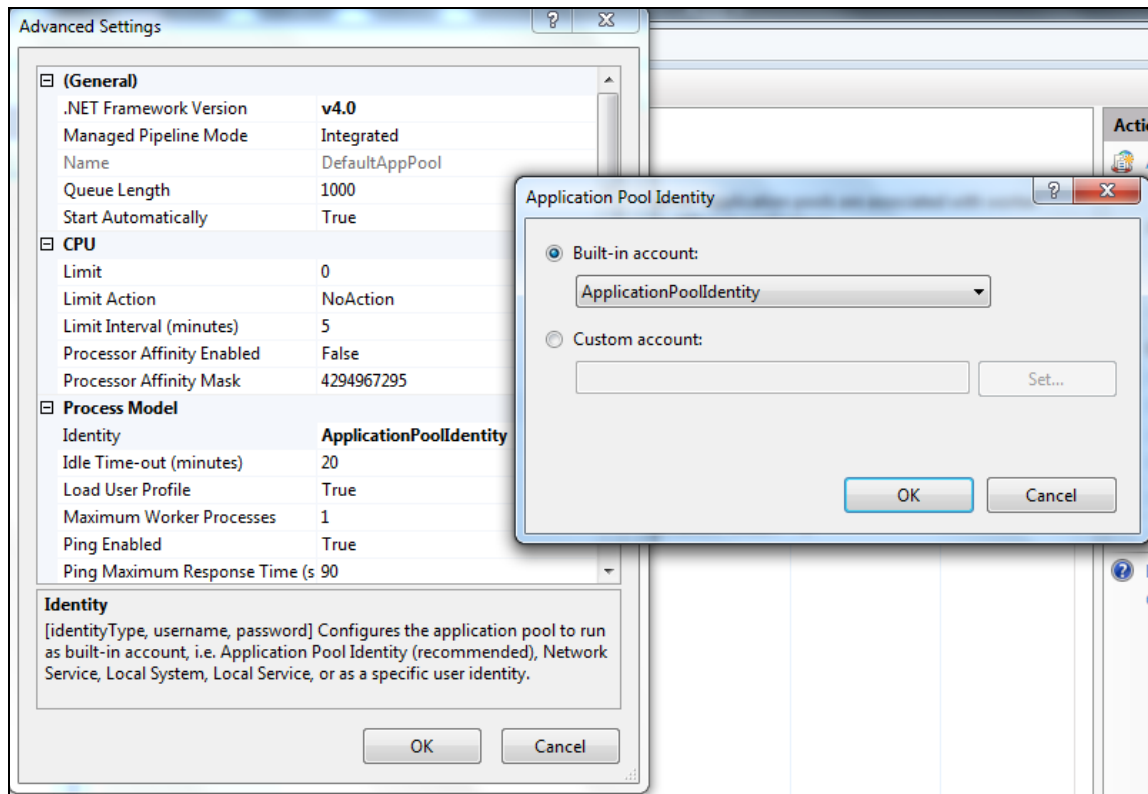


Figure 19: Application Pool Identity

### Steps to open Advanced Settings window for Application Pool:

1. Select Application Pools node under Connections Pane in IIS.
2. Select the application pool assigned for Intellicus Application.
3. Click on Advanced Settings link on Actions Pane.



**Note:** Default application pool is DefaultAppPool for Intellicus application.

2. Rename the correct web configuration file resides at <Intellicus web application root path> -

If Intellicus portal is running on -

- a. Framework 2.0: Rename file "web\_For\_IIS7\_Framework\_2.0.config" to "web.config" file (refer Figure 15).
- b. Framework 4.0: Rename file "web\_For\_IIS7\_Framework\_4.0.config" to "web.config" file (refer Figure 15).



**Note:** The framework version for Intellicus application can be checked from Advanced Settings window (refer Figure 20).

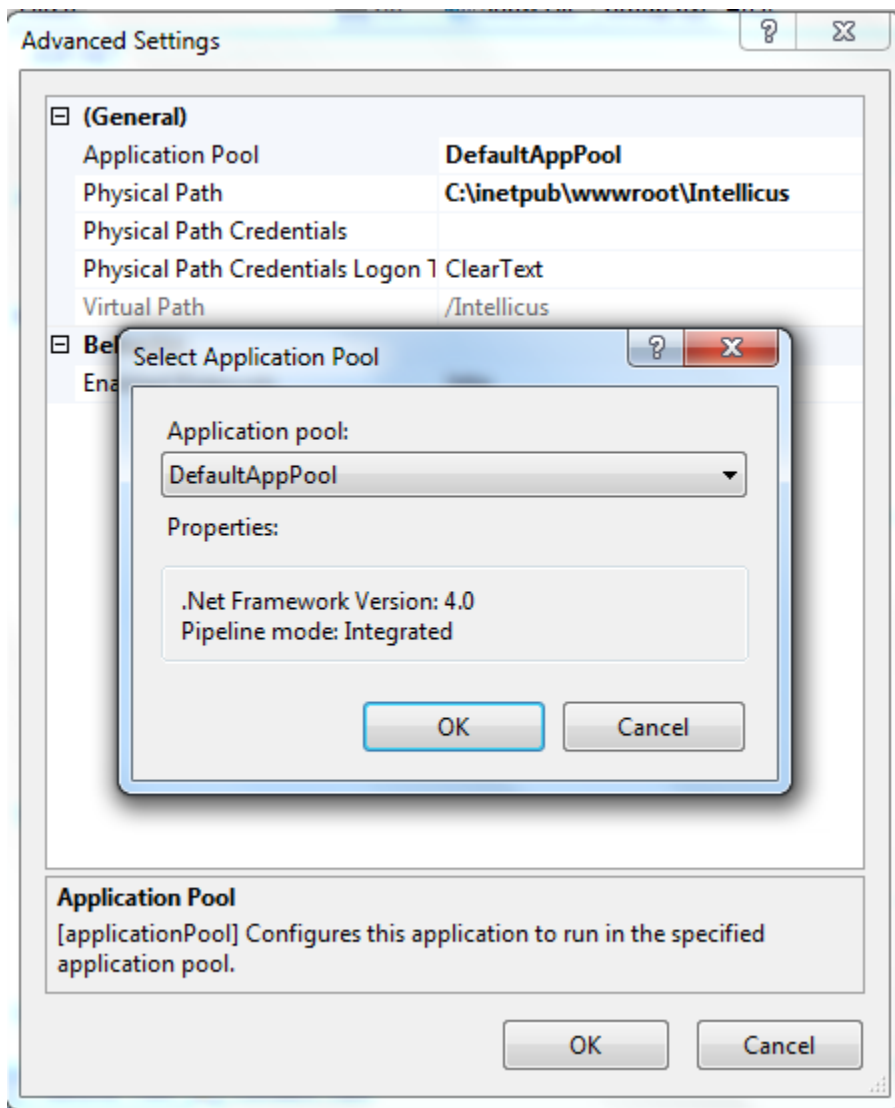


Figure 20: Advanced Settings

### Steps to open Advanced Settings window for Intellicus Application:

1. Select the Intellicus application in IIS.
2. Click on Advanced Settings link on Actions Pane.

### Configuring Intellicus portal on IIS 6:

1. Intellicus web portal can read/write contents from file system, hence read and write permission needs to be provided to IIS worker process account on following Intellicus web application sub-folders.
  - a. <Intellicus web application root path>/**client** (refer Figure 21)
  - b. <Intellicus web application root path>/**SecureData** (refer Figure 21)

- c. <Intellicus web application root path>/**webdesigner** (refer Figure 21)
- d. <Intellicus web application root path>/**Log4NetConfig.xml** (refer Figure 21)



**Note:** The Default IIS worker process account for IIS 6 is NETWORK SERVICE (refer Figure 22).

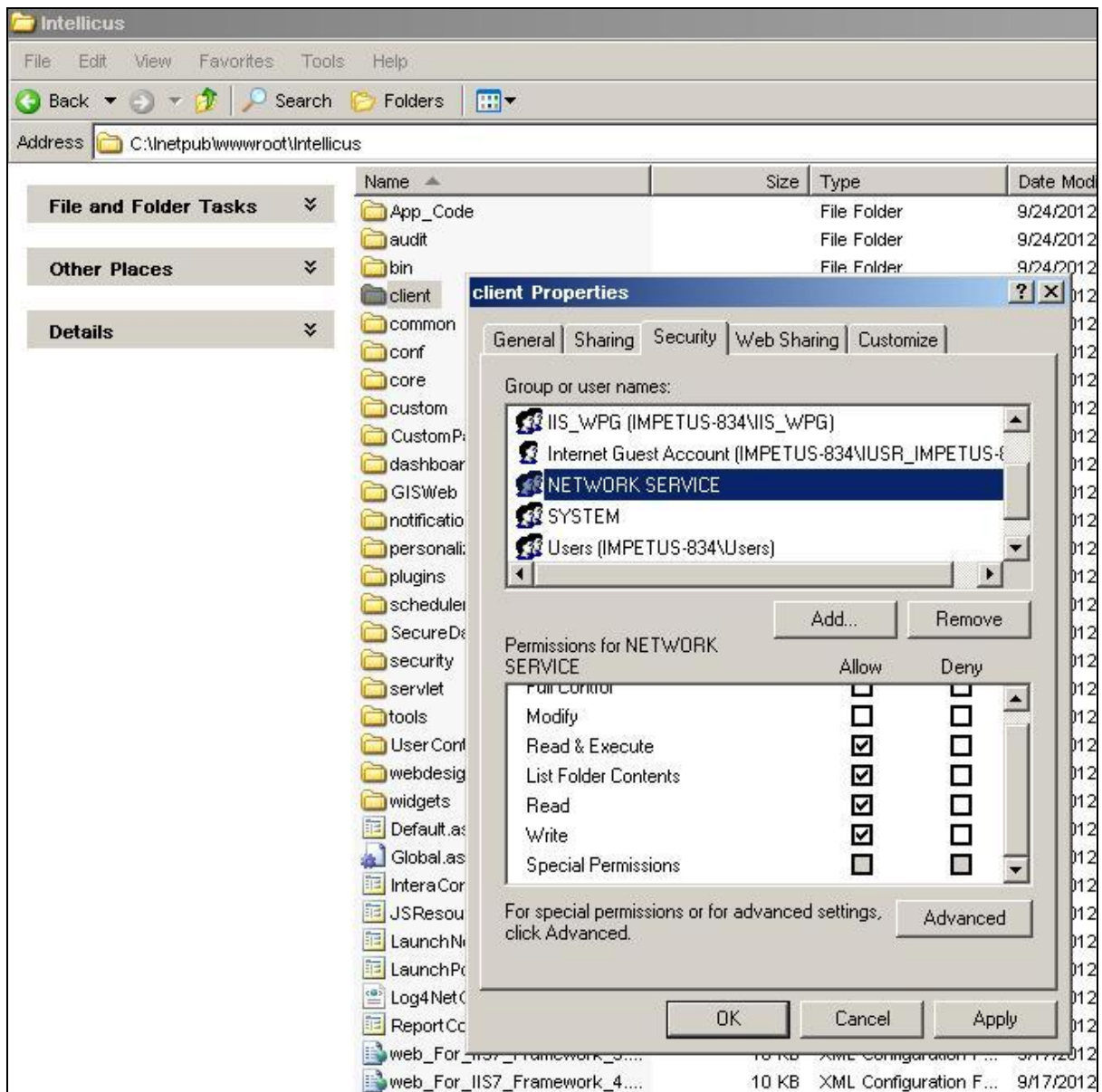


Figure 21: Granting Access Permissions



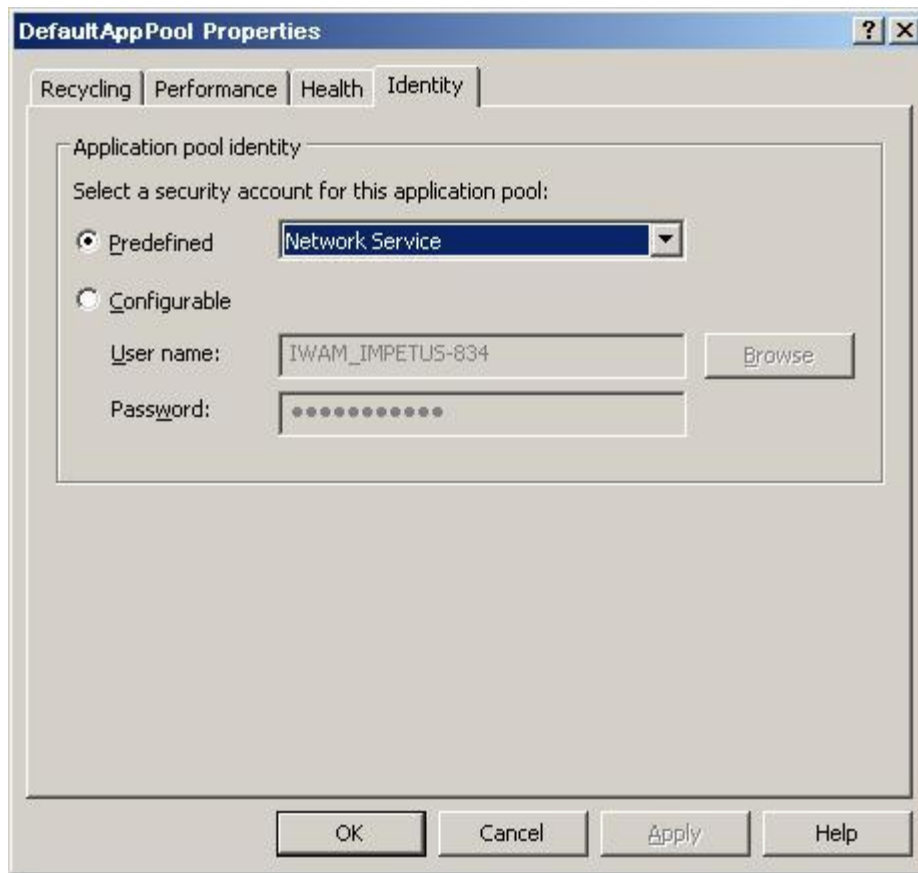


Figure 22: Application Pool Properties

### Steps to open Application Pool properties:

1. Expand Application Pools node in IIS.
2. Select the application pool assigned for Intellicus Application.
3. Right click and select Properties.



**Note:** Default application pool is DefaultAppPool for Intellicus application.

2. Rename the file "web\_For\_IIS\_5\_Or\_6\_Framework\_2.0.config" to "web.config" file resides at <Intellicus web application root path> (refer Figure 15).
3. Add wildcard application maps for Intellicus application. This can be added from Application Configuration window.

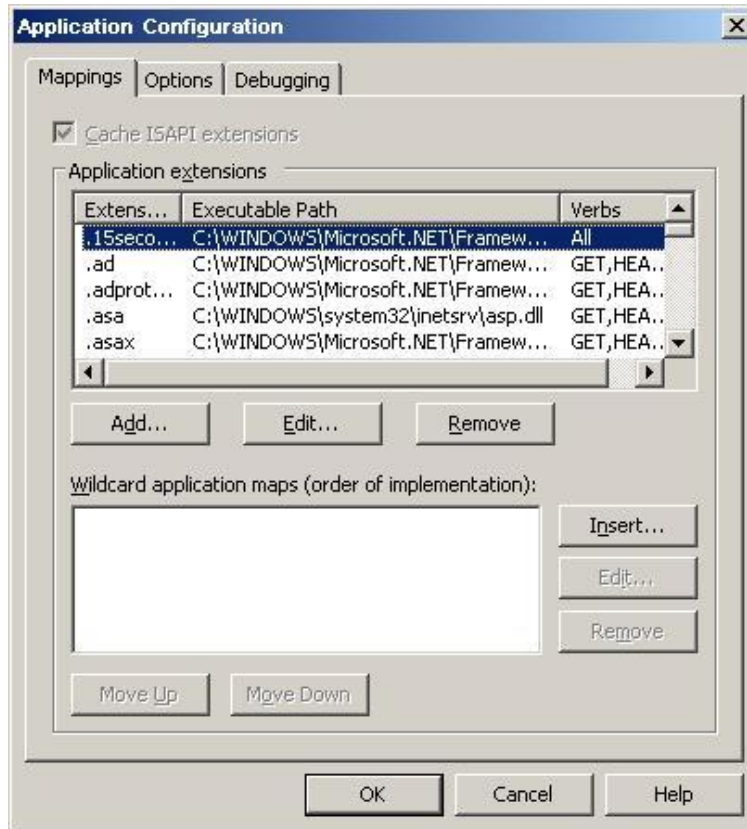


Figure 23: Application Configuration

**Steps to open Application Configuration:**

1. Select Intellicus application in IIS.
2. Right click and select Properties.
3. Click on Configuration button.

**Steps to add wildcard application maps:**

1. Click on Insert button (refer Figure 23).
2. Browse to aspnet\_isapi.dll (refer Figure 24).
3. Uncheck verify that file exists checkbox.
4. Click on OK button.

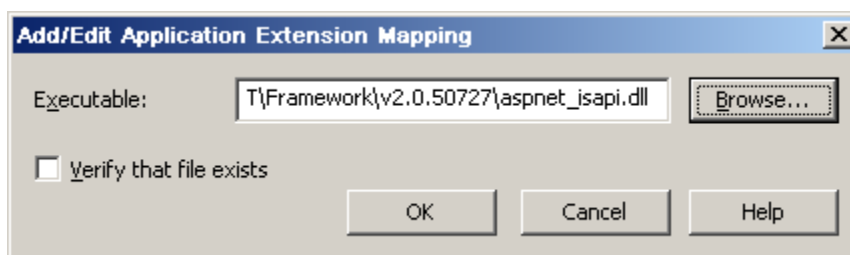


Figure 24: Application Extension Mapping

4. Add MIME extension “.svg” with MIME type “application/octet-stream” for Intellicus application.

**Steps to add MIME extension for application:**

1. Open application property window.
2. Select HTTP Headers tab.
3. Click on MIME Types button.
4. Click on New button.
5. Specify **.svg** in Extension and **application/octet-stream** in MIME type textboxes.

**Configuring Intellicus portal on IIS 5:**

1. Intellicus web portal can read/write contents from file system, hence read and write permission needs to be provided to IIS worker process account on following Intellicus web application sub-folders.
  - a. <Intellicus web application root path>/**client** (refer Figure 25)
  - b. <Intellicus web application root path>/**SecureData** (refer Figure 25)
  - c. <Intellicus web application root path>/**webdesigner** (refer Figure 25)
  - d. <Intellicus web application root path>/**Log4NetConfig.xml**(refer Figure 25)



**Note:** The Default IIS worker process account for IIS 5 is ASPNET (refer Figure 25).

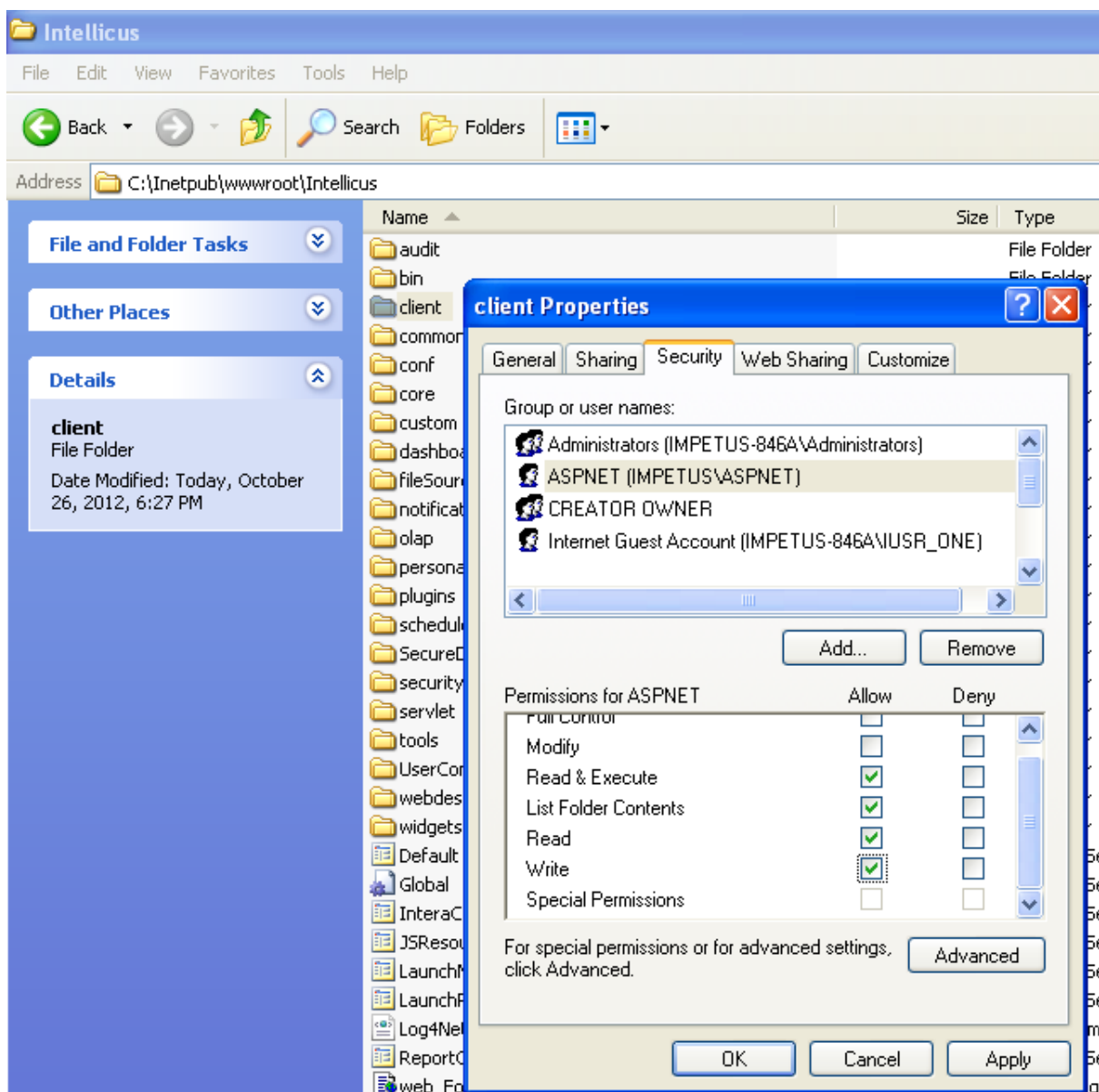


Figure 25: Granting Access Permissions

2. Rename the file "web\_For\_IIS\_5\_Or\_6\_Framework\_2.0.config" to "web.config" file resides at <Intellicus web application root path> (refer Figure 15).
3. Add wildcard application maps for Intellicus application. This can be added from Application Configuration window.

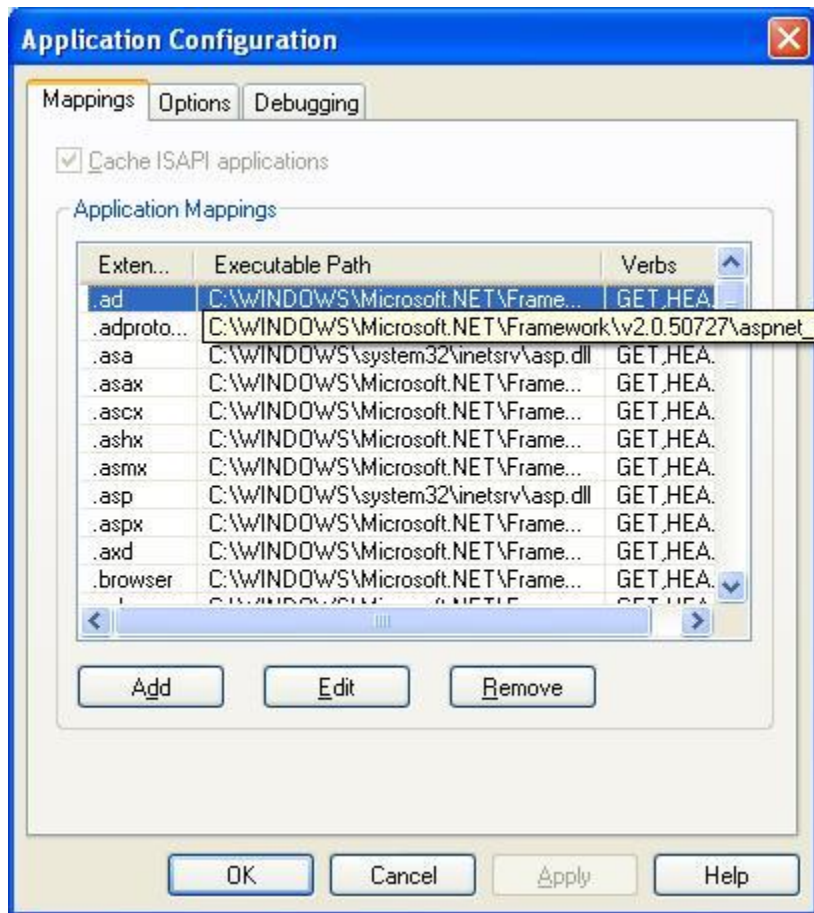


Figure 26: Application Configuration

### Steps to open Application Configuration:

1. Select Intellicus application in IIS.
2. Right click and select Properties.
3. Click on Configuration button.

### Steps to add wildcard application maps:

1. Click on Add button (refer Figure 26).
2. Browse to aspnet\_isapi.dll (refer Figure 27).
3. Specify extension as .\*(refer Figure 27).
4. Uncheck verify that file exists checkbox.
5. Click on OK button.

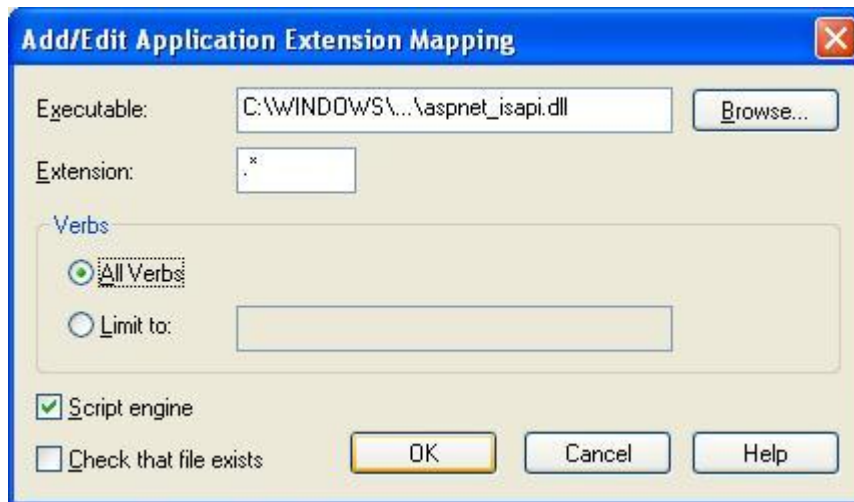


Figure 27: Application Extension Mapping

4. Add MIME extension “.svg” with MIME type “application/octet-stream” for Intellicus application.

#### Steps to add MIME extension for application:

1. Open application property window.
2. Select HTTP Headers tab.
3. Click on File Types button.
4. Click on New button.
5. Specify **.svg** in Associated Extension and **application/octet-stream** in Content type textboxes.

## Security Modes of tool

The security mode of tool can be enabled or disabled.

With disabled security mode anyone can use the product.

With the security mode enabled, you need to have necessary access privileges to log into the application. After successful login, you can use Intellicus for the activities that you are authorized to perform.

When security mode is enabled, the first page you receive is authentication page. You need to specify following login details:

- User Name
- Password
- Organization (under Options)

When the tool is run with Demo License, users having names: **Admin**, **Designer** and **User** are already created. The screen is divided in two parts:

**Login** (left side of the screen) and **DEMO LOGIN** (right side of the screen). You have to feed respective User Name and Password to carry out respective tasks.



Figure 28: Login Details

## Uninstalling Intellicus

Use **Add/Remove Programs** window in the Control Panel to uninstall Intellicus. Click Start > Settings > Control Panel > Add/Remove Programs.

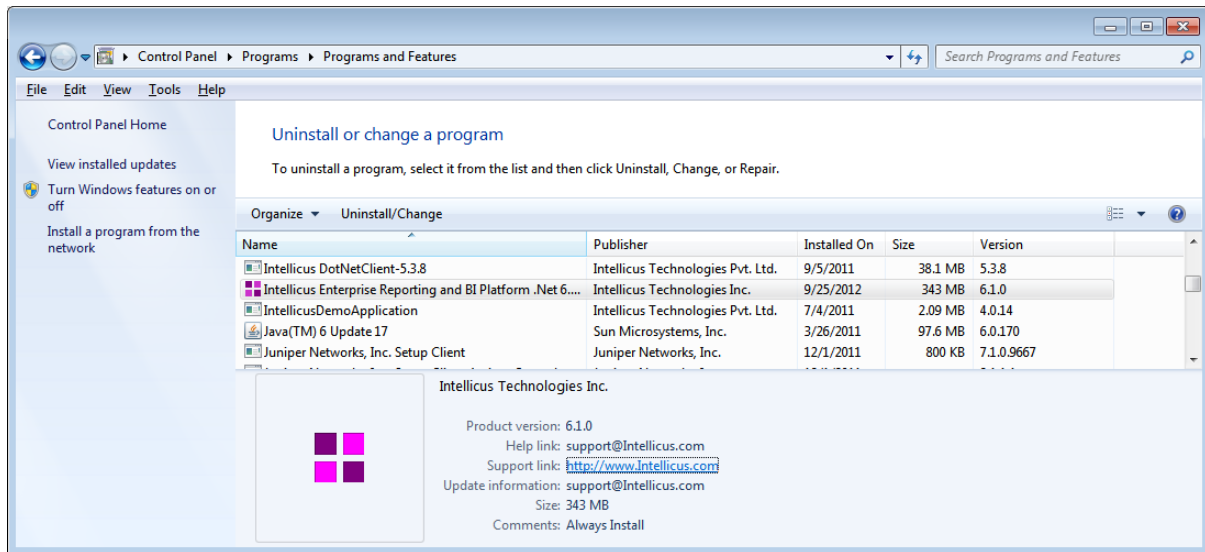


Figure 29: Uninstall Intellicus Web-based Reporting Suite

Select the product to be removed and click the 'Change/Remove' button (appears on the right side of the screen) or 'Uninstall/Change' button (appears on the top side of the list). The dialog box **Welcome** appears, as shown in the figure below. Select **Remove** and click **Next**. The **Confirm Uninstall** screen appears. Click **OK** to start uninstall process.



**Tip:** You can also start uninstall process by clicking Start > Programs > Intellicus > Uninstall (refer Figure 30).



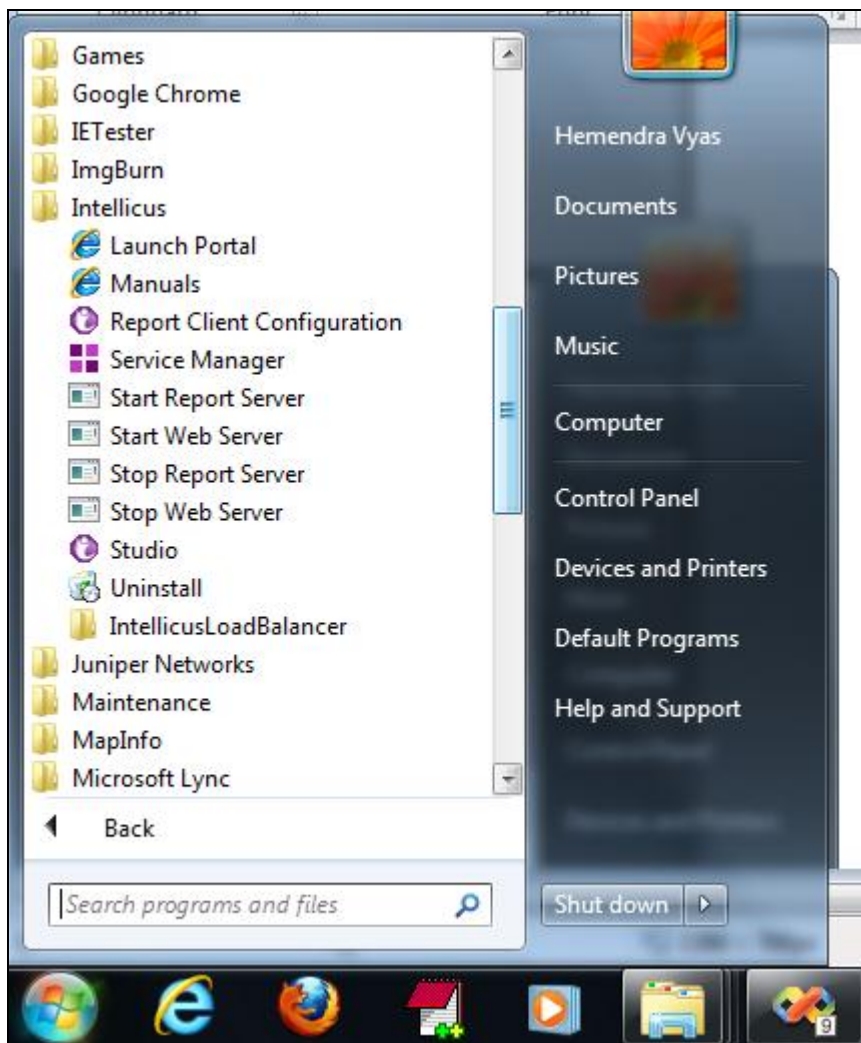


Figure 30: Uninstall Intellicus from Start Menu

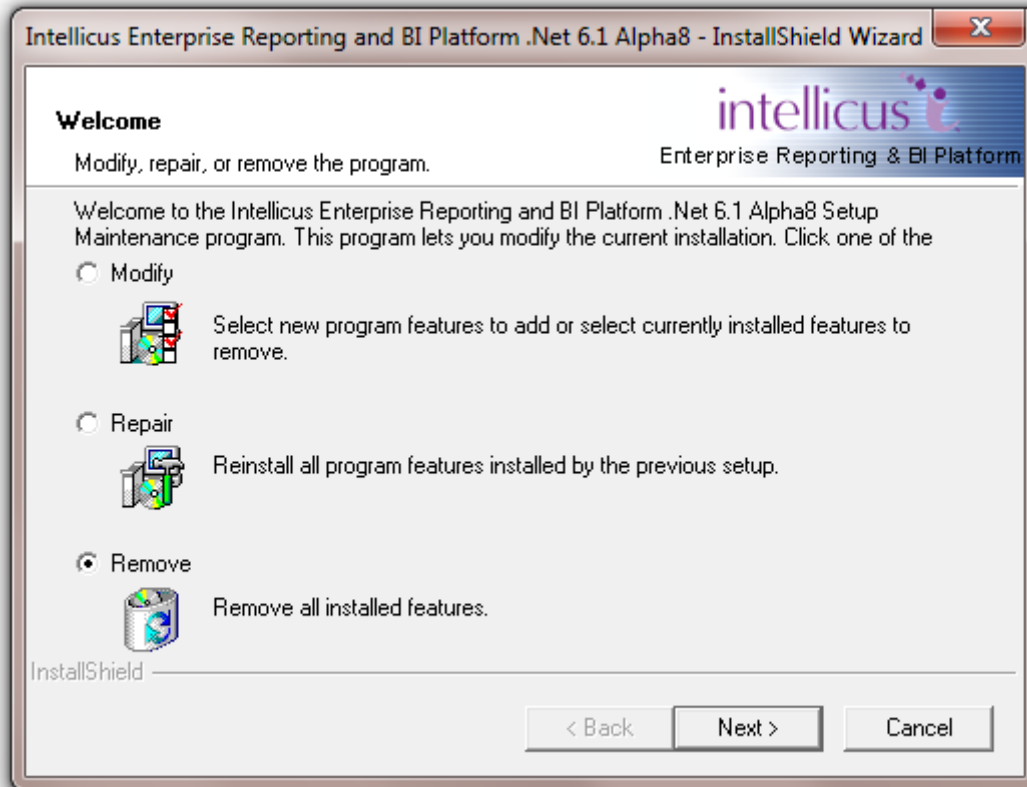


Figure 31: Modify, Repair, or Remove Program



**Note:** You can modify, remove or re-install Intellicus Application.

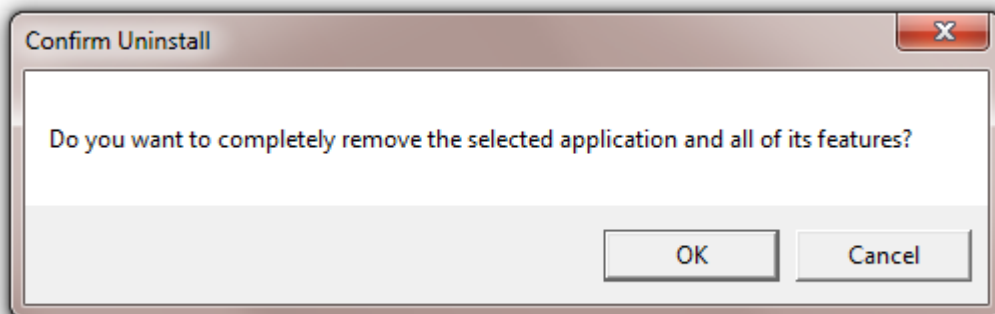


Figure 32: Uninstall Confirmation