



# **InfoPanels**

## **Installation**

Corporate Broadcasting

# Contents

|                                      |          |
|--------------------------------------|----------|
| <b>Welcome to the InfoPanels</b>     | <b>3</b> |
| Overview of the installation steps   | 3        |
| General installation steps           | 3        |
| <b>InfoPanels</b>                    | <b>4</b> |
| Installation of the InfoPanels       | 4        |
| Preparing                            | 4        |
| Installing                           | 4        |
| InfoBridge InfoPanels Configurator   | 5        |
| SuperOffice Connection Configuration | 6        |
| License and credentials              | 9        |

## Overview of the installation steps

The following section gives a short overview of all the installation steps, on the oncoming pages the installation steps are described in detail.

## General installation steps

- Prepare the InfoPanels server by installing .NET 4.5, IIS and ASP.NET;
- Install the InfoPanels;
- Run the InfoPanels configurator;
- (Optional) Run the SuperOffice Connection configurator;
- Configure license and admin credentials.

See also this knowledge base article:

<http://kb.infobridge.com/hc/en-us/articles/203269201>

### System requirements

Before you start with the installation please read the following knowledge base article about the system requirements carefully:

<http://kb.infobridge.com/hc/en-us/articles/202881022>

### Product Registration

Registration is done over the internet. Therefore a working internet connection is required.

## Installation of the InfoPanels

The following section gives a short overview of the preparation and installation steps.

### Preparing

Before the InfoPanels can be installed the server has to be prepared.

#### Step 1

Install .NET Framework 4.5.

The installer can be downloaded here:

<http://www.microsoft.com/en-us/download/details.aspx?id=30653>

#### Step 2

Install IIS and ASP.NET

The following KB article describes the installation steps for the supported Windows versions:

<http://kb.infobridge.com/hc/en-us/articles/203211892>

### Installing

To install the InfoPanels run the installation application and follow the directions given by the installer.

When you have selected the "**Launch configuration**" option in the last step of the installation the "**InfoBridge InfoPanels Configurator**" will start and the configurator screen appears.

#### NOTE

*The installation application will automatically do the following things:*

- Add an 'InfoPanels' Application Pool;
- Give IIS\_USERS full access on these folders:
  - C:\Program Files (x86)\InfoBridge\InfoPanels\BackgroundImages;
  - C:\Program Files (x86)\InfoBridge\InfoPanels\Logs;
- If "Default Website" is found, an application called 'InfoPanels' will be added to it;
- If it is not found you need to add a website or application manually in IIS Manager.

## InfoBridge InfoPanels Configurator

The InfoPanels Configurator will configure: the InfoPanels database, some basic settings and the SuperOffice connection (optional) which are required before the InfoPanels can be used.

### NOTE

*The InfoPanels Configurator can be started from the start menu at any time:  
Start->All Programs->InfoBridge->InfoPanels->Configuration*

- A Server:** Fill in the server name or IP address of the Microsoft SQL database server that will serve the InfoPanels database.
- B Authentication:** Either select SQL Authentication or Windows Authentication. In case Windows Authentication is used the user running the InfoPanels Application Pool requires access to the database and is **allowed to create databases**.
- C Username:** Username of an SQL user which is **allowed to create databases**.
- D Password:** The password of the SQL user.
- E New / existing database:** Either create a new InfoPanels database, or select an existing InfoPanels database.
- F Database:** For new databases: Enter the name of the InfoPanels database. For existing databases: select the InfoPanels database from the list.
- G Test:** Test the connection settings and display the result.
- H Culture:** Select what culture setting should be used by the InfoPanels. The culture settings are used for properly formatting dates, times and numbers. By default the server culture setting is selected.
- I Use SuperOffice:** Check this box to enable the SuperOffice widgets.
- J Username:** Username of an (active) SuperOffice associate or system user. Note that a regular database user is not sufficient.
- K Password:** The password of the SuperOffice user.
- L Configuration:** By clicking the “**launch**” button the “**SuperOffice Connection Configurator**” is launched. This tool is described in the next section of the manual: SuperOffice Connection Configuration

By pressing the “**OK**” button all settings are saved and the InfoPanels application can be started.

## SuperOffice Connection Configuration

This step is optional. If you are not going to use the SuperOffice widgets this step can be skipped.

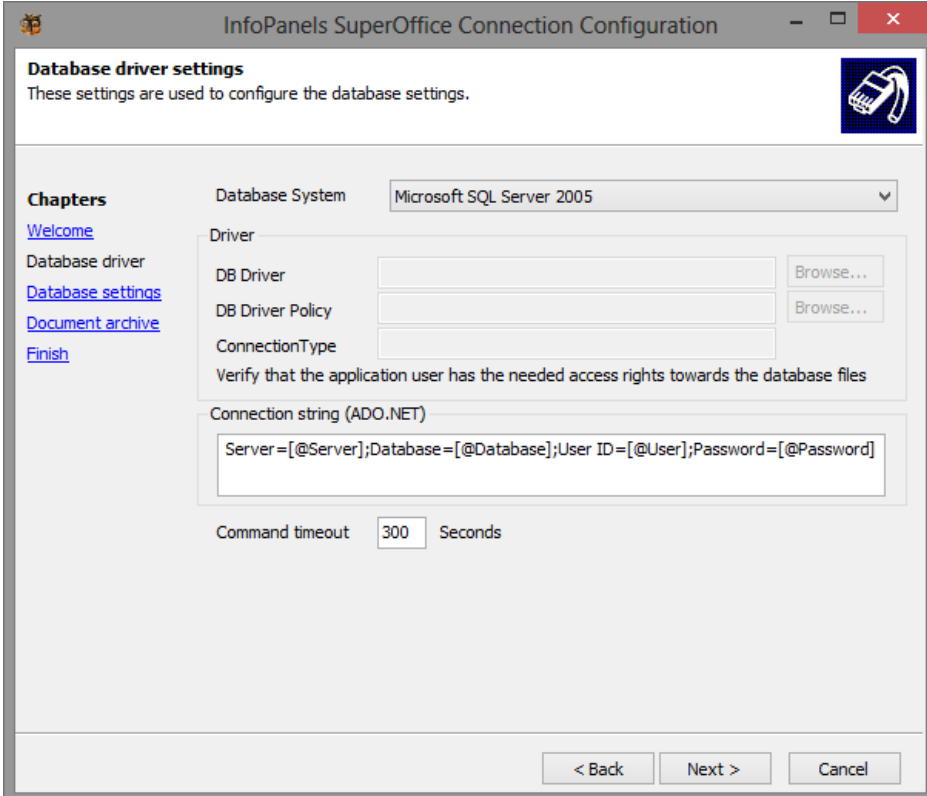
From the InfoPanels Configurator the SuperOffice Connection Configurator is started. In order to use the SuperOffice widgets you have to configure NetServer for SuperOffice CRM. This topic will guide you through all the steps for a successful configuration of NetServer.

### Step 1: Welcome

The welcome screen is shown. Press the **"Next >"** button to start the configuration.

### Step 2: Database driver settings

The **"Database driver settings"** screen is shown; here you must configure your database driver.



The screenshot shows a window titled "InfoPanels SuperOffice Connection Configuration" with a sub-header "Database driver settings". Below the sub-header is a note: "These settings are used to configure the database settings." and a small icon of a hand holding a plug. On the left, there is a "Chapters" list with links: "Welcome", "Database driver", "Database settings", "Document archive", and "Finish". The main area contains the following fields and controls:

- Database System:** A dropdown menu currently showing "Microsoft SQL Server 2005".
- Driver:** A section containing three input fields: "DB Driver", "DB Driver Policy", and "ConnectionType". Each field has a "Browse..." button to its right.
- Verify that the application user has the needed access rights towards the database files**: A text label.
- Connection string (ADO.NET)**: A large text area containing the template: `Server=[@Server];Database=[@Database];User ID=[@User];Password=[@Password]`.
- Command timeout:** A numeric input field set to "300" followed by the text "Seconds".

At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

- Select the Database System from the list.

### WARNING

Do **NOT** change the connection string settings unless you have enough knowledge about this topic!

- Press "**Next >**".

### Step 3: Database settings

The "**Database settings**" screen is shown; here you must configure your database settings.

- Fill in the "**Name or IP Address**" field; this must be the name of your database server where the database system is running or the IP address of that server.
- Fill in the "**Database / Instance**" field; this is the database or instance name of the SuperOffice database.
- Fill in the "**Database user name**" field; set the user name to log on to NetServer (e.g. CRM5 or CRM7).
- The "**Table prefix**" field is usually crm5 or crm7 unless you have created another table prefix for SuperOffice.

- Press "**Test connection**" to test the database settings you have entered!
- If the connection is successful press "**Next >**"; If the connection fails then edit or review your settings and test the connection again.

### NOTE

If the connection problem persists, contact your supplier or go to <http://kb.infobridge.com> to review the Frequently Asked Questions.

#### Step 4: Document Archive

The "**Document Archive**" screen is shown; here you can configure your "**Archive Path**" folder and your "**Temporary Path**" folder; Press "**Next >**" to continue.

The screenshot shows a window titled "InfoPanels SuperOffice Connection Configuration". The "Document Settings" tab is active, with a subtitle "These settings configure how to access the document archive". On the left, a "Chapters" list includes "Welcome", "Database driver", "Database settings", "Document archive", and "Finish". The main area contains two sections: "Location" with "Archive Path" and "Temporary Path" (each with a text box and a "Browse..." button), and "Impersonate User" with an unchecked checkbox, "Archive Domain", "Archive User", and "Archive Password" text boxes, and a "Validate" button. A note states: "Verify that the application user has the needed access rights towards the archive directories". At the bottom, a red error message reads "\* = Input field has invalid input." and navigation buttons "< Back", "Next >", and "Cancel" are present.

#### Step 6: Finish

The configuration is now completed, press "**Finish**".

## License and credentials

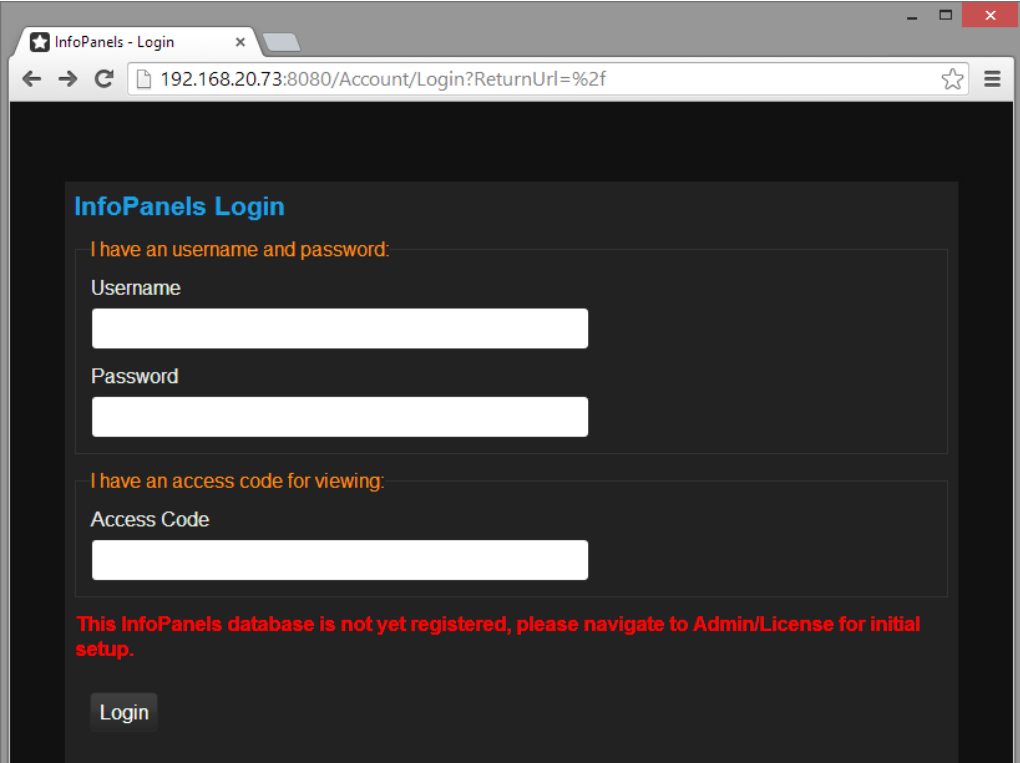
After the InfoPanels and SuperOffice configurators are ran the InfoPanels can be launched.

**Step 1:** Open the InfoPanels website.

Browse to the location of the InfoPanels website. If you are still on the server and you are using the default application the URL is: <http://localhost/InfoPanels>

**Step 2:** Login without credentials

After opening the InfoPanels website the following screen is presented:



The screenshot shows a web browser window titled 'InfoPanels - Login'. The address bar shows the URL '192.168.20.73:8080/Account/Login?ReturnUrl=%2f'. The main content area has a dark background. At the top, it says 'InfoPanels Login' in blue. Below this, there are two sections. The first section is titled 'I have an username and password:' in orange. It contains two white input fields labeled 'Username' and 'Password'. The second section is titled 'I have an access code for viewing:' in orange. It contains one white input field labeled 'Access Code'. At the bottom, there is a red error message: 'This InfoPanels database is not yet registered, please navigate to Admin/License for initial setup.' Below the error message is a 'Login' button.

Either press the “**Login**” button or browse to <http://localhost/InfoPanels/Admin/License> to start the initial setup.

**Step 3:** License

The license screen allows you to manage your license details. It will also enable you to set the InfoPanels admin password.

In case you do not have a working internet connection please contact InfoBridge so we can send you the license file. You can save the license file 'lic.xml' in the bin folder of the InfoPanels installation.

**InfoPanels Admin - License**

**Registration**

InfoBridge Customer ID (Only for existing customers, leave this empty if you are a new customer.) **A**

Company Name **B**

Contact Person Name **C**

Contact Person E-mail Address **D**

Contact Person Phone Number **E**

Subscribe To Our Newsletters ☐ **F**

**License Status**

**Set Admin Credentials**

Username **G**

Password **H**

Apply / Update

- A InfoBridge Customer ID:** If you have received a Customer ID from your partner or from InfoBridge you can enter it in this field. Otherwise this field can be left blank to create a new Customer ID and start your free **30 day trial**.
- B Company Name:** The company name of the license holder.
- C Contact Person Name:** The full name of your primary contact person.
- D Contact Person E-mail Address:** The e-mail address of your primary contact person. This can be used by InfoBridge to get in touch regarding your license.
- E Contact Person Phone Number:** The phone number of your primary contact person. This can be used by InfoBridge to get in touch regarding your license.
- F Subscribe to Our Newsletters:** Check this box if you want to receive the monthly InfoBridge newsletter on the e-mail address specified above.
- G Username:** The username of the InfoPanels Admin user. By default this is **"admin"**. The admin user can update the InfoPanels license information and add/remove additional InfoPanels users.
- H Password:** The password of the admin user.

Press **"Apply/Update"** to save the settings.

You can now login using the admin username and password and start using the InfoPanels!

Please refer to the User Manual for more information.

**<http://www.crmplaza.com/Apps/InfoPanels>**

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