



## Installation Guide

Product: TAB FusionRMS, All Editions

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# 1. Before You Begin

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## FusionRMS

- Microsoft® Access databases are no longer supported.
- Install Microsoft® SQL Server before installing FusionRMS.
- Install Microsoft® SQL Server Management Studio (SSMS). Depending the version of Microsoft® SQL Server, SSMS may require a separate installation step.
- Microsoft® SQL Server software and licensing is **NOT INCLUDED** and must be purchased separately.
- Microsoft® SQL Server Express Edition software and licensing is **NOT INCLUDED** but can currently be downloaded from Microsoft® at no charge. The FusionRMS Full Text search feature requires the Advanced Edition of SQL Express with the fulltext catalog capabilities of Microsoft® SQL Server®.
- The Microsoft® SQL Server® database used by FusionRMS must be set to collation SQL\_LATIN1\_GENERAL\_CP1\_CI\_AS
- Ensure the server and workstations have the supported versions of Microsoft® .NET Framework installed.
- Review the minimum system requirements to ensure support compatibility.

## FusionRMS WebAccess

- WebAccess, black and white label printing requires the “Microsoft Print to PDF” or Win2PDF or Win2PDF TSE. Win2PDF or Win2PDF TSE are third party printer drivers for creating PDF files and not included in FusionRMS. Win2PDF or Win2PDF TSE is **NOT INCLUDED** and must be purchased separately.
- Ensure that Microsoft® Information Server® (IIS) that will host TAB WebAccess and Microsoft SQL Server® that will host the database are set to the same time zone.
- Ensure that FusionRMS Service Manager is installed on the same server hosting FusionRMS WebAccess.
- Microsoft IIS server should be configured and running before FusionRMS WebAccess is installed. The following features and roles must be turned on. Any feature not listed can be turned on or off. Text in ***Italics*** is for additional explanation and do not show on the feature and roles screen.
  - World Wide Web Services
    - Common HTTP Features
      - Default Document
      - HTTP Errors
      - Static Content
    - Application Development Features
      - .NET Extensibility
      - ASP.Net 4.5 (***or above***)
  - Application Server
    - .Net Framework 4.5 (***or above***)
    - ASP.net 4.5 (***or above***)

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- WCF Services
  - HTTP Activation
  - TCP Activation
- Authentication
  - Basic Authentication
  - Window Authentication (*For SSO*)

## Upgrade Information

If you are upgrading from a previous version, please review the following information:

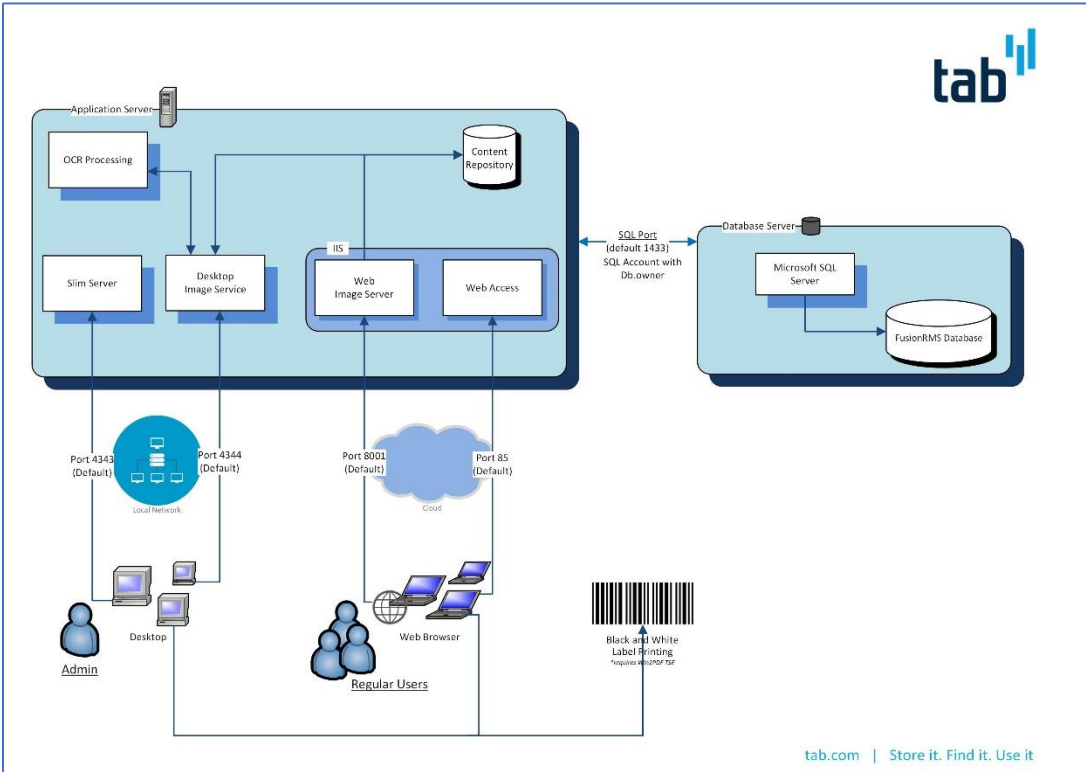
- FusionRMS 10.2 will upgrade systems from 9.2 and above.
- Once the installation has been started and the progress bar appears, old files will be removed. In order to use FusionRMS, you must continue with the upgrade once it has begun. If you cancel before the installation is complete, you will not be able to use the application without uninstalling manually.

## Components

FusionRMS is comprised of several distinct software components. For scalability each of the components can be installed on physically or virtually separate servers but can be installed on a single server or desktop computer for a small deployment. Each of the components that can be installed through the installer:

- License Server (SLIM Server): This is a required component on a network server. It is used to connect a database in the SLIM Manager or Database Utility with the Microsoft SQL Server®. It also handles the synchronization of the Active Directory groups. It should only be installed in one location.
- Service Manager: These processes retention-related operations and the background processing tasks initiated by users from WebAccess. It can only be installed in one location. It must be installed on the same server as WebAccess if WebAccess is deployed.
- License Manager (SLIM Manager): The SLIM Manager provides the FusionRMS administrator an interface to add or modify databases, licenses, and seat counts. It can be installed anywhere the administrator needs it, but it should only be installed in one location.
- Desktop Image Service: Controls access to the image repository for the retrieval of images and documents for the FusionRMS Attachment Viewer and Orphan Viewer as a Web Service. For imaging customers only.
- Web Image Server: Manages attachments and documents within IIS for FusionRMS WebAccess. If you will be using FusionRMS WebAccess Attachment Viewer, select this service instead of the Tab Image Service. For imaging customers only.
- FusionRMS Desktop: The complete application, including the user interface and the Admin Manager.
- FusionRMS WebAccess: The web user interface and the Admin Manager.
- Past Due Email Utility: A utility for sending out past due e-mail notifications.
- FusionRMS OCR Utility: This component is installed separately and isn't included with the Fusion Desktop/WebAccess Installation. The installation file is found in FusionRMS Installation Media\Options\Full Text OCR.

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## 2. Software Installation

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### FusionRMS Desktop

1. Open the install folder.
2. Double-click the Setup file.
3. The Welcome screen appears. Accept the license agreement by clicking **Agree**.
4. License Server Location. If you know where the license server has been installed, enter the IP address and port number. Double-check your entry to make sure you've entered the correct information. If you do not know the location, you can search the network (Note: This may take several minutes, especially if the license server is not running on the network.) Or, if this is a server, you can skip this step and it will be installed as a component, or, if this is a workstation, you can skip this step and it will not be installed.
5. Select your installation type:
  - Workstation: This is for the general end user. Does not include server components or sample databases.
  - Server: This is for a network server. It will include the License Manager, Service Manager, Image Server Web Service, and License Server. The License Manager (SLIM Manager) does not need to be installed on the server. It can be installed on the FusionRMS administrator's computer for easier access.
  - Server Workstation: Clients without large networks may install all of the server and workstation components on one computer that acts as the server. Users would need access to this computer to open a database.
  - Custom: All components, except the Image Server Web Service and Database Utility.
  - Sales Demo: All components, except the Image Server Web Service.
6. Review and revise the list of components selected for install. In most cases the list will not need to be revised.

**Note** Selecting an installation type will pre-select the list of components that are needed for that type of installation.
7. Select a new destination folder for the selected components, or click **Next** to accept the default location.
8. If installing the License Server, find and select your license file. (It can be entered later in the SLIM Manager.) Click **Next** to continue.
9. For the services you will be installing, enter valid ports for each one. The default values are already present. Make note of these ports for future reference during installations. Click **Next** to continue.
10. Click **Install**.
11. **Sales Demo/Database Utility ONLY:** Once the installation is finished, the Database Utility can be launched automatically. If you have installed SQL Server Express 2008 before installation, this utility will create a SQL database and connect it to the SLIM Server automatically. Click **Add** to begin this process. The sample database will be added to the SQL Server and the SLIM Manager, FusionRMS will launch, and the database will appear on the log in screen.

## FusionRMS WebAccess

1. Ensure that FusionRMS Service Manager is installed on the same server hosting FusionRMS WebAccess.
2. Open the install folder.
3. Click Next to begin.
4. Read and agree to the Software License Agreement.
5. The installation will attempt to locate the SLIM Server service running on the network. If found, it will appear in the text box. Otherwise, enter the IP address of the SLIM Server.
6. For most installations, it is recommended that port 85 be used so as not to interfere with any previous Websites established on the IIS default port. It is also recommended that you do not enter a host header. The ability to edit both the port and host header is provided for advanced IIS users only.
7. Click Next to install to the default destination folder.
8. Click Install.

**Known Issue:** ASP .NET web service extension may not be enabled by default. During the install, the service will be enabled automatically. If troubleshooting, check to see that the service has been enabled.

To enable ASP .NET Web Service Extension

1. Open the Internet Information Services (IIS) Manager.
2. Under the name of the server, click the Web Service Extensions folder.
3. Select ASP .NET, and then click Allow.

## Enabling TLS 1.2 support

To enable TLS 1.2 support and by extension disabling older TLS 1.0 and 1.1 protocols, first install and configure Microsoft® SQL Server as appropriate for your version of Microsoft® SQL Server; once completed take the steps below for FusionRMS.

**Note.** For SQL Server 2014 SP3, download the provider for TLS from:

<https://download.microsoft.com/download/7/9/F/79F4584A-A957-436B-8534-3397F33790A6/SQLServer2014SP3-KB4022619-x64-ENU.exe>

**Note.** For SQL Server 2016 or higher, TLS 1.2 is supported without additional downloads required.

For all computers with FusionRMS Desktop installed:

- Download and install from Microsoft MSOLEDBSQL provider  
<https://docs.microsoft.com/en-us/sql/connect/oledb/download-oledb-driver-for-sql-server?view=sql-server-ver15>
- Navigate to the folder where FusionRMS is installed, and open folder named Slim Server (ex. C:\Program Files (x86)\TAB\FusionRMS\Slim Server)

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- Open the file slimService.exe.config with a text editor (ex. Notepad) and change the entry for DB provider to MSOLEDBSQL
  - `<add key="DBProvider" value="MSOLEDBSQL"/>`
- Save the File and restart Slim Service.

For all servers with FusionRMS WebAccess:

- Download and install from Microsoft MSOLEDBSQL provider  
<https://docs.microsoft.com/en-us/sql/connect/oledb/download-oledb-driver-for-sql-server?view=sql-server-ver15>
- Navigate to the folder where FusionRMS WebAccess is installed (ex. C:\inetpub\wwwroot\TAB\WebAccess)
- Open the file Web.config with a text editor (ex. Notepad) and change the entry for DB provider to MSOLEDBSQL
  - `<add key="DBProvider" value="MSOLEDBSQL"/>`
- Save the File and restart IIS and Image Server.

For Microsoft SQL Server®:

- Go to SQL Server Network configuration -> Right-click on your SQL Server instance -> Properties -> Certificate tab
- Choose the certificate which is Assigned or SSL certificate from the Drop down -> Click on Apply
- Click on the Flags -> Click on Force Encryption -> Click on Yes from the Drop down
- Restart Microsoft SQL Server® Service
- Restart FusionRMS Slim Service

**Note.** For Windows Server 2019 if that is Upgraded to Windows Version of 1809, by default it supports TLS 1.2. If that is being used as IIS server, we don't need to change the Web.config file for the Web Access. (<https://support.microsoft.com/en-us/topic/october-20-2020-kb4580390-os-build-17763-1554-preview-ac4799c9-838f-8665-a968-0f19b6cb1049>)

## WebAccess and Desktop import using Microsoft® Excel .xlsx files

FusionRMS WebAccess requires Microsoft Access Database Engine 2016 Redistributable to be installed on the WebAccess Server to support importing records in batch mode using Microsoft® Excel® .xlsx files. FusionRMS Desktop requires Microsoft Access Database Engine 2016 Redistributable to be installed on all computers that will be used to import records in batch mode using Microsoft® Excel® .xlsx files. The redistributable can be downloaded from <https://www.microsoft.com/en-us/download/details.aspx?id=54920> . Please follow the instructions as provided by Microsoft to install this component.

## WebAccess Black and White Label Printing with PDF files.

- Install Win2PDF

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- Open “Web.config” file found in C:\inetpub\wwwroot\TAB\WebAccess folder and change the following line from:  
`<add key="PrinterDriver" value="Microsoft Print to PDF" />`  
 To  
`<add key="PrinterDriver" value="Win2PDF" />`
- Ensure the setting for the Extension is set to "pdf"
- Set the correct permissions on temporary directories
  - Press Windows + R (Run), enter "Temp" into the combobox, grant Full Control to (Administrators and IIS\_IUSRS Users) to the folder (Windows -> Temp)
  - Press Windows + R (Run), enter "%Temp%" into the combobox, grant Full Control (Administrators and IIS\_IUSRS Users) for this folder (Windows -> Temp -> 2)
- Restart IIS from IIS Manager, Click on the Server on the right we can see the Restart

## WebAccess Black and White Label Printing with XPS files.

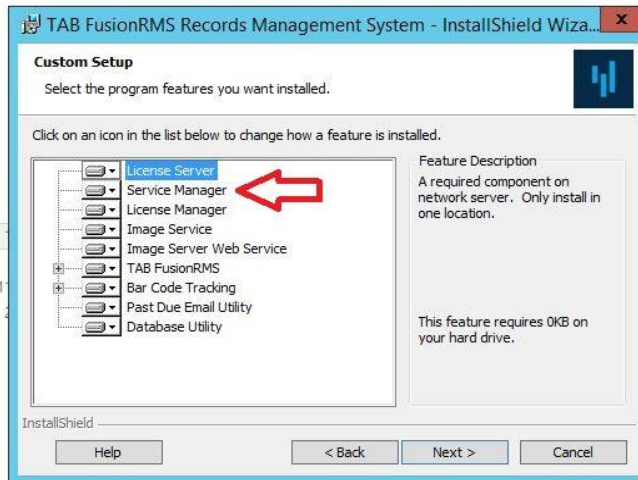
- Confirm Microsoft® XPS printer driver is installed
- Open “Web.config” file found in C:\inetpub\wwwroot\TAB\WebAccess folder and change the following line from:  
`<add key="PrinterDriver" value="Microsoft Print to PDF" />`  
 To  
`<add key="PrinterDriver" value=" Microsoft XPS Document Writer " />`
- Ensure the setting for the Extension is set to "XPS"
- Set the correct permissions on temporary directories
  - Press Windows + R (Run), enter "Temp" into the combobox, grant Full Control to (Administrators and IIS\_IUSRS Users) to the folder (Windows -> Temp)
  - Press Windows + R (Run), enter "%Temp%" into the combobox, grant Full Control (Administrators and IIS\_IUSRS Users) for this folder (Windows -> Temp -> 2)

Restart IIS from IIS Manager, Click on the Server on the right we can see the Restart

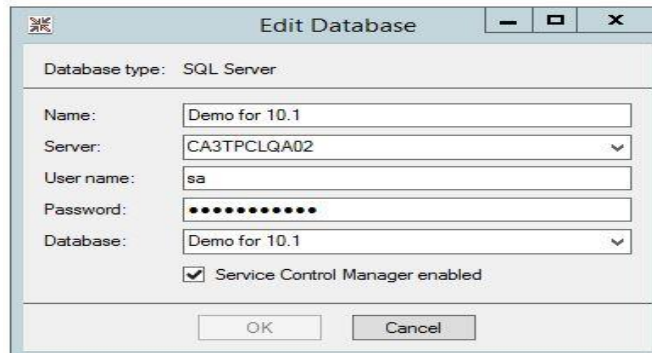
## WebAccess Background Processing Installation

Follow steps below:

1. Ensure “Service Manager” component is installed, The Service Manager components executes all background processes.



2. Open SLIM Manager, select the appropriate Database, ensure Service Control Manager is selected as shown below, Click OK



3. Open WebAccess, navigate to the Administration, enter appropriate Min and Max values for Non - Blocking Operations (Export/Transfer)

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## 3. FusionRMS License Manager (SLIM Manager)

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All databases need to be added to the License Manager (SLIM) before they can be opened in the FusionRMS application.

1. To open SLIM Manager, on the **Start** menu, point to **All Programs**, point to **FusionRMS**, and click **SLIM Manager**.
2. View and select options using the SLIM Server Manager tabs:
  - a. License
    - View Registration and Dealer information
    - View Products, Seats, Features, and Details available with the current license.
    - To change or add a license, on the **Action** menu, click **Acquire From Internet**.
    - To change or add a license without access to the internet:
      - i. On the **Action** menu, click **Load From File**.
      - ii. Locate the License Manager File by browsing to the Extras folder on the installation CD.  
**Note** If you do not have an installation CD and have received the License Manage File by some other means, copy the file into a network share or local folder, and then browse to it in order to select it.
    - To reset the license to Demonstration mode, on the **Action** menu, click **Reset Demo License**.
  - b. Databases
    - To add a database:
      - i. On the **Action** menu, click **Add Database**.
      - ii. Enter the database and server information. (If you are using SQL Authentication, enter the user name and password for that log in. If you are using Windows Authentication, you must have already signed into the computer running the SLIM Manager as an administrator with rights to the SQL Server; leave the fields blank. See above sections on database connection credentials for more information.)
      - iii. Select **Service Control Manager** in order for retention-related reporting, such as the Inactive Records report and Eligible for Destruction report, to be handled as a service.
      - iv. Click **OK**.  
**Note** Do not add the same database twice.
    - To setup access to the database for FusionRMS and Active Directory
      - i. From the column on the left, click the + button, and then select the database.
      - ii. Enable Active Directory.
      - iii. Enable or disable Service Manager processing for the selected database
  - c. Current User Seats
    - View Product, Host, and Time details of logged on users.
    - To reserve a seat for a user
      - i. Click **Current User Seats**.
      - ii. On the **Action** menu, click **Manage Seat Reservations**.
      - iii. Select **Manual Add**.

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- iv. Enter a user name.
  - v. Click the arrow on the right and select the product you would like to associate with the reserved seat.
  - vi. Click **Add**.
  - vii. Continue to add reserved seats for users as necessary. Keep in mind that only one seat may be reserved for a user for each installed application. Also, the number of available seats in the pool for each installed application will be reduced by one for each reserved seat added.
3. Close or refresh the License Manager (SLIM) to enable new or modified settings. On the **File** menu, click **Exit** or **Refresh**.

## 4. Database upgrade

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When upgrading from a previous version of FusionRMS, the data model must be upgraded. To upgrade each database login in to FusionRMS using the FusionRMS Desktop client. On login into the database you will see a message about updating your database to the current version.

## 5.Active Directory Integration

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FusionRMS users and groups can be synchronized with the users of Active Directory. This feature helps administrators with tedious tasks, such as adding large numbers of users, updating e-mail addresses, and disabling user access.

When you perform the integration, you will map all of the Active Directory groups with the groups you create in FusionRMS. When you perform the synchronization, the mapped groups and all user information is brought over to the FusionRMS system. When users log in, they use the same user name, password, and domain name that they would use to log in to their system. FusionRMS will then authenticate this information through Active Directory. If the log in fails, FusionRMS will then attempt to authenticate this information using the FusionRMS information created during synchronization.

The synchronization can be performed manually or scheduled to run automatically. When Active Directory synchronization occurs, only the FusionRMS data is changed. Active Directory data is never altered—it is only queried. This means that if you need to add a user, first add the user in your Active Directory system and then perform a synchronization with FusionRMS. User information should not be added or edited in the FusionRMS system; it will not be passed back to Active Directory.

Before you integrate with Active Directory you will need to set up your FusionRMS groups and set the permissions.

### Integrating Active Directory Groups with FusionRMS

If you enable the Active Directory integration, you must map and synchronize the Administrator group to ensure access to all areas of the system.

To integrate (or map) and synchronize your Active Directory groups with FusionRMS groups

1. Open the **SLIM Manager**.
2. Click the + button next to Databases.
3. Select your database from the list.
4. Select **Enable**.
5. If found, your Active Directory domain, organizational units, and AD groups will load. If the wrong domain has been found, enter a new one.
6. Select your organizational unit.
7. Select your Active Directory group.
8. Select the corresponding FusionRMS group.
9. Click **Map selected groups**.
10. Continue to map your Active Directory groups and corresponding FusionRMS groups.
11. If you make a mistake, select the item from the synchronization map, and then click **Delete Mapping**.
12. If you would like to create temporary tracking users if one does not exist in the tracking table, select **Create tracking employee**. You can then select whether this should occur for all groups or a selected AD group. This is a temporary entry that is created for the session at log in.
13. When you are finished, click **Synchronize**.

## Active Directory with the FusionRMS WebAccess Module (WebAccess)

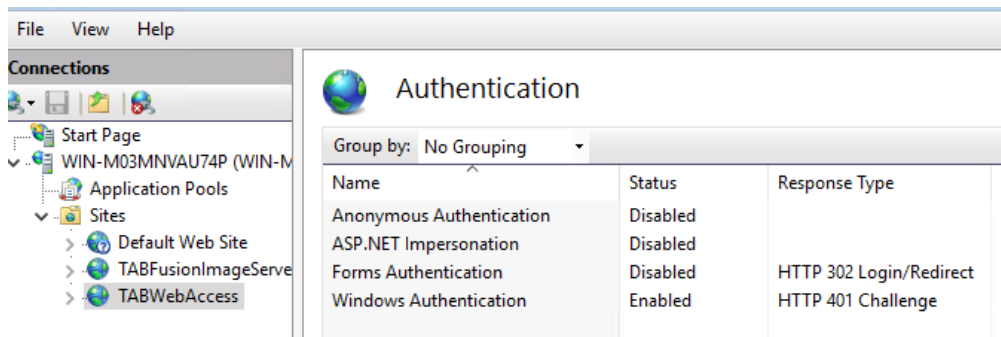
In order to use the Active Directory settings with WebAccess, you will need to make the following Internet Information Services (IIS) setting changes where the database is published.

1. On the **Start** menu, point to **Administrative Tools**, and then click **Internet Information Services**.
2. Under Web Sites, right-click **Default Web Site**, and then click **Properties**.
3. Select the **Directory Security** tab.
4. Under **Authentication and access control**, click **Edit**.
5. If selected, clear **Enable anonymous access**.

## Turning on Single Sign On (SSO) for WebAccess

Single Sign On is an optional setting and only available when Active Directory Integration is enabled. FusionRMS Desktop does not support SSO. Follow the steps for Integrating Active Directory Groups with FusionRMS

- Ensure the “Window Authentication” Feature has been added to Microsoft® Internet Information Services (IIS)
- Ensure the Anonymous Authentication is set to Disabled in Microsoft® Internet Information Services (IIS) for the FusionRMS WebAccess site.
- Ensure the Windows Authentication is set to Enabled in Microsoft® Internet Information Services (IIS) for the FusionRMS WebAccess site.



- Navigate to the Slim manager
- Create a new Database or Open any Existing Database
- Click on the check box, WebAccess SSO Enabled
- Map all the necessary groups from AD to Fusion Application and Click on Synchronize. If Active Directory is turned off, it automatically turns off SSO for the database.

To enable or disable login prompts on each client computer:

- Open the Microsoft® Windows® Control Panel, select ‘Internet Options’.
- Select the ‘Security’ tab add the WebAccess URL to the Trusted zone
- From Security Options, choose “Custom Level”.

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- In the Prompt Settings, select “Automatic Logon with current user name and password” under “User Authentication”, “Logon”

## Scheduling Active Directory Synchronization

If you need to force a synchronization because of important changes to your Active Directory system, you can open the SLIM Manager, select your database, and then click Synchronize.

ADVANCED: Automatic synchronization on a hourly, daily or weekly bases can be scheduled by using Windows task scheduler and the supplied executable SyncToActiveDirectory (exe) . Configuring Windows task scheduler is beyond the scope of this document. SyncToActiveDirectory (exe) takes no parameters. It is installed with SLIM server and is typically located in C:\Program Files (x86)\TAB\FusionRMS\Slim Server.

## 6. WebAccess Attachment Setup

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### Completing installation of attachment viewer for Google® Chrome or Apple® Safari browsers

- Ensure user IIS\_IS has full control permission the HTML5Cache folder.
- Navigate in wwwroot folder and open "local.config" file.
  - Modify the value of It.Cache.Directory to reflect the folder location where temporary images are stored. The default setting is:
    - `<add key="It.Cache.Directory" value="C:\inetpub\wwwroot\TAB\WebAccess\HTML5Cache"/>`
  - Modify the value of It.DocumentConverter.ExePath to reflect the actual location of the root folder location. The default setting is:
    - `<add key="It.DocumentConverter.ExePath" value="C:\inetpub\wwwroot\TAB\WebAccess\leadtoolsutilities\TabFusionRMS.WebDocumentConverter.exe"/>`
  - Modify the value of It.Ocr.RuntimeDirectory to reflect the actual location of the root folder location. The default setting is:
    - `<add key="It.Ocr.RuntimeDirectory" value="C:\inetpub\wwwroot\TAB\WebAccess\OcrAdvantageRuntime"/>`

### Changing maximum file size allowed to be Drag and Dropped onto the Grid

A new feature was added in FusionRMS 10.2 allowing user to drag and drop attachment file to the grid. The default maximum file size is 5 MB.

To change that value:

- Navigate to the FusionRMS Administration
- Click on Data section
- Click on Settings Table
- Change the value of DragAndDropAttachment from the Section -> Change the ItemValue to the desired Value in MB

### Changing the number of hits displayed in Search Results

A new feature was added in FusionRMS 10.2 whereby search results are displayed for permitted Views of a Table. Note that the view must be set to Searchable and the user must have access to the View via security configuration. The number of hits displayed for each View is configurable. The default value is 25. To change the default value.

To change that value:

- Navigate to the FusionRMS Administration

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- Click on Data section
- Click on Settings Table
- Change the value of GlobalSearch to the desired value

## Image Repository

The service responsible for managing the image repository will need read/write permissions. When hosting the service in IIS, the ASP.NET account will need permission. When running as a Windows Service, the system account will need permission.

## Image Service File Type Exclusions

Each service has a config file containing a list of file types that are not processed for pages or a preview image.

The list is stored in **Tab.RecordsManagement.Imaging.Export.dll.config**.


For the Web Service, the config file is located in **[Install Directory]\ImageServer\Bin**.

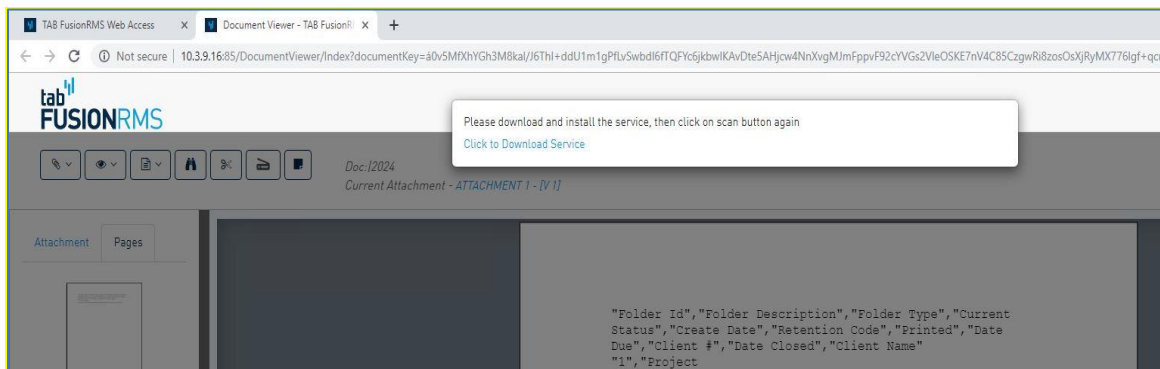
For the Windows Service, the config file is located in **[Install Directory]\Image Service**. In both cases, the list is stored in the **configuration\applicationSettings\Tab.RecordsManagement.Imaging.Export.MySettings\setting[name='Exclusions']\value** section as a comma-delimited list. Files of these types can still be used as an attachment and opened in the native application; however, they will not have a preview.

## Scanner Utility for Google® Chrome®

FusionRMS 10.2 enables users to scan attachments directly to a record via TWAIN based scanners with Google® Chrome® on Microsoft Windows. This feature is not available for Apple® Safari® or Microsoft® Edge®

On first use, the user must download and install the FusionRMS Web Scanning Host utility. The following steps must be executed on each user's computer.

- Using Google® Chrome® on Microsoft Windows view an attachment.
- Click the Scanner button available on the tool bar 
- A pop up will be shown on the screen, click on the link "Click to Download Service".



- Double click to install the "msi" file following the on-screen prompts.

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- Refresh the attachment viewer page or Click 'F5' from keyboard.
- Ensure a TWAIN supported scanner is linked to the local machine via USB or over a network.
- Click Scanner button

## 7. Silent Installation

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Either by using a network logon script or by leveraging Microsoft's SMS capabilities, FusionRMS can be "pushed" out to as many workstations as needed.

The flexibility of the silent installation capability allows any group of FusionRMS to be pushed out; from installing FusionRMS Desktop only to installing all components (i.e. SLIM Manager, Image Service, etc). This is accomplished by specifying one or more of the following variable names on the command line.

There is no concept of an install role when installing in silent mode, you must specify which features you want install.

Variable names that can be set from the command line:

- LICENSE\_FILE\_NAME – the path to the license file.
- LICENSE\_SERVER\_PORT – the port that will be used by slim. Required event though the port is available in the SLIM\_Network\_Address. For example, 4343.
- SLIM\_NETWORK\_ADDRESS – the address of license server on the network, including the port. For example, [dbsdlkivwsu101.svrn.acme.com:4343](http://dbsdlkivwsu101.svrn.acme.com:4343)
- IMAGE\_SERVER\_PORT – windows image service port.
- IMAGE\_WEB\_SERVICE\_PORT – web image service port.
- INSTALLDIR – the directory where files will be installed to.
- ADDLOCAL – comma separated list of features:
  - viii. License\_Server\_Files – License Server
  - ix. Service\_Manager\_Files – Background processing service
  - x. License\_Manager\_Files – License Server user Interface
  - xi. ImageServiceFiles – Image Service (windows based service)
  - xii. Image\_Server\_WebService\_Files – Image Service (web based service)
  - xiii. SmeadSoft\_RMS\_Files – FusionRMS Desktop
  - xiv. Bar\_Code\_Files\_RMS – Datalogic Installer files
  - xv. Past\_Due\_Files – Server Past Due Email Utility
  - xvi. DatabaseUtility – Server Database Utility

**Note** the EULA is accepted without any interaction when running in silent mode.

**Note** silent installation does not remove previous versions of FusionRMS. The previous version must be removed beforehand as part of the SCCM package, login script, etc:

```
msiexec /x <Product.msi | ProductCode>
```

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Example commands:

To install FusionRMS Desktop only:

```
<msiName (including path)> /passive /l*vx c:\tab.log LICENSE_SERVER_PORT="4343"  
SLIM_NETWORK_ADDRESS="dbsdlkivwsu101.svrn.acme.com:4343" INSTALLDIR="C:\Program Files  
(x86)\TAB\FusionRMS" ADDLOCAL=SmeadSoft_RMS_Files
```

To install FusionRMS and the Past Due Email Utility:

```
<msiName (including path)> /passive INSTALLDIR="C:\Program Files\tab\FusionRMS"  
ADDLOCAL=SmeadSoft_RMS_Files,Past_Due_Files
```

You can also do a silent install from the setup.exe by using InstallShield's passthrough feature:

```
<setup.exe (including path)> /v"/passive INSTALLDIR="C:\Program Files\tab\FusionRMS"  
ADDLOCAL=SmeadSoft_RMS_Files,Past_Due_Files"
```

## 8. Program Maintenance

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Once you have installed the FusionRMS application and re-run the setup to add or remove extra components, it's important to understand the Custom Setup options. Once past the Welcome screen, select **Modify**. On the **Custom Setup** screen, you can select the components you would like to upgrade and/or install.

- The components listed with the computer image next to them were found on your local machine and will be upgraded.
- The components listed with the red X were not found on your local machine. No action is required.
- If you select one of the components installed locally and switch it to the red X, that component will be removed completely from your local machine.
- If you select one of the components with the red X and switch it to the computer image, it will be installed.

# 9. Ongoing operations and best practices

## Temporary file cleanup

On a regular basis the contents following directories should be deleted from the server hosting FusionRMS WebAccess so as not to fill up the available space:

- C:\inetpub\wwwroot\TAB\WebAccess\HTML5Cache
- C:\inetpub\wwwroot\TAB\WebAccess\ImportFiles
- C:\inetpub\wwwroot\TAB\WebAccess\LabelData

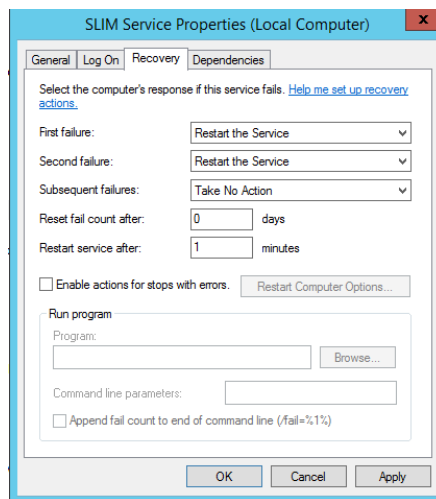
## Reboot/ Restart Schedule

TAB recommends the services comprising each of the FusionRMS processes be restarted once a day, the physical or virtual server hosting the components be rebooted weekly. The FusionRMS services are named:

- SLIM Service
- Service Manager
- Smead Image Service

SIAScheduler		Running	Automatic	Local System
SLIM Service	Controls the license and determines acces...	Running	Automatic	Local System
Smart Card	Manages access to smart cards read by thi...		Disabled	Local Service
Server	Supports file, print, and named-pipe shari...	Running	Automatic	Local System
Service Manager	Builds eligibility for inactivity list.	Running	Automatic	Local System
Shell Hardware Detection	Provides notifications for AutoPlay hardwa...	Running	Automatic	Local System
Smart Card Removal Policy	Allows the system to be configured to lock...		Manual	Local System
Smead Image Service	Controls access to the image repository fo...	Running	Automatic	Local System
SNMP Service	Enables Simple Network Management Pro...	Running	Automatic	Local System

TAB recommends the services be set to recover by restarting on the first and optionally second failure.



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## 10. Troubleshooting

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### Troubleshooting FusionRMS

**Full Text Search:** If no results are returned with a search or an error appears, you may need to set the FDHOST Launcher (MSSLFDLauncher) Service Account for full-text search capabilities in the SQL Server Configuration Manager.

### Troubleshooting Attachments

**No Images in Attachment Viewer:** If you receive a message on the Attachment Viewer that there are no attachments to display, but the header contains the correct title for the attachment, try to re-register ASP.NET for IIS. The command prompt can be slightly different based on your operating system:

(32-bit): `C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -i -enable`

(64-bit): `C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe -i -enable`

Once you have finished re-registering ASP.NET, reset IIS. You can use the same command prompt and enter:  
iisreset

**500.0 Error:** If you receive a 500 error, uninstall and then reinstall the web service.

# 11. Database Utility

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## Database Utility

This is an optional utility for adding databases to a local SQL Server and connecting them with SLIM. If your database is already on SQL Server, you can use the Existing Database feature in Database Utility to connect the database to SLIM.

**ADVANCED USERS:** This utility can be used to build and attach a database file, restore a database backup file, or execute a SQL script on a local or network server. Use the **Browse** button to locate your file. Enter your server name\SQL instance. To populate the list with network servers, on the **Tools** menu, click **Options**, and then select **Show Network Servers**. Enter your authentication credentials (see below). Enter a Display Name. (This is the name you will see on the Log in screen database list.) You can use the Display Name to name the SQL database, or you can enter a unique database name. Click **Add**. These advanced features are not intended to be a substitute for SQL Server Management Studio.

## One-Time Database Connection Credentials

The credentials entered at the time of database connection are what the SLIM Server uses to create or communicate with the FusionRMS database on SQL Server without Active Directory Integration.

### With Windows Authentication:

This simple process only requires that the user logged into the computer running the connection process have administrative rights to the SQL Server and the Active Directory groups.

- In the **SLIM Manager**, leave the fields blank.
- In the **Database Utility**, select **Windows** under Authentication.

### With SQL Authentication:

This process requires that you enter a Login with the correct permissions created within SQL Server.

- In SQL Server, create a Login with SQL Server authentication selected.
- For the default database, select the FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value master.)
- Under **Server Roles**, select **sysadmin**.
- Under **User Mapping**, select the FusionRMS database, and then grant the following memberships: **db\_datareader**, **db\_datawriter**, and **db\_owner**. (Skip this step if you are using the Database Utility.)

In the **SLIM Manager**, enter the Login. In Database Utility, select SQL and then enter the Login.

## Database Connection Credentials For Initial Connection and Subsequent Active Directory Synchronization

The SLIM Server handles the automatic synchronization process of the Active Directory groups and must have access to both the Active Directory system and the database on the SQL Server through either a fixed Windows Authentication or a fixed SQL Authentication Login user.

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### With Windows Authentication (recommended):

This process begins with the initial database connection and continues repeatedly at a set interval or by the administrator to update the Active Directory Integration. (For information on manual and automatic synchronization, see “Scheduling Active Directory Synchronization” on page 16. A fixed login/user will need to be created in Active Directory, SQL Server, and then entered as a user for the SLIM Server service.

1. Create a user in Active Directory with rights to Active Directory, SQL Server, and the SLIM Server service.
2. In SQL Server, create a Login with Windows Authentication for this user.
  - For the default database, select the FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value **master**.)
  - Under **Server Roles**, select **sysadmin**.
  - Under **User Mapping**, select the FusionRMS database, and then grant the following memberships: **db\_datareader**, **db\_datawriter**, and **db\_owner**. (Skip this step if you are using the Database Utility.)
3. Add this user to the SLIM Server service. In Services, locate the **SLIM Server**. Right-click the service, and then click **Properties**. On the **Log On** tab, select **This account**, and then enter the user.

### With SQL Authentication:

This process begins with the initial database connection and continues repeatedly at a set interval or by the administrator to update the Active Directory Integration. (For information on manual and automatic synchronization, see “Scheduling Active Directory Synchronization” on page 16. A fixed login/user will need to be created in Active Directory, SQL Server, and then entered as a user for the SLIM Server service.

1. Create a user in Active Directory with rights to Active Directory, SQL Server, and the SLIM Server service .
2. In SQL Server, create a Login with SQL Server Authentication that shares the same user name and password that was created for Active Directory.
  - For the default database, select the FusionRMS database you will be connecting. (If you are using the **Database Utility**, leave the default value **master**.)
  - Under **Server Roles**, select **sysadmin**.
  - Under **User Mapping**, select the FusionRMS database, and then grant the following memberships: **db\_datareader**, **db\_datawriter**, and **db\_owner**. (Skip this step if you are using the Database Utility.)
3. Add this user to the SLIM Server service. In Services, locate the **SLIM Server**. Right-click the service, and then click **Properties**. On the **Log On** tab, select **This account**, and then enter the user.