

Liquent InSight Rendering 4.4 Installation Guide

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Liquent InSight Rendering 4.4 Installation Guide

This document describes how to install and configure Liquent InSight Rendering repository on a server.

Perform the procedures in this guide, in the order presented, on each server that will act as a repository in the Liquent InSight Rendering domain.

It includes domain migration options for Oracle database domains. Configuration steps are included for several (but not all) authoring applications supported by the Rendering Service. Any other supported authoring application not listed in the System Support Document is beyond the scope of this document.

Liquent InSight Rendering Installation Prerequisites

Before installing InSight Rendering, ensure that your machine meets the following prerequisites.

- Please refer to the *Liquent InSight Rendering System Support Document (SSD)* for complete system hardware and software prerequisites and recommendations.
- Make sure that you have the license key for the Liquent InSight Rendering version that you want to install. Each new version of Liquent InSight Rendering requires a new license.

For SharePoint Only

When using InSight or InSight Rendering with SharePoint, versioning must be set to 'on' in the SharePoint Libraries in use for InSight Rendering to render documents without error.

To configure versioning:

1. In **SharePoint**, select your library.
2. Choose the versioning settings.
3. Select **Create major and minor versions**.
4. Set the option **Require documents to be checked out before they can be edited?** to **No**.

Upgrade Installation Requirements

You may only upgrade from the following Liquent InSight Rendering releases, as these releases were the only ones certified on Windows 2012, R2.

- Liquent InSight Rendering 4.2
- Liquent InSight Rendering 4.2 CHF 1
- Liquent InSight Rendering 4.2 CHF 2
- Liquent InSight Rendering 4.2 CHF 3
- Liquent InSight Rendering 4.3
- Liquent InSight Rendering 4.3 CHF 1

You may upgrade your Oracle database to Oracle 12.2.0.1, or you may create a new Oracle 12.2.0.1 database.

Recommended InSight Rendering Hardware Requirements

Recommended hardware requirements for the installation of InSight Rendering.

- 2.8 GHz quad core processor based on current Intel platform
- 8 GB RAM or higher
- 35 GB available hard disk space for document rendering

- 50 GB of additional free space for publishing

Software Requirements

General Software Requirements

Software requirements for installing InSight Rendering.

- Microsoft Windows Server 2012, R2, Update KB2919355
- Java
 - Publishing only: JRE 1.8.0_152 (32-bit only) and higher patches
 - Using Documentum D2 only: JRE 1.8.0_XX (64-bit only) and higher patches
- Microsoft .NET Framework 4.5.2 and later CLR 4 versions (reboot after installing)
- Confirm that the Print Spooler service is running prior to installing InSight Rendering
- Ensure that you have installed all the necessary fonts on your InSight Rendering repository servers for full and accurate rendering of your documents
- The following font types are not supported: Custom Encoding (Unable to read certain encodings), Type3, and Macroman

DMS Repository Communication Requirements

The following are required for DMS Repository Communication:

Documentum

- Documentum Foundation Classes (DFC) 7.2.
- Documentum eContent server Docbase Owner Username and Password
- Rendering Service Only: Documentum Directory for Rendering service Watch Folder (create one if needed, e.g. create a new folder in a cabinet within Documentum).

Note: This section is optional for creating a watch folder in Documentum

Open Text Content Server

- Open Text Content Server 10.0 or 10.5

SharePoint

- SharePoint Server 2013, 64-bit

Rendering Service Requirements

Rendering Service Requirements for InSight Rendering.

- Ensure that every authoring application can successfully launch and that all registration dialogs and foreground help applications are disabled.
- Ensure that you have installed all the necessary font sets on each InSight Rendering repository server for full and accurate rendering of your documents. The following font types are not supported: **Custom**, **Encoding** (unable to read certain encoding), **Type 3**, and **MacRoman**.
- Microsoft Office (Word, Excel, PowerPoint): 2016 (32-bit and 64-bit).
- Microsoft Project (application not mandatory but configurations are included in this procedure): 2016 (32-bit and 64-bit).

- Microsoft Visio (application not mandatory but configurations are included in this procedure): 2016 (32-bit and 64-bit).
- Any additional authoring software programs to be used (configuration for additional authoring software is not included as part of this installation procedure).
- Network Share Drive access (for watch queue).
- Share hostname.
- Share domain Username and Password.

Domain Activity Notification Requirements

Domain activity requirements for InSight Rendering

The requirements below are not applicable if you are not setting up Domain Activity Notifications.

- SMTP (email) Server Name
- InSight Rendering Administrator email account

Domain Repository Migration Requirements

Domain Migration Requirements for InSight Rendering.

Migrating to Oracle: Oracle Enterprise or Standard 12c (12.2.0.1.0)

- Oracle server hostname
- Oracle server Database Owner Username and Password
- Oracle Client (Administrator), version 12.2.0.1.0, 32-bit only

Windows SharePoint Communication Prerequisites

Prerequisites for the Windows SharePoint Communication portion of InSight Rendering

- The Windows firewall must be disabled on the InSight Rendering server.
- The Windows WebClient service must be started on the InSight Rendering server.
- You must install the Desktop Experience so that the WebClient service is present.
- You must set security on the InSight Rendering server so that your SharePoint login credentials are persisted. Go to **Start > Control Panel > Internet Options**, and then click the **Security** tab. With the **Internet zone** selected, click **Custom Level**. Under **User Authentication > Logon**, select **Automatic logon with current username and password**. Restart the server.
- You must install the LIQUENT SharePoint Web service on the SharePoint server. See “Installing the SharePoint Web Services” in this document for instructions. Note that this release of Liquent InSight Rendering uses a new Sharepoint Web Connector. Liquent InSight Rendering 4.4 is not certified against the older, pre-4.2 connector version, so you will have to upgrade this on your Sharepoint server. If you have a mixed system (you will be using a pre-4.2 version of Liquent InSight Rendering as well as), you may leave the current connector on the Sharepoint server and install this one. They can co-exist on the same Sharepoint server, but they will have different URLs.

Setup Data

That person must also know the name of the company/organization for the client installation, the location of the installation drives on the client for the client applications, and the directory path for the Oracle database. The following data objects are used to reference these items in the installation procedures.

Page Options	Description
<name>	A user with Local Administrator privileges for the client installations.
<company name>	The name of the company/organization for the client installation.
<install drive>	The installation drives on the client for the client applications.
<Oracle database>	Directory path for the database.

Setting Up the Account Used for Installation

Before you install Liquent InSight Rendering, set up a service account for installing all applications in your publishing or rendering environment, including the Liquent InSight Rendering repositories.

Using a service account to install the applications does the following:

- Ensures that the user profile and application configuration settings are consistent in all repositories in a Liquent InSight Rendering domain.
- Ensures that the **BusinessServiceManager** services inherit consistent and correct profile information.
- Increases stability in the domain.
- Prevents configuration problems.

A domain service account is a Windows domain user account that is given local administrative privileges to Windows for each server in the Windows domain. The domain service account for Liquent InSight Rendering does not need to have domain-wide administrative privileges.

Installing Liquent InSight Rendering 4.4

1. Verify the following for the installation user account:

- The account is a Windows domain user account placed in the Administrators group on the server.
- That this account is the same one used to install all prerequisite software for the server.
- This account will be referred to as local administrator.

Note: The account name may only contain the standard Latin 256 characters.

2. Verify appropriate TCP/IP network access. (Enter NA for all items below that are not applicable.)

- Ping the InSight Rendering Rendering Server by hostname.
- Enter the hostname of the InSight Rendering Server: _____
- The InSight Rendering Server is going to be communicating with an Oracle Database on another network server. Ping that server by hostname. Enter the following information about the Database Server:
- Host Name _____ DB Type _____ DB version _____
Database Name _____

3. Verify that the server's operating system is set to optimize **Applications/Programs** (not background services).

- Select **Start**, right click on **This PC**, select **Properties**.
- Select the **Advanced** tab and click the **Performance** button.
- On the **Visual Effects** tab, select the **Adjust for best performance** radio button.
- On the **Advanced** tab, select the **Adjust for best performance of Programs** radio button.
- Select **OK** twice.

4. Disable Data Execution Prevention:

- Select **Start > Run** and type **cmd**.
- Type `bcdedit.exe /set nx AlwaysOff` and press Enter.
- You will have to reboot the server for this change to take effect. You can do that now or wait until the server configuration is complete.

Note: You may skip this step if it cannot be performed.

5. Verify that Internet Explorer Enhanced Security Configuration is not configured.

6. Launch **Server Manager**.

- In the tree on the left, select the **Local Server**.
- Under the **Properties** section, select **IE Enhanced Security Configuration**.
- Select **Off** for both Administrators and Users.
- Click **OK** to apply your changes.

Installing Internet Information Services (IIS)

How to install Internet Information Services for LIQUENT InSight Rendering

Prerequisites

While still in the Server Manager Dashboard, if IIS is not already installed, select **Add roles and features**.

1. If the **Before you begin** screen is displayed, click **Next**.
2. In the **Select installation type** screen, select the **Role-based or feature-based installation** radio button and click **Next**.
3. In the **Select destination server** screen, select the **Select a server from the server pool** radio button, choose the desired server in the **Server Pool** list, and click **Next**.
4. In the **Select server roles** screen, add the following **Roles: Application Server, File And Storage Services** (should already be selected), **Web Server (IIS)** (if the **Add features that are required for Web Server (IIS)?** dialog displays, ensure the **Include management tools** checkbox is selected and click the **Add Features** button). Click **Next**.
5. In the **Select features** screen, select **.NET Framework 4.5 Features and WoW64 Support** (should already be selected) and click **Next**.
6. In the **Application Server** screen, click **Next**.
7. In the **Select role services** screen, add the following **Role Services: .NET Framework 4.5, Web Server (IIS) Support** (if the **Add features that are required for Web Server (IIS)?** dialog displays, ensure the **Include management tools** checkbox is selected and click the **Add features** button) and everything under and including **Windows Process Activation Service Support** (for any popup screen that displays asking for confirmation to install features, ensure the **Include management tools** checkbox is selected and click the **Add features** button) and select **Windows Process Activation Service Support – HTTP Activation**. Click **Next**.
8. In the **Web Server Role (IIS)** screen, click **Next**.
9. In the **Select role services** screen, leave the defaults and click **Next**.
10. In the **Confirm installation selections** screen, select the **Restart the destination server automatically if required** checkbox and click the **Install** button.

Disable the Windows Firewall

1. Click **Start > Control Panel > System and Security > Windows Firewall**.
2. Select the **Turn Windows Firewall on or off** link.
3. Select all the **Turn off Windows Firewall (not recommended)** radio buttons.
4. Click **OK**.
5. Close the **Control Panel**.

Configure the Service Account to log on as a Windows Service

1. Select **Start > Run**.
2. Type `secpol.msc` and press **Enter**.
3. In the **Security Settings** tree, expand **Local Policies**.
4. Click **User Rights Assignment**.
5. In the right pane, right-click **Log on as a service** and select **Properties**.
6. In the **Log on as a service Properties** box, add the Ligent InSight Rendering service account to the list.
7. Click **OK**.

Disable User Account Control (UAC)

1. While still in the **Local Security Policy** dialog, select **Security Options** in the tree.
2. In the right pane, right-click **User Account Control: Run all administrators in Admin Approval Mode** and select **Properties**.
3. In the **Local Security Setting** tab, select the **Disabled** radio button.
4. Click **OK**.
5. Close the **Local Security Policy** dialog.

Note: If you choose **Action Center** to change or view the UAC settings, you must **Cancel** out of that dialog. Clicking **OK**, even if you do not make any changes, will change this value to **Enabled**.

For changes to take effect, you must reboot the system. You may do this now or later, after you have completed all the configuration steps.

Install LIQUENT InSight Rendering on a Drive other than the C: Drive

1. Launch **Windows Explorer**.
2. Right-click the disk drive, and click **Properties**.
3. In the **Properties** dialog box, on the **Security** tab, click the service account.
4. Click **Edit**.
5. Click the service account again.
6. Click **OK**.
7. In the **Properties** dialog box, click **Advanced**.
8. On the **Advanced** dialog box, on the **Permissions** tab, click the service account and **Change Permissions**.
9. In the **Change Permissions** dialog box, click the service account, and ensure that **Replace all child objects with inheritable permissions from this object** is not selected.
10. Click **OK**.
11. In the **Advanced** dialog box, click **OK**.
12. In the **Properties** dialog box, click **OK**.

Create a NUL: Printer Port

1. Select **Start > Control Panel > Devices and Printers**.
2. Click **Add a printer**.
3. Select **The printer that I want isn't listed**.
4. Select **Add a local printer or network printer as an Administrator**.
5. Select **The printer that I want isn't listed**.

6. Select **Add a local printer or network printer with manual settings** and click **Next**.
7. Select **Use an existing port**.
8. Click the arrow to display all available ports in the drop-down list. Look for a port called **NUL:**. If the **NUL:** port is on your system, click **Cancel**; you do not need to do anything further.
9. If the **NUL:** port is not on your system, select **Create a new port**. Select **Local Port** from the drop-down list. Click **Next**. Enter **NUL:** for the port name.
10. Click **OK**.
11. Click **Cancel**.

Reserve Ports

1. Select **Start > Run**.
2. Type `regedit`, and press **Enter**.
3. Navigate to `HKLM\System\CurrentControlSet\Services\Tcpip\Parameters`.
4. Right-click in a blank spot in the right pane, and click **New > Multi-String Value**.
5. Name the new item **ReservedPorts**, and press **Enter**.
6. Press **Enter** to edit the value.
7. For Value data, type the following on one line: `2866-2872`
8. Click **OK**.
9. Close the registry editor.

Configure Microsoft Word 2016

Prerequisites

Open the Windows Explorer and navigate to the following directories and verify that they contain no files; if they do, remove the files.

For Microsoft Word 2016 32-Bit:

- `%ProgramFiles(x86)%\Microsoft Office\Office16\Startup`
- `%ProgramFiles(x86)%\Microsoft Office\Office16\XLStart`
- `%appdata%\Microsoft\Word\STARTUP`

For Microsoft Word 2016 64-Bit:

- `%ProgramFiles%\Microsoft Office\Office16\Startup`
- `%ProgramFiles%\Microsoft Office\Office16\XLStart`
- `%appdata%\Microsoft\Word\STARTUP`

1. If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.
2. Launch Microsoft Word.
3. In Microsoft Word, click **File > Options**.
4. Click **General**, and do the following:

- a) Under **User Interface options** set the **ScreenTip style** option to **Don't show ScreenTips**.
 - b) Clear the following under **Start up options**:
 - Tell me if Microsoft Word isn't the default program for viewing and editing documents.
 - Open e-mail attachments and other uneditable files in reading view
 - Show the Start screen when this application starts
 5. Click **Display**, and then ensure that nothing is selected under **Always show these formatting marks on the screen**.
 6. Under **Printing options**, clear the following options:
 - Print background colors and images
 - Print hidden text
 - Update fields before printing
 - Update linked data before printing
 7. Click **Proofing** and then under **When correcting spelling and grammar in Word**, clear the following options:
 - Check spelling as you type
 - Mark grammar errors as you type
 - Frequently confused words
 - Check grammar with spelling
 8. Click **Save** and then under **Save documents**, clear the following option:
 - Save AutoRecover information every
 9. Click **Advanced**.
 10. Under **Editing options**, clear the following options:
 - Typing replaces selected text
 - When selecting, automatically select entire word
 - Allow text to be dragged and dropped
 - Use CTRL + Click to follow hyperlink
 - Automatically create drawing canvas when inserting AutoShapes
 - Use smart paragraph selection
 - Use smart cursoring
 - Prompt to update style
 - Keep track of formatting
 11. Under **Cut, copy and paste**, clear the following options:
 - Show Paste Options button when content is pasted
 - Use smart cut and paste
 12. Under **Show document content**, clear the following options:
 - Show background colors and images in Print Layout view
 - Show field codes instead of their values
 13. Under **Show document content**, select the following option:
 - Show drawings and text boxes on screen
 14. Under **Print**, clear the following options:
 - Print in background
 - Print XML tags
 - Print field codes instead of their values
 - Scale content for A4 or 8.5 x 11" paper sizes
 15. Under **Save**, clear the following option:
 - Always create backup copy
-

- Allow background saves
16. Under **General**, clear the following options:
 - Provide feedback with sound
 - Provide feedback with animation
 - Confirm file format conversion on open
 - Update automatic links at open
 17. Click **Trust Center**.
 - Under **Microsoft Word Trust Center**, click **Trust Center Settings**.
 - Click **Privacy Options** and then clear all options under **Privacy Options** in the right pane.
 18. Under **Document-specific settings**, clear the following option:
 - Warn before printing, saving or sending a file that contains tracked changes or comments
 19. Under **Document-specific settings**, select the following options:
 - Store Random numbers to improve Combine accuracy
 - Make hidden markup visible when opening or saving
 20. Click **File Block Settings** and clear all **Open** and **Save** boxes.
 21. Select **Message Bar**, and then select **Never show information about blocked content**.
 22. Select **Protected View**, and then clear all items.
 23. Select **Macro Settings**.
 - Select **Enable all macros**.
 - Select **Trust access to the VBA project object model**.
 24. Select **ActiveX Settings**.
 - Select **Enable all controls without restrictions and without prompting**.
 - Clear **Safe mode**.
 25. To close the **Word Options** dialog box, click **OK** twice.
 26. Click **Review** tab on the Menu Bar.
 - In the **Tracking** options section upper drop-down list, select **All Markup**.
 27. Close Microsoft Word.

Configure Microsoft Excel 2016

Prerequisites

If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.

1. Launch Microsoft Excel.
2. In Microsoft Excel, click **File > Options**.
3. Click **General**.
4. Under **User Interface options**, set the **ScreenTip style** to **Don't Show ScreenTips** option.
5. Under **Start up options**, clear the following options:
 - Tell me if Microsoft Excel isn't the default program for viewing and editing spreadsheets
 - Show the Start screen when this application starts
6. Click **Formulas** and then under **Error Checking**, clear the **Enable background error checking** option.

7. Click **Save** and then under **Save workbooks**, clear the **Save AutoRecover information every** option.
8. Click **Advanced**.
9. Under **Cut, copy and paste**:
 - a) Clear the following options:
 - Show Paste Options button when content is pasted
 - Show Insert Options buttons
 - b) Select the following option:
 - Cut, copy and sort inserted objects with their parent cells
10. Under **Display**, clear the **Show function ScreenTips** option.
11. Under **General**, clear the following options:
 - Ask to update automatic links
 - Scale content for A4 or 8.5 x 11" paper sizes
12. Click **Trust Center**.
 - a) Under **Microsoft Excel Trust Center**, click **Trust Center Settings**.
 - b) Click **Privacy Options** and then clear all options.
13. Click **File Block Settings** and clear all **Open** and **Save** boxes.
14. Select **Message Bar**, and then select **Never show information about blocked content** option.
15. Select **Protected View**, and then clear all options.
16. Select **Macro Settings**.
 - a) Select **Enable all macros** option.
 - b) Select **Trust access to the VBA project object model** option.
17. Select **ActiveX Settings**.
 - a) Select **Enable all controls without restrictions and without prompting** option.
 - b) Clear **Safe mode** option.
18. To close the **Excel Options** dialog box, click **OK** twice.
19. Close Microsoft Excel.

Configure Microsoft PowerPoint 2016

Prerequisites

If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.

1. Launch Microsoft PowerPoint.
2. In Microsoft PowerPoint, click **File > Options**.
3. Click **General**, and do the following:
 - a) Under **User Interface options** set the **ScreenTip style** option to **Don't show ScreenTips**.
 - b) Clear the following under **Start up options**:
 - Tell me if Microsoft PowerPoint isn't the default program for viewing and editing presentations.
 - Show the Start screen when this application starts
4. Click **Proofing** and then under **When correcting spelling in PowerPoint**, clear the following option:
 - Check spelling as you type
5. Click **Save** and then under **Save presentations**, clear the following option:

- Save AutoRecover information every
6. Click **Advanced**.
7. Under **Editing options**, clear the following options:
 - When selecting, automatically select entire word
 - Allow text to be dragged and dropped
8. Under **Cut, copy and paste**, clear the following options:
 - Use smart cut and paste
 - Show Paste Options button when content is pasted
9. Under **Slide Show**, clear the following options:
 - Show menu on right mouse click
 - Show popup toolbar
 - Prompt to keep ink annotations when exiting
 - End with black slide
10. Under **Print**, clear the following option:
 - Print in background
11. Under **General**, clear the following options:
 - Provide feedback with sound
 - Show add-in user interface errors
12. Click **Trust Center**.
 - Under **Microsoft PowerPoint Trust Center**, click **Trust Center Settings**.
 - Click **Privacy Options** and then clear all options under **Privacy Options** in the right pane.
13. Click **File Block Settings** and clear all **Open** and **Save** boxes.
14. Select **Message Bar**, and then select **Never show information about blocked content**.
15. Select **Protected View**, and then clear all items.
16. Select **Macro Settings**.
 - Select **Enable all macros**.
 - Select **Trust access to the VBA project object model**.
17. Select **ActiveX Settings**.
 - Select **Enable all controls without restrictions and without prompting**.
 - Clear **Safe mode**.
18. To close the **PowerPoint Options** dialog box, click **OK** twice.
19. Close Microsoft PowerPoint.

Configure Microsoft Project 2016

Prerequisites

If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.

1. Launch Microsoft Project.
2. In Microsoft Project, click **File > Options**.
3. Click **General**.
4. Under **User Interface options**, set the **ScreenTip style** to **Don't Show ScreenTips** option.

5. Under **Start up options**, clear the **Show the Start screen when this application starts** option.
6. Click **Schedule** and then under **Schedule**, clear the **Show scheduling messages** option.
7. Under **Schedule Alerts Options**, clear the following options:
 - Show task schedule warnings
 - Show task schedule suggestions
8. Click **Save** and then under **Save projects**, clear the **Auto save every** option.
9. Click **Advanced**.
10. Under **General**, clear the following options:
 - Set AutoFilter on for new projects
 - Prompt for project info for new projects
 - Show add-in user interface errors
 - Open last file on startup
11. Under **Planning Wizard**, clear the **Advice from Planning Wizard** option.
12. Under **General options for this project**, clear the **Automatically add new resources and tasks** option.
13. Under **Edit**, clear the **Ask to update automatic links** option.
14. Click **Trust Center**.
 - a) Under **Microsoft Project Trust Center**, click **Trust Center Settings**.
 - b) Click **Privacy Options** and then clear all options.
15. Click **Legacy Formats** and clear the **Allow loading files with legacy or non-default file formats** option.
16. Click **Macro Settings** and select the **Enable all macros** option.
17. To close the **Project Options** dialog box, click **OK** twice
18. Close Microsoft Project.

If you are asked to save the changes to the document, select **No**.

Configure Microsoft Visio 2016

Prerequisites

If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.

1. Launch Microsoft Visio.
2. In Microsoft Visio, click **File > Options**.
3. Click **General**.
4. Under **User Interface options**, set the **ScreenTip style** to **Don't Show ScreenTips** option.
5. Under **Start up options**, clear the **Show the Start screen when this application starts** option.
6. Click **Proofing**.
 - Under **When correcting spelling in Microsoft Office programs**, select the **Ignore words that contain numbers** option.
 - Under **When correcting spelling in Visio**, clear the **Check spelling as you type** option.
7. Click **Save** and then under **Save documents**, clear the the following options:
 - Save AutoRecover information every
 - Prompt for document properties on first save
8. Click **Advanced**.

9. Under **Save/Open**, clear the following options:
 - Show file save warnings
 - Show file open warnings
10. Click **Trust Center**.
 - a) Under **Microsoft Visio Trust Center**, click **Trust Center Settings**.
 - b) Click **Privacy Options** and then clear all options.
11. Click **File Block Settings** and clear all **Open** and **Save** boxes.
12. Select **Message Bar**, and then select **Never show information about blocked content** option.
13. Select **Macro Settings**.
 - a) Select **Enable all macros** option.
 - b) Select **Trust access to the VBA project object model** option.
14. Select **ActiveX Settings**.
 - a) Select **Enable all controls without restrictions and without prompting** option.
 - b) Clear **Safe mode** option.
15. To close the **Visio Options** dialog box, click **OK** twice
16. Close Microsoft Visio.

If you are asked to save the changes to the document, select **No**.

Configure Microsoft Outlook 2016

If you intend to use Outlook to render e-mail messages, you must configure Outlook to have an e-mail box. Configure this per your company's guidelines. It would be best to use the service account as the Outlook entity.

If you are not already logged in, login to the Liquent InSight Rendering Server as local administrator.

1. Launch Microsoft Outlook.
2. In Microsoft Outlook, click **File > Options**.
3. Click **General**.
4. Under **User Interface options**, set the **ScreenTip style** to **Don't Show ScreenTips** option.
5. Under **Start up options**, clear the **Make Outlook the default program for E-mail, Contacts, and Calendar** option.
6. Click **Mail** and then under **Save Messages**, clear the following options.
 - Automatically save items that have not been sent after this many minutes
 - Save forwarded messages
 - Save copies of messages in the Sent Items folder
7. Under **Tracking**, set the option **For any messages received that includes a read receipt request to Never send a read receipt**.
8. Click **Search** and then under **Sources**, clear the **Show prompt to enable Instant Search** option.
9. Click **Advanced** and then under **Outlook start and exit**, clear the **Empty Deleted Items folders when exiting Outlook** option.
10. Under **Reminders**, clear the following options:
 - Show reminders
 - Play reminder sound
11. Under **Other**, clear the **Prompt for confirmation before permanently deleting items** option.

12. Click **Trust Center**.
 - a) Under **Microsoft Outlook Trust Center**, click **Trust Center Settings**.
 - b) Click **Privacy Options** and then clear all options.
13. Click **Automatic Download** and clear the **Warn me before downloading content when editing, forwarding, or replying to e-mail** option.
14. To close the **Outlook Options** dialog box, click **OK** twice.
15. Close Microsoft Outlook.

If you are asked to save the changes to the document, select **No**.

Configure Microsoft Internet Explorer 11

1. Launch Internet Explorer.
2. From the menu, select **Tools > Internet options**.
3. Select the **Advanced** tab. Under **Security**, uncheck the following:
 - **Warn about certificate address mismatch**
 - **Warn if changing between secure and not secure mode**
 - **Warn if POST submittal is redirected to a zone that does not permit posts**
4. Click **OK**.

If you need to reboot your computer because of changing the checkbox for **Warn about certificate address mismatch**, you may do so now or later.

Oracle Database Installation

These topics describe in detail how to install or upgrade an Oracle Database.

First Time Installation Table Creation Notes

Note: When creating your database, deselect the **Create as Container database** option in the **Oracle Database Configuration Assistant Select Database Creation Mode or Specify Database Identification Details** dialog.

Note: When creating your database, select the **Unicode (AL32UTF8)** and **National Character Set UTF8 - Unicode 3.0 UTF-8 Universal** character sets.

If you are installing Liquent InSight Rendering for the first time, arrange for an Oracle DBA or qualified technician to execute the Oracle SQL script `Oracle-repositoryINSTALL.sql`. The person who executes this script needs to be aware of the following:

- The installation script can be run either directly on the database server or remotely from a Liquent InSight Rendering client running Windows with Oracle's SQL*Plus. The Oracle client *must* be the same version as the Oracle DB software on the DB server.
- Verify that you are running the Oracle Database installation SQL script on a Windows based computer. If your Oracle Database is hosted by a Unix server, you must run the Oracle Database installation SQL script on a Windows client that can remotely access the database server using Oracle's SQL*Plus.
- The newly created service must be included in the local `tnsnames.ora` file on each Liquent InSight Rendering repository.

First Time Installation Table Creation

1. On the computer where you are running the installation script, create a temporary install directory, for example `C:\Install\IRDB`.
2. From the Ligent InSight Rendering installation media, copy every file from the `EnterpriseServices\Common\Ligent\Database` folder to the temporary install directory.
3. Use a text editor to edit the `define.install` file to define the `orapath` variable as the locations of the database tables on the Oracle database server.
4. Save and close the file.
5. Use a text editor to edit the `define.passwords` file to define the `vistapass` variable as the password of the new `vista1` user that is used to connect the Ligent InSight Rendering server to the database.
6. Save and close the file.
7. Open a Command Prompt window and do the following:
 - a) At the command prompt, enter: `sqlplus /nolog`.
 - b) At the `SQL>` prompt, enter: `connect system/<system password>@<SID>`.
The command prompt returns `Connected` and then `SQL>`.
 - c) Enter `@` followed by the complete file path to the customized SQL script.
For example, `@"C:\Install\IRDB\Oracle-repositoryINSTALL.sql"`.
The SQL script runs and the `SQL>` prompt is returned when the script completes.
8. To test the connection to the database for the `vista1` user, do the following:
 - a) At the command prompt, enter `sqlplus /nolog`
 - b) At the `SQL>` prompt, enter `connect vista1/<new vista1 password>@<SID>`
 - c) Confirm that the connection is successful.
9. Enter `Exit` to close the `sqlplus` connection.
10. Enter `Exit` to close the **Command Prompt** window.

Note: It is normal to receive `ORA-01418: specified index does not exist` errors since the script is trying to delete indexes that do not exist.

Installation Using an Oracle Database Domain (Oracle Only)

Note: You must have already installed the 32-bit version of the Oracle version 12.2.0.1 client (Administrator) on the Ligent InSight Rendering server. The 64-bit client will not work with Ligent InSight Rendering.

Note: Due to a known Oracle issue, an "unable to connect" error can appear. Perform the following procedure to be able to connect.

1. Select **Start > Run**. Type `cmd` and press **Enter**.
2. `cd` to the `bin` folder under the Oracle client installation path.
3. At the prompt, type: `regsvr32 oraoledb12.dll` and press **Enter**. Select **OK** for the acknowledgment pop up.
4. Type `exit` and press **Enter** to close the command prompt.

Install the LIQUENT InSight Rendering Software

1. If you are not already logged in, login to the Lquent InSight Rendering server as local administrator.
2. Copy the installation files from the LIQUENT installation media to either a local drive on the Lquent InSight Rendering server, or to a network drive that the Lquent InSight Rendering server can access. LIQUENT recommends performing the installation from a local drive.
3. Locate the `setup.exe` file in the installer's **EnterpriseServices** directory, right-click it and select **Run as administrator**.
4. On the **InstallShield Welcome** window, click **Next**.
5. On the **Customer Information** window, enter the **User Name** and the **Company Name**, and leave the default of **Anyone who uses this computer (all users)** selected. Click **Next**.
6. On the **License Agreement** window, read the License Agreement and click **Yes**.
7. On the **Choose Destination** window: to accept the default installation destination, click **Next**. To change the default location, click **Browse**, select the desired location, click **OK**, and then click **Next**.
8. On the **License File** window, click **Browse**, navigate to the license file, highlight it, and select **Open**. Click **Next**.
9. On the **User Information** window, enter the following:
 - a) Domain: _____
 - b) User: local administrator
 - c) Password: _____
 - d) Confirm the password
10. On the **Oracle Database Information** page, enter the following:
 - a) Service (Global Database Name) _____
 - b) User – **vista1** by default.
 - c) Enter Password for **vista1** _____
 - d) Confirm the password.
 - e) Click **Test Connection**.
 - f) When completed, click **Next**.
11. On the **Start Copying Files** page, verify the information and click **Next**.
12. On the **InstallShield Wizard Complete** page, click **Finish**.
13. Launch Windows Explorer and check for the existence of the following folder:
 - a) For Office 2016, 64-bit: %WINDIR%\SysWOW64\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache
 - b) For Office 2016, 32-bit: %WINDIR%\system32\config\systemprofile\AppData\Local\Microsoft\Windows\INetCache
 - c) If the folder does not exist, create it.
14. If you are upgrading from InSight Rendering 4.2, 4.2 CHF 1, 4.2 CHF 2, 4.2 CHF 3, 4.3, or 4.3 CHF 1, or if you are reusing the database from a previous installation, check the following after upgrading all InSight Rendering servers in the domain:
 - Launch **Domain Manager** (via the menu or desktop icon) from any server.
 - In the **Configuration** tab, in the tree on the left, select **Services** under the first server.
15. In the pane on the right, check the following:
 - a) Ensure **Concurrent for Alias printer** is **1**.
 - b) Ensure **Retry Interval** is **1 or greater** if **Retry Count** is **1 or greater**.

This default has changed to prevent timeout errors of `generate-printer-output` requests for PostScript printers.

16. If the above values are not as specified, double-click the service, make the change in the **Service Properties** dialog, and select **OK**.
17. Repeat the checks for all the other servers in the domain.
 - a) If you made changes, select the **Save** icon and click **Yes** in the confirmation dialog.

Liquent InSight Rendering Service (IRS) Installation

Prerequisites

If you will be connecting to a Liquent InSight Rendering Publisher system, you must install the Liquent InSight Rendering Service on at least one Liquent InSight Rendering server in the domain. This server is specified in the `insight.var` file on the InSight Application Server. Installing the Liquent InSight Rendering Service on more than one Liquent InSight Rendering Server will ease disruption caused if the Liquent InSight Rendering Server specified in `insight.var` goes down.

Note: If this is an upgrade and you have the Liquent Enterprise Services Connector installed, you must uninstall that before installing the Liquent InSight Rendering Service. Since they use the same port, they cannot coexist on the same server.

1. Install the IRS via the installer. Copy the installation files locally from the `InSightRenderingService` folder in the installer. Right-click on `setup.exe` and select **Run as administrator**.
2. On the **Welcome** page, click **Next**.
3. On the **Customer Information** page, enter the *User Name*, *Company Name*, and *Serial Number*. Click **Next**.
4. On the **License Agreement** page, read the License Agreement and then click **Yes**.
5. On the **Choose Destination Location** page, choose to accept the default **Destination Folder** or **Browse** to another folder. Click **Next**.
6. On the **Start Copying Files** page, verify the displayed information and then click **Next**.
7. On the **Setup Status** page, when the **InstallShield Wizard Complete** page appears, select **Finish**.
8. Launch IIS Manager (**Start > Control Panel > Administrative Tools**).
 - a) Select the server in the tree on the left.
 - b) Double-click **ISAPI and CGI Restrictions** in the middle panel (if it is not displayed, select the **Features View** at the bottom of the middle pane).
 - c) If any of the entries are **Not Allowed**, right-click on it and select **Allow**.
9. Select **Application Pools** under your server name in the tree on the left.
 - a) Right-click on **InSightRenderingService** and select **Advanced Settings**.
 - b) Edit the value for **Identity** (under **Process Model**) and select **ApplicationPoolIdentity** in the dropdown under **Built-in account**.
 - c) Under **Load User Profile**, select **True**.
 - d) Click **OK** twice.
 - e) Stop and Start the **InSightRenderingService** application pool (right panel).
10. Select the **InSight Rendering Service** site in the tree.
 - a) Double-click **Authentication** in the middle pane.

- b) Right-click on **Anonymous Authentication** and select **Enable**.
If any other entries are Enabled, right-click on them and select **Disable**.
11. Repeat the previous step for the **InSightRenderingService Virtual Directory**, located under the **Liquent InSight Rendering** site.
12. Select the **Liquent InSight Rendering** site and click **Restart**.
13. Check that IIS is properly configured by entering the following in a browser: `http://server_name:2861/InSightRenderingService/Service.svc?wsdl` . If Internet Explorer displays some XML (with no error), the setup is correct.

Liquent InSight Rendering Backbone Generator Installation

If you will be using , you must manually install the Backbone Generator to be able to create eCTD XML backbones.

1. Create the following directory on your InSight Rendering server: `<IR_INSTALLATION_DIRECTORY>\BackboneGeneratorService\3.5\Lib`
If the directory already exists, delete all files in it.
2. In the installation media for Liquent InSight, navigate to the folder called **ectd-backbone**.
 - a) Unzip the contents to a network share that all the Liquent InSight Rendering servers have access to.
 - b) Copy the unzipped files to the folder in the previous step on each Liquent InSight Rendering server that will be used for publishing.
3. Set the `JAVA_Home` environment variable:
 - a) Right-click on the **Start**, select **System**.
 - b) Select the **Advanced** system settings link.
 - c) On the **Advanced** tab, click **Environment Variables**.
 - d) In the **System variables** field, if `JAVA_HOME` is not specified click **New** and create it.
 - e) For **Variable name**, type `JAVA_HOME`.
 - f) For **Variable value**, type the path to the Java installation, for example: `<drive>:\Program Files\AdoptOpenJDK\jre-8.0.202.08`. Note that this is the correct path if you can append `\bin\server` to it to get to the folder where `jvm.dll` is located.
 - g) When completed, click **OK** two or three times to close all dialogs.
4. In the Environment Variables dialog box, add the `TNS_ADMIN` variable.
 - a) In the **System variables** field, click **New**.
 - b) For Variable name, type `TNS_ADMIN`.
 - c) Open Windows Explorer, navigate to the `admin` directory of the Oracle client installation, and copy the path to the clipboard.
 - d) For **Variable value**, paste the path you copied to the clipboard.
5. Ensure the `JAVA\bin` path is in the **Path variable** as follows:
 - a) Select the **Path System Variable** and select **Edit**.
 - b) If the path to the `JAVA bin` file is not in the Path: **For Windows 2016** - Select **New**, provide the path to the bin folder of the JAVA installation, and click **OK**. Click **Move Up** until this entry is at the top of the list. **For Windows 2012** - Prepend the path to the bin folder to the Path.
 - c) Press **OK** three times to close all dialog boxes.
6. Reserve ports:

- a) Right-click **Start**, select **Run**, type `regedit`, and press **Enter**.
- b) Navigate to `HKLM\System\CurrentControlSet\Services\Tcpip\Parameters`.
- c) Right-click in a blank spot in the right pane and click **New | Multi-String Value**.
- d) Name the new item `ReservedPorts`, and press **Enter**.
- e) Press **Enter** to edit the value.
- f) For Value data, type the following on one line: `2866-2872`
- g) Click **OK**.
- h) Close the registry editor.

Configuring Services

1. Select **Start > Run**, type `services.msc`, and click **Enter**.
2. If you intend to publish to paper, start the **Print Spooler** service and set it to **Automatic**.
 - a) Right-click on the **Print Spooler** service.
 - b) Select **Properties**.
 - c) Set **Startup type** to **Automatic**.
 - d) Click **Start**. Click **OK**.
3. If you will be connecting to a SharePoint server, start the **WebClient** service and set it to **Automatic**.
 - a) Right-click on the **WebClient** service.
 - b) Select **Properties**.
 - c) Set **Startup type** to **Automatic**.
 - d) Click **Start**.
 - e) Click **OK**.

Memory Allocated to Java-based Business Services

Liquent InSight Rendering uses the Java-based eCTD backbone business service to create the XML files and checksum files required for a compliant eCTD submission. The eCTD backbone business service, as well as any other Java-based business service, is allocated a maximum of 512 MB of memory by default on a Liquent InSight Rendering repository server, which is usually sufficient for most publishing jobs. However, if the memory allocation is not enough, the eCTD backbone job will fail. To avoid this error, Domain Manager enables you to increase the maximum amount of memory on the servers in the Liquent InSight Rendering domain that can be allocated to a Java-based business service.

Memory Allocated to Java-based Business Services Memory Increase

1. In Domain Manager, click the **Configuration** tab in the left pane.
2. At the top of the directory tree, right-click **Domain** and choose **Properties**.
3. In the **Domain Properties** dialog box, select the **General** tab.
4. Under **JVM Option (Java business services)**, in the **Memory Size** box, enter a value between 512 and 1024 MB.
5. Click **OK**.
6. Choose **File > Save** to save your changes.

Liquent PostScript Printer Notes

Installing the LIQUENT PostScript Printer Requirements and Notes.

The installation of this printer is optional and only required for PostScript-based printer published output. The following printers are supported:

- Xerox XPIF Job Ticket with Postscript
- Xerox ASCII Job Ticket with Postscript
- Network Imaging System Job Ticket with Postscript
- All Canon imageRUNNER printers with imagePASS controllers
- Konica Minolta bizhub PRO 1050 / bizhub PRO 1050P PS
- Konica Minolta bizhub PRO 1200P / bizhub PRO 1051 PS

Windows must have access to the certificate chain of authority. The certificate chain is available if the server has access to the Microsoft Trusted Root Certificate Program. This is part of Windows Updates.

Otherwise, the customer is responsible for the certificate chain of authority to be available to Windows using the customer's certificate policies.

Install the Liquent PostScript Printer

1. If you are upgrading and the Liquent PS Printer already exists, remove it as follows:
 - a) Go to **Control Panel**, View **Devices and printers**.
 - b) Right-click on the **Liquent PS Printer** and select **Remove device**.
 - c) Click **Yes** at the **Remove Device** confirmation.
2. Create a new folder called `LiquentPSPrinter`.

It can be anywhere on the server, but it is recommended to be in the service account's local user directory, i.e., `C:\Users\.`
3. Select **Start > Control Panel > Devices and Printers > Add a Printer**.
4. Click **The Printer that I want isn't listed**.
5. Select **Add a local printer or network printer with manual settings** and click **Next**.
6. Select the **Create a new port** option and select **Local Port** for the **Type of port**. Click **Next**.
7. On the **Port Name** dialog box, in the **Enter a port name** field, enter an existing local directory path, including a file name with a .ps extension (e.g., `C:\Users\). Click OK. Click Next.`
8. On the **Install the printer driver** dialog box, click **Have Disk...** and browse to the location of the postscript printer driver (the installation files location in the `LiquentPSPrinter` folder) and select the `LIQTPS.inf` file. Click **Open**, and then click **OK** and **Next**.
9. On the **Type a printer name** dialog box, do not change the Printer name from **Liquent PS Printer**. Click **Next**.

If you get a Windows Security prompt asking `Would you like to install this device software?`, select the **Install** button.
10. On the **Printer Sharing** page, choose **Do not Share this Printer**. Click **Next**.
11. On the **You've successfully added a printer** page, do not choose **Set as default printer**. Click **Finish**.

Configure a Document Management System (DMS)

Documentum DMS

Configure Documentum DMS on an InSight Rendering Server

In order to be able to connect to a Documentum Docbase, you must first install the proper Documentum Foundation Classes (DFC) on each InSight Rendering Rendering server and have the correct information in the `dfc.properties` file. See the pertinent Documentum documentation for more information.

If you are upgrading your DFC, it is recommended that you uninstall the previous version of DFC and run a registry cleaning utility before installing the new DFC.

If you are unable to connect to your Documentum docbase with DFC installed, this may be because your Oracle Client installation has placed the incorrect Java version in the Path environment variable. To fix this, prepend the locations of the `Java\bin` and `Java\bin\client` folders to the Path environment variable.

1. To edit the *Path* variable, select **Start**, right-click on **Computer**, and click **Properties**.
2. Select **Advanced system settings**.
3. Click the **Environment Variables** button.
4. Under System variables, double-click the *Path* variable, and then in the **Edit System Variable** dialog box, prepend the value in the *Variable* value field with the locations of the `Java\bin` and `Java\bin\client` folders.
For example: `C:\Program Files (x86)\Java\jre1.8.0_74\bin;C:\Program Files (x86)\Java\jre1.8.0_74\bin\client;`
5. Right click on **Start**, select **Run**, type `regedit` and press **Enter**.
6. Navigate to: `HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Documentum\Components\DJCB` and proceed as follows:
 - If the `VMArgs` key exists, proceed to [Step 11](#).
 - If the `VMArgs` key does not exist, proceed to the next step.
7. Right click in a blank spot in the right pane, and select **New > String Value**. Name the new item `VMArgs`, and press **Enter**.
8. Press **Enter** to edit the data.
9. Type `-Xmx512M` and press **Enter**.
10. Close the registry editor.
11. Select **OK** three times and restart the server.

Configure a Documentum DMS in Domain Manager

1. Launch **Domain Manager**.
2. In the **Domain Manager**, choose **File > Configure DMSs**.
The **DMS Properties** dialog box is displayed.

- Click the **Documentum** tab.
- In the **Docbase Properties** window, provide the following information:

Field	Description
Name:	The name of the Documentum Docbase.
DMS API URL:	<p>The URL of the DMS API, in the form of:</p> <pre><scheme>://<DMSAPIService_Server>:<Port></pre> <p>Where:</p> <ul style="list-style-type: none"> <scheme> is either <code>http</code> or <code>https</code> <DMSAPIService_Server> is the name of the server that the DMS API Service is connecting to <Port> is the port on the server that the DMS API Service connects through

- You will need to do this step on each Ligent InSight Rendering server in the domain.

SharePoint DMS

Install the Sharepoint Web Service (Sharepoint DMS Only) Requirements

You need only do this section if you intend to connect to one or more Sharepoint servers.

Repeat this installation procedure on each Sharepoint server that will act as a Sharepoint repository server.

Note: A prerequisite for installing the Sharepoint Web Service on Sharepoint 2013 is that .NET 4.5 must already be installed on the Sharepoint server. .NET 4.0 will not work.

If you need to uninstall this Web service, stop the IIS service, then use **Add/Remove Programs** or **Programs and Features** to remove the LIQUENT Sharepoint Services program. Then manually remove the LIQUENT Web Services IIS site.

Uninstall the Web Service from older LIQUENT Enterprise Services\ Ligent InSight Rendering versions and install the one supplied in 4.4.

This version of the Sharepoint connector has been refactored and will not work with older versions of Ligent InSight Rendering/LIQUENT Enterprise Services, SmartLink for Word, and SmartLink for PDF. Sharepoint 2010 is no longer supported in Ligent InSight Rendering 4.4.

Install the Sharepoint Web Service (Sharepoint DMS Only)

- Login to the SharePoint server as the local administrator. If you run MSTSC, use the `/admin` switch.
- On the LIQUENT installation media, locate the `LigentSharePointServices` folder and copy the installer to a local drive on the Sharepoint server.
- To run the **Sharepoint Web Services** installer, right-click `setup.exe`, and select **Run as administrator** and complete the installation.

Note: The installer creates an IIS website called `LigentSharepointServices`.

- After running the `LigentSharePointServices` installer:
 - Click the Windows **Start** button.
 - Go to **Administrative Tools > Internet Information Services (IIS) Manager**
- Launch IIS Manager.
 - Expand `<Local Computer>`, `Sites`.

- b) Select the **LiquentSharepointServices** site.
6. Double-click **Authentication** in the middle pane.
 - a) Right-click **Anonymous Authentication** and select **Disable**.
 - b) Right-click **Windows Authentication** and select **Enable**.
7. Select the **LiquentSharePointServices** site. Right-click on **Authentication** and select **Basic Settings**.
 - a) If the **Application** pool is not Sharepoint (usually Sharepoint – 80), click **Select** and choose your Sharepoint application pool.
 - b) Click **OK**.
8. Expand **LiquentSharepointServices** and select the **DMSSharepointServices Virtual Directory**.
 - a) Double-click **Authentication** (in the pane in the middle).
 - b) Right-click **Anonymous Authentication** and select **Disable**.
 - c) Right-click **Windows Authentication** and select **Enable**.
9. Select the **DMSSharePointServices** virtual directory. Right-click on **Authentication** and do the following:
 - a) Select **Basic Settings**.
 - b) If the Application pool is not Sharepoint (usually Sharepoint – 80), click **Select** and choose your Sharepoint application pool.
 - c) Click **OK**.
10. Select the **LiquentSharepointServices** web site and select **Restart** in the right pane.
11. Close the **Internet Information Services (IIS) Manager** window.
12. To check that everything is correctly configured, launch the following URL in a browser: `http://machine_name:2861/DMSSharePointServices/dmssharepointservices.svc`

Configuration Notes for LIQUENT SharePoint Services

After installing LIQUENT Sharepoint Services, if you are unable to connect to your Sharepoint server using its UNC path in Windows Explorer, or if you cannot use the Explorer View in the browser, perform the following steps.

Installing LIQUENT Sharepoint Services may also break the shortcut you use to connect to your Sharepoint Administrator. Just append `default.aspx` to the URL the shortcut places in your browser.

If you need to uninstall the Web service, use **Add or Remove Programs** and remove the LIQUENT Sharepoint Services program. After uninstalling the Sharepoint Web service, you must then manually uninstall the LIQUENT Web Services site from the Sharepoint server using IIS Manager

1. Open **Sharepoint Administrator**.
2. Select **Application Management**.
3. Select **Create or extend Web Application**.
4. Under **Web Application**, select **Change Web Application**.
5. Select your primary Sharepoint application, that is, the Sharepoint application that uses port 80. Leave all the defaults and make note of the port number under **Create a new IIS site**.
6. Click **OK**.
7. Verify that you are now able to use UNC and the Explorer view.
8. Return to Application Management in Central Administration and select **Remove Sharepoint from IIS Web site**.
9. Under **Select IIS Web site and zone to remove**, select the Sharepoint Intranet item you just created.
10. Under **Delete IIS Web sites**, select **Yes**.
11. Click **OK**.

Transfer Files Larger than 100MB

By default, LIQUENT Sharepoint Services will only allow transfer of files that are under 100MB. If you need to transfer files larger than 100MB, do the following:

1. Connect to the Sharepoint server as the local administrator:
 - a) If you run MSTSC, use the `/admin` switch.
2. Log on to the server as the service account user that you set up.
3. Go to the `<installation_location>\DMSSharePointServices\` folder.
4. Open `web.config` file.

Use any XML editor for this (Notepad, for example).
5. Update `maxRequestLength` and `maxAllowedContentLength` parameters with the new limit value.

Please note that the value for `maxRequestLength` should be specified in KB but the value for `maxAllowedContentLength` should be specified in bytes.
6. Save the `web.config` file.

Configure SharePoint DMS in Domain Manager

You only need do this Step if you intend to connect to one or more Sharepoint server(s). You will need to do this Step on each Liquent InSight Rendering server in the domain.

1. Launch **Domain Manager**.
2. In the **Domain Manager**, choose **File > Configure DMSs**.
The **DMS Properties** dialog box is displayed.
3. Click on the **SharePoint** tab.
4. Click **Add**. Provide the following information:

Field	Description
Name:	Any unique way to identify the Sharepoint site. This will be used later to configure the login.
Site URL:	The site URL, usually in the form of: <code>http://{SP_Server_Name}/sites/{Site_Name}</code>
WebService URL:	The URL to access the LIQUENT Sharepoint Services web site, usually in the form of: <code>http://machine_name:2861/DMSSharePointServices/dmssharepointservices.svc</code>

5. Click **OK** twice.
6. Click **File > Save**.

Veeva Vault DMS

Configure the Veeva Vault

Create a Permission Set in Veeva Vault

To create a permission set in the Veeva vault:

1. If the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Users & Groups**.
3. On menu on the left, click **Permission Sets**.
4. In the top-right area of the **Permission Sets** page, click **Create**.
5. On the **New Permissions Sets** page, enter the information for the `Parexel InSight Permissions` permission set.
6. Click **Save**.
7. On the **Permissions Sets** page, click **Parexel InSight Permissions**.
8. At the top of the **Parexel InSight Permissions** page, click **Application**.
9. In the top-right area of the page, click **Edit**.
10. In the **Vault Actions** section of the page:
 - a) On the **API** row, select **All API**.
 - b) On the **Document** row, select **Download Document** and **Download Rendition**.
11. Click **Save**.


Create a Security Profile in Veeva Vault

To create a security profile in the Veeva vault:

1. If the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Users & Groups**.
3. On menu on the left, click **Security Profiles**.
4. In the top-right area of the **Security Profiles** page, click **Create**.
5. On the **New Security Profiles** page, enter the information for the `Parexel Service` service profile.
6. Click **Save**.
7. On the **Security Profiles** page, click **Parexel Service**.
8. In the top-right area of the **Parexel Service** page, click **Edit**.
9. In the bottom-right area of the page, click **Add** and **Existing Permission Set**.
10. In the list click **Parexel InSight Permissions**, and click **OK**.

Create a User in Veeva Vault

To create a user in the Veeva vault:

1. If the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Users & Groups**.
3. On menu on the left, click **Users**.
4. In the top-right area of the **Users** page, click the **Add a User** icon: 
5. On the **Add User** page, enter at least the required information for the `InSight Service` user.
6. In the **Primary Information** section of the page, for **Security Profile**, click **Parexel Service**.

7. Click **Save**.
8. Do one of the following:
 - If are prompted to use the same credentials that are configured for the user in another vault, click **Yes**.
 - If you do not see the prompt (because the user is not configured to use any other vault), type the required information.

Creating a Role and Adding the Role to Lifecycle States in Veeva Vault

Perform this procedure for each lifecycle-state combination that a user needs to access from Ligent InSight Rendering.

To create a role in the Veeva vault:

1. If the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Configuration**.
3. On menu on the left, under **LIFECYCLE MANAGEMENT**, click **Lifecycles & Workflows**.
4. On the **Lifecycles** page, click **General Lifecycle**.
5. At the top of the **General Lifecycle** page, click **Roles**.
6. In the top-right area of the **General Lifecycle** page, Click **Create**.
7. On the **Create Lifecycle Role** page, enter the information for the **Ligent InSight Service Role**. For **Add Default Users When**, select **Starting a workflow** and **Creating a document**.
8. Click **Save**.
9. Click on **Ligent InSight Service Role**.
10. On the **Ligent InSight Service Role** page, click **Default Rule**.
11. Click **Edit**.
12. In the empty box, click the arrow on the right, and click the user **InSight Service**.
13. Select **Default User**.
14. Click **Save**.
15. Add the **Ligent InSight Service Role** role to the Approved state and to each other state for which you want to create LIQUENT renditions. For each state:
 - a) At the top of the **General Lifecycle** page, click **States**.
 - b) Click the state, such as the **Approved** state.
 - c) At the top of the next page, click **Security Settings > Edit**.
 - d) On the **Ligent InSight Service Role** row, select **View Document**, **Edit Fields**, **Download Source**, **Edit Document**, and **Manage Viewable Rendition**.
 - e) Click **Save**.

Create Veeva Rendition Types and Obtaining Veeva Rendition Names

In Veeva, an administrator creates rendition types for document renditions. If the rendition type is for a custom, non-standard rendition, the administrator can add the rendition type to a document. The administrator can also add a standard rendition type to a document type, if the standard rendition type is not by default added to all standard document types.

To create a rendition type and obtain the rendition name that will use:

1. In the **Veeva** vault, if the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Configuration**.
3. On menu on the left, under **DOCUMENT SETUP**, click **Rendition Types**.
4. In the top-right area of the **Rendition Types** page, click **Create**.

5. On the **Create Rendition Type** page, for **Rendition Type** type `parexel`.

Note: InSight Rendering requires the rendition type `parexel` in the Veeva Vault repository that InSight Rendering connects to. InSight Rendering uses this rendition type to reference the standard rendition.

6. Click **Save**.

7. To obtain the rendition name that Veeva generates from the rendition type, call Veeva Support.

Note: Veeva generates a unique rendition name from each rendition type. The rendition identifier values that you create in InSight Rendering Administration must match the rendition names that Veeva generates.

8. Note the following:

- Editing a rendition type does not change the generated rendition name.
- Deleting a rendition type does not delete the generated rendition name.
- Recreating a deleted rendition type creates a new rendition name, not the name generated from the rendition type before the rendition type was deleted. If you recreate a deleted rendition type, call Veeva Support to get the new rendition name.

Associating Rendition Types with Document Types

You need to associate each rendition type with document types.

For instructions on how to do this, see *Adding the Rendition Type to All Documents*.

Adding the Rendition Type to All Documents

Assign the Parexel rendition type to every document type in the vault:

1. If the rightmost item on the bar is **Admin**, click **Admin**.
2. On the bar, click **Configuration**.
3. On menu on the left, under **DOCUMENT SETUP**, click **Document Types**.
4. Assign the `parexel` rendition type and give the **InSight Service** account **Create Document Permission** to every document type in the vault. For each document:
 - a) On the Document Types page, navigate to and point to the document type.
 - b) Click the arrow to the right of the document type, and click **Edit Details**.
 - c) On the **Edit Details** page, for **Rendition Types** click `parexel`.
 - d) Click the **Security** link.
 - e) For **Create Document Permission**, click the arrow and add **InSight Service**.
 - f) Click **Save**.

Note: If you add a document type after performing the preceding procedure, remember to add the `parexel` rendition type to the new document type.

Making Pre-existing Vault Documents Accessible from LIQUENT InSight Rendering


To enable InSight Rendering users to access **Veeva Vault** documents that were in their Vault before your Veeva administrator created the **InSight Service** user, do either of the following:

- Ask Veeva Professional Services to share all documents with the **InSight Service** user, set as the default user for the Lipient InSight Service role.
- If your Veeva administrator enabled the **Library: Bulk Update** feature for your vault, perform the following procedure.

To enable users to access Veeva Vault documents from :

1. If the rightmost item on the bar at the top of the page is **Vault**, click **Vault**.
2. On the bar, click **Library** or **Documents**, whichever is displayed.
(Which is displayed depends on your vault type).



3. Click the rightmost icon: 
4. Under **PERFORM BULK ACTION** click the first option, for all documents.
5. On the **Refine Selection** page, click **Next**.
6. Under **Edit Sharing Settings** click **Add Users to Role**, and click **Next**.
7. On the **Add Users to Role** page:
 - a) For **Users** click **InSight Service**.
 - b) For **Role** click **Lquent InSight Service Role**.
8. Click **Next**.
9. On the **Confirmation** Page, click **Finish**.

Configure LIQUENT InSight Rendering

Configure a Veeva Vault DMS in Domain Manager

This configuration procedure is required only if you intend to connect to one or more Veeva Vaults. When connecting to one or more Veeva Vaults, you must perform this procedure on each InSight Rendering server in the domain.

1. Launch **Domain Manager**.
2. In the **Domain Manager**, choose **File > Configure DMSs**.
The **DMS Properties** dialog box is displayed.
3. Click the **Veeva** tab and click **Add**. Provide the following information:

Field	Description
Repository Name:	The name that identifies the Veeva Vault.
Site URL:	The Veeva Vault URL in the format: <code>https://<vault_name>.veevavault.com/</code>
Rendition Name:	The name that identifies the rendition type that Lquent InSight Rendering uses when performing an operation that requires a rendition. This name must be: <code><rendition type configured in your Veeva vault>__c</code> . Note: The characters before the terminating <code>c</code> are two underscores.

4. Click **OK** twice.
5. Click **FileSave**.

Configure a Veeva Vault Login

To enable Lquent InSight Rendering to communicate with a Veeva Vault DMS, perform the following on one InSight Rendering server in the domain.

1. Start **Domain Manager**. Use the shortcut on the desktop.

2. On the Domain Manager **Configuration** tab, in the tree on the left, right-click **Logins**, and click **New login**.
3. On the **New Login Properties** dialog box, in the **What** field, type `dms://veeva/<repository_name>`.
<repository_name> is the name of a configured Veeva repository in the DMS configuration.
4. In the **User** field, type the InSight Service user ID.

Note: The user ID must be the same user ID configured for logging in to your network. The user ID must have create, read, write, and delete privileges for all Veeva objects that Ligent InSight Rendering accesses.

5. In the **Password** field, type the password for the InSight Service user ID.

Note: The password must be the same password configured for logging in to your network.

Open Text DMS

Configure Open Text DMS on an InSight Rendering Server

Click **Start > Run**, type `regedit`, and press **Enter**. Create the following registry keys:

- a) `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\ Services\Tcpip\Parameters`

Entry	Type of Value	Value
TcpTimedWaitDelay	DWORD	30
MaxUserPort	DWORD	65534

- b) `HKEY_LOCAL_MACHINE\SYSTEM\SOFTWARE\Wow6432Node\LIQUENT\DMS\Livelink Intranet\{OTCS_Server_Name}`

Entry	Type of Value	Value
Cache	DWORD	1
Cachesize	DWORD	1000
Cachetimeout	DWORD	300000

Configure an Open Text DMS in Domain Manager

This configuration procedure is required only if you intend to connect to one or more Open Text Content Servers. When connecting to one or more Open Text Content Servers, you must perform this procedure on each InSight Rendering server in the domain.

1. Launch **Domain Manager**.
2. In the **Domain Manager**, choose **File > Configure DMSs**.
The **DMS Properties** dialog box is displayed.
3. Click the **Open Text** tab and click **Add**. Provide the following information:

Field	Description/Value
Repository Name:	The Livelink service name (case sensitive).
Server Name:	The HTTP server name.

Field	Description/Value
Session Name:	The Database name.
Server Port Name:	2099
Web Application Name:	The name of the Livelink Web application.

4. Click **OK** twice.
5. Click **File**.
6. Click **Save**.

Configure Logins

You only need to do this on one Lipient InSight Rendering server in the domain.

1. Launch **Domain Manager** (shortcut is on the desktop).
2. In **Domain Manager**, on the **Configuration** tab, in the tree on the left, select **Logins**. Right-click in the right pane and select **New login**.
3. On the **New Login Properties** dialog box, supply the following information in the **What** field for each DMS you intend to connect to (including the DMS location for eCTD Definition and Rules files):
 - a) SharePoint: `dms://shpt/sharepoint_site_name`
 - b) Documentum: `dms://dctm/docbase_name` (case sensitive)
 - c) Veeva Vault: `dms://veeva/repository_name`
 - d) OpenText: `dms://llin/OpenText_repository_name`
 - e) File System: `\\machine\share`
(usually, you do not need to supply this for the File System)
 - f) Supply the **User** and **Password**.
4. Click **OK**. Repeat for each login.
5. When completed, click **File > Save**.

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