



Instant Archive Viewer V4 Installation Guide

June 7, 2012

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Pre-installation Checklist

- IIS 6.0+
- OCS 2007, OCS 2007 R2 or Lync 2010
- SQL Server 2005 or 2008
- .Net Framework 2.0+
- Internet Explorer
- Archiving enabled on the Microsoft Lync 2010 or Microsoft OCS server

OCS Configuration

Archive Viewer leverages the existing LCSLog database that is provided as part of the default Microsoft OCS and Microsoft Lync archiving component. Therefore, in order to effectively use the Archive Viewer application, the core archiving service must be enabled for the OCS/Lync Server. See your OCS/Lync documentation for information concerning this.

Additionally, it is recommended that SQL Authentication be enabled for the archiving database, and a SQL login be created with db_owner permissions to the LCSLog database.

IIS Server Roles Required:

Archive Viewer V4 is a standard ASP.Net application. Since Archive Viewer runs under Microsoft IIS, various IIS server roles should be configured. These can be installed using Server Manager. Select Roles/Web Server (IIS) in the sidebar and right-click and select **Add Role Services**.

- Common HTTP Features
 - Static Content
 - Default Document
 - Directory Browsing
 - HTTP Errors
 - HTTP Redirection
- Application Development
 - ASP.Net
 - .NET Extensibility
 - ISAPI Extensions
 - ISAPI Filters
- Security
 - Basic Authentication
 - Windows Authentication
- Management Tools – (if using IIS 7)
 - IIS 6 Management Compatibility (All roles)

IIS Configuration

Authentication Settings

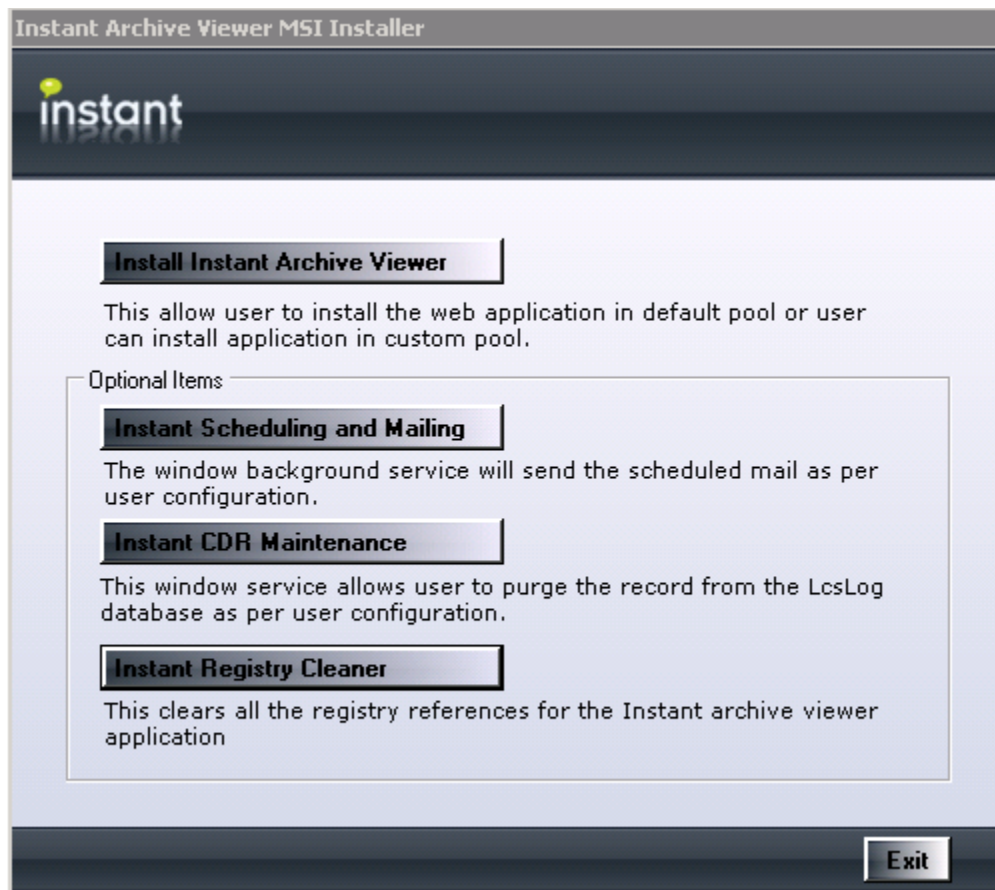
- Anonymous Authentication: Disabled
- ASP.NET Impersonation: Enabled

- Basic Authentication: Disabled
- Forms Authentication: Disabled
- Windows Authentication: Enabled

Application Pool Settings

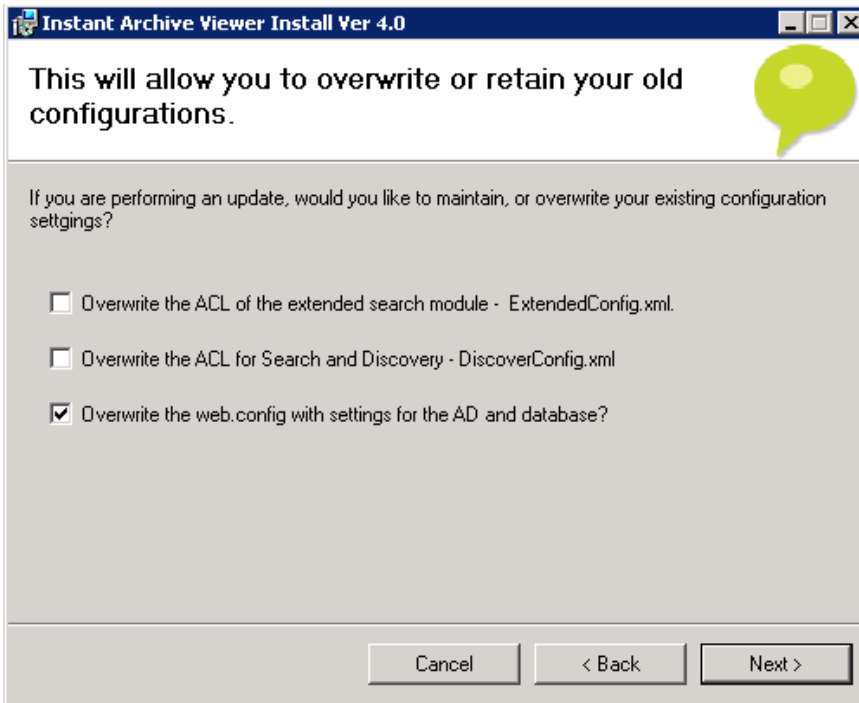
- .Net Framework v2.0.
- Managed pipeline mode: Classic

Installation

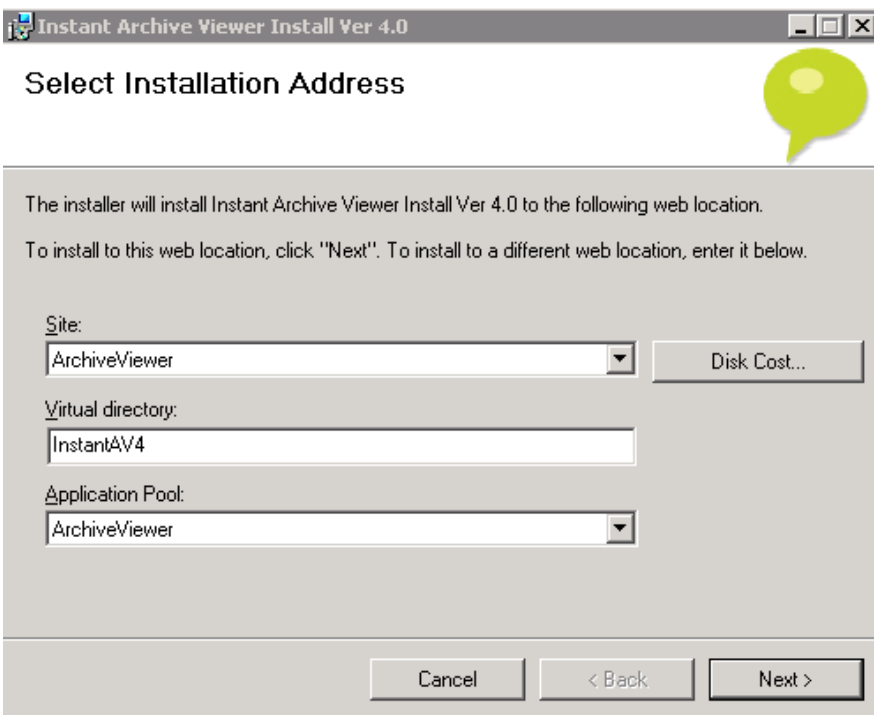


Install Archive Viewer

1. Select **Install Instant Archive Viewer** from the install launcher.
2. Progress through the install dialogs. Accept the license agreement. Select the appropriate option when prompted for your Communications Server version.
3. If you are performing a new install, select all three of the checkboxes on the form below. If you are performing an upgrade, you may select only those settings which you wish to overwrite.



4. Select the IIS site that you would like to install to, and the Application Pool associated with that site.



5. Continue on with the installation wizard.
6. During the file copy process you will be presented a dialog to set some configuration settings. Enter your Active Directory and SQL Server connection information here. Be sure to test these connections before you progress. You can also choose to launch the website automatically at

the end of the installation process.

Application Configuration

Please enter configuration information for the application

Active Directory Settings:

Location of Active Directory : INSTANT-TECH

Use Windows Authentication

Access AD Using a Name User

User Name : Administrator

Password : *****

Test Connection

SQL Server Settings:

Address of the SQL Server : OCS2008R2

LCSLog Database Name : LCSLog

SQL Version : SQL Server 2008

Use Windows Authentication

Use SQL Authentication Using a Named User:

User Name : SA

Password : *****

Test Connection

Automatically launch the Instant Archive Viewer after the installation

LocalHost Port Number 800

Next

SQL Server connection success

7. Conclude the installation. You may either install the optional services, or proceed to the application configuration.

Instant Scheduling and Mailing

Instant CDR Maintenance

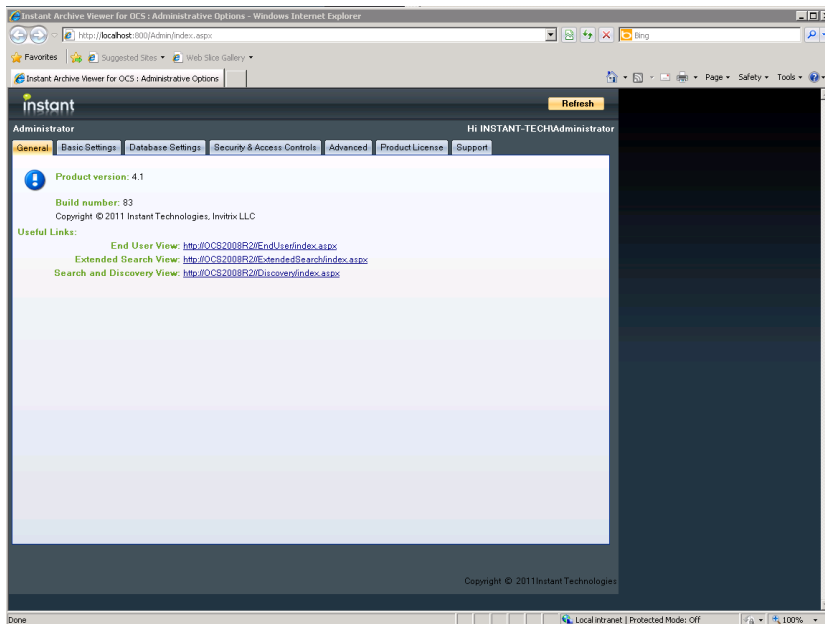
Instant Registry Cleaner

Application Configuration

Launch Instant Archive Viewer 4 by either navigating to the appropriate url, or by launching from the IIS Manager. **NOTE:** Currently, Archive Viewer only supports Internet Explorer 6, or IE 7+ with Compatibility View.



Proceed to the Administrator section by selecting that image link.



You will be presented with a page listing the version and build numbers. These numbers are important when contacting Instant Technologies for support.

Proceed to the Basic Settings Tab.

Basic Settings

The screenshot shows a web browser window displaying the 'Basic Settings' tab of the 'Instant Archive Viewer for OCS : Administrative Options'. The browser's address bar shows 'http://localhost:800/Admin/index.aspx'. The page header includes the 'instant' logo and a 'Refresh' button. Below the header, there are navigation tabs: 'General', 'Basic Settings' (selected), 'Database Settings', 'Security & Access Controls', 'Advanced', 'Product License', and 'Support'. The main content area is titled 'Specify the basic settings for the application' and contains several sections:

- IP address or FQDN of domain controller:** A text input field containing 'INSTANT-TECH'.
- Active Directory server connection settings:**
 - Query active directory using specified account
 - Username:
 - Password:
 - Enable pass-through authentication of users

Test Connection
- Specify whether you want to work on multi domain or single domain:**
 - Enable Global Catalog
 - Enable LDAP
- Other settings:**
 - Enable anonymous users to access the archive display pages
Anonymous access is not recommended for production servers since it may expose the archive to anonymous users and users supplying a Sip-Uri in the browser.
 - Enable Summary view:** Enable
 - Select time format:**
 - 12 hour format
 - 24 hour format

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You may see some pre-populated data in these fields. If it does not match what you input during the installation, replace it with the correct values.

Be sure to click the Save button at the bottom of the page before proceeding.

Database Settings

The screenshot shows a web browser window titled "Instant Archive Viewer for OCS : Administrative Options - Windows Internet Explorer". The address bar shows "http://localhost:800/Admin/index.aspx". The browser's Favorites, Suggested Sites, and Web Slice Gallery are visible. The application interface has a dark blue header with the "instant" logo and a "Refresh" button. Below the header, the user is identified as "Hi INSTANT-TECH Administrator". A navigation menu includes tabs for "General", "Basic Settings", "Database Settings" (which is selected), "Security & Access Controls", "Advanced", "Product License", and "Support".

The "Database Settings" page is titled "Set Database Settings" and contains the following fields and options:

- IP address or FQDN of the SQL Server:** A text input field containing "OCS2008R2".
- Specify database name:** A text input field containing "LCSLog".
- Choose SQL Server Authorization type:** A section with the instruction: "This is the information necessary to establish a database connection".
 - Use SQL Authentication (for example, SA and password)
 - Username:** A text input field containing "SA".
 - Password:** A password input field with masked characters "••••••".
 - Use Windows authentication. Below this is the instruction: "This will query the SQL Server with the credentials for the end user (not the machine running IIS and the archive viewer) please consult the documentation on how to configure this option."

A "Test Connection" button is located below the authentication options.

- Customized display:** A section with two radio buttons:
- Enable integrated view
- Enable non-integrated view
- Table name:** A text input field containing "integratedview".
- Below the table name field is the instruction: "Enabling integrated view will display CN name of the user in the application. Please consult the documentation on how to configure this option."

At the bottom right of the page, the copyright notice reads: "Copyright © 2011 Instant Technologies".

Ensure that the settings for connecting to your database are correct, and that the correct version of OCS is selected.

When you are finished, click the Save button. This is essential, as this sets up a number of stored procedures which the application relies upon.

Proceed to the Security & Access Controls tab.

Security & Access Controls

Here you may modify access control to the Extended Search, Discovery, and Reporting portals.

Extended Search

You can grant full access to the entire chat history to users or groups, using the Full Archive Access option.

If you would like to provision a user to have access to the full chat history of an Active Directory Group, you may use the Access Groups option.

Discovery

The users specified here will be able to access the Discovery portal of the application.

Report Settings

These users will be able to access the Charting and Reporting module.

After making any changes, it is important to click **Commit Changes** before continuing to another tab.

Advanced Options – Email Configuration

Instant Archive Viewer for OCS : Administrative Options - Windows Internet Explorer
http://localhost:800/Admin/index.aspx

Instant Archive Viewer for OCS : Administrative Options

instant Refresh

Administrator Hi INSTANT-TECHAdministrator

General Basic Settings Database Settings Security & Access Controls **Advanced** Product License Support

SMTP Settings CDR Maintenance

SMTP Email Settings

Please enter the name or IP of SMTP server :

Please enter the recipient email address :

Test Connection

Save Cancel

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These settings apply to the optional services, and can be ignored if those are not being used.

SMTP Settings

Set the address of your email server here.

CDR Maintenance

These settings concern the purging of archived messages.

Product License

The screenshot shows a web browser window with the address bar displaying `http://localhost:800/Admin/index.aspx`. The page title is "Instant Archive Viewer for OCS : Administrative Options". The browser's address bar includes "Favorites", "Suggested Sites", and "Web Slice Gallery". The page content features the "instant" logo and a "Refresh" button in the top right corner. Below the logo, the user is identified as "Administrator" and "Hi INSTANT-TECH\Administrator". A navigation menu includes "General", "Basic Settings", "Database Settings", "Security & Access Controls", "Advanced", "Product License" (highlighted), and "Support". The main content area is titled "Type your product key for activation" and includes a "License Key" field with five input boxes, a "Version" field, and a "Refresh" button. Below these fields are sections for "Activities Allowed", "Users allowed", and "Total number of AD and OCS users". The "Total number of AD and OCS users" section includes sub-sections for "OCS users" and "AD users", and an "Update License" button. At the bottom right, there is a "Total number of users" section with an "Add Groups or Users" button. The footer of the page contains the text "Copyright © 2011 Instant Technologies".

Here you may input your license key and verify it.

FAQ

If you experience difficulty installing Instant Archive Viewer 4, consult the FAQ, at <http://faq.instant-tech.com/>. It has solutions to many common issues experienced by customers.

If you cannot find a solution to your problem, contact Instant Support.