

# **VAR Guide to Laserfiche Suite: Detailed Hardware/Software Installation Checklist**

*White Paper*

July 2010

**Laserfiche®**

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# Overview

This document outlines the major checklists of items that should be verified before installing the suite of Laserfiche software. These checklists vary from general items that apply to all installations—such as licensing and software—to product-specific items that may or may not apply to your particular installation. As such, it is recommended that you review all of the checklists in this document before starting your installation to determine which items are relevant and to verify that your system meets all of the necessary requirements for each component that applies.

## Checklists

### Hardware

<p><b>Verify the minimum/recommended hardware specifications for all of the products you plan to include in your installation.</b></p> <p><b>Note:</b> Some Laserfiche products are very resource intensive; for successful implementation, it is best to follow the list of recommended hardware requirements. For more information about minimum/recommended hardware specifications, see the <a href="#">Laserfiche Hardware Planning and Specifications</a> white paper.</p>	<input type="checkbox"/>
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### Software

<p><b>Will you be bringing the software with you or has your customer already downloaded the necessary software?</b></p> <p><b>Tip:</b> It is a good idea to have the latest copy of the Laserfiche suite of software on a USB key that you can bring with you on-site.</p> <p>Once on-site, you may want to consider copying the software to either the Laserfiche Server or a network folder specifically intended for software installations.</p>	<input type="checkbox"/>
<p><b>Did the customer request the hardcopy manual?</b></p>	<input type="checkbox"/>

## Activation (if applicable)

Currently, the following products use activation:

- Laserfiche Server 8.1, Rio License Manager 8, Web Access 8.1, Quick Fields 8, Plus 7, and all subsequent versions of these products

For more information about activation, see the [Laserfiche Activation and Licensing](#) white paper.

<b>Were you able to generate your activation keys from the Laserfiche Support site?</b> <b>Note:</b> Activation keys should be obtained from the Laserfiche Support Site at least a few days before the scheduled installation date.	<input type="checkbox"/>
<b>Is port 443 open on the firewall to enable communication with the activation server?</b> <b>Note:</b> The Domain Name System (DNS) name of the activation server is activation.laserfiche.com.	<input type="checkbox"/>
<b>Have you properly activated your products?</b> <b>Note:</b> Activation is included as an installation step for all of the products listed above with the exception of Quick Fields, which must be activated post-installation, and Plus, which must be activated when the product is launched for the first time.	<input type="checkbox"/>

## Licensing

Currently, the following products use pre-made license files instead of activation:

- Laserfiche Server 8.0, Client 8.1, Snapshot 8.0, Web Access 8.0, Quick Fields 7.0, and all prior versions of these products
- All versions of all other Laserfiche products not listed above or covered by activation

For more information about licensing, see the [Laserfiche Activation and Licensing](#) white paper.

<b>Do you have the complete set of customer's product licenses for Laserfiche?</b> <b>Note:</b> Licenses should be obtained from the Laserfiche Support Site at least a few days before the scheduled installation date.
<b>Do you have an actual master license?</b>

## Upgrading

<b>Are you upgrading to Laserfiche 8 from Laserfiche 7 or earlier?</b> <b>Note:</b> If you are upgrading from an earlier version of Laserfiche 8, you can simply run your upgrade ovetop of your existing Laserfiche 8 installation.	<input type="checkbox"/>
<b>If so, have you run the Laserfiche 8 Migration Utility?</b> <b>Note:</b> For more information about upgrading to Laserfiche 8 using the Migration Utility, see the <a href="#">Laserfiche 8 Migration Quick Reference</a> white paper.	<input type="checkbox"/>

## Remote Access

<b>Configure remote access software (e.g., Remote Desktop, VPN, etc.).</b>	<input type="checkbox"/>
<b>Get the IP addresses of the servers that you will need to access.</b>	<input type="checkbox"/>
<b>Get authentication information for VPN and login information for individual servers.</b>	<input type="checkbox"/>

## Rio

<b>What server will the Laserfiche License Manager be installed on?</b> <b>Note:</b> Given that the Laserfiche License Manager is not processor intensive, it is acceptable to install it on the same box as the first Laserfiche Server.	<input type="checkbox"/>
<b>Will the Laserfiche License Manager be able to communicate with all licensed Laserfiche products on the network?</b> <b>Note:</b> This applies to the following products when licenses are generated through Rio License Manager: Laserfiche Server, Laserfiche Web Access, Laserfiche WebLink, Laserfiche Quick Fields, and Laserfiche Import Agent.	<input type="checkbox"/>
<b>Has the hardware arrived at the customer's facility?</b>	<input type="checkbox"/>
<b>Is the OS installed? What version?</b>	<input type="checkbox"/>
<b>Is the server on the network (TCP/IP)?</b>	<input type="checkbox"/>
<b>What is the IP address of the server?</b>	<input type="checkbox"/>

What is the hostname of the server?	<input type="checkbox"/>
Determine a username and password for admin access to the machine.	<input type="checkbox"/>

## Laserfiche Server

Has the hardware arrived at the customer's facility?	<input type="checkbox"/>
Is the OS installed? What version?	<input type="checkbox"/>
Is the server on the network (TCP/IP)?	<input type="checkbox"/>
What is the IP address of the server?	<input type="checkbox"/>
What is the hostname of the server?	<input type="checkbox"/>
<p><b>Verify that the Laserfiche Server can communicate with your Laserfiche applications over the relevant ports.</b></p> <p><b>Note:</b> Depending on your Server operating system, the ports will vary as follows:</p> <ul style="list-style-type: none"> <li>• For the 32-bit edition of Windows XP, the Server and Client communicate on port 5050.</li> <li>• For all other supported operating systems, the Server and Client communicate on port 80.</li> </ul> <p>Additionally, for Workflow installations, the Laserfiche Server must be able to broadcast notifications on port 5051. On the Server machine, port 5053 should also be open.</p>	<input type="checkbox"/>
Determine a username and password for admin access to the machine.	<input type="checkbox"/>

## SQL Server

Confirm architecture. Dedicated or shared server?	<input type="checkbox"/>
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Has the hardware arrived at the customer's facility?	<input type="checkbox"/>
Is the OS installed? What version?	<input type="checkbox"/>
<p><b>Is SQL Server installed? What version?</b></p> <p><b>Note:</b> Laserfiche does not require any specific SQL Server configuration; however, if a customer requires certain SQL Server options (e.g., to support older versions of SQL Server), it is best to configure those during the SQL Server installation. Some of these options may include:</p> <ul style="list-style-type: none"> <li>• <b>Cluster configuration information</b></li> <li>• <b>Windows Authentication</b> (<b>Note:</b> The domain user chosen must be the same user that is configured to log in to both the Laserfiche and Workflow server services.)</li> <li>• <b>Collation</b></li> </ul>	<input type="checkbox"/>
Does the customer have a requirement for where the SQL data file and SQL transaction logs are stored?	<input type="checkbox"/>
Is the server on the network (TCP/IP)?	<input type="checkbox"/>
What is the IP address of the server?	<input type="checkbox"/>
<p>What is the hostname of the server?</p> <p><b>Note:</b> Make sure that the SQL instance has the same name.</p>	<input type="checkbox"/>
Is there remote access to the SQL Server? If so, is it through SQL Server Management Studio and/or Remote Desktop?	<input type="checkbox"/>
What rights will we have to the SQL Server? If not full rights, what limited set of rights will we have?	<input type="checkbox"/>
Will the Laserfiche SQL databases be configured manually?	<input type="checkbox"/>
Are we using SQL Server authentication or Windows Authentication?	<input type="checkbox"/>
<p>Determine an administrative-equivalent username and password for accessing the machine.</p> <p><b>Note:</b> For SQL Server, Laserfiche does not require an admin user; however, the service account that Laserfiche uses to connect to SQL Server must have dbo-level access to the Laserfiche database that is created.</p>	<input type="checkbox"/>

## Workflow

Confirm architecture. Dedicated or shared server?	<input type="checkbox"/>
Has the hardware arrived at the customer's facility?	<input type="checkbox"/>
Is the OS installed? What version?	<input type="checkbox"/>
<b>Have the Workflow prerequisites been installed?</b> <b>Note:</b> By default, most Workflow prerequisites are automatically installed; however, the <b>Windows Message Queuing</b> component must be manually installed on the machines hosting the Workflow Server and Subscriber. For more information on installing this component, see the <a href="#">Workflow help files</a> .	<input type="checkbox"/>
What SQL Server will the Workflow database reside on?	<input type="checkbox"/>
Is the server on the network (TCP/IP)?	<input type="checkbox"/>
What is the IP address of the server?	<input type="checkbox"/>
What is the hostname of the server?	<input type="checkbox"/>
<b>Verify that the Laserfiche Server can communicate with Workflow over the relevant ports.</b> <b>Note:</b> Depending on your Server operating system, the ports will vary as follows: <ul style="list-style-type: none"><li>• For the 32-bit edition of Windows XP, the Server communicates on port 5050.</li><li>• For all other supported operating systems, the Server communicates on port 80.</li></ul> Additionally, for all Workflow installations, the Laserfiche Server must be able to broadcast notifications on port 5051.	<input type="checkbox"/>
Determine a username and password for admin access to the machine.	<input type="checkbox"/>

## WebLink/Web Access/Audit Trail Reporter

Confirm architecture. Dedicated or shared server?	<input type="checkbox"/>
<b>If it is a dedicated server, will Windows Authentication be used?</b> <b>Note:</b> If so, Kerberos configuration is required. Configuring Kerberos is a very intensive operation in terms of time and technical IT expertise.	<input type="checkbox"/>
Is there a firewall between the Web server and the Laserfiche Server?	<input type="checkbox"/>
<b>If there is a firewall, determine the proper IP addresses, proxy settings, and TCP ports for Laserfiche.</b>	<input type="checkbox"/>
Has the hardware arrived at the customer's facility?	<input type="checkbox"/>
Is the OS installed? What version?	<input type="checkbox"/>
Is IIS installed?	<input type="checkbox"/>
Is IIS configured to run .aspx pages?	<input type="checkbox"/>
Is the server on the network (TCP/IP)?	<input type="checkbox"/>
What is the IP address of the server?	<input type="checkbox"/>
What is the hostname of the server?	<input type="checkbox"/>
Is there a Domain Name System (DNS) entry for the Web server?	<input type="checkbox"/>
<b>If you are using Audit Trail Web Reporter, have you set up access to the Configuration Page through IIS security?</b>	<input type="checkbox"/>

<p><b>Verify that the Laserfiche Server can communicate with your Laserfiche applications over the relevant ports.</b></p> <p><b>Note:</b> Depending on your Server operating system, the ports will vary as follows:</p> <ul style="list-style-type: none"> <li>• For the 32-bit edition of Windows XP, the Server communicates on port 5050.</li> <li>• For all other supported operating systems, the Server communicates on port 80.</li> </ul>	<input type="checkbox"/>
<p><b>Determine a username and password for admin access to the machine.</b></p>	<input type="checkbox"/>

### Laserfiche Client

<p><b>Has the hardware arrived at the customer's facility?</b></p>	<input type="checkbox"/>
<p><b>Is the OS installed? What version?</b></p>	<input type="checkbox"/>
<p><b>Is the server on the network (TCP/IP)?</b></p>	<input type="checkbox"/>
<p><b>Is this workstation going to be a scan station?</b></p>	<input type="checkbox"/>
<p><b>If so, verify compatibility between scanner and Client operating systems.</b></p>	<input type="checkbox"/>
<p><b>Has the scanner arrived at the customer's facility?</b></p>	<input type="checkbox"/>
<p><b>What scanner drivers will be used? (e.g., TWAIN, ISIS, Kofax)</b></p>	<input type="checkbox"/>
<p><b>Have the latest drivers for the scanner been downloaded?</b></p>	<input type="checkbox"/>
<p><b>What scanning interface will be used? (e.g., USB, SCSI, Kofax)</b></p>	<input type="checkbox"/>
<p><b>If SCSI or Kofax, are the necessary cards and cables available?</b></p> <p><b>Note:</b> Make sure that the correct SCSI interface is being used; there is a wide variety.</p>	<input type="checkbox"/>
<p><b>If installing Snapshot, be aware that additional configuration is required for x64 computers.</b></p>	<input type="checkbox"/>

<p><b>Verify that the Laserfiche Server can communicate with the Laserfiche Client over the relevant ports.</b></p> <p><b>Note:</b> Depending on your Server operating system, the ports will vary as follows:</p> <ul style="list-style-type: none"> <li>• For the 32-bit edition of Windows XP, the Server and Client communicate on port 5050.</li> <li>• For all other supported operating systems, the Server and Client communicate on port 80.</li> </ul>	<input type="checkbox"/>
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## Laserfiche Repository Creation

<p><b>Make sure at least one Administrator instance of the Laserfiche Client is installed to provide access to the LF Administration Console.</b></p>	<input type="checkbox"/>
<p><b>Determine the hostname or IP address of the Laserfiche application server and SQL Server.</b></p>	<input type="checkbox"/>
<p><b>Register your Laserfiche Server in the Administration Console.</b></p>	<input type="checkbox"/>
<p><b>Create the Laserfiche repository. Choose a name for the Laserfiche repository and the corresponding SQL database.</b></p> <p><b>Tip:</b> Choose a self-explanatory name for both the repository and its database; ideally, the two should use the same name to more easily identify their relationship.</p>	<input type="checkbox"/>
<p><b>Enable repository security by setting a password for the default “admin” Laserfiche user.</b></p>	<input type="checkbox"/>
<p><b>Enable Audit Trail.</b></p> <p><b>Note:</b> If you are licensed for Audit Trail on your Server, you will have to enable it before you can begin tracking events. If you are unsure what settings to use for Audit Trail, we recommend enabling tracking on all items under the Everyone group in the Laserfiche Administration Console.</p>	<input type="checkbox"/>

## Post-Installation Checks

<p><b>In the Administration Console, can you create a new volume?</b></p>	<input type="checkbox"/>
<p><b>In the Client, can you open your new repository?</b></p> <p><b>Note:</b> This item should be verified from a Laserfiche Client that is not installed on the Laserfiche Server.</p>	<input type="checkbox"/>

<b>In the Client, can you import a document?</b>	<input type="checkbox"/>
<b>In the Client, can you open a Laserfiche imaged document, and view its image, text, thumbnails, and metadata?</b>	<input type="checkbox"/>
<b>In the Client, can you open an electronic document, and view it in its native application (Adobe, Microsoft Word, etc.)?</b>	<input type="checkbox"/>
<b>In the Client, can you OCR or extract text from a document?</b>	<input type="checkbox"/>
<b>In the Client, can you perform a text search? Are the text highlights in the proper places?</b>	<input type="checkbox"/>
<b>In Scanning, can you scan a new document and store it in the repository?</b>	<input type="checkbox"/>



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**Description:**

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