



SmartSearch

Server and Client Installation Guide

v4.4

Square 9 SmartSearch

Server and Client Installation Guide

Version 4.4

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How to Use This Guide

Purpose

The *SmartSearch® Client and Server Installation Guide* provides instructions for installing your SmartSearch application. It outlines recommendations for the average deployment scenario. Your needs may vary depending on number of users, capture volume, workflows and capture requirements. This guide will help perform the following tasks:

- Identify prerequisites for installing SmartSearch
- Install the Global Suite of Products core applications SmartSearch and GlobalSearch.

Audience

SmartSearch/GlobalSearch administrators should read this guide to understand how to do server and client installations.

Organization

This guide is organized into four chapters as follows:

- Chapter 1, Server Prerequisite Configuration, an explanation of the prerequisites before installing on servers.
- Chapter 2, Server Installation, instructions for installing SmartSearch on servers.
- Chapter 3, Client Installation, instructions for installing SmartSearch on client machines.
- Chapter 4, Post-Installation Requirements, instructions on registering your application.

For software requirements, please refer to the Square 9 website.

Conventions Used in this Guide

Icons

<i>Name</i>	<i>Icon</i>	<i>Description</i>
Behind the Scenes		Highlights technical information useful to administrators and installers
Business Case		Calls attention to specific examples which demonstrate how features can be used to address business needs
CAUTION		Highlights important information to know to avoid situations that could potentially cause a loss of data or configuration, or could impact performance, functionality, or successful implementation
Example		Highlights examples of settings for typical business uses
Note		Highlights information of interest or important information needed to successfully accomplish a task or understand a procedure
Tip		Highlights techniques, shortcuts, or productivity tips
Troubleshooting		Highlights information or references troubleshooting resources that might prove helpful in solving a problem

Typographic Conventions

<i>Convention</i>	<i>Description</i>
Bold	Highlights interface items such as menus, dialog boxes, settings, and options and highlights text that must be entered exactly as shown
<i>Italics</i>	Emphasizes text or indicates a placeholder variable which the user should replace with a specific word or symbol
<u>Underlined Blue</u>	Points out URL links to external web pages or documents
Fixed Width Font	Used for filenames, Windows folder paths, URLs, code samples, and system text
SMALL CAPITAL LETTERS	Indicates keyboard keys, such as CTRL+C, ENTER, DELETE, or TAB

Writing Conventions

<i>Convention</i>	<i>Description</i>
<Username>	Angle brackets enclosing a word or phrase in italics indicates that information must be entered specific to the installation, configuration, or system. For example, <Username> means to enter a specific username in the indicated field
>	Indicates the need to select an item from a menu. For example, File > Save
Initial Caps	Indicates the item referenced is particular to SmartSearch or a Square 9 product or feature. For example, the Index Fields selected when creating an Archive
• Bullet	A dot-shaped bullet indicates an unordered list, which in a procedure indicates either a procedure which is only one step long or a step or steps which may or may not need to be taken and in no particular order.
➤ Bullet	An arrowhead bullet indicates information closely related to a step in a procedure.

Help and Support

Support

Phone: 203-890-0889, option 2

Email: support@square-9.com

Other Resources

Forums: forums.square-9.com

Square 9 classes: education@square-9.com

Server Prerequisite Configuration

SmartSearch is a next-generation document management software that runs on the Microsoft® .NET platform. It is fully supported in both virtual or physical environments and runs on Windows Professional and Server Operating systems. SmartSearch uses Microsoft SQL Server® for its database backend and IIS (Internet Information Services) to communicate to its clients.

Regarding Updating SmartSearch

If you plan on upgrading SmartSearch from a version previous to 4.2, you must be on version 4.1.1 before upgrading. For questions regarding the upgrade process for SmartSearch, please reference the *SmartSearch Upgrade Guide*. Documentation regarding SmartSearch, which can be found on our forums (<http://forums.square-9.com>).

Prior to installing SmartSearch, you will need to install both Microsoft Internet Information Server (IIS) and Message Queuing on your system.

Windows 7/8/8.1/10 Pro Prerequisites Configuration

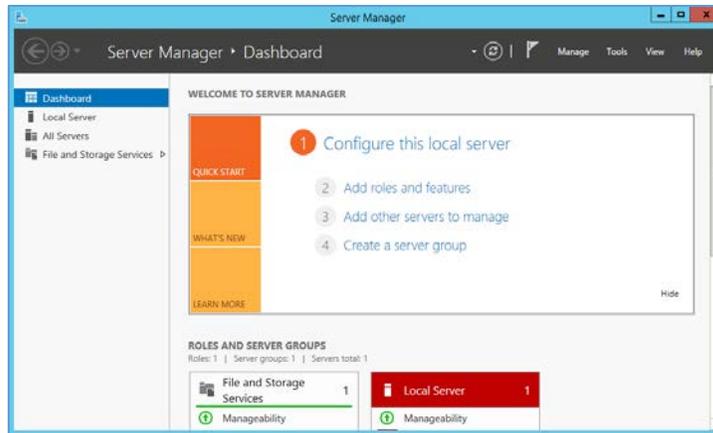
To install IIS and Message Queueing on a compatible Windows operating system, you will need to follow the steps below:

1. To configure IIS and Messaging Queueing on a compatible Windows operating system, open the **Control Panel**.
 - You may be prompted to insert the Windows Installation CD to install these features.
2. Select **Programs**.
3. In **Programs**, in the **Programs and Features** group, select **Turn Windows Features on or off**.
4. In the **Windows Features** window, enable the following system prerequisites:
 - Microsoft .NET Framework (3.5 and higher).
 - Microsoft .NET 4.5.2 or higher is required to install SmartSearch v4.4. Windows 10 should already have .NET 4.6 installed; there is no need to install .NET 4.5.2 in that case.
 - In **Internet Information Services > World Wide Web Services**:
 - Expand **Application Development Features** and enable the following:
 - **.NET Extensibility**
 - **ASP.NET**
 - Expand **Common HTTP Features** and enable the following:
 - **Default Document**
 - **Directory Browsing**
 - **Static Content**
 - Expand **Security** and enable the following:
 - **Basic Authentication**
 - **Windows Authentication**
5. To begin installing or enabling the prerequisites, click **OK**.
 - This may require you to reboot the computer to complete the process.

Windows Server 2008/2008 R2/2012/2012 R2

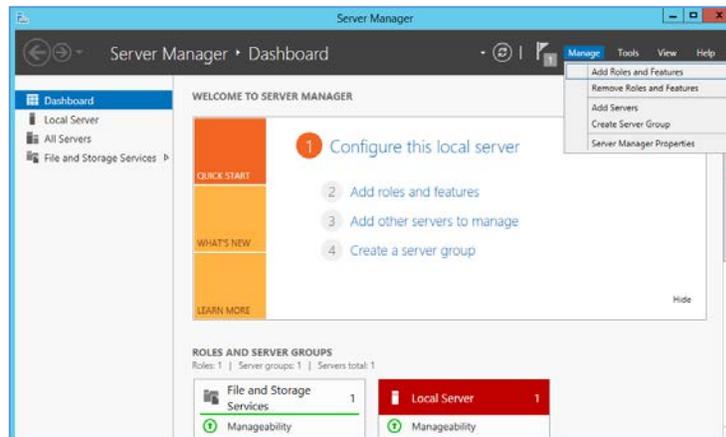
Prerequisites Configuration

1. To enable IIS and Message Queuing on a compatible Windows server operating system, open the **Control Panel**.
2. Select **Programs**.
3. In **Programs**, in the **Programs and Features** group, select **Turn Windows Features on or off**.
 - Once selected, **Server Manager** will launch, then after a moment, **Add Windows Features** will launch.



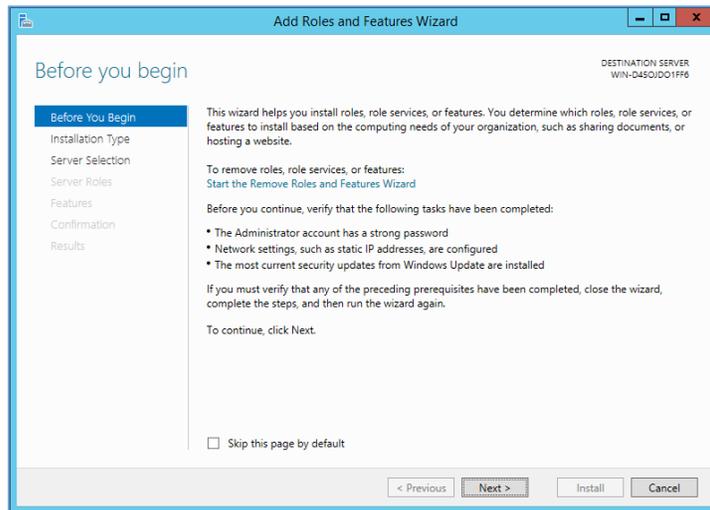
Server Manager

4. If the **Add Roles and Features Wizard** doesn't appear, click **Manage**.
5. Click **Add Roles and Features**.



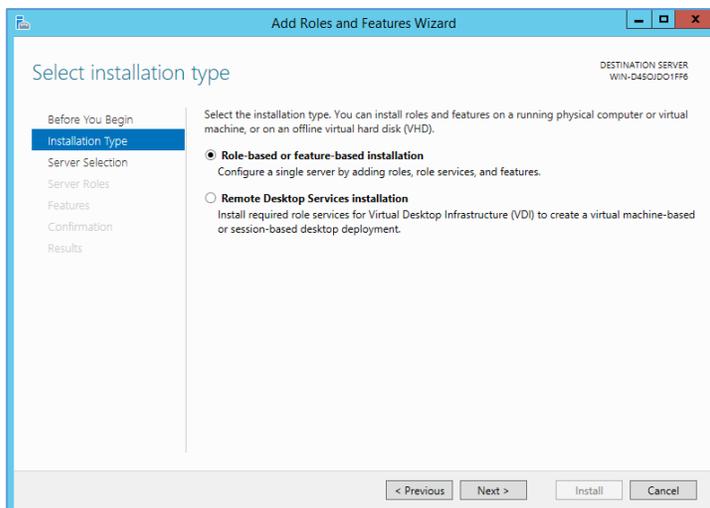
Server Manager Manage Menu

6. When the **Add Roles and Features Wizard** opens, click **Next**.



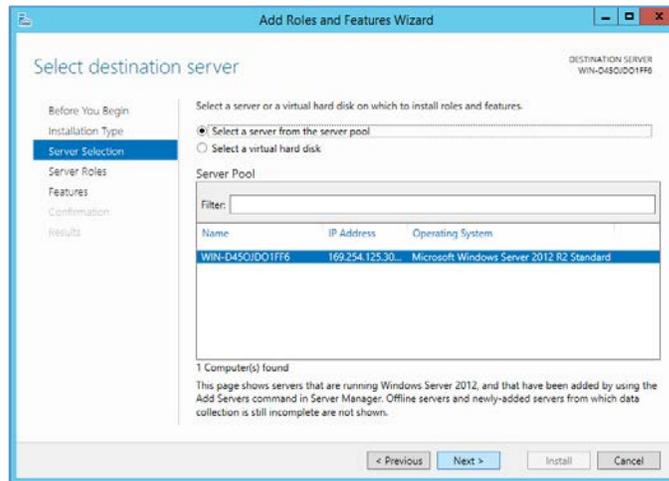
Add Roles and Features

7. In **Installation Type**, select **Role-based or feature-based Installation** in **Installation Type** to configuring a single server by adding roles or features to it.



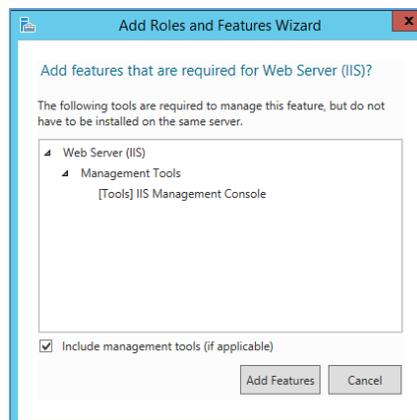
Role-Based or Feature-Based Installation

8. In **Server Selection**, select the server (this should be the local machine).



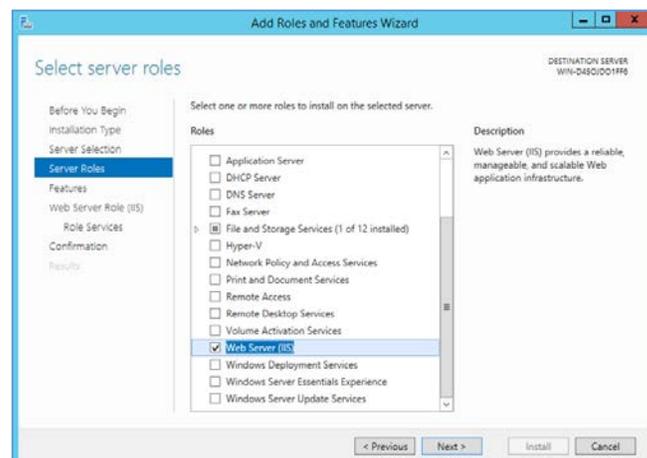
Server Selection

9. Click **Next**.
10. In **Server Roles**, select **Web Server (IIS)**.
11. Once that is selected there is a chance that a window will open with a message about installing other required features. Click **OK** to return to the Installation Wizard.



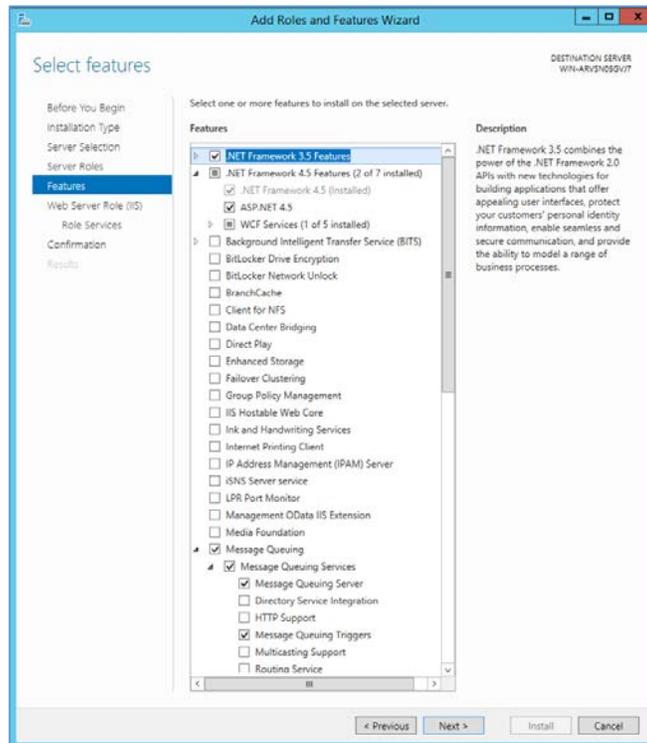
Server Roles

12. With **Web Server (IIS)** selected, click **Next**.



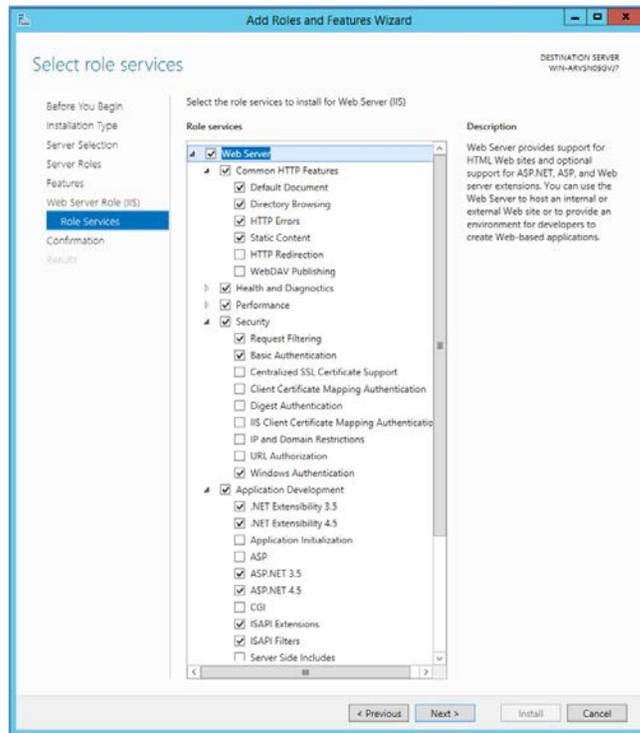
Web Server IIS

13. If they are not already selected, In **Features**, select the following features:
- **.NET Framework** (3.5 and higher)
 - **Message Queueing Triggers**
 - If you have selected a checkbox and another window appears, select **Add Features**.
14. Click **Next**.



Add Features

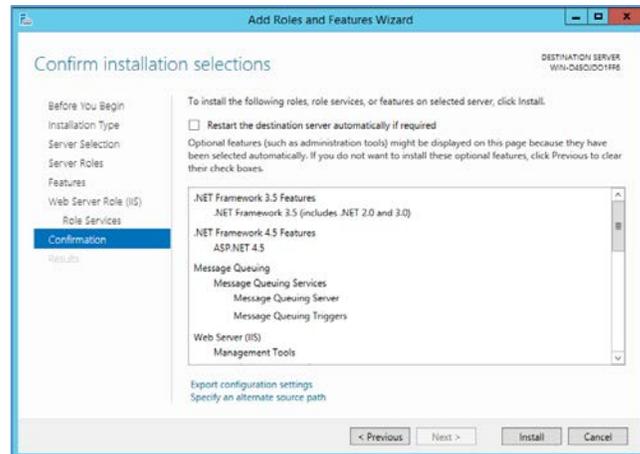
15. In **Role Services**, install the IIS Role Services and install the following:
- Expand **Common HTTP Features** and enable the following:
 - **Default Document**
 - **Directory Browsing**
 - **Static Content**
 - Expand **Security** and enable the following:
 - **Basic Authentication**
 - **Windows Authentication**
 - Expand **Application Development** and enable the following:
 - **.NET Extensibility** (3.5 and higher)
 - **ASP.NET** (3.5 and higher)



IIS Role Services

16. Once the Services are selected, click **Next**.

17. In **Confirmation**, make sure that all the SmartSearch prerequisites have been selected, and then click **Install**.



Confirmation of Installation

Server Installation

SmartSearch is distributed through download links. These links can be obtained from the Square 9 Softworks Fulfillment department by contacting them at:

Phone – 203.789.0889 Option 1

Email – fulfillment@square-9.com

Once the link is sent, it is valid for seven days. Download the self-extracting installation media to a folder of your choice.

Prior to the installation of SmartSearch, the logged in account that will perform the installation must have the correct network permissions.

- If you're installing onto a Domain, you will need to ensure that the user you are logged into the system as has the ability to create users on the Active Directory and to create databases within SQL Server. It is recommended that you use a "Domain Admin" during the initial install.
- If you're doing a local installation, you must be logged into the system as an Administrator.

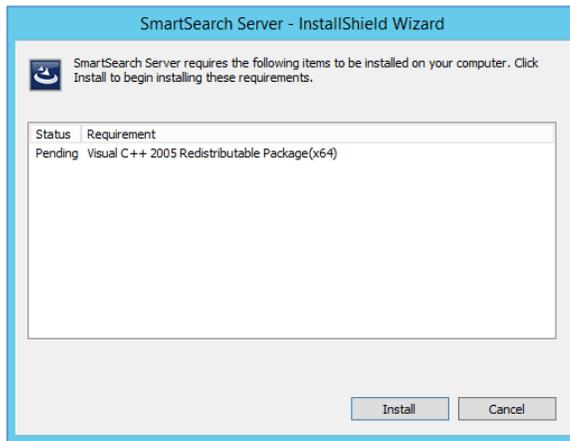
SmartSearch Media Extraction

1. Once the installation media has been downloaded, double-click on it to run the self-extractor.
2. In the **SmartSearch Self-Extractor** window, select the location you want the files to go in **Select extraction path**.
3. Click **OK** to proceed with the extraction.
 - This may take some time. If the extraction errors out, it is possible that the download has been corrupted. If so, it will need to be downloaded again.
4. Once it has been extracted, proceed to the SmartSearch installation.

SmartSearch Installation

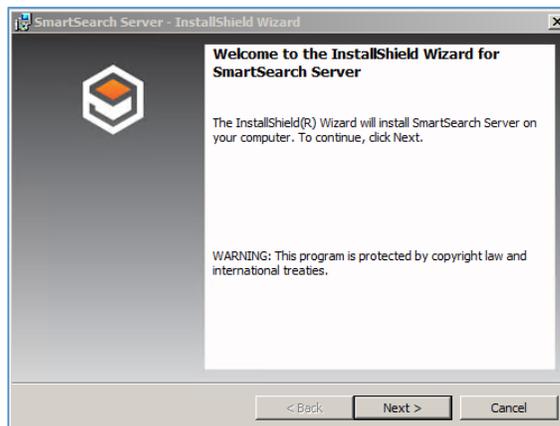
Installation Wizard

1. To start the Installation Wizard for SmartSearch, from your installation media, navigate to the **AIO** directory, expand this directory, right-click on **setup.exe** and select **Run as Administrator**.
 - It's possible that the C++ Redistributables will need to be installed before running the Installation Wizard.
 - If you are missing any prerequisites, an error message will appear listing the missing items.
2. To install any listed missing elements, click **Install**.
3. If you do not receive this window, continue to the next step.



(C++ Redistributable Package)

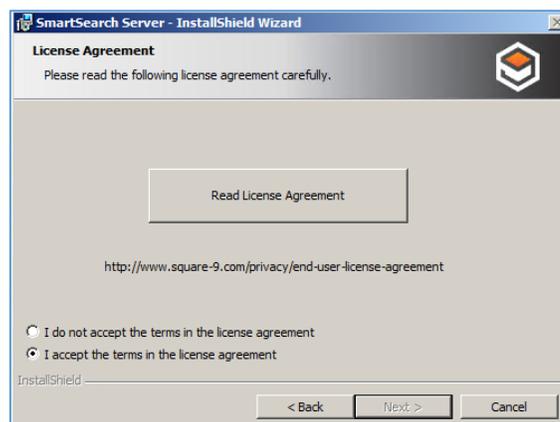
4. Click **Next** to start the SmartSearch installation process using the Installation Wizard.
 - There may be a pause for installation.



SmartSearch Installation Wizard

License Agreement

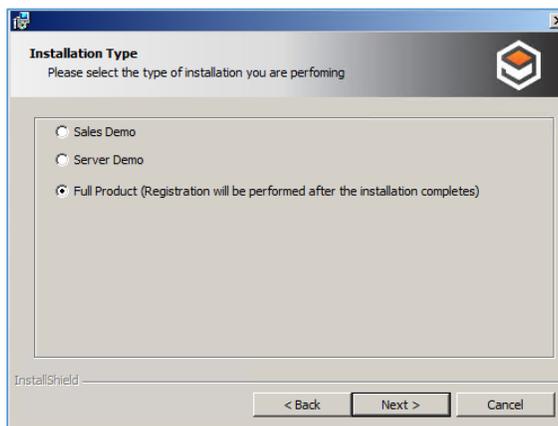
1. Click **Read License Agreement** to read the agreement.
2. Click **I accept the terms in the license agreement** to accept the terms.
3. Click **Next**.



License Agreement

Installation Type

1. In **Installation Type**, choose the type of installation:
 - **Sales Demo** – Configures the demonstration installation for machines that will be mobile. This option installs a SmartSearch demonstration, assuming that your IP address will change, and configuration files will be configured to reference your machine as a localhost.
 - **Server Demo** – Configures the demonstration installation to use your server's static IP address or name.
 - **Full Product** – A **Full Product** installation requires an `ssFeatures.lic` file and a serial number for the product, sent from Square 9 Fulfillment.



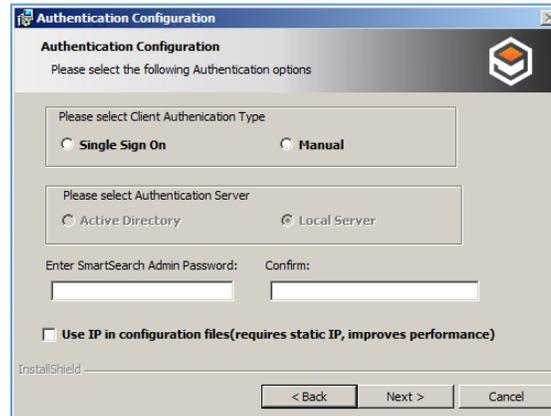
Installation Type

2. Click **Next**.
3. If the **Full Product** option was chosen, then the **Change Current Destination Folder** window appears.
 - a. Enter the destination folder:
 - Browse to the folder where SmartSearch will be installed.
 - Type in the path to where SmartSearch will be installed.
 - b. Click **Next**.

Authentication Configuration

1. In **Authentication Configuration**, in the **Please select Client Authentication Type** group, select the client authentication type:
 - **Single Sign On** – Use to allow automatic sign on into SmartSearch. When users launch SmartSearch it will use their Windows Active Directory or Square 9 User credentials to log in.
 - **Manual** – When selected, users launch SmartSearch a window will appear, prompting them to log in using their credentials to sign into SmartSearch. The information that is passed here will be the users' Windows or Square 9 User credentials.
2. In the **Please select Authentication Server** group, select either **Active Directory** or **Local Server**.
 - **Active Directory** – Enable to indicate SmartSearch is to be installed using Active Directory users and groups.
 - **Local Server** – Enable to indicate SmartSearch is to be installed using Workgroup users and groups (users and groups that are local to the server).

3. Enter a password for the ssAdministrator account in the **Enter SmartSearch Admin Password** text box and confirm the password by typing it again in the **Confirm** text box.
 - This password must meet your machine’s password guidelines. It is case sensitive.
4. To using IP in the configuration files, enable **Use IP in configuration files**.
 - Used to improve performance, this option requires a static IP address.



Authentication Configuration



Tip: Meet System Requirements for Passwords. The password *must* meet the system requirements for the operating system on which the installation is being performed. The Installation Wizard will let you enter a non-compliant password, but SmartSearch services will not run properly if the password does not meet your system requirements.

Tip: Change ssAdministrator Password. The ssAdministrator password can be changed at a later point, if you want. If you do so:

- It must comply with the password requirements for your machine.
- The password must be updated in three locations: IIS, the Application Pool, and the Service Console.

Setup Type

In **Setup Type**, choose either the **Complete** or the **Custom** setup type.

Complete Setup

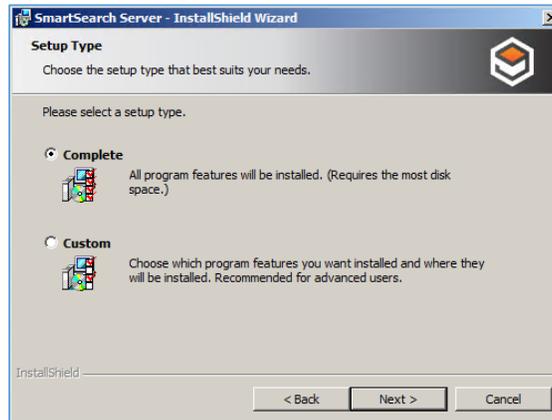
To perform a complete installation, with all the default settings and file paths, choose **Complete**. This will include the installation of demonstration Inboxes and the demonstration databases.

1. In **Setup Type**, choose **Complete**.
2. Click **Next**.
 - The Installation Wizard will proceed to the **Ready to Install** window before you start the SmartSearch installation. Skip to the "[SmartSearch Installation](#)" section below.

Custom Setup

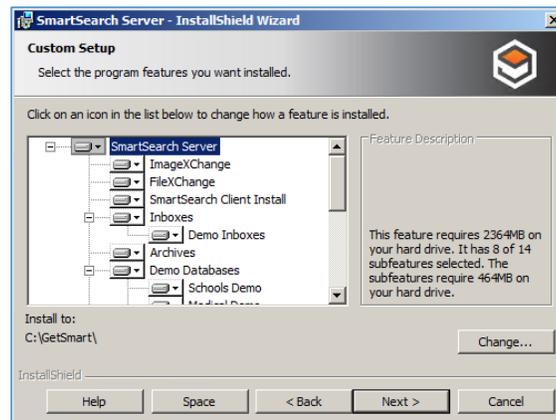
To customize the installation, such as installing extra components, choosing the SQL Server instance to install to, or setting the location SmartSearch will be installed onto, choose **Custom**. Note that optional features can be installed, but will not function without the proper license.

1. In **Setup Type**, choose **Custom**.
2. Click **Next**.
 - In **Custom Setup** there is the option to change the locations of where SmartSearch, the Client Installation folder, Archives and inboxes will be installed.



Setup Type

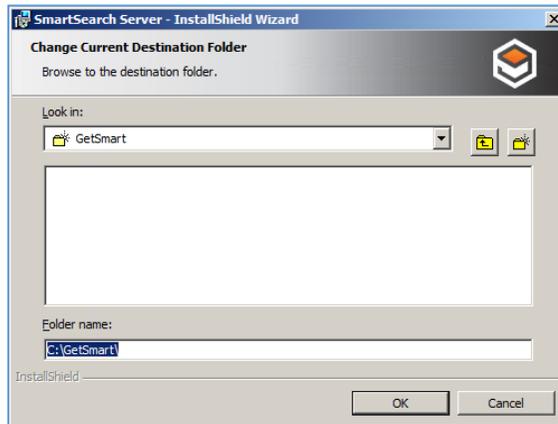
3. Scroll through the list and select the desired options.
 - All options that are purchased, thus available for installation, are enabled by default to be installed. You can elect to not install features.
 - When you click on a feature in the list you will see a description and the amount of hard drive space required for that feature.
4. To remove a feature from installation, in **Custom Setup**, click the drop-down to the left of any feature to remove and select **This feature will not be available**.



Custom Setup Configuration

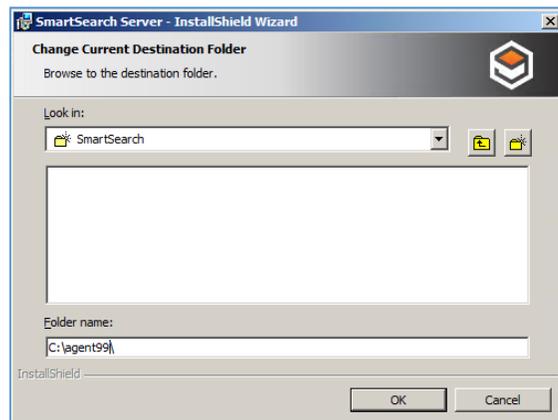
5. To change the installation location for the GetSmart directory from the default of C:\GetSmart\
 - a. Click **Change**.

- b. In **Change Current Destination Folder**, choose to:
 - Enter the path for the custom installation location.
 - Browse to the folder and enter it in the **Look In** text box.
- c. Type in the path to where SmartSearch will be installed in the **Folder Name** text box.
- d. Click **OK**.



Change Destination Folder

6. To change the location of items from the default location:
 - e. In the features list, select the item, and click **Change**.
 - f. In **Change Current Destination Folder**, choose to:
 - Enter the path for the custom item location.
 - Browse to the folder and enter it in the **Look In** text box.
 - g. Enter the new path to where the item will be installed in the **Folder Name** text box.
 - h. Click **OK**.

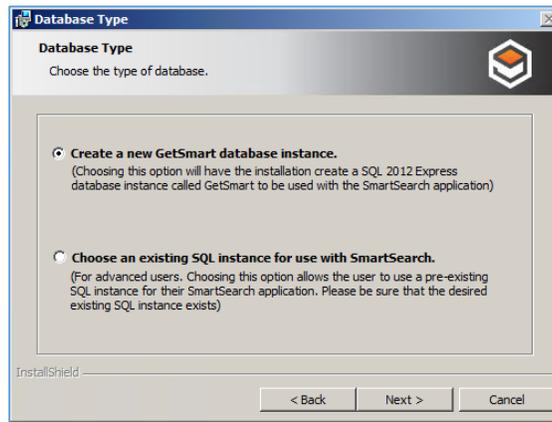


Change Destination Item Folder

7. To change the location of Inboxes from the default location, follow step six just above.
8. Click **Next**.

Database Type

In **Database Type**, choose either the **Create a new GetSmart database instance** or the **Choose an existing SQL instance for use with SmartSearch** database type.

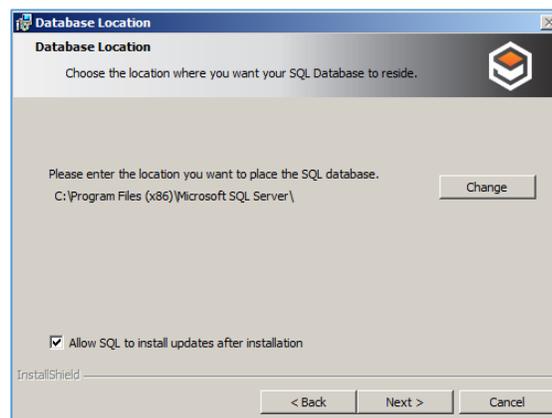


Database Type

Create a New Database Instance

By default, SmartSearch installs with Microsoft SQL 2012 Express® and creates a database called "GetSmart."

1. In **Database Type**, select **Create a new GetSmart database instance**.
2. Select **Create a new GetSmart database instance**.
3. Click **Next**.
4. If you wish indicate an alternate installation location for Microsoft SQL Server 2012 Express, in **Database Location**, click **Change**.
5. If updates to SQL Server are desired, enable **Allow SQL to install updates after installion**.
6. Click **Next**.



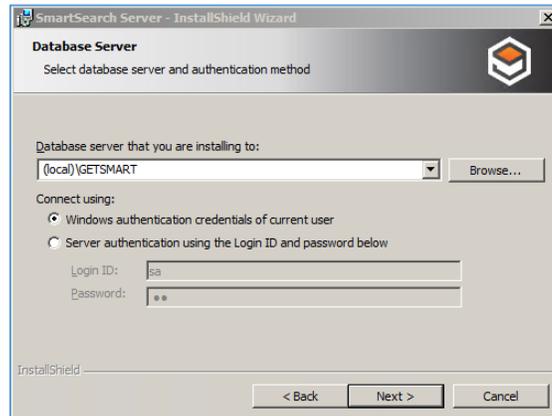
(Database Location)

Select an Existing Database Instance

You can use SmartSearch with an existing SQL Server or SQL Server Express database instance (SQL Server 2008 R2 or above).

1. In **Database Type**, select **Choose an existing SQL instance for use with SmartSearch**.
2. Select **Choose an existing SQL instance for use with SmartSearch**.

3. Click **Next**.
4. In **Database Server**, in **Database server that you are installing to**, click the expansion arrow to and select from a list of the SQL Server instances available to you or click the **Browse** button and browse to a SQL Server instance.
5. Choose login credentials in the **Connect Using** section:
 - Select **Windows Authentication credentials of current user** to use the login credentials of the currently logged in user to create databases in the specified SQL instance.
 - Select **Server authentication using the Login ID and password below** to enter the System Administrator (SA) user credentials.
6. Click **Next** to continue the installation.



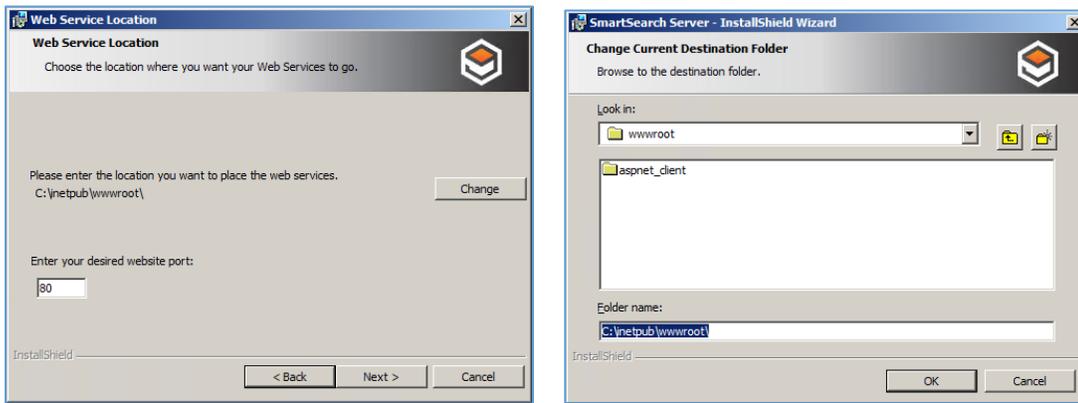
Select Database Server and Authentication Method

Web Service Location

1. To use the default web services location and the default website port and continue the installation, in **Web Service Location** click **Next**.
2. If you need to change the installation location in which web services will be installed, in **Web Service Location**:
 - a. Click **Change**.
 - b. In **Change Current Destination Folder**, enter the new location path in the text box.
 - c. Click **OK**.
3. The website port defaults to Port 80. To change the port that SmartSearch will be installed to, enter a port number in the **Enter your desired web port** text box.
4. Click **Next**.



Note: By default SmartSearch is installed onto port 80. SmartSearch must be the only application running on a specified port. The availability of the specified port is not validated by the installer; you must ensure the port's availability prior to beginning the installation.

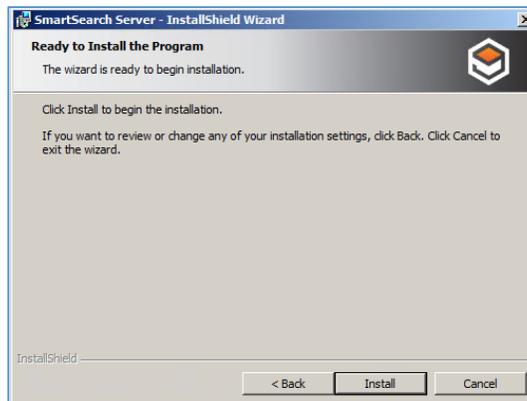


Web Service Location

SmartSearch Installation

Once preparation is done, you are ready to install SmartSearch. The SmartSearch installation window will pause while first GlobalCapture Server, then the GlobalCapture Engine installs, and then it finishes the installation process.

1. To install SmartSearch, in **Ready to Install the Program**, click **Install**.
 - There will be a pause while the installation is processing.
2. If necessary, click **Back** to return to previous dialog boxes and make adjustments to the installation.

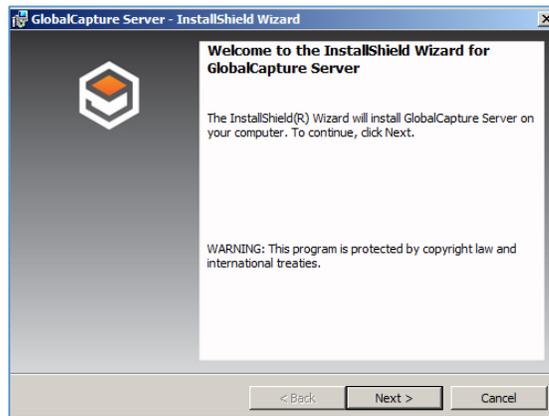


Begin SmartSearch Installation

GlobalCapture Server Installation

Move the paused **Installing SmartSearch Server** window aside to fully view **Welcome to the InstallShield Wizard for GlobalCapture Server**.

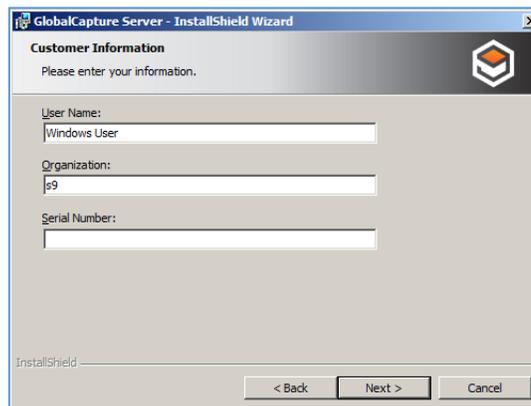
1. From your installation media, navigate to the **GCW** directory, expand this directory, right-click on `setup.exe` and select **Run as Administrator**.
2. Click **Next** to start the GlobalCapture installation process using the Installation Wizard.
 - There will be a pause while the installation is processing.



GlobalCapture Server Installation Wizard

GlobalCapture Server Customer Information

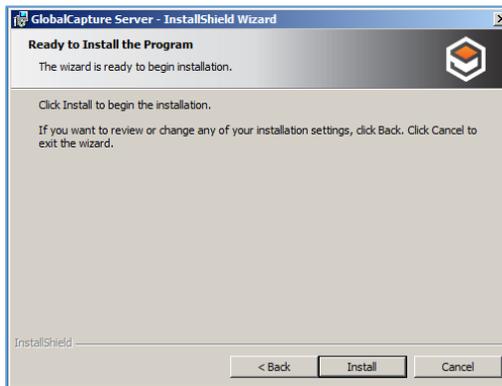
1. In the **Customer Information** window, enter a name in the **User Name** text box.
2. Enter a name in the **Organization** text box.
3. Enter your serial number provided by Square 9 in the **Serial Number** text box.
4. Click **Next**.
5. If prompted with an error message, click **OK** or **Yes** and proceed with corrections.
 - If no serial number is entered, a reminder message will appear. Click **OK** to proceed.



Customer Information

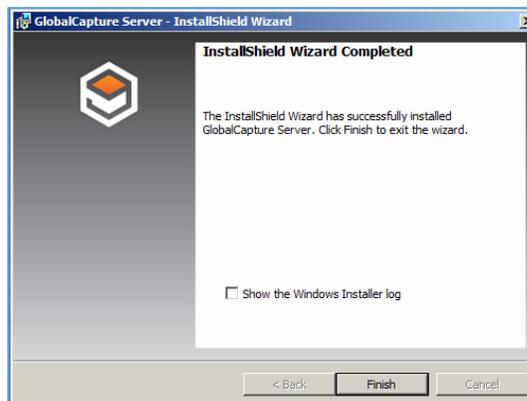
GlobalCapture Server Installation

1. Once preparation is done, in **Ready to Install the Program**, click **Install** to install GlobalCapture.
 - There will be a pause while the installation is processing.
2. If necessary, click **Back** to return to previous dialog boxes and make adjustments to the installation.



Begin GlobalCapture Server Installation

3. In **InstallShield Wizard Completed**, click **Finish**.
 - a. If you prefer, enable the **Show the Windows Installer log** checkbox to see actions and times related to the GlobalCapture installation and then click **Finish**.
 - b. To keep the log for future reference:
 1. In Notepad, select **File > Save As**.
 2. If you prefer, select a different filename and/or storage location.
 3. Click **Save**.
 4. Close Notepad when done reviewing the log file.
4. In **GlobalCapture Installer Information**, choose one of the following:
 - At the prompt, click **Yes** to reboot the server, so that GlobalCapture is operational.
 - Or, click **No** if you will manually reboot later.
 - There will be a pause while the installation is processing.



GlobalCapture Server Installation Completed

GlobalCapture Engine Installation

When GlobalCapture Server is done installing, the GlobalCapture Engine for GlobalCapture installation begins. The GlobalCapture Engine installation process is very similar to the GlobalCapture Server process. If the **GlobalCapture Engine InstallShield Wizard** appears behind the GlobalCapture Server installer, drag it into view.

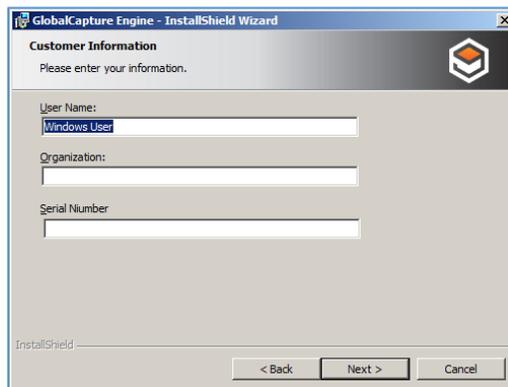
1. In the **Welcome to the InstallShield Wizard for GlobalCapture Engine** window, click **Next**.
 - There will be a pause while the installation is processing.



GlobalCapture Engine Installation Wizard

GlobalCapture Engine Customer Information

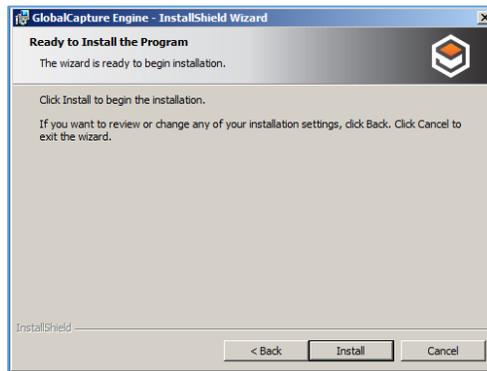
1. In **Customer Information**, enter a name in the **User Name** text box.
2. Enter name in the organization in the **Organization** text box.
3. Enter your license number provided by Square 9 in the **Serial Number** text box.
4. Click **Next**.
5. If no serial number is entered, a reminder message will appear. Click **OK** to proceed.



GlobalCapture Engine Customer Information

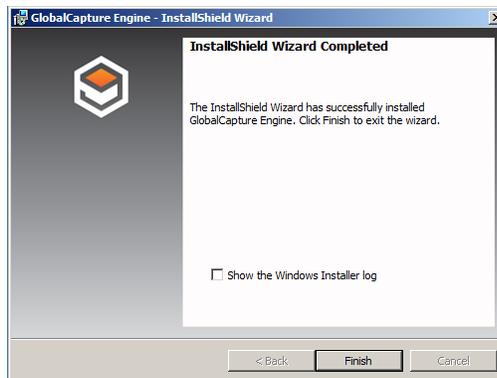
GlobalCapture Engine Installation

1. Once preparation is done, in **Ready to Install the Program**, click **Install** to install the GlobalCapture Engine.
 - There will be a pause while the installation is processing.
2. If necessary, click **Back** to return to previous dialog boxes and make adjustments to the installation.



Begin GlobalCapture Engine Installation

3. In **InstallShield Wizard Completed**, click **Finish**.
 - a. If you prefer, enable the **Show the Windows Installer log** checkbox to see actions and times related to the installation and then click **Finish**.
 - b. To keep the log for future reference:
 - i. In Notepad, select **File > Save As**.
 - ii. If you prefer, select a different filename and/or storage location.
 - iii. Click **Save**.
 - iv. Close Notepad when done reviewing the log file.
 - You are returned to the GlobalCapture Engine installer.
4. In **Capture Engine Installer Information**, choose one of the following:
 - At the prompt, click **Yes** to reboot the server, so that the GlobalCapture Engine is operational.
 - Or, click **No** if you will manually reboot later.

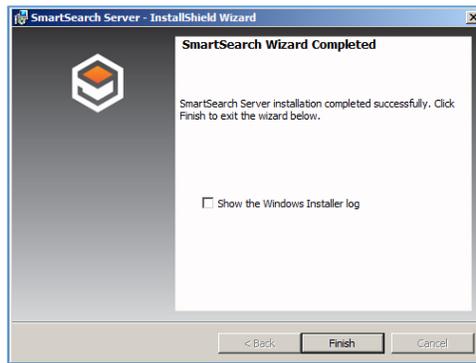


GlobalCapture Engine Installation Completed

Complete SmartSearch Installation

Once the GlobalCapture Server and GlobalCapture Engine installations are finished, the SmartSearch installation will finish.

1. In the **SmartSearch Wizard Completed** window, click **Finish**.



SmartSearch Installation Completed

2. At the prompt, reboot the system.
 - A reboot must be done before SmartSearch can be launched and run properly.
 - Once the system has been restarted SmartSearch will start automatically. When launching SmartSearch v4.4 for the first time, you will be prompted to log into SmartSearch.
3. Log into SmartSearch.
 - After successfully logging into SmartSearch, the application will open.

With the SmartSearch with GlobalCapture installation complete, the SmartSearch desktop client and GlobalSearch shortcuts will appear on your Windows desktop.

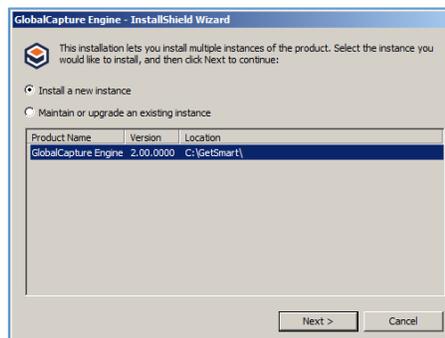


Desktop Shortcuts

Additional GlobalCapture Engine Instances

You can stand up to seven additional GlobalCapture Engine instances for GlobalCapture per machine which is running GlobalCapture.

1. Return to the location of your installation media, navigate to the **GlobalCaptureEngineStandaloneInstaller** directory, expand this directory, right-click on **setup.exe** and select **Run as Administrator**.
2. Select **Install a new instance** and click **Next** to start the next GlobalCapture Engine installation process.
 - There will be a pause while the installation is processing.



Install a New GlobalCapture Engine Instance

- The Installation Wizard will appear. Follow the instructions in the "[GlobalCapture Engine Installation](#)" section above for the next GlobalCapture Engine.
- 3. To begin the installation, in **Welcome to the InstallShield Wizard for GlobalCapture Engine 2**, click **Next** to proceed to the next window.
 - There will be a pause while the installation is processing.
- 4. In **Customer Information**:
 - a. Enter a name in the **User Name** text box.
 - b. Enter name in the organization in the **Organization** text box.
 - c. Enter your license number provided by Square 9 in the **Serial Number** text box.
 - d. Click **Next** to continue the installation.
 - If no serial number is entered, a reminder message will appear. Click **OK** to proceed.
- 5. In **Database Server**:
 - e. In **Database server that you are installing to**, click the expansion arrow to and select from a list of the SQL Server instances available to you or click the **Browse** button and browse to a SQL Server instance.
 - f. Choose login credentials in the **Connect Using** section:
 - Select **Windows Authentication credentials of current user** to use the login credentials of the currently logged in user to create databases in the specified SQL instance.
 - Select **Server authentication using the Login ID and password below** to enter the System Administrator (SA) user credentials.
 - g. Click **Next** to continue.
- 6. Once preparation is done, in **Ready to Install the Program**, click **Install** to install the GlobalCapture Engine.
 - There will be a pause while the installation is processing.
- 7. In **InstallShield Wizard Completed**, click **Finish**.
 - a. If you prefer, enable the **Show the Windows Installer log** checkbox to see actions and times related to the installation and then click **Finish**.
 - b. To keep the log for future reference:
 - i. In Notepad, select **File > Save As**.
 - ii. If you prefer, select a different filename and/or storage location.
 - iii. Click **Save**.
 - iv. Close Notepad when done reviewing the log file.
 - You are returned to the GlobalCapture Engine installer.
- 8. In **GlobalCapture Installer Information**, choose one of the following:
 - At the prompt, click **Yes** to reboot the server, so that GlobalCapture is operational.
 - Or, click **No** if you will manually reboot later
 - There will be a pause while the installation is processing.

Once installation is complete, you will see the additional Engines listed in the GlobalCapture License Management interface.

Client Installation

When a server **Demo** or **Full Product** is installed, it will create a **SmartSearch Client Installation** folder. Use this folder to perform the installation of clients. This folder can be shared out from the server to everyone, then run over the network.

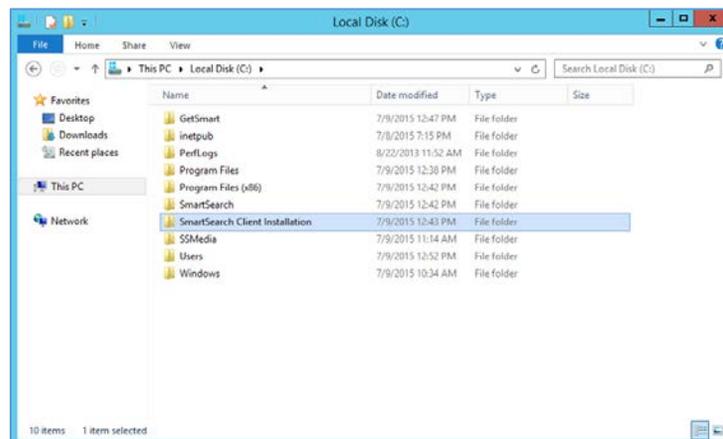


CAUTION: Do not use the SmartSearch Client Installation folder that is located in the `SSMedia` folder. The directory in `SSMedia` is the source of the directory that ends up on the application server, but the files that are written to the directory on the server are updated with install-specific information.

It is recommended that you share out the "SmartSearch Client Installation" folder, then navigate to that folder using a UNC path. The following steps will show you the location of this folder and the steps of how to install it from the client. By default, the "SmartSearch Client Installation" folder is located at the root of `C:\`.



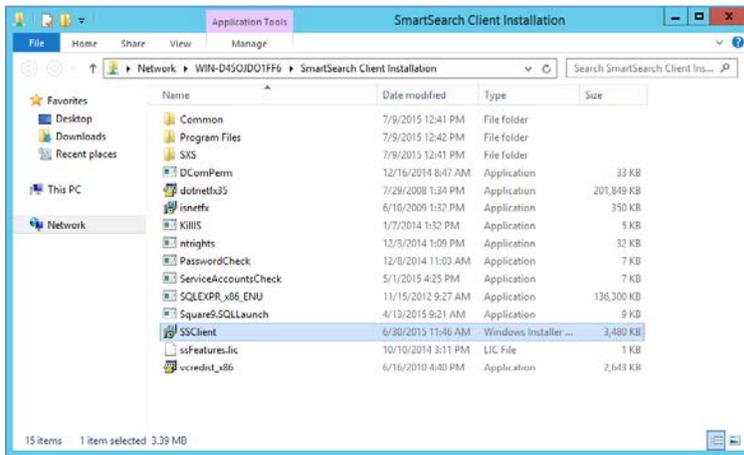
Note: You can only perform the client installation once the server installation has been done.



SmartSearch Client Installation Folder

Installation Wizard

1. To install, you must be on the client that SmartSearch will be installed onto. On the client, navigate to the client installation folder.



(SmartSearch Client Installation for UNC Path)

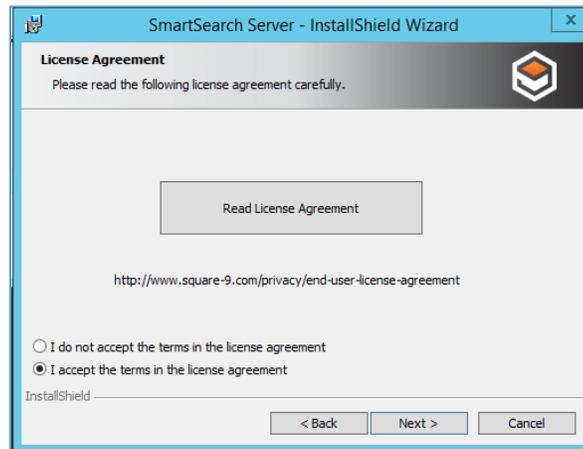
2. To start the Installation Wizard for the SmartSearch client, in the SmartSearch Client Installation folder, select **setup.exe**.
3. Click **Next**.



SSClient Installation Wizard

License Agreement

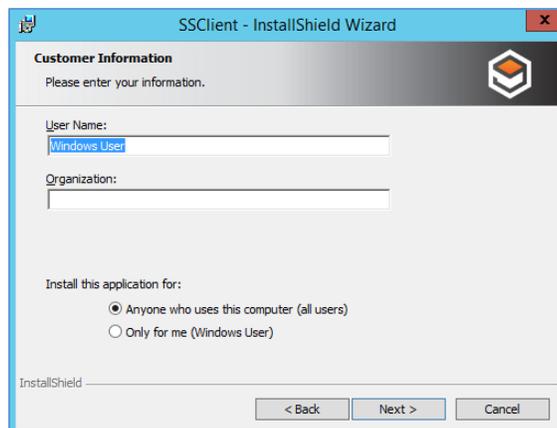
1. Click **Read License Agreement** to read the agreement.
2. Click **I accept the terms in the license agreement** to accept the terms.
3. Click **Next**.



License Agreement

Customer Information

1. In the **Customer Information** window, in the **User Name** text box, enter the name of the SmartSearch client end user.
2. Enter a name in the **Organization** text box.
3. Select from the two **Install this application for** choices:
 - Click **Anyone who uses this computer** to install the client for all users.
 - Click **Only for me** to install the client only for a single end user.
4. Click **Next**.



Customer Information

Custom Setup

To customize the installation, such as installing extra components, choose Custom. Note that optional features can be installed, but will not function without the proper license.

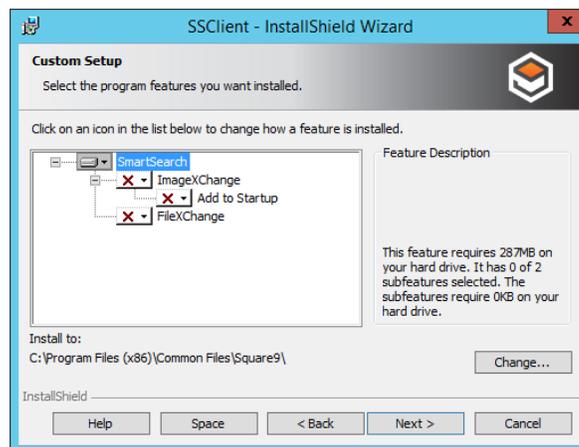
1. In **Setup Type**, choose **Custom**.
2. Click **Next**.
3. In **Custom Setup**, select one or more of the options to install:

- Choose **ImageXChange** to install Image XChange.
- Select **FileXChange** to install File XChange.
- When you click on a feature in the list you will see a description and the amount of hard drive space required for that feature.



Tip: Options Can Be Added Later. These options can be installed after the initial installation. From the workstation, again run `\SmartSearch Client Installation\Setup.exe` located on the app server.

4. To remove a feature from installation, in **Custom Setup**, click the drop-down to the left of any feature to remove and select **This feature will not be available**.
5. To change the installation location of a listed feature from the default:
 - a. Click the name of any feature then click **Change**.
 - b. In the **Install to** text box, choose to:
 - Enter the path for the custom installation location.
 - Browse to the folder and enter it in the **Look In** text box.
 - c. Type in the path to where the client application will be installed in the **Folder Name** text box.
 - d. Click **OK**.
6. Click **Next**.

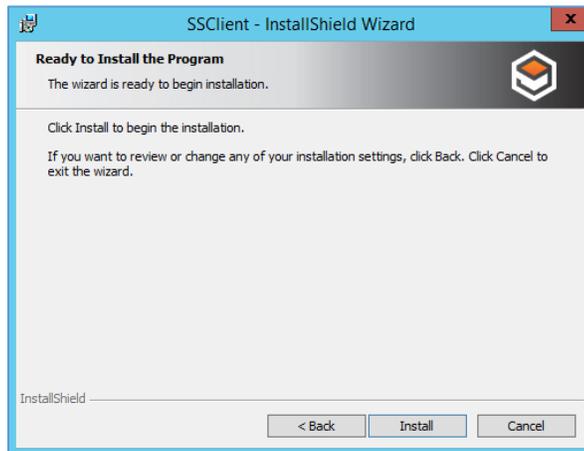


Custom Setup Configuration

Install SmartSearch Client

Once preparation is done, you are ready to install SmartSearch.

1. To install the SmartSearch client, click **Install**.
 - There will be a pause while the installation is processing.
2. If necessary, click **Back** to return to previous dialog boxes and make adjustments to the installation.



Begin Client Installation

3. Once the installation is finished, in the **SmartSearch Wizard Completed** window, click **Finish**.



SmartSearch Client Installation Completed

SmartSearch

- After successfully installing the client, a shortcut is added to the desktop and to the Start menu. Double-click on the shortcut icon to launch SmartSearch.

Post-Installation Requirements

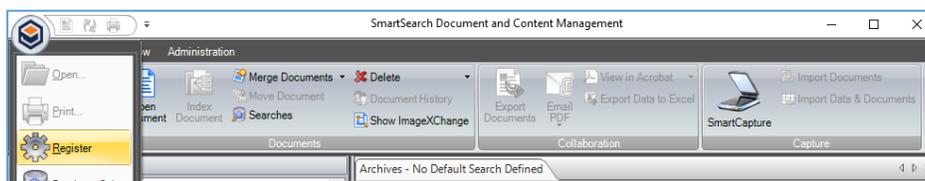
Once SmartSearch is installed you will need to register the product. Fulfillment has sent an email with a link to the media, an `ssFeatures.lic` file, and also a serial number. Use that serial number to register the copy of SmartSearch.

If you do not register SmartSearch, some features may be limited with the system and there is a maximum amount of documents that can be stored into SmartSearch.

SmartSearch Server Registration

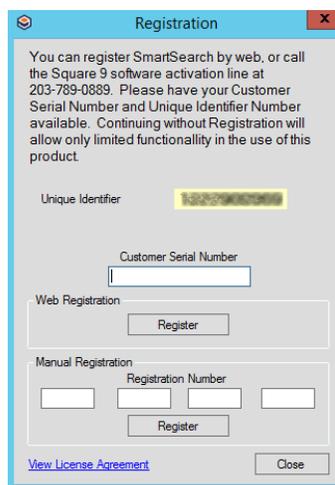
Register from Desktop Client

1. To register in the desktop client, click the applications control menu (Square 9 logo) button.
2. Click **Register**.



SmartSearch Registration

3. In the **Registration** window enter the Customer Serial Number in the text box.
4. In the **Web Registration** group, click **Register**.



Serial Number Registration

- If receiving errors after clicking **Register**, contact the Square 9 Support Department.
5. If needed, in the **Manual Registration** group, enter the number provide by Square 9 into the **Registration Number** text boxes.
6. Click **Close**.

Register from Web Client

1. To register in the web client, in the **Administration** menu, select **Administration**.
2. In the vertical Administration menu, select **System**.
3. Click the Expand (down arrow) icon on the **Registration** bar.

Registration

Status: Unregistered

To re-register or activate new features, you can do so over the web, or by calling the Square 9 Software Activation Line at (203)789-0889.

Unique Identifier:

Serial Number: Required

Manual Registration Features View License Agreement Activate

Registration

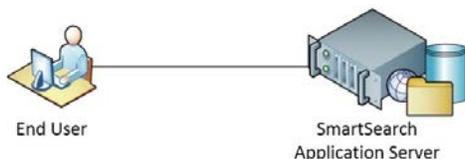
4. To register online, enter the required registration serial number in the **Serial Number** text box.
5. If you did not have an internet connection to perform the web registration or if requested by Support, click **Manual Registration** and enter the number provided by Square 9.
6. To see a list of the Square 9 features enabled by your license, click **Features**.
7. Click the Close Features (X) icon to hide the Features list.
8. Click **View License Agreement** to go to the End User License Agreement (EULA) page on the square-9.com website to review the license agreement.
9. Click **Activate**.

Common Server Configurations

Square 9's modular approach allows you to have the products installed on completely separate servers, the same server (hardware resources permitting) or the same product installed across multiple servers (for example having two SmartSearch servers to handle user load). Below are some examples of common server configurations.

Services and Database on a Single Server

SmartSearch can be installed on a single server, storing images, and hosting its database on the same machine. This is suitable in small to medium environments.



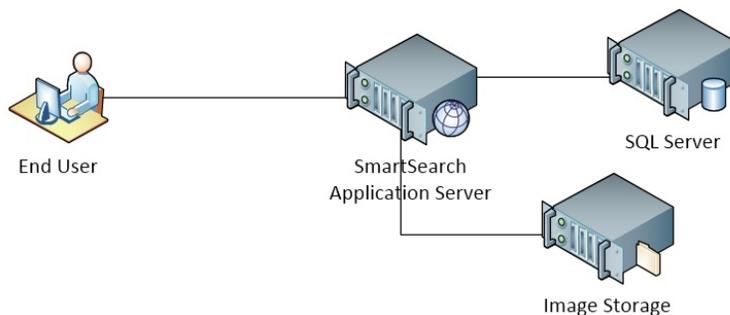
SmartSearch with a Separate SQL Server

In environments where a SQL server is available or demand requires it, the SmartSearch database and the SQL Server database can be installed on separate servers.



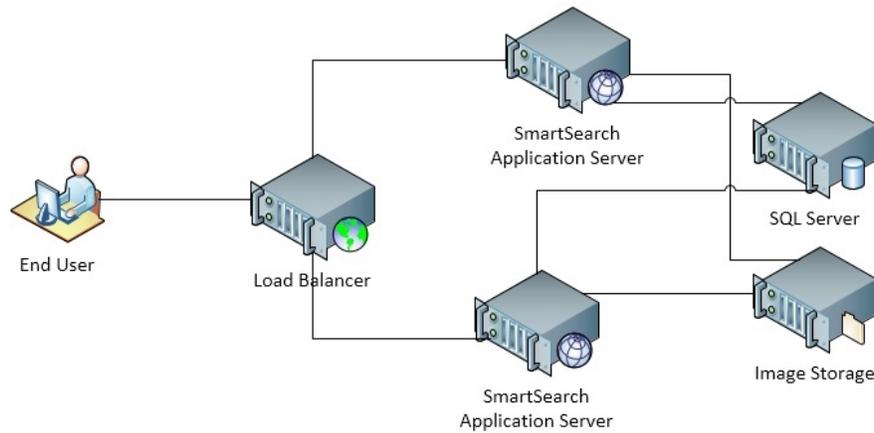
SmartSearch with Separate Network File Storage and Database Servers

In more enterprise level environments, SQL, file storage and application operations may be separated entirely. Images can be stored on a separate file server, such as a NAS, SAN or any other addressable storage and database operations are performed on a dedicated or shared SQL server.



SmartSearch with Multiple Application Servers

In high volume environments, it may be necessary to spread SmartSearch across multiple application servers. As such, use of a load balancer can handle traffic distribution, utilizing separate servers for image storage and database operations. You can create a more highly available environment when databases are stored on clustered SQL instances or images across redundant file storage.



Behind the Scenes: Because KeyFree Indexing in SmartSearch is a server-based activity, in high volume situations or those requiring a large number of simultaneous KeyFree users, performance can be enhanced with additional server processors, load-balancing, or the addition of dedicated KeyFree Indexing hosting. Please contact your Regional Sales Director for more detail on these options.

KeyFree Indexing creates a temporary version of the document, runs an OCR engine, and collects data for Index Fields. Depending upon the systems set up and internet connection, In SmartSearch this can average approximately 12 seconds per document (approximately 20 minutes per 100 documents).