PSIGEN software **inc.**
the **science** of document capture

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Screenshots: **3.2.26.0**

PSI**capture**
Fusion

PSIcapture Fusion Installation
Quick Start Guide

Getting Started

Welcome to PSIcapture Fusion!

This Quick Start Guide is designed to help you through the process of installing PSIcapture Fusion on a machine where it has never before been installed. For additional information on features not covered in this guide please refer to the PSIGEN wiki at help.psigen.com. PSIGEN offers detailed hands on training with the PSIcapture Fusion software as well.

This guide covers Installation of PSIcapture Fusion 3.2.x. This guide assumes you have basic knowledge of Microsoft Windows.

PSIcapture Fusion Requirements
- Ensure your computer meets the minimum requirements
- You have DOWNLOADED v3.2.x of PSIcapture Fusion
- You have a current PSIcapture Fusion License Key
  - PSxxx-xxxxxxxx – Product Key

These <u>four</u> are the required components that we will walk you through how to install with this guide on *Windows Server* or *Windows 10*.
1. Microsoft .Net 4.x
2. Microsoft SQL Server Express 2019
3. Microsoft SQL Server Management Studio 18.x
4. PSIcapture Fusion 3.x
5. Training Prep Walkthrough Guide (*Required for Training)*

System Requirements

Component	Minimum Requirement	Recommended Specification
Processor	1.0 GHz Dual-Core Processor	2.0 GHz Dual-Core Processor or better
RAM	1 GB RAM	2 GB RAM
HDD	2 GB free disk space	4 GB free disk space[2]
Video	Super VGA (1366 x 768) or higher resolution	

Hardware Requirements

Software Requirements

Component	Minimum Requirement	Recommended Specification
Operating System	• Desktop Class: Windows 8-Windows 10 (x86/64) • Server Class: Windows Server 2012R2 – Windows Server 2019	
Framework	• Microsoft .NET Framework Version 4.6 or later	
Webserver	Microsoft IIS 7.0[3]	Microsoft IIS 7.5
Database	Microsoft SQL Server 2012SP3 - 2019 (Standard / Express)	

Unsupported Platforms

PSIcapture Fusion is not supported on:

- Apache HTTP Web Server, nginx, and other open-source web server software platforms
- Oracle, sqlite or similar serverless databases

Support for these is not planned at this time.

NOTES

1. *PSIcapture Fusion is supported for both 32-bit and 64-bit platforms. We recommend, but do not require, a 64-bit server platform for optimum performance.*

2. This amount of disk space is generally required for the operating system and framework, and their updates. More may be required depending on the operating system version, and more disk space will be required for storage of scanned documents.

3. Microsoft Internet Information Services (IIS) will not serve a web application to more than 10 concurrent users when running on a non-server operating system.

PSIcapture Fusion will only be supported on non-server operating systems for demonstration purposes.

Installing Prerequisites

Introduction

This section of the guide provides resources to assist you in preparing your server to host the PSIcapture Fusion application.

Microsoft .NET Framework

The PSIcapture Fusion installer will install or update the .NET Framework installation on your server. However, if you wish to install the latest version of the framework manually you may use the links below to do so.

The following link will download the installer for the framework directly:

https://support.microsoft.com/en-us/help/4503548/microsoft-net-framework-4-8-offline-installer-for-windows

Installing SQL Server Express

Download for SQL Server Express 2019 can be found here:

https://www.microsoft.com/en-us/sql-server/sql-server-downloads

Installing SQL Server Management Studio

Download and installation instructions for SQL Server Management Studio can be found here:

https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-ver15

Installation and Configuration of OS Requirements

Microsoft .NET Framework 4.8.x

Download the Microsoft .NET Framework 4.8.x Package
Using the link provided above
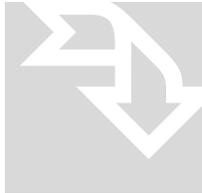
The Microsoft .NET Framework 4.8.x Setup file is roughly 115 MB. When using a broadband connection, you should be able to download it in around 1-5 minutes.

Installation

Right click the installation file and select Run as administrator
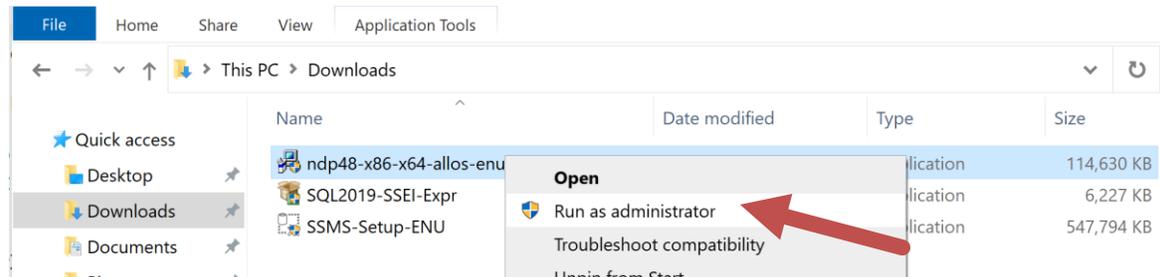
If Microsoft .NET Framework 4.8.x or newer is already present on the machine the installation will end

Select
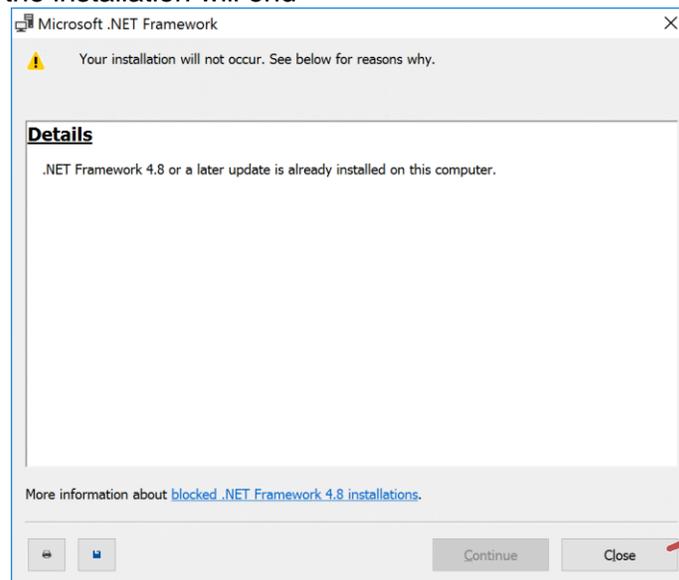
If Microsoft .NET Framework 4.8.x is missing from the system, click to accept the license terms and continue through prompts to finish installation.
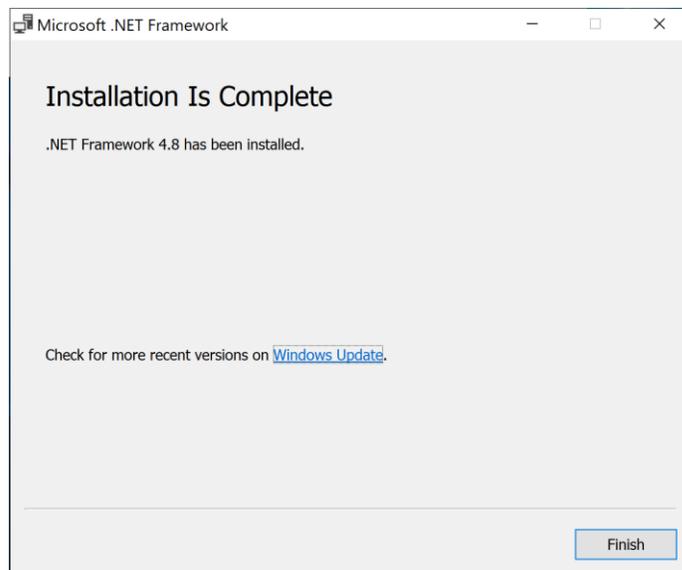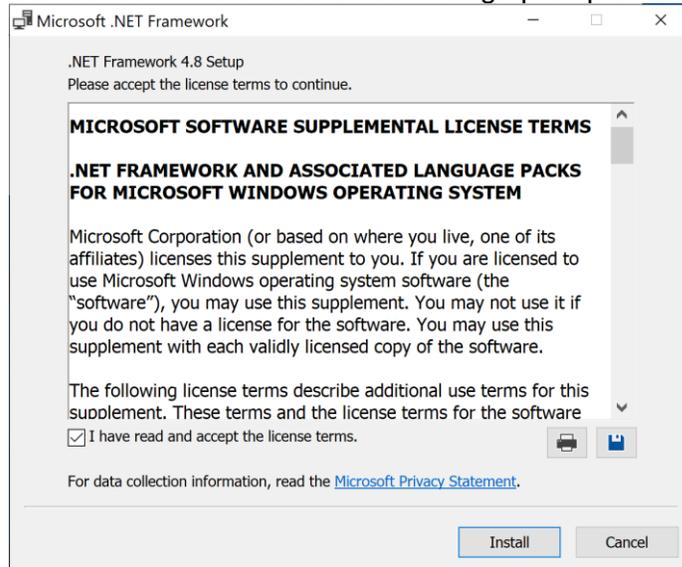
If prompted click Restart Now
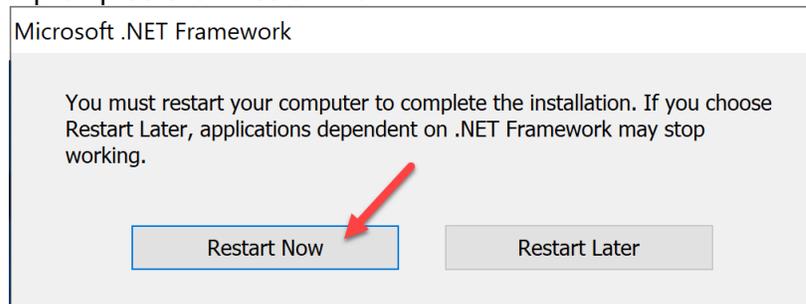
SQL Server Express

Install the Microsoft SQL Server 2019 Express Package (SQLServer2019-SSEI-Expr) using the link above

The SQL Server Express Setup file is roughly 800 MB. When using a broadband connection, you should be able to download it in around 5-10 minutes.

Installation

Right click and Run SQLServer2019-SSEI-Expr as Administrator

File	Home	Share	View	Application Tools

← → ∨ ↑ 📥 > This PC > Downloads

Name	Date modified

⭐ Quick access
📁 Desktop 📌
📥 Downloads 📌
📄 Documents 📌

🔧 ndp48-x86-x64-allos-e
📦 SQL2019-SSEI-Expr
🔧 SSMS-Setup-ENU

Open
🛡️ Run as administrator
Troubleshoot co...   Select

Select Yes to UAC prompt

User Account Control ×

Do you want to allow this app to make changes to your device?

📦 SQL Server 2019

Verified publisher: Microsoft Corporation
File origin: Hard drive on this computer

Show more details

Yes	No
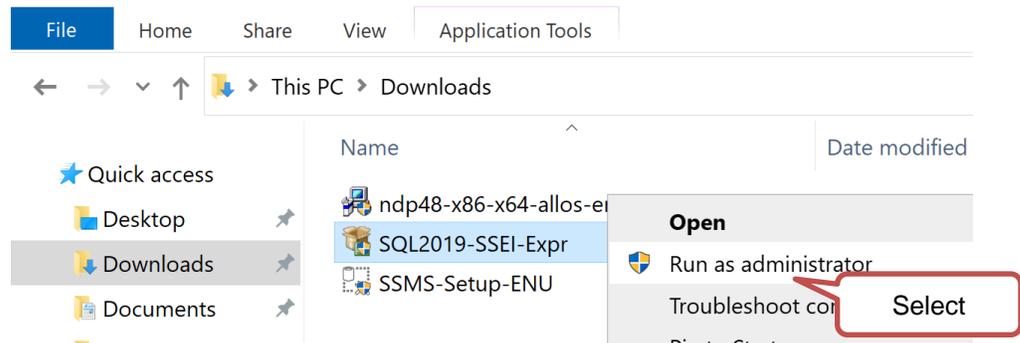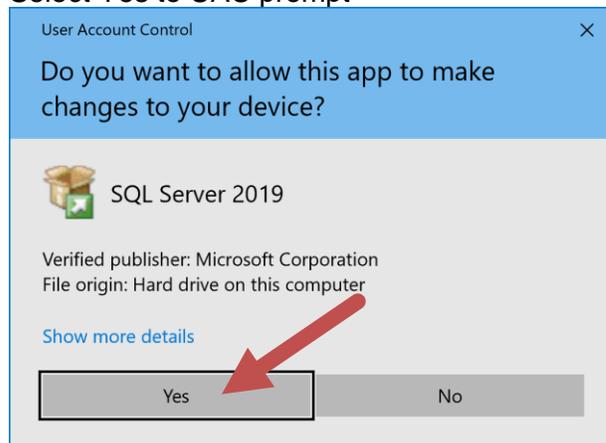
Select the Custom Install
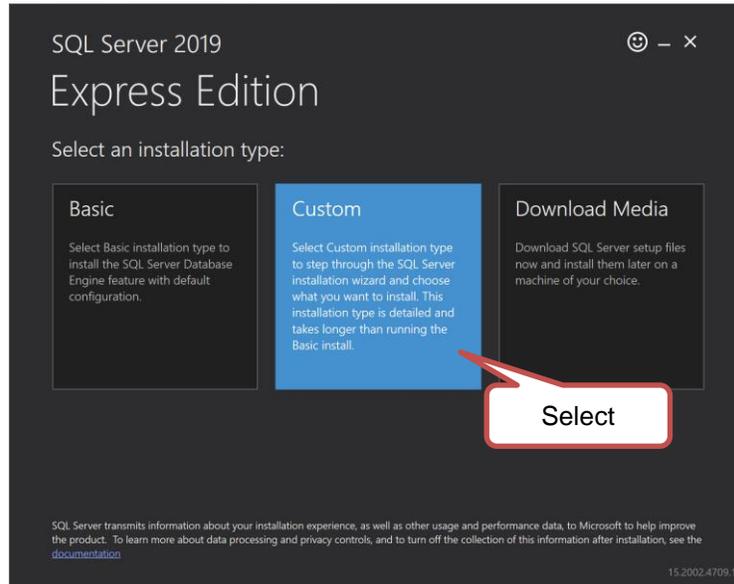
Accept the install path and click Install
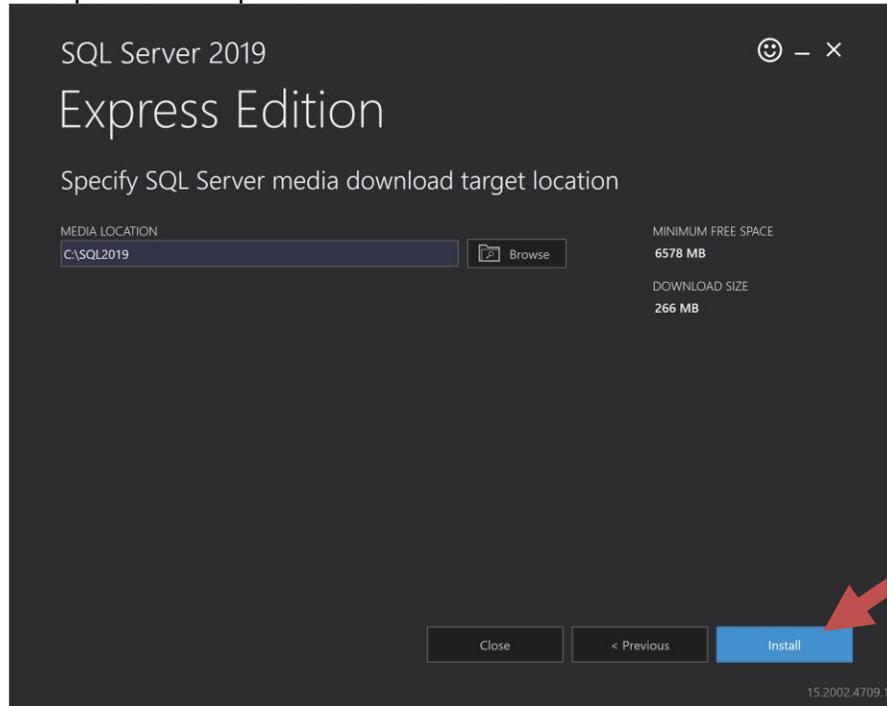
Installer will download installation package
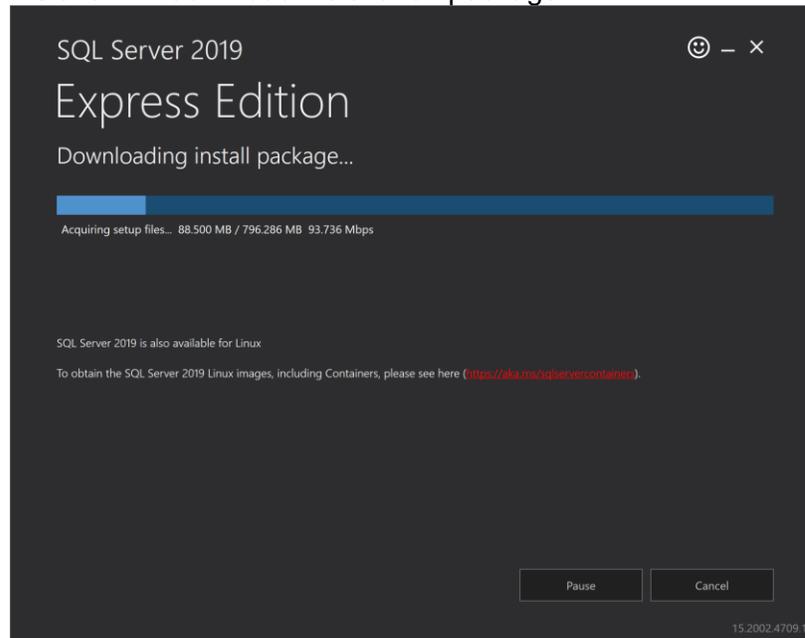
Once SQL Server Installation Center opens, select New SQL Server stand-alone installation
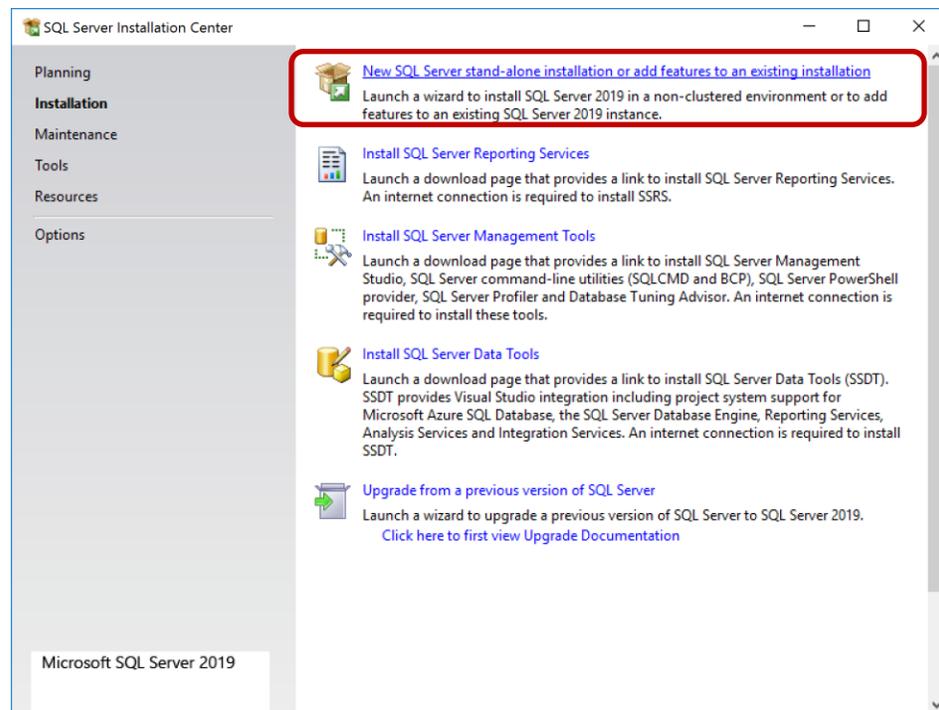
SQL Server Express will extract appropriate setup files and run preliminary system checks. If any issues are present, address and re-run installation
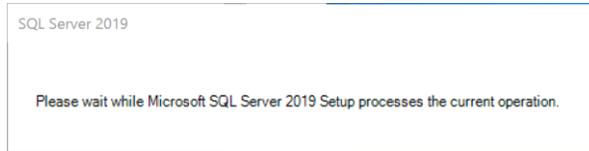
Check the box next to I accept license terms and click **Next**
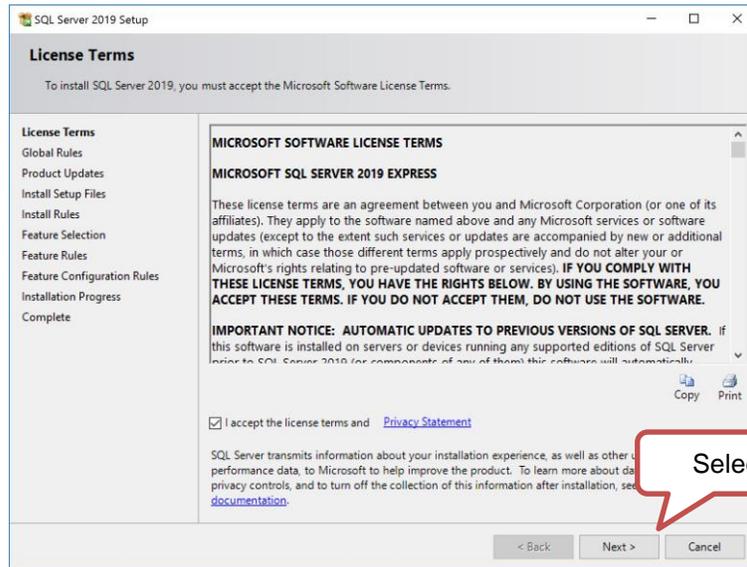
If the Microsoft Update screen is displayed check the box to "Use Microsoft Update" and click Next>
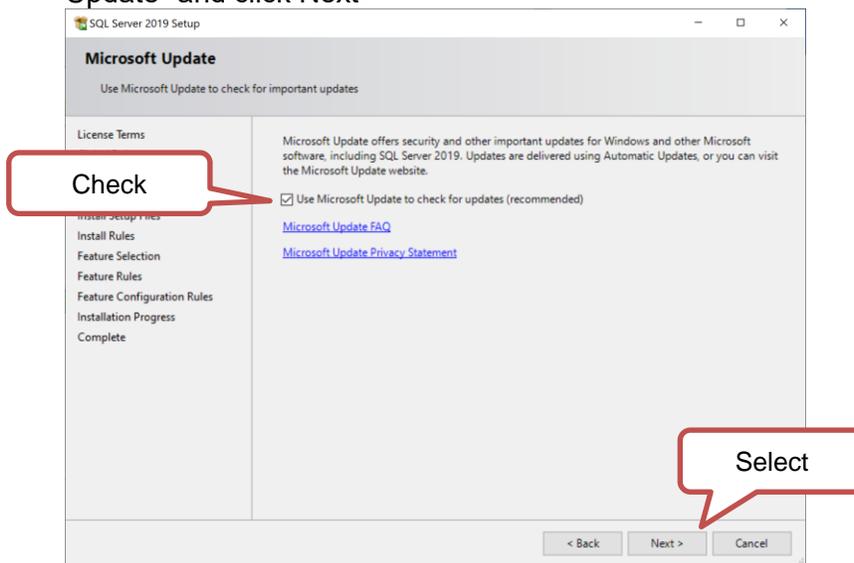
SQL Server Express will check for pre-requisites, address any warnings that it reports
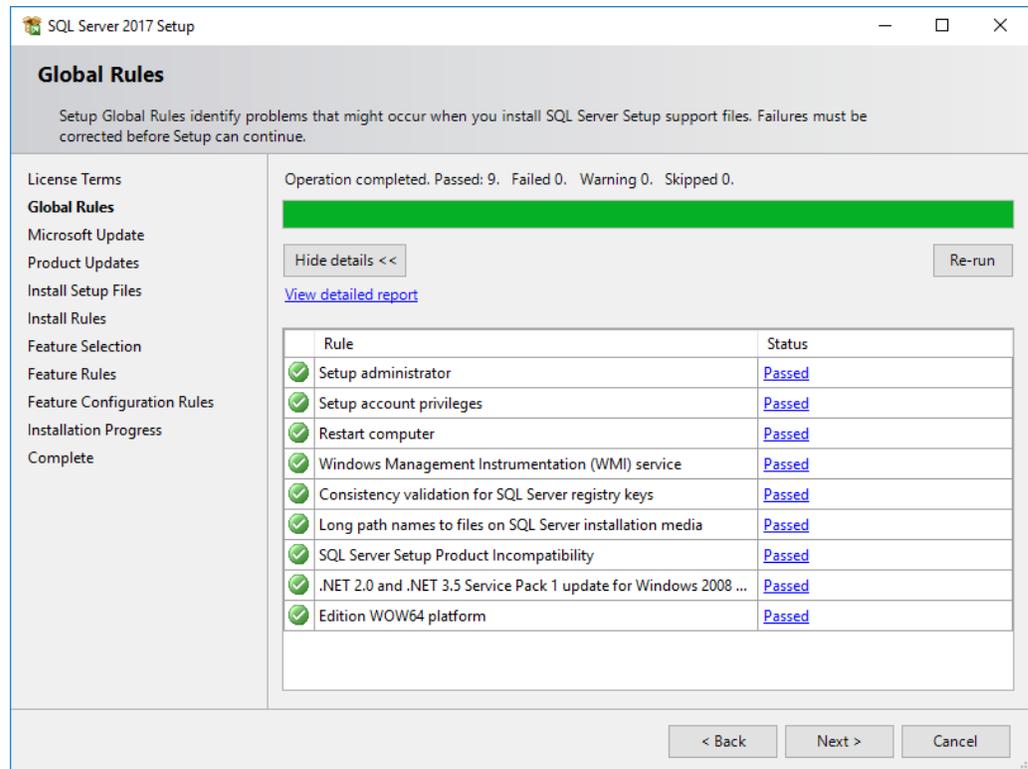
The installer will present a list of Features. Uncheck Machine Learning Services and leave the remaining defaults and select **Next**
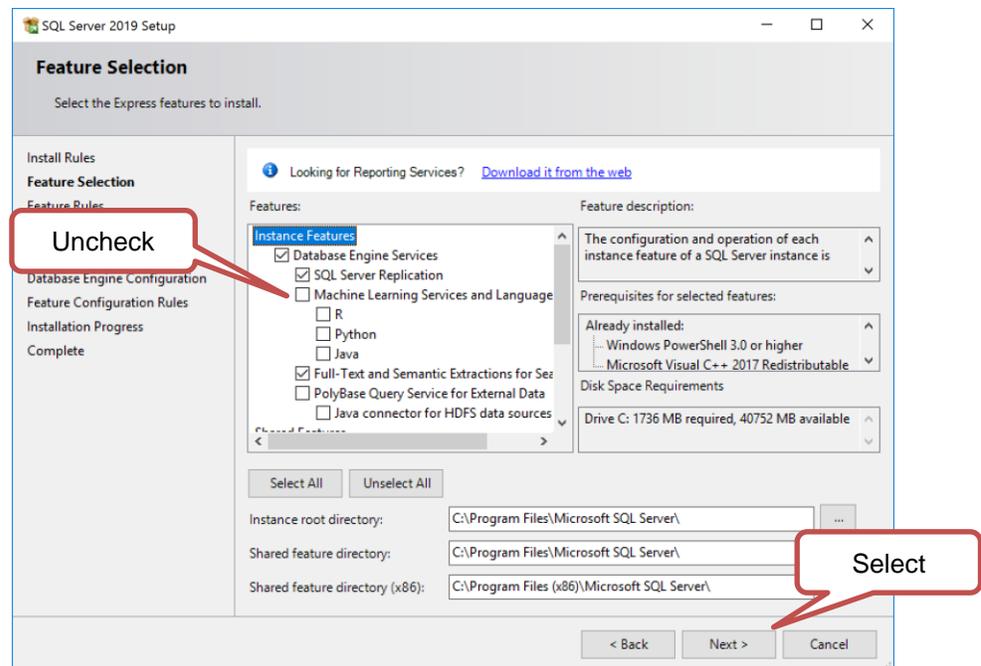
On the Instance Configuration window change the instance name to **Fusion** and click **Next**
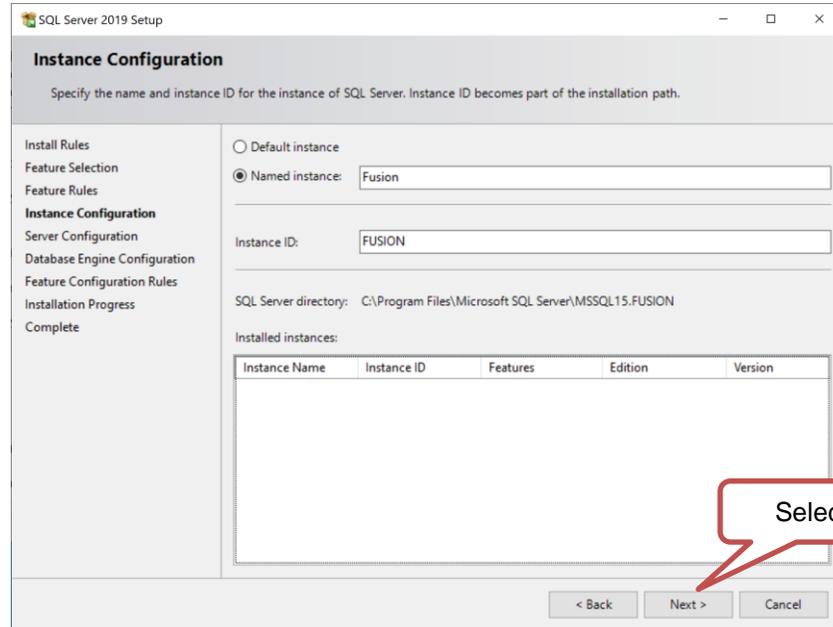
Server Configuration will display Windows Service Accounts responsible for running SQL. Set the SQL Server Browser to **Automatic** and select **Next**
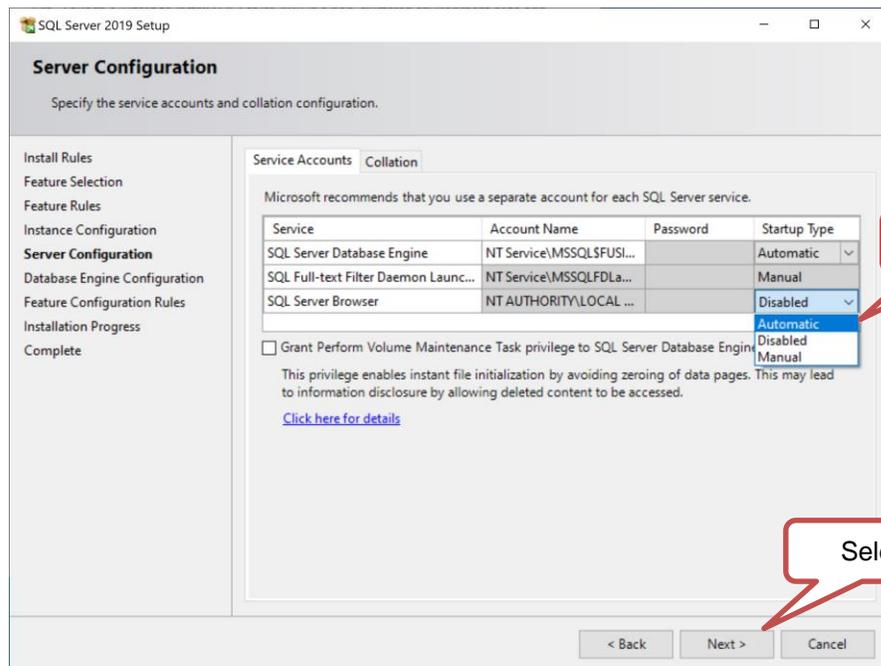
The Database Engine Configuration screen will allow us to establish credentialing for PSIcapture Fusion's connection to the database. Set the Authentication Mode to **Mixed** which will allow SQL Authentication or Windows Authentication. Also specify the SQL Administrator (sa) password as **Admin-01**.
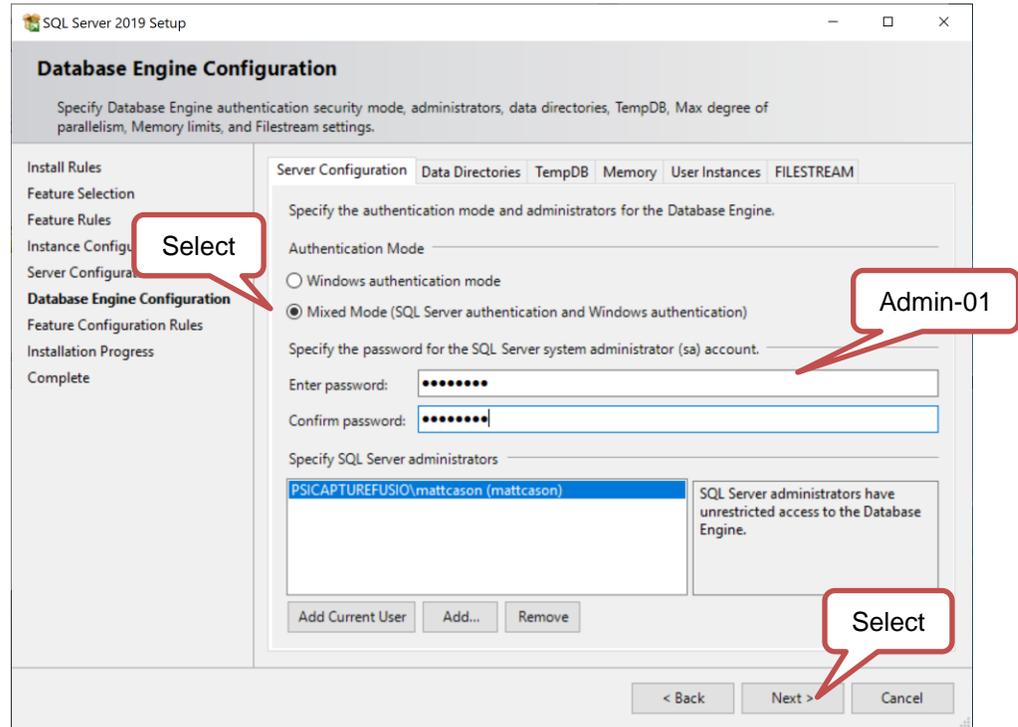
If logged in as local Administrator, we can choose to "Add Current User" if it is not already populated.

The installation will begin (may take up to 15 minutes)
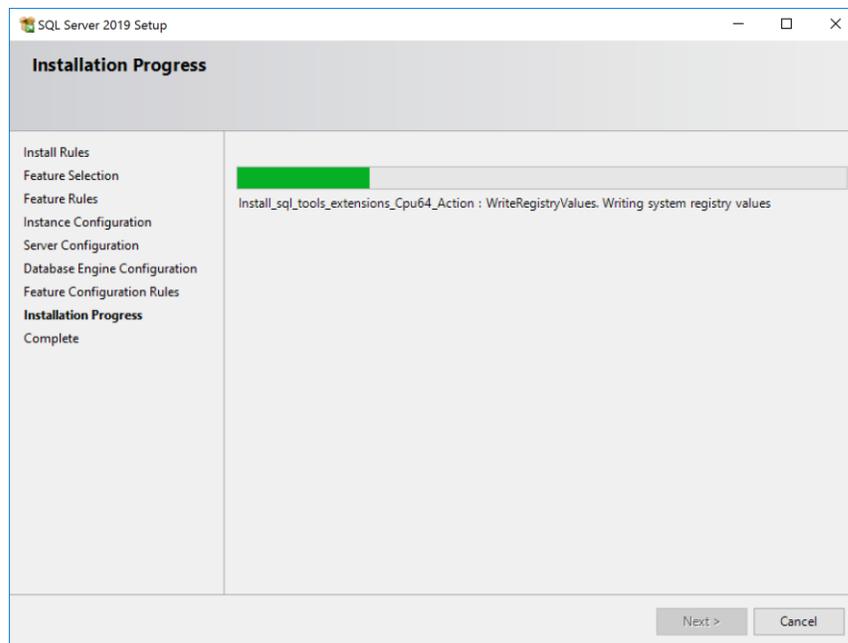
Once the Complete screen appears click **Close.** If prompted to reboot, please reboot now
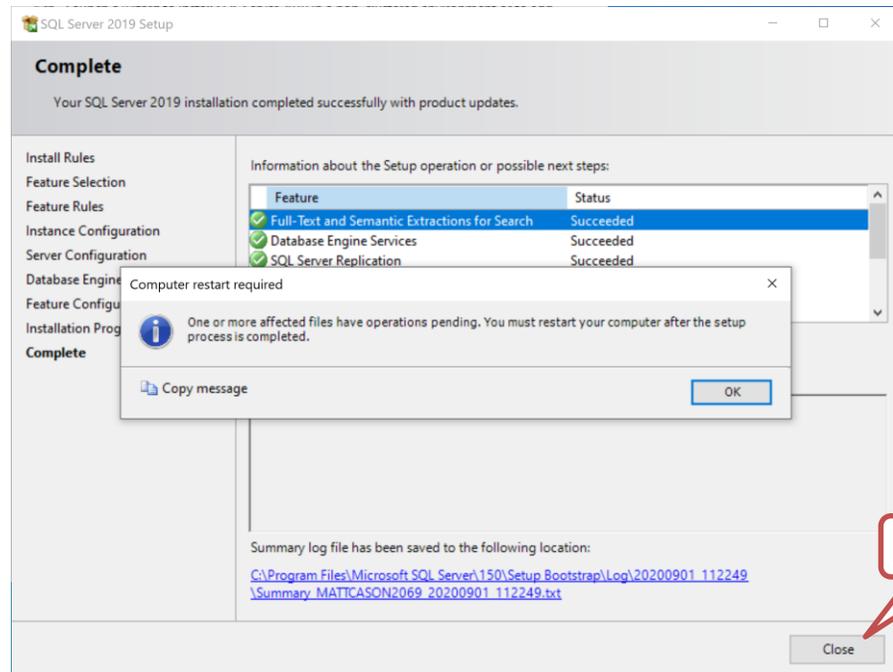
Close SQL Server Installation Center
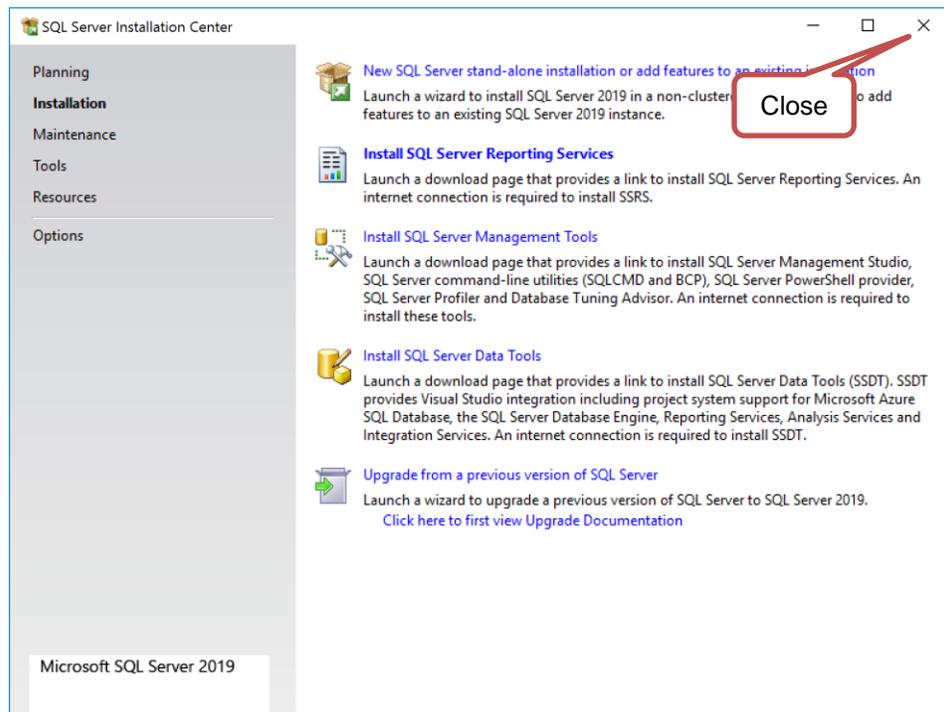
SQL Configuration

Open the SQL Server Configuration Manger

Windows 10: Start>Microsoft SQL Server 2019>SQL Server Configuration manager, accept UAC Prompt

Or

Enter "SQL Server Configuration Manager" in Windows Search
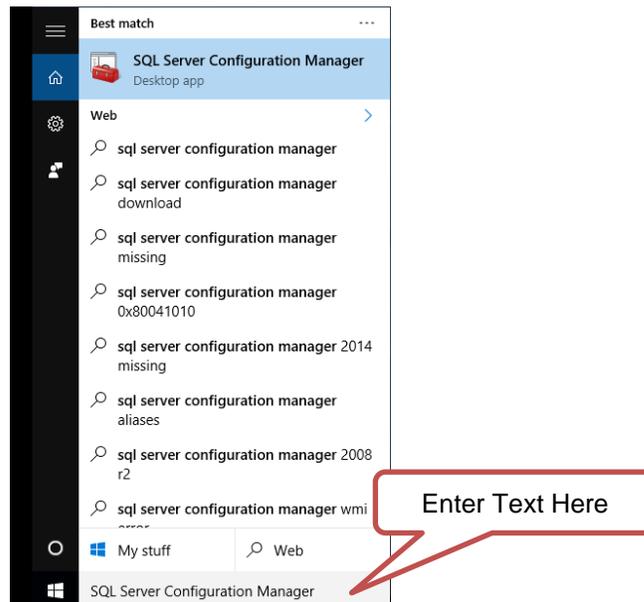
Windows Server 2019: From Start screen, select the SQL Server 2019 Configuration Manager, accept UAC prompt
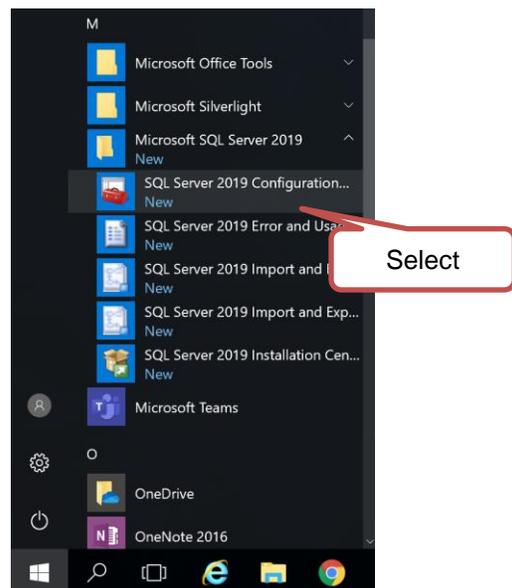
Once SQL Server Configuration Manager opens, expand SQL Native Client 11.0 Configuration (32bit) and verify **all** Client Protocols are enabled
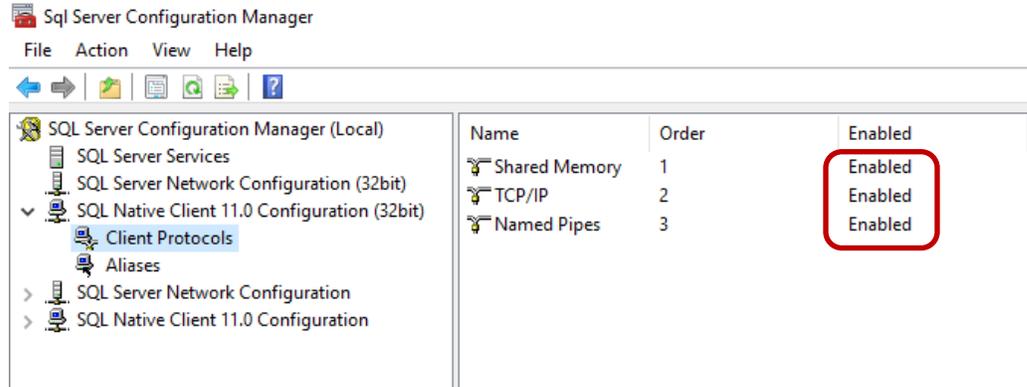
Expand SQL Server Network Configuration and verify **all** Protocols for SQLEXPRESS are enabled
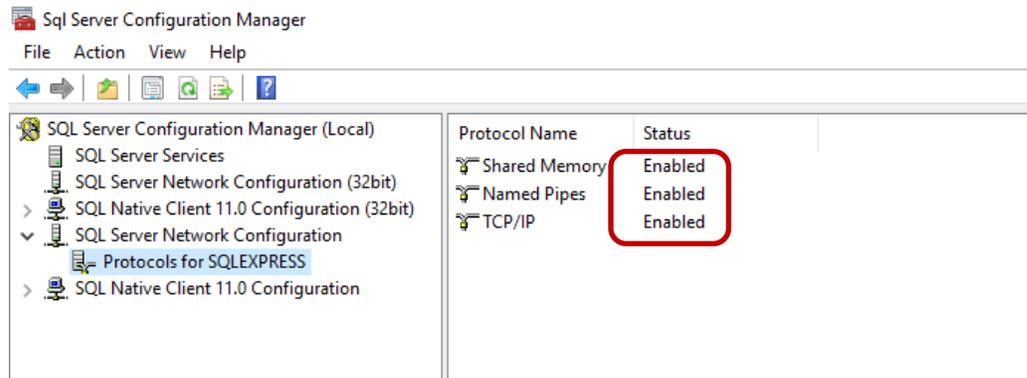
☆ Note:
To enable an item: right--click desired protocol select enable. Select OK on Warning message related to restarting the service.

Expand SQL Native Client 11.0 Configuration and verify all Client Protocols are enabled
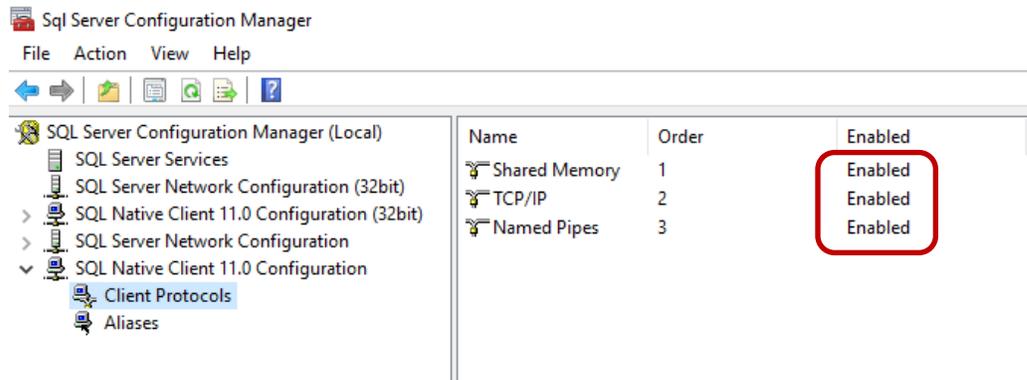
Select SQL Server Services then right click SQL Server (SQLEXPRESS) and select Restart
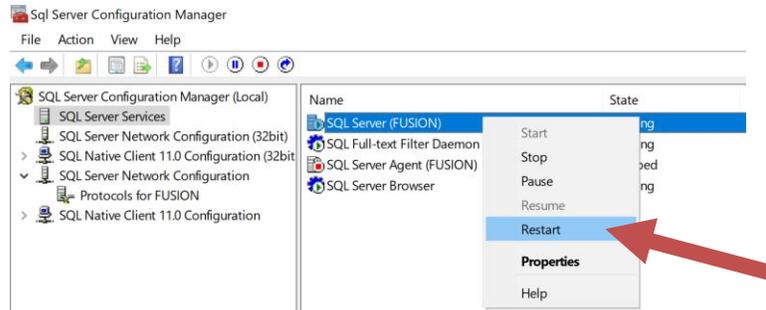
SQL Server Express installation and configuration complete, close Manager

SQL Server Management Studio

Install the Microsoft SQL Management Studio (SSMS-Setup-ENU)

The SQL Server Management Studio application allows you to manage your databases.

Installation

Right click and Run SQLServer2019-SSEI-Expr as Administrator
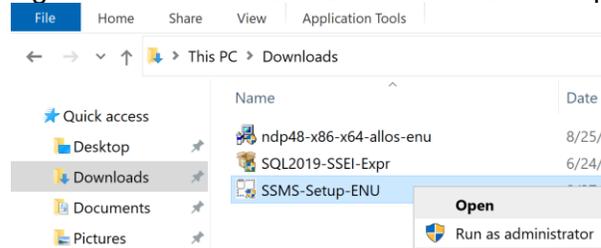
Select Yes on UAC Prompt
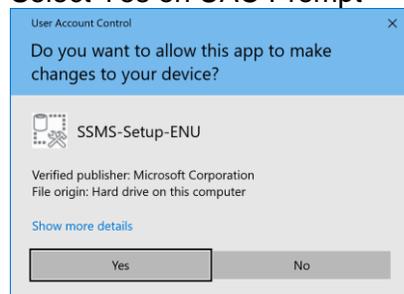
Accept the default installation location and select Install
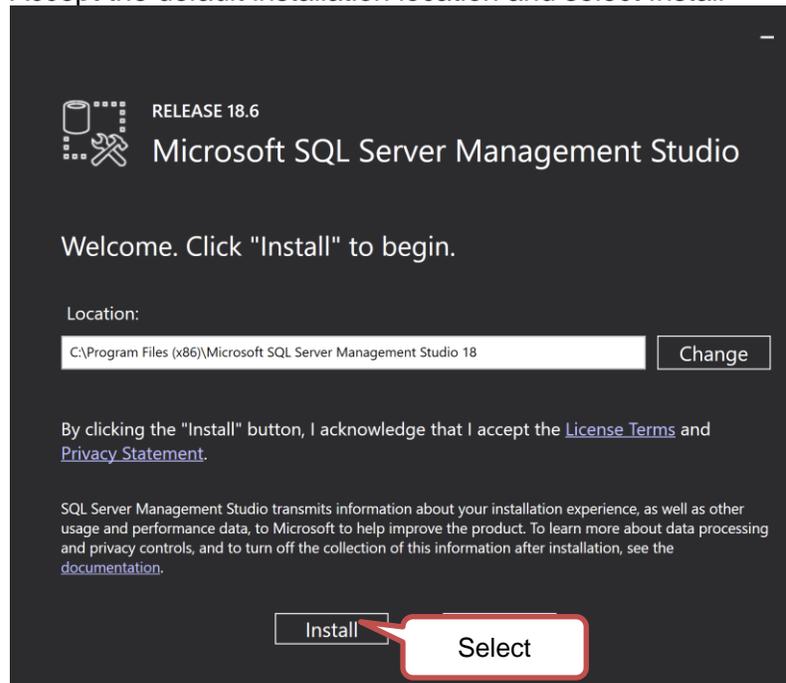
Installation will take a few minutes
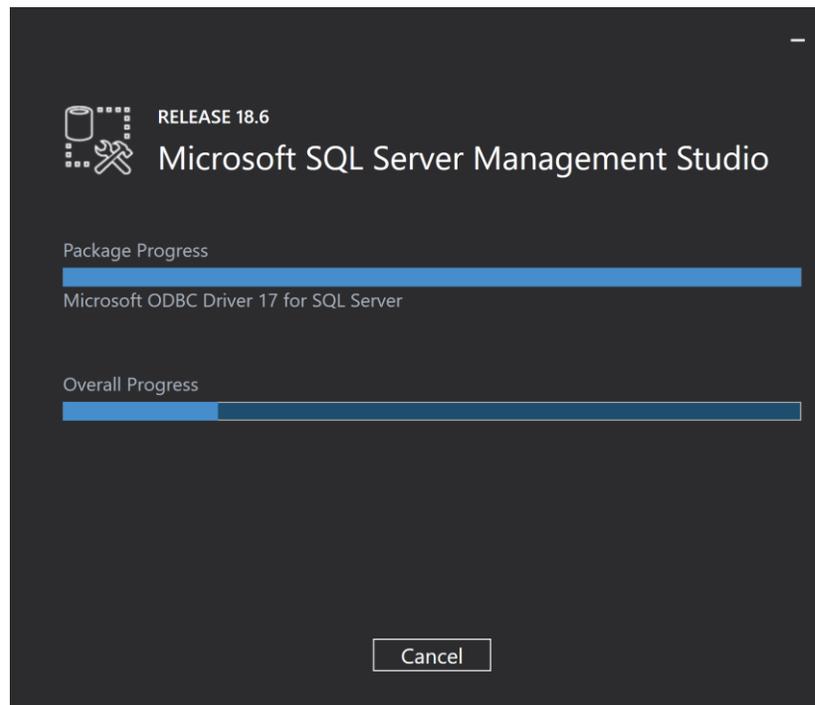
If prompted to Restart click to Restart otherwise click Close.
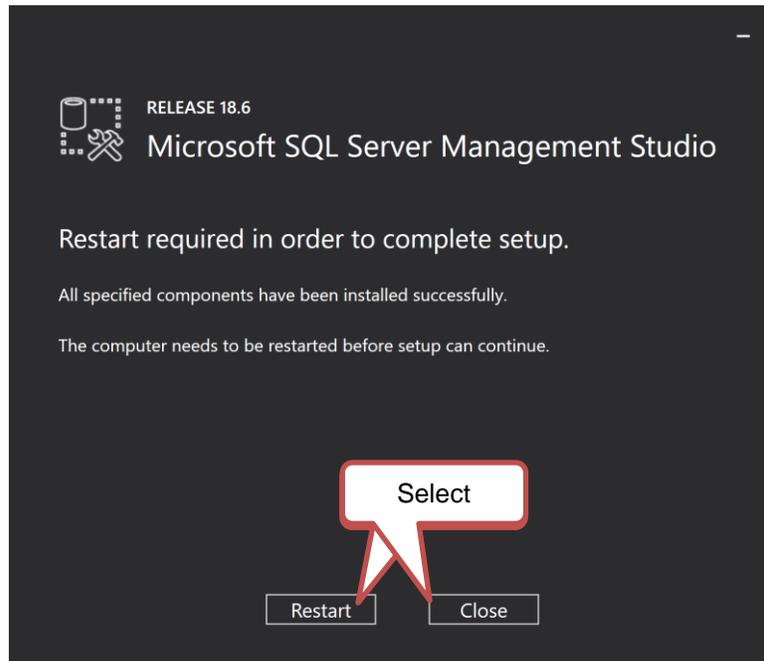
Internet Information Services (IIS)

These instructions are assuming that no previous installations of IIS exist on the server.

Windows Server 2019

From the Server Manager Dashboard, select Add roles and features
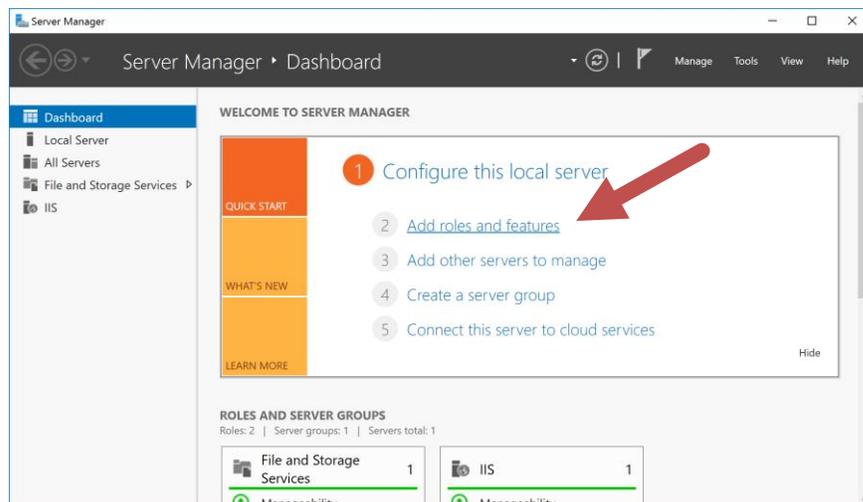
Verify the Before you begin items have been addressed and click Next
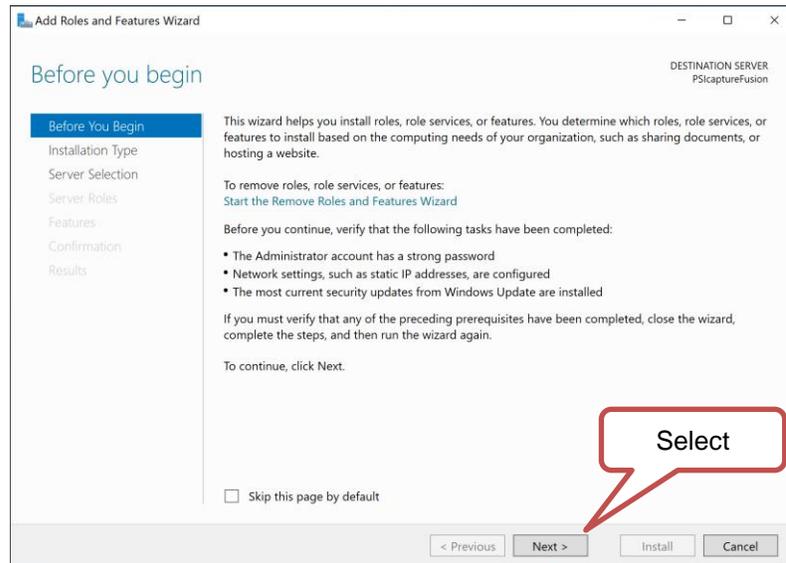
Select Role-based or feature-based installation and click Next
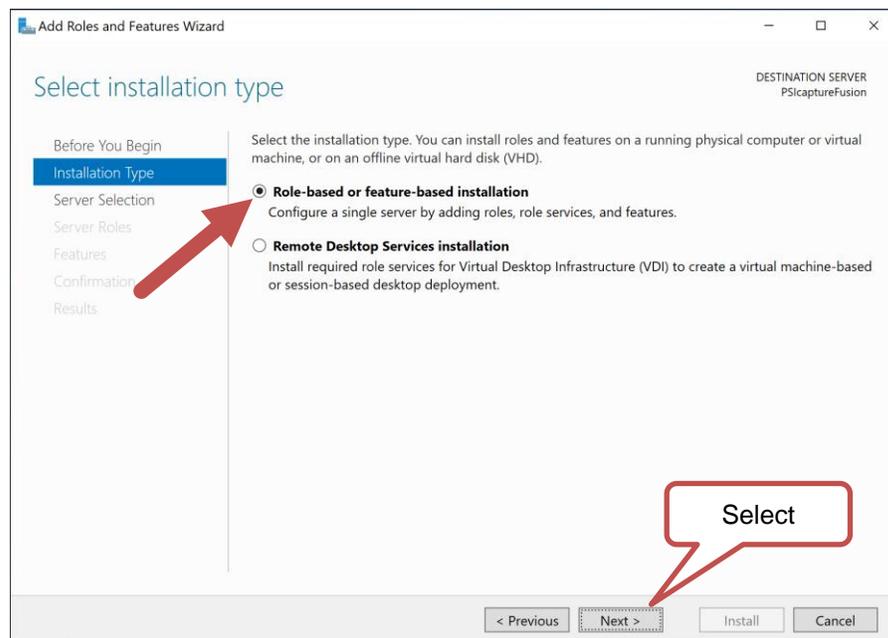
Leave default entries on the Select destination server screen and click Next
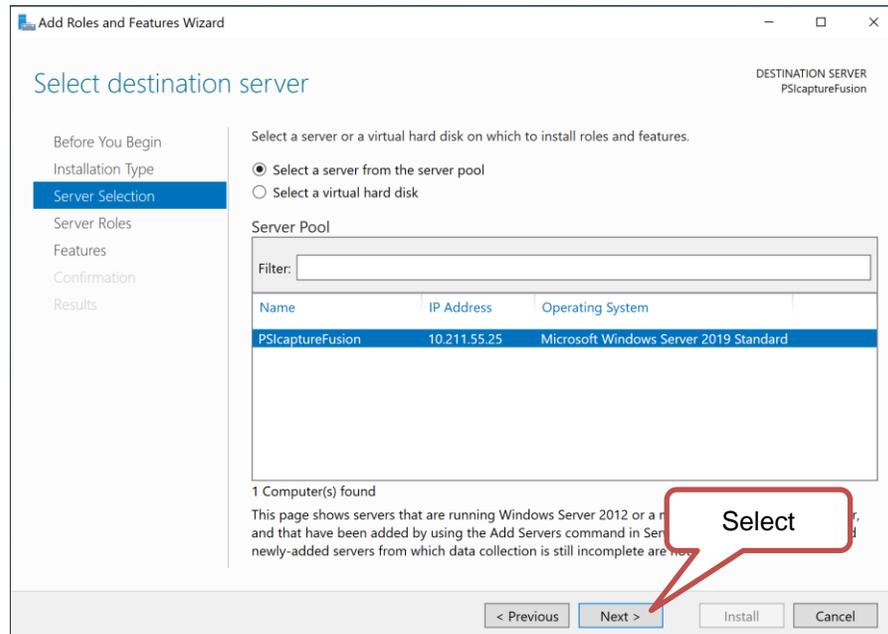
From the Select server roles screen, check Web Server (IIS)
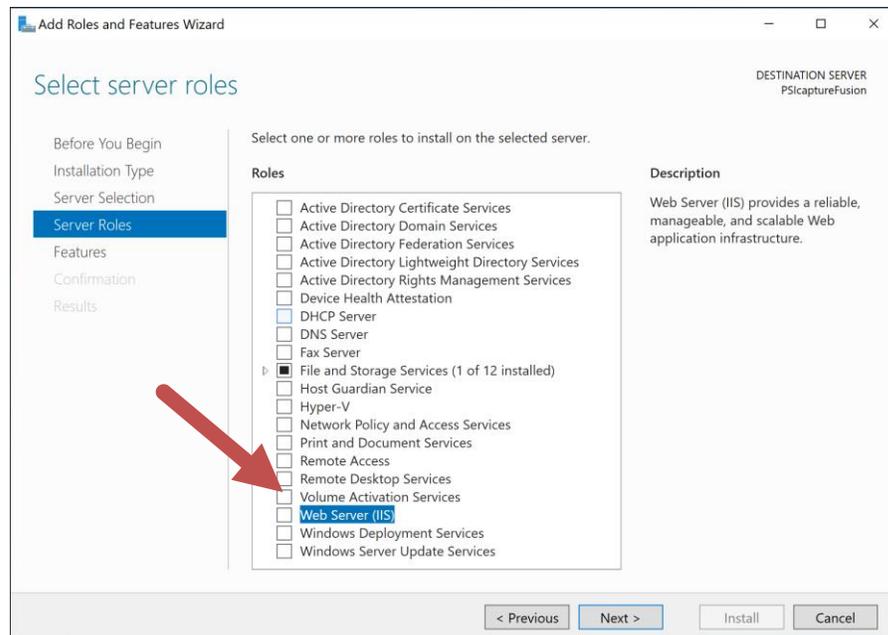
Select Add Features for the Management Tools pop up
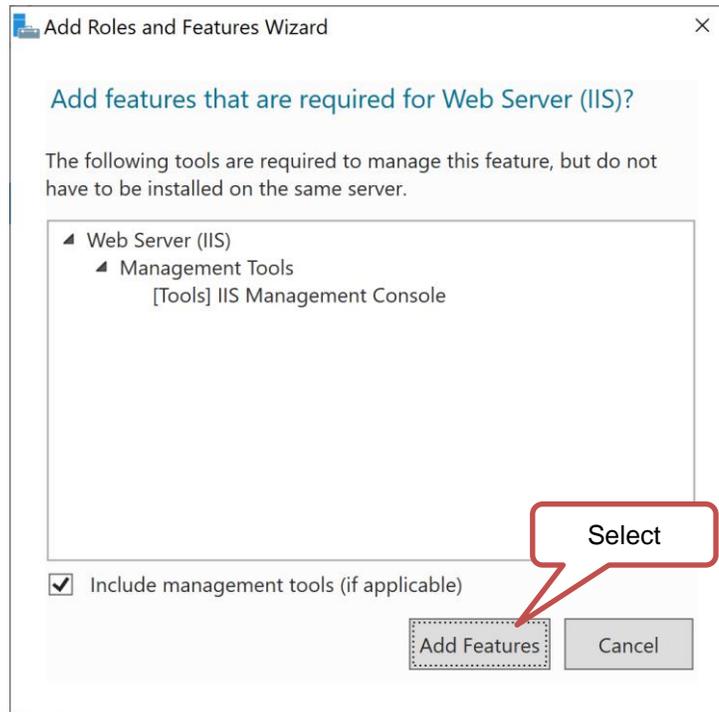
Select Next on Select Server Roles
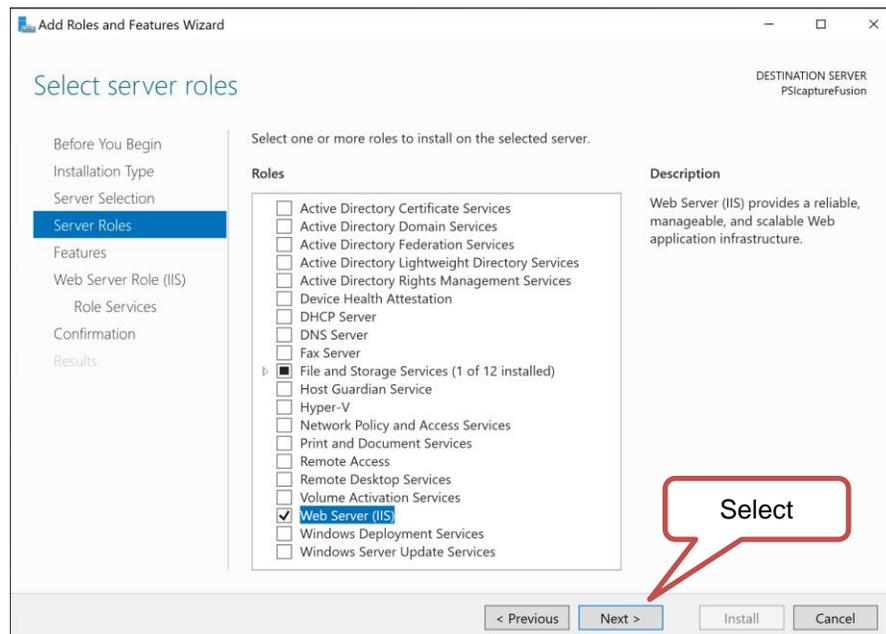
In the Select Features tab expand .Net Framework 4.7 Features, expand WCF Services and enable HTTP Activation.
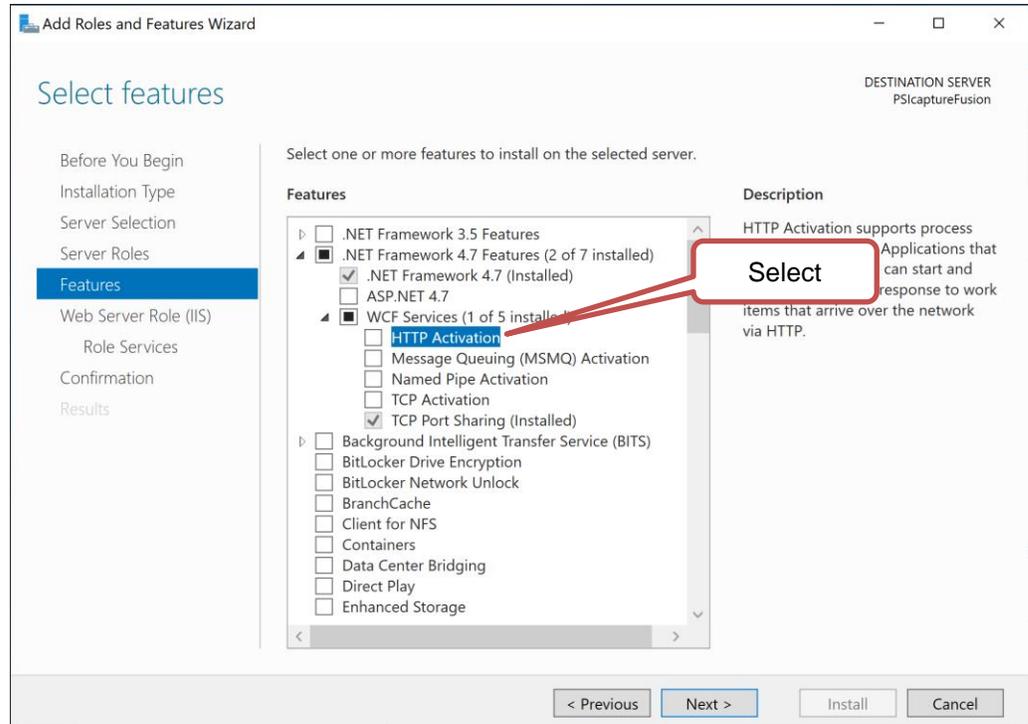
In the feature's popup select add and click Next.
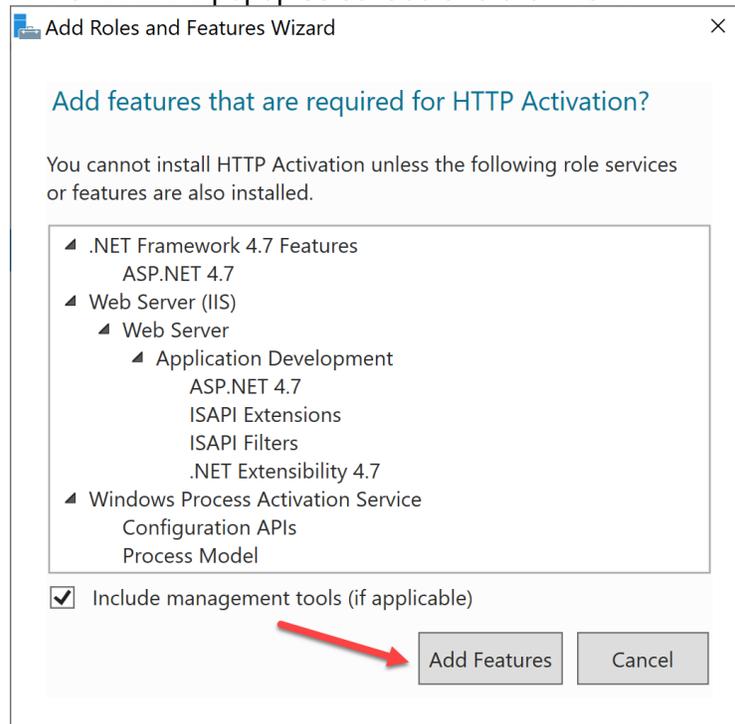
Review notes presented on the Web Server Role (IIS) screen and click Next
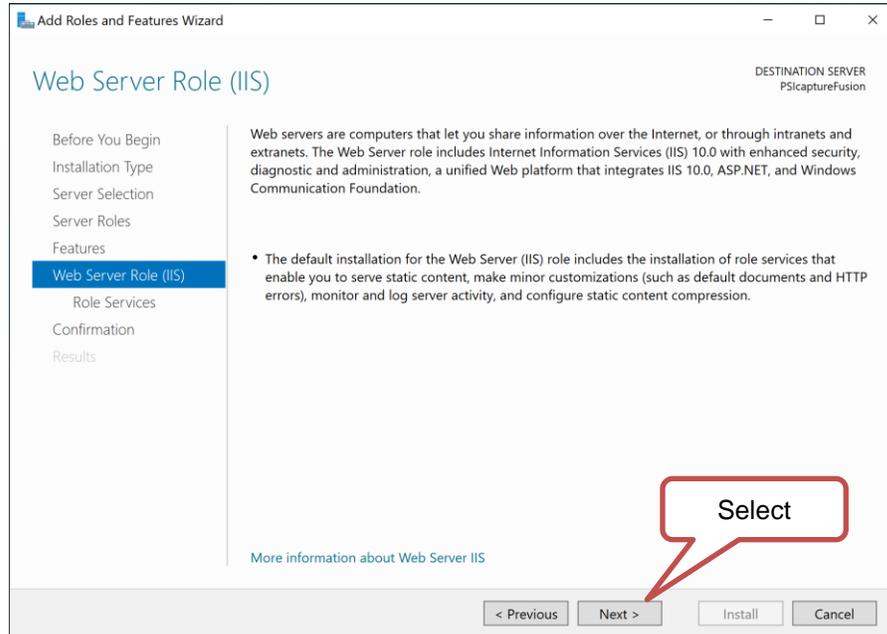
The Select role services window will open
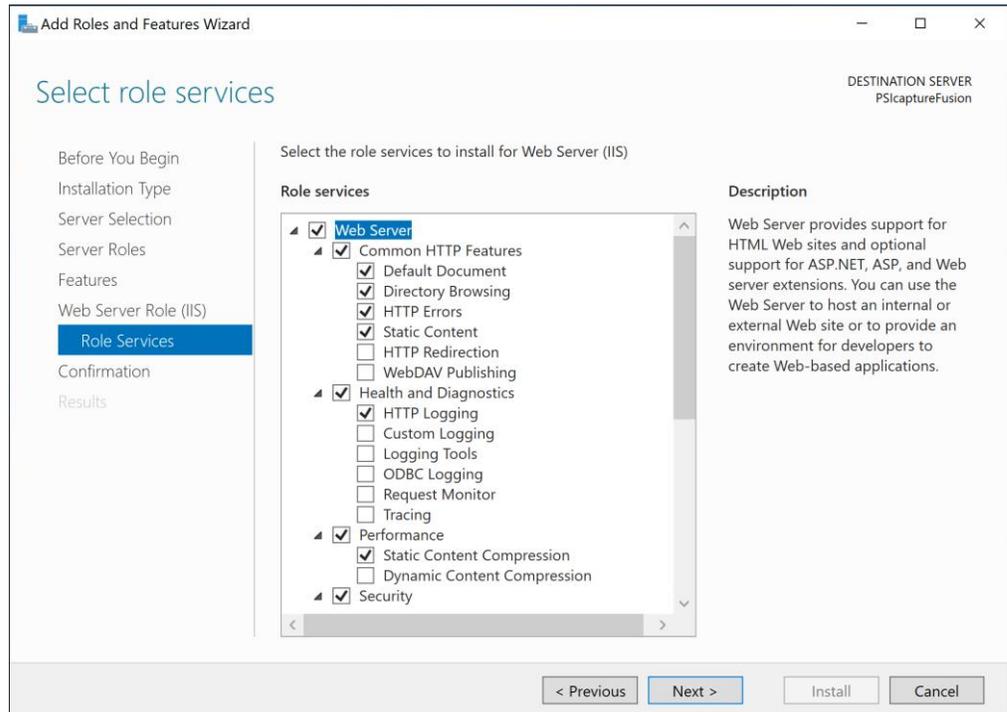
Enable the following options (leaving default selections in place)

Under Security
1. Basic Authentication
2. Digest Authentication
3. Windows Authentication
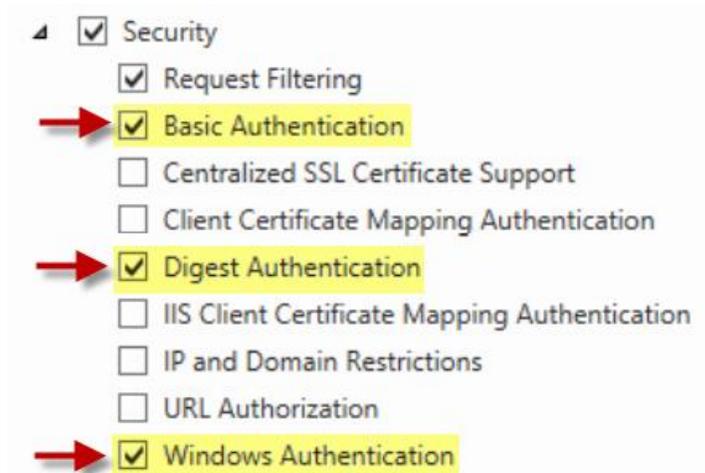
Expand Application Development
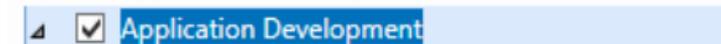
Under Application Development
        Check to make sure ASP.NET 4.7 is checked
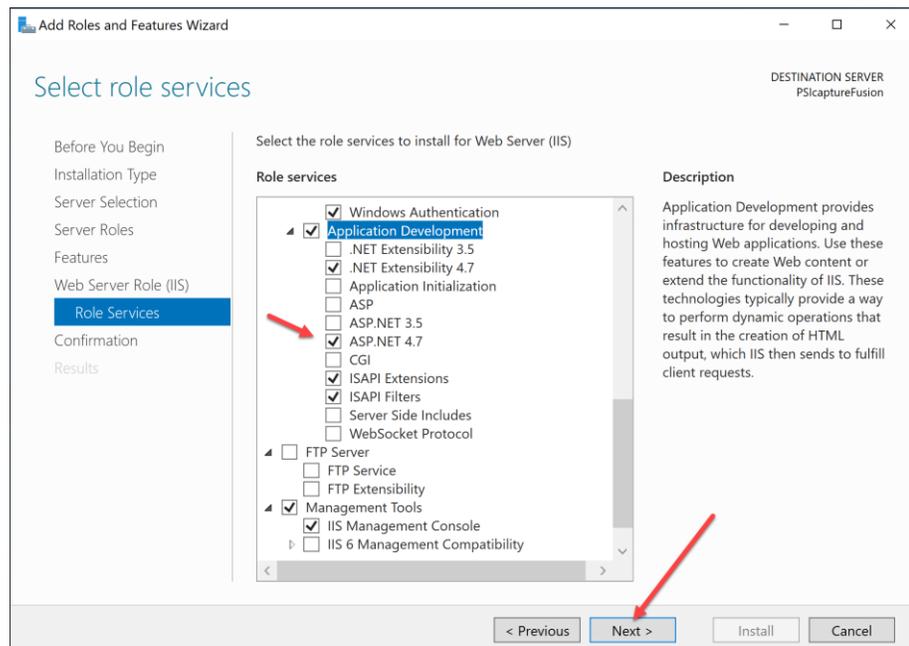
Click Next to continue installation

From the Confirm installation selections window, check option to Restart the destination server automatically if required
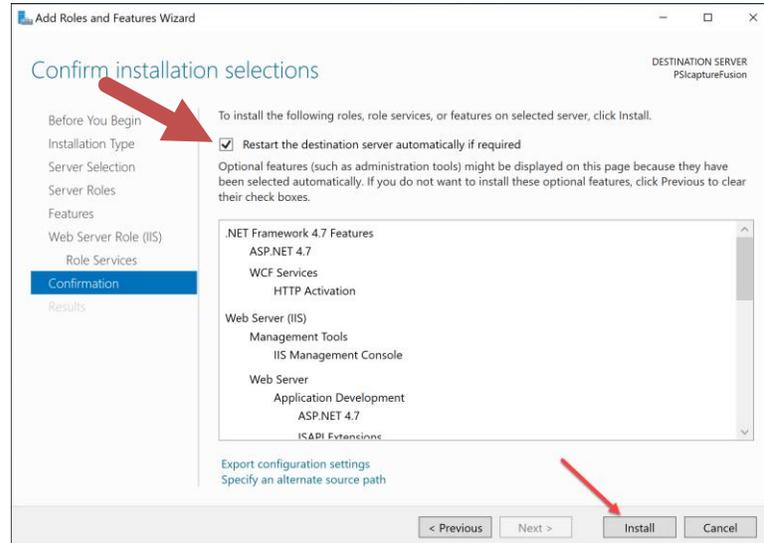
Click Install
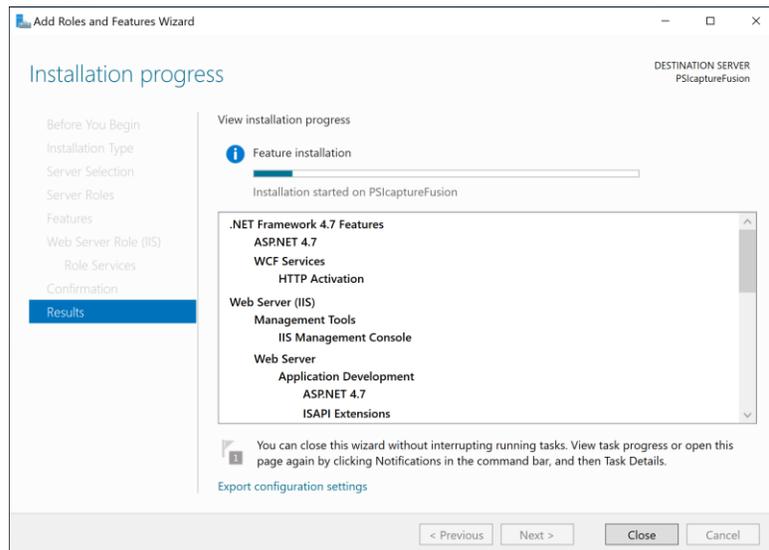
Click Close button once the installation is complete

From the Server Manager Dashboard, select the Tools menu, then Internet Information Services (IIS) Manager
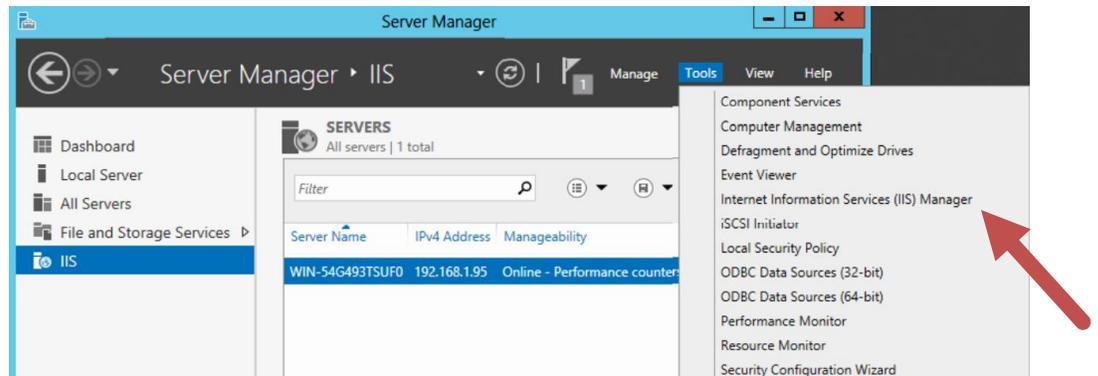
From the Connections menu, expand until Default Web Site is viewable. Select Default Web Site
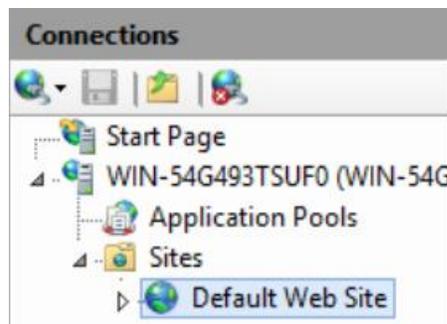
If Microsoft Web Platform message opens, click Do not show this message and select No
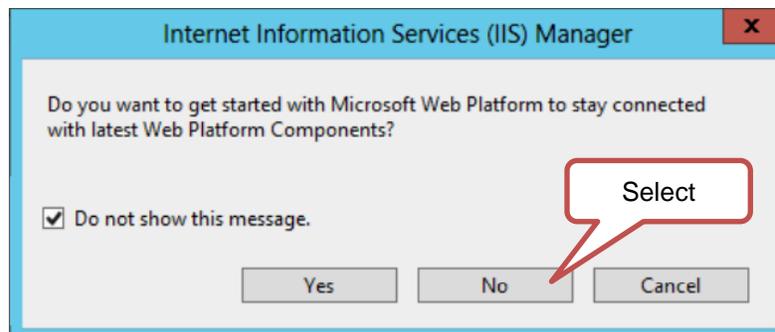
From the Actions menu on the right, click on Browse *:80 (http)
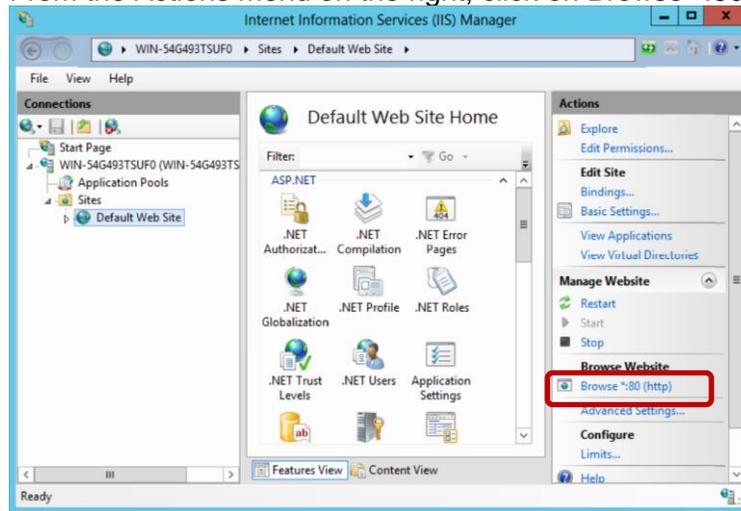
If installed correctly the web browser will display the IIS Home Screen
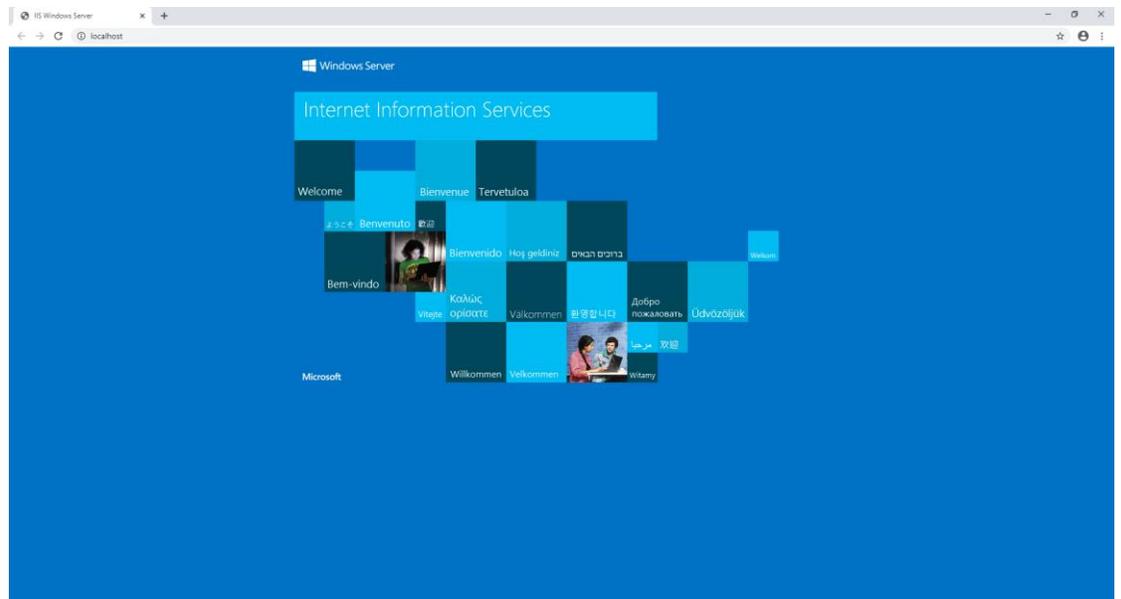
Windows 10

Open Windows 10 Control Panel by typing "Control Panel" in the Windows search box
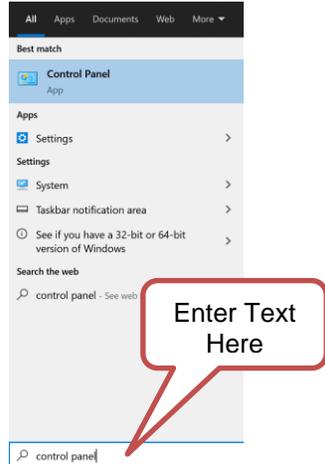
Select Programs
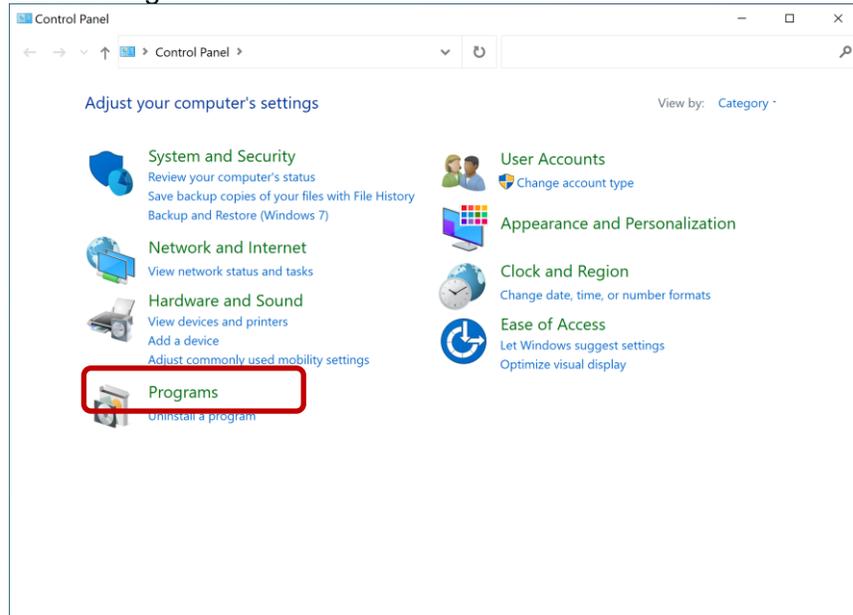
From the top, select Turn Windows features on or off
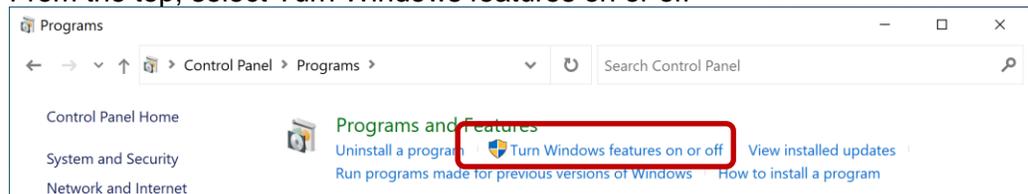
From Windows Features, enable the following
  (Graphics are below)

1. .NET Framework 4.7 Advanced Services
    a. WCF Services
        i. HTTP Activation
2. Internet Information Services
    a. Web Management Tools
        i. IIS Management Console
    b. World Wide Web Services
        i. Application Development Features
            1. ASP .NET 4.7
            2. Auto selected after checking ASP .NET 4.7
                a. .NET Extensibility 4.7
                b. ISAPI Extensions
                c. ISAPI Filters
        ii. Common HTTP Features
            1. HTTP Errors
            2. Static Content
    c. Security
        i. Basic Authentication
        ii. Digest Authentication
        iii. Windows Authentication
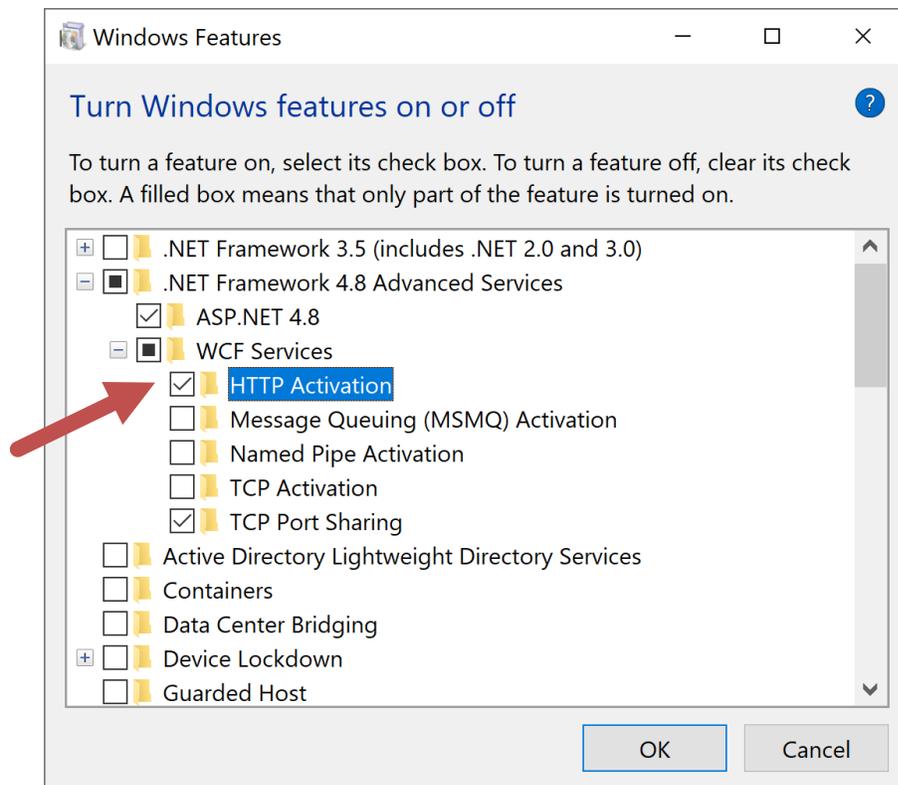
Scroll down and select the following
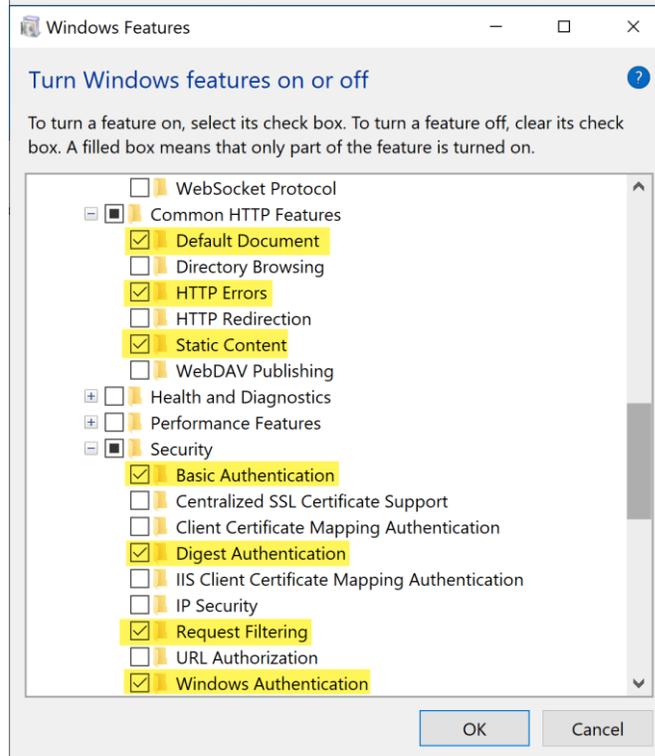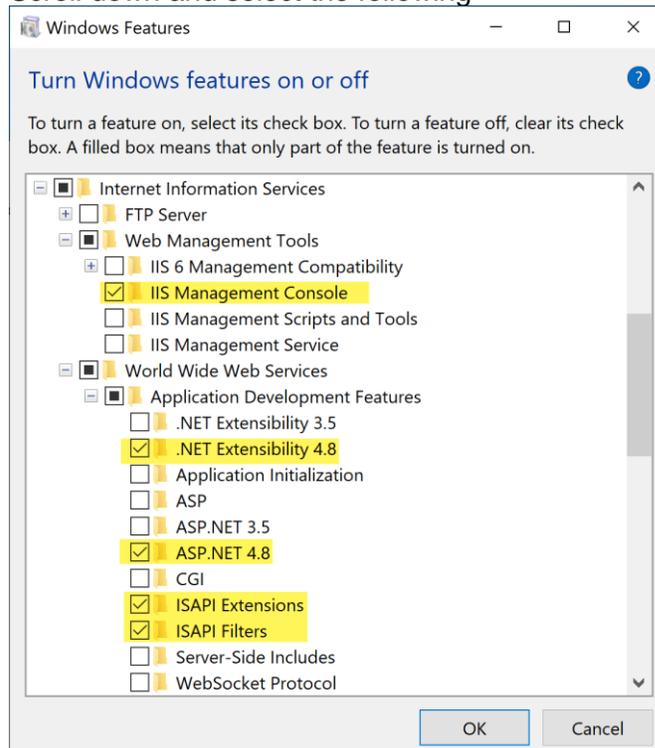
Select OK when done
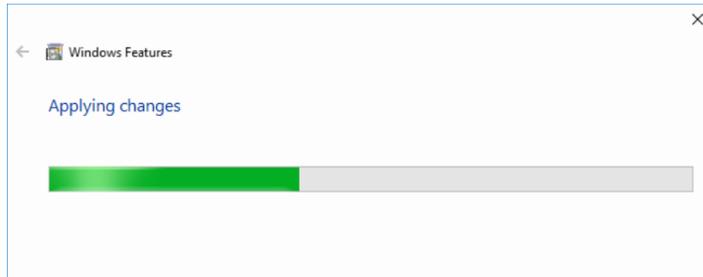
Click Close once complete
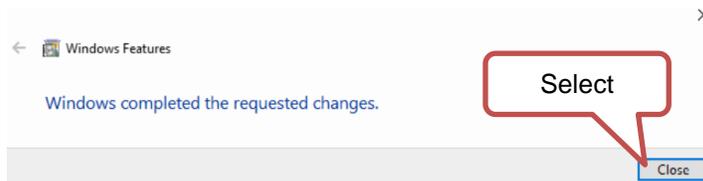
Select

Click on Start icon and type IIS
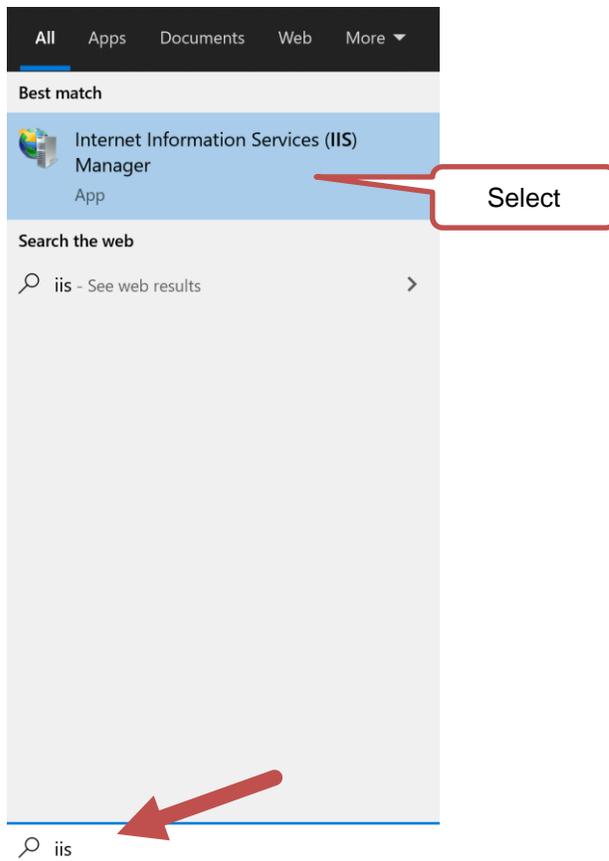
Select

From the Connections menu, expand until Default Web Site is viewable. Select Default Web Site
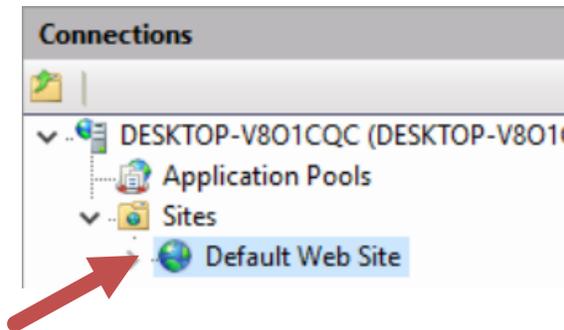
From the Actions menu on the right, click on Browse *:80 (http)
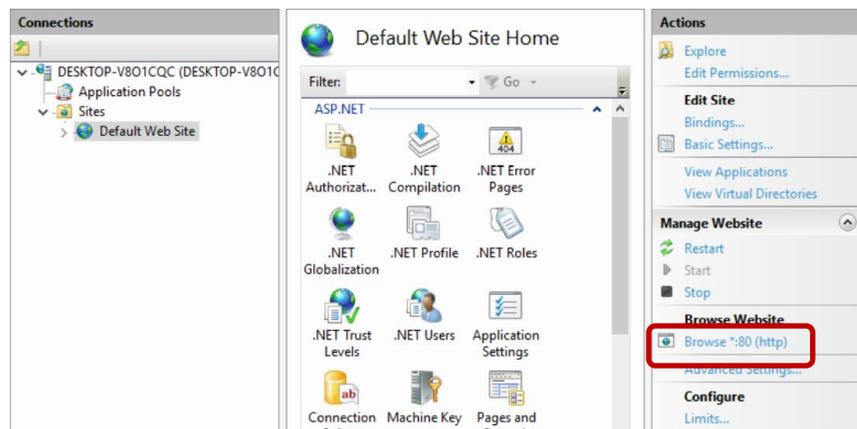
If installed correctly the web browser will display the IIS Home Screen
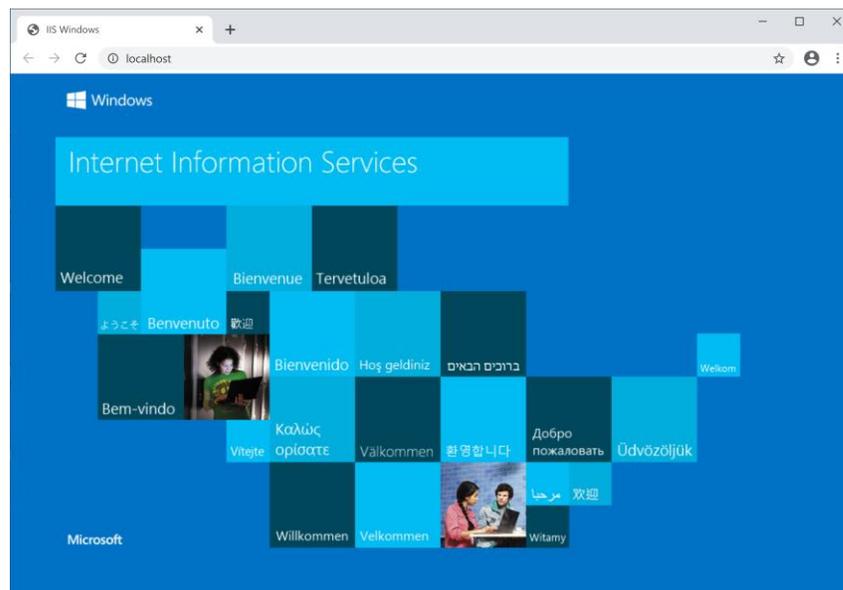
Install PSIcapture Fusion

Download the PSIcapture Fusion Installer

As of the creation of this guide, the latest version of the PSIcapture Fusion software is available at this location

http://downloads.psigen.com/PSIcapture.Fusion.Setup.3.2.zip
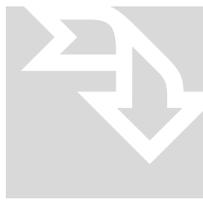
The PSIcapture Fusion Setup file is roughly 100 MB. When using a broadband connection, you should be able to download it in around 5 minutes.

Extract all files from the installation zip folder
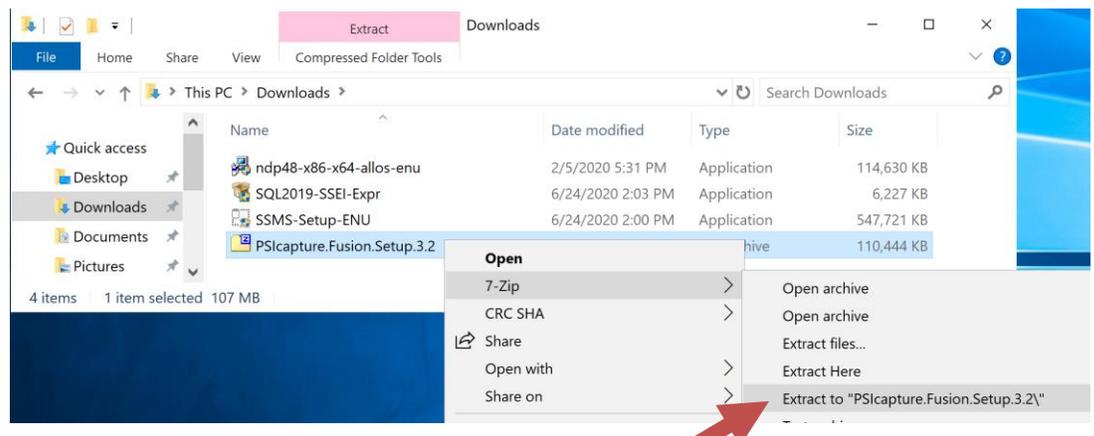
Right click on the extracted installation file and go to Properties
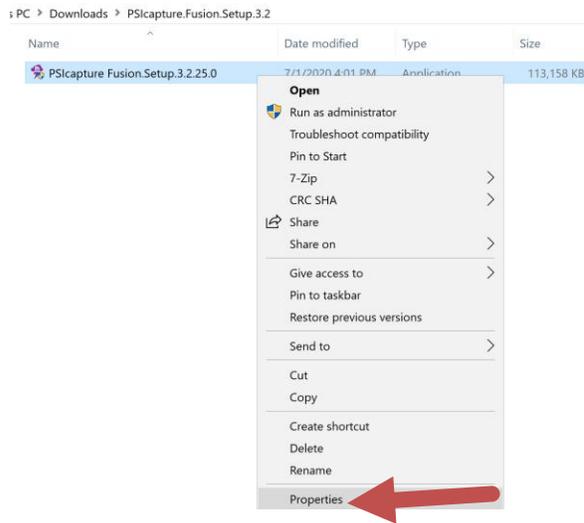
Check the option to Unblock the file and click OK
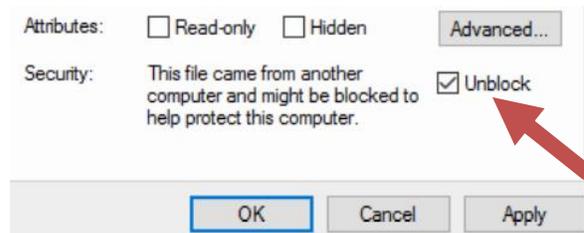
Right click on the installation file and select Run as administrator
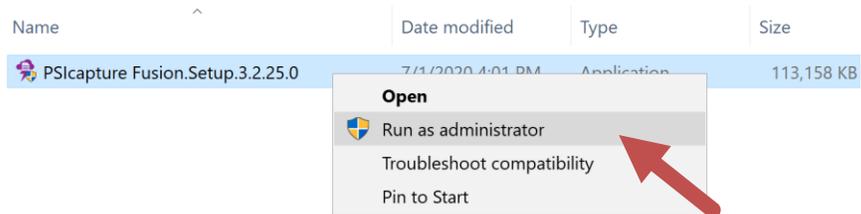
If UAC is enabled on the system, click Yes to allow the installation to continue

34
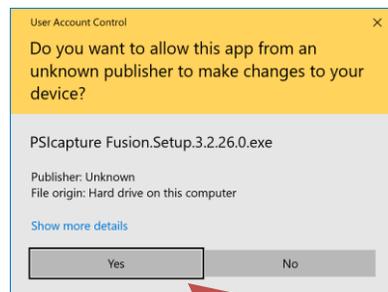
A Prerequisites Wizard will launch to install missing items that are required for PSIcapture Fusion, Click Next
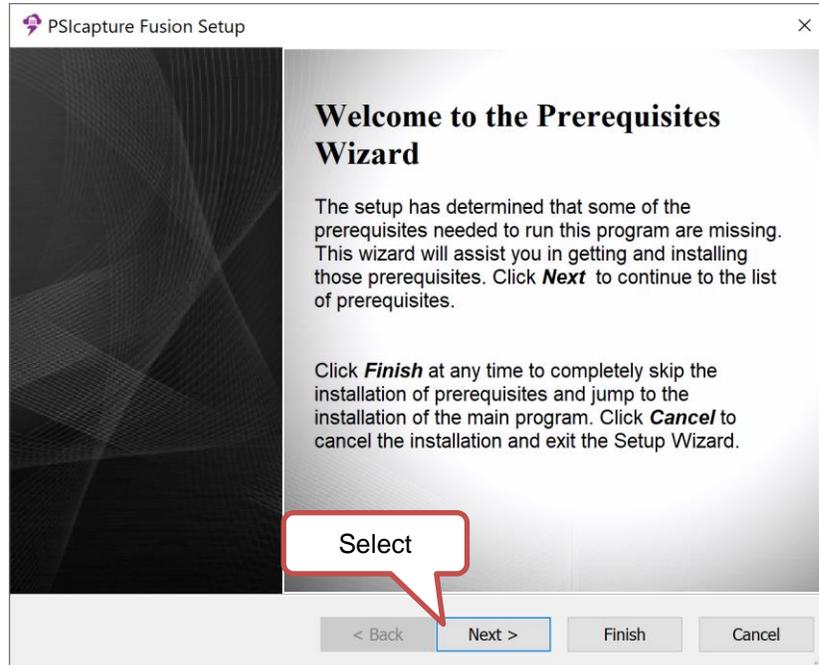
Click Next to allow the wizard to download and install the missing items
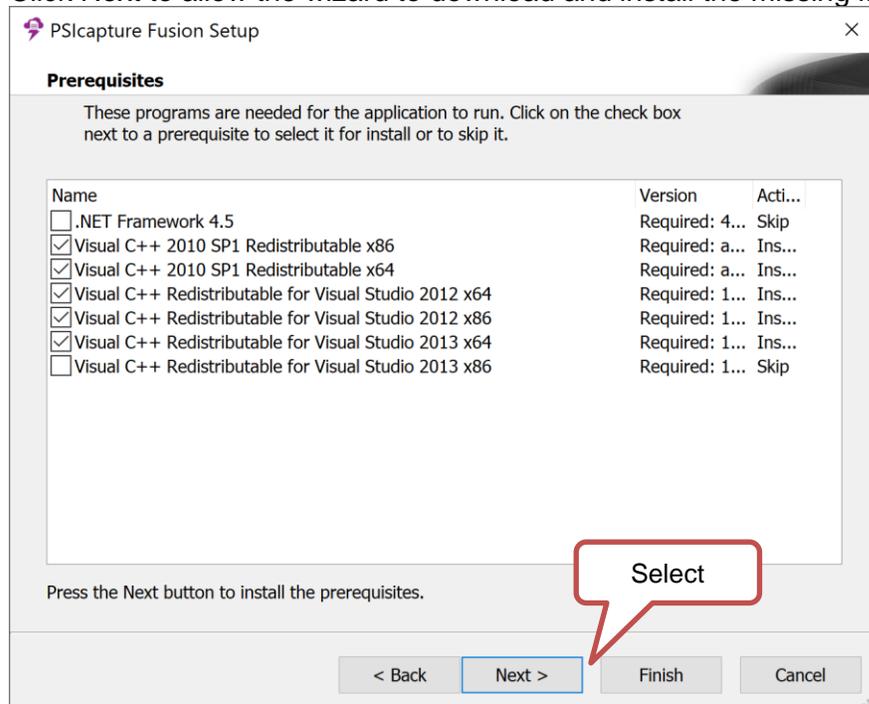
Following the wizard, the PSIcapture Fusion installation will launch.

Check the box to agree to the license terms and conditions and click Install
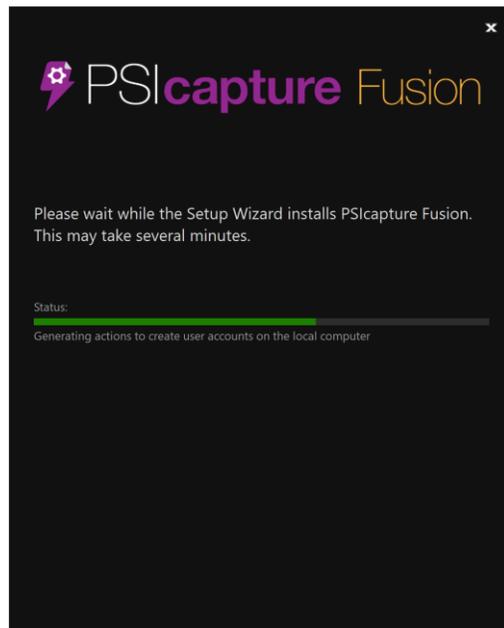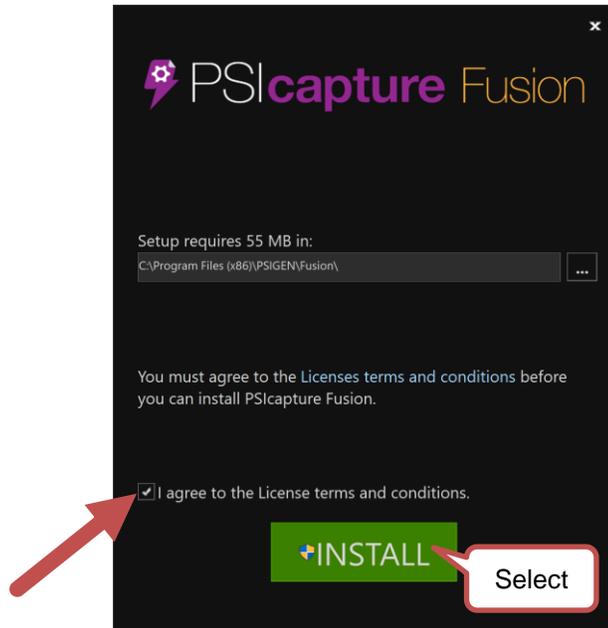
Once the installation is complete, click Finish

PSIcapture Fusion has been successfully installed.

Select

Finish
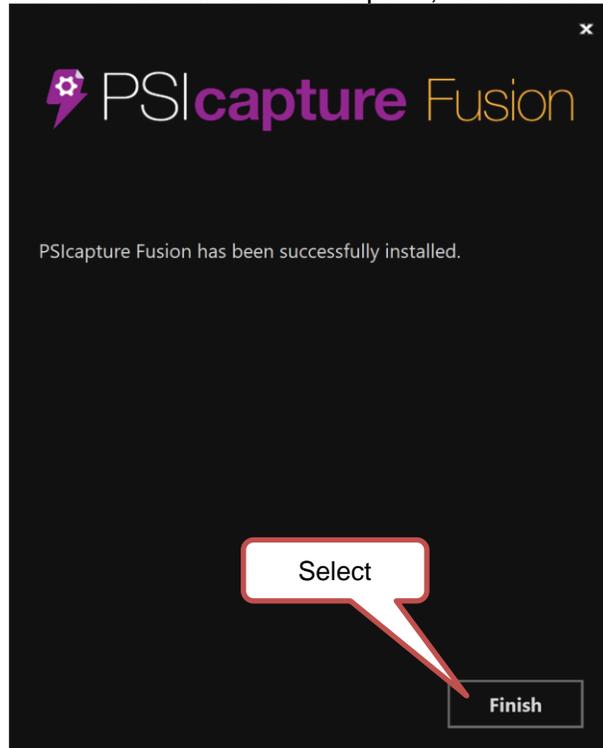
Open the Deployment Manager by right clicking and selecting Run as administrator

Windows 10
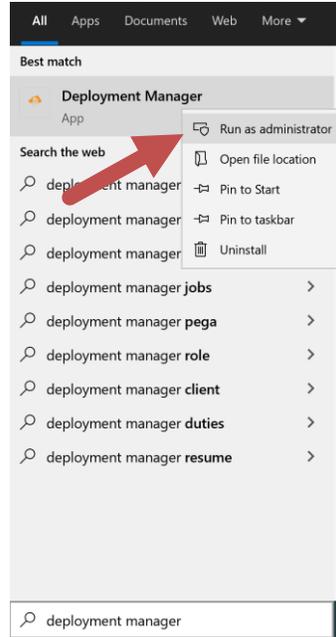
Windows Server 2019
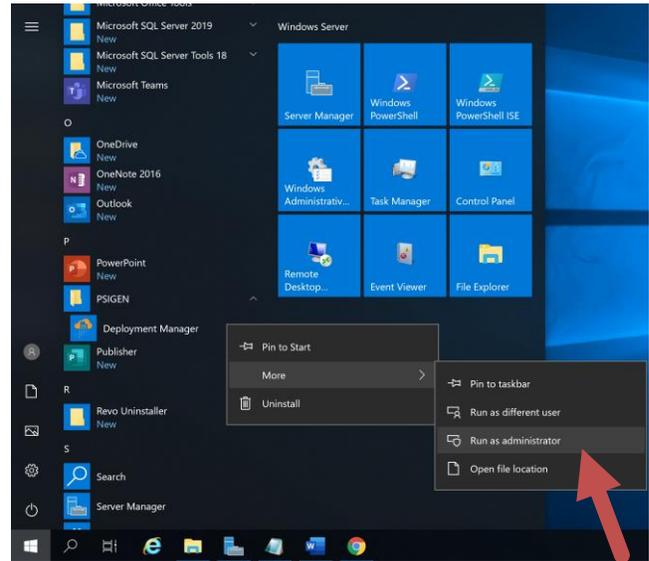
Click Add Deployment from the bottom of the screen

Enter a name for the deployment by overwriting "New Deployment"
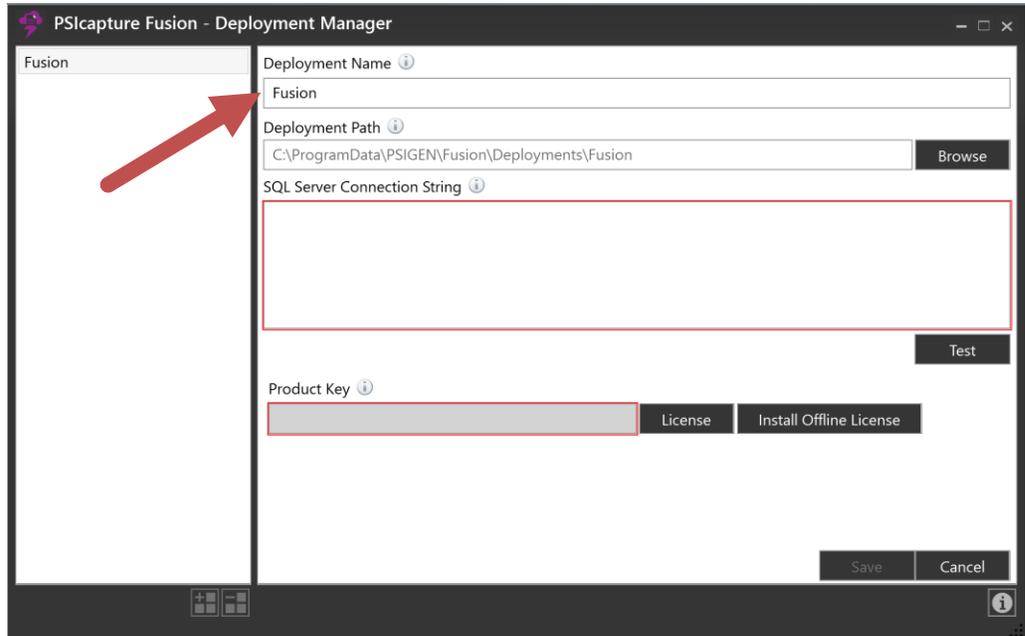
Configure the SQL Server Connection String

Server=localhost\FUSION;Database=Fusion;User Id=sa;Password=Admin-01;
        *Note if you used a different SQL SA password you will need to adjust the
above string
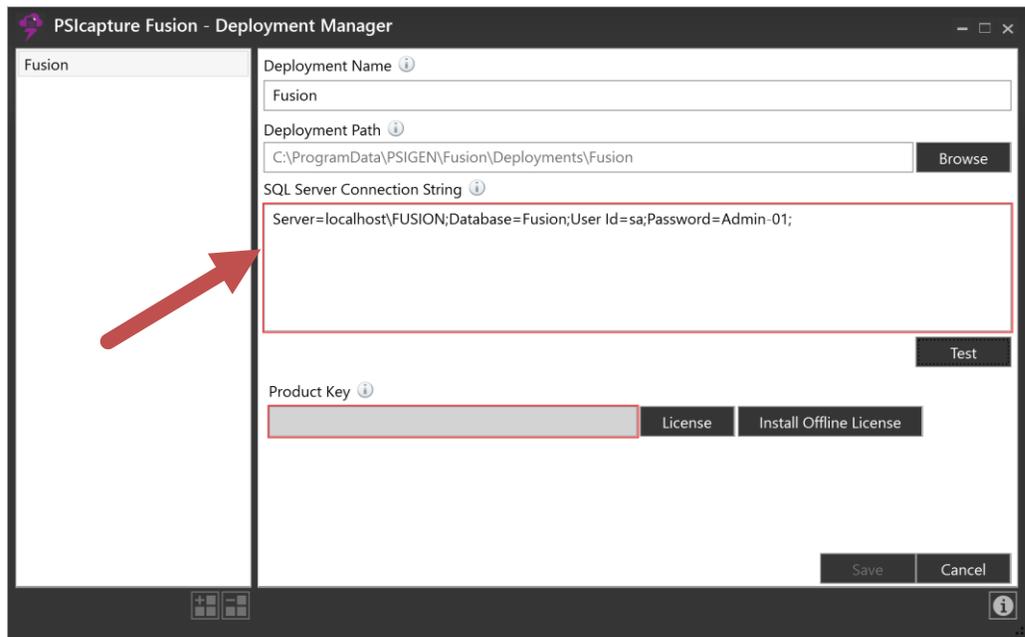
Click Test button to verify connection
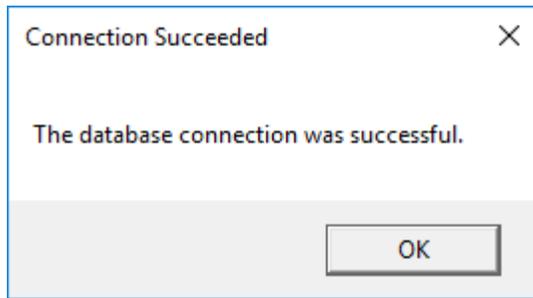
Click the License button

Enter your contact information as well as the provided Product Key and click Submit

Save the Deployment
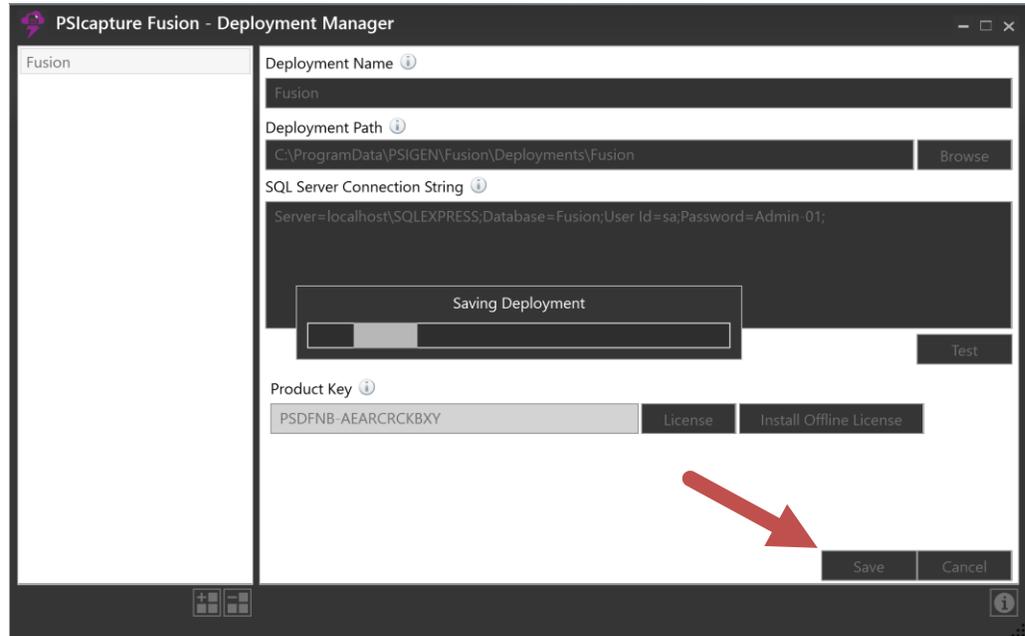
Click on the deployment to review licensing returned from activation
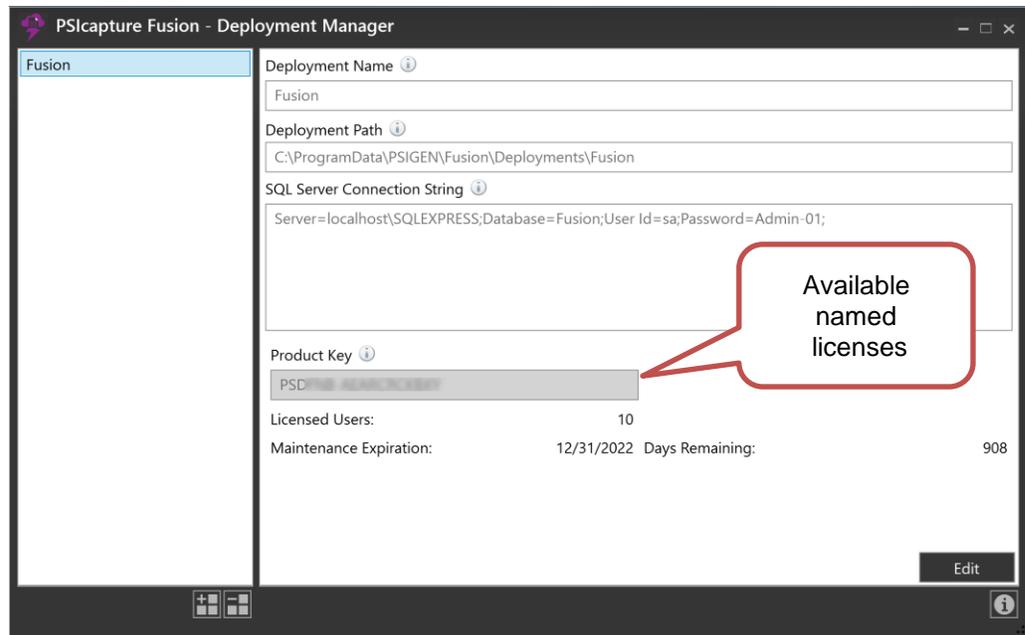
Close Deployment Manager by clicking the X in the top right corner

Return to the Internet Information Services (IIS) Manager

Windows 10
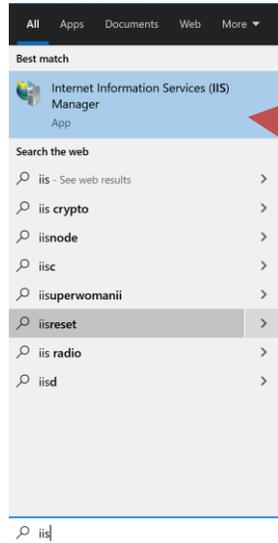
Windows Server 2019
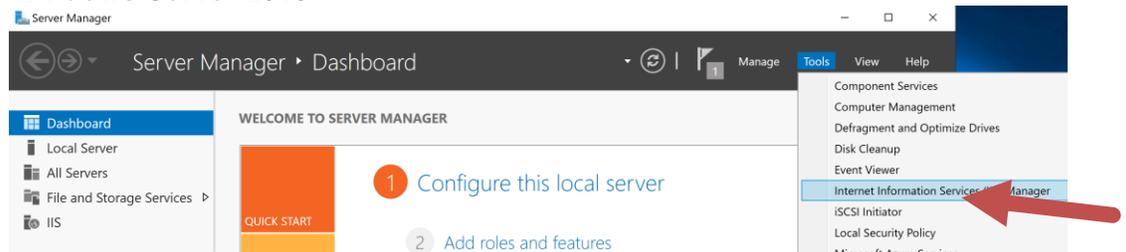
Expand the Connections tree and select Application Pools. From the available Application Pools, select PSIcapture Fusion – "Deployment Name". Click the Advanced Settings option from the Actions menu on the right
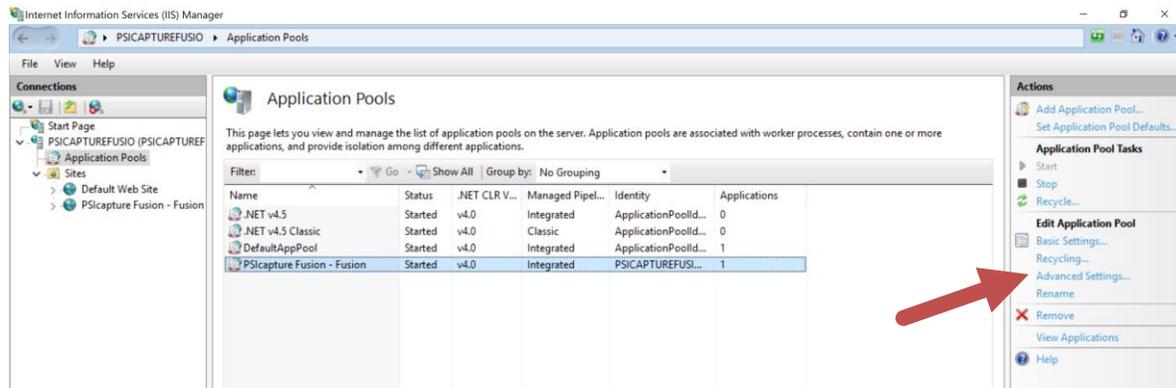
Verify that Enable 32-Bit Applications is set to True and the Identity is listed as Computer Name\Fusion
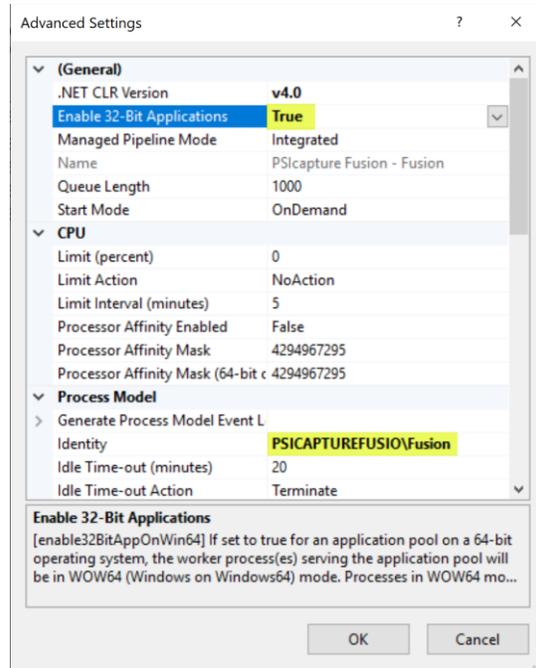
Click OK

Expand the Sites folder under Connections, highlight PSIcapture Fusion – "Deployment Name" then select Browse *:8080 (http) from the Actions menu
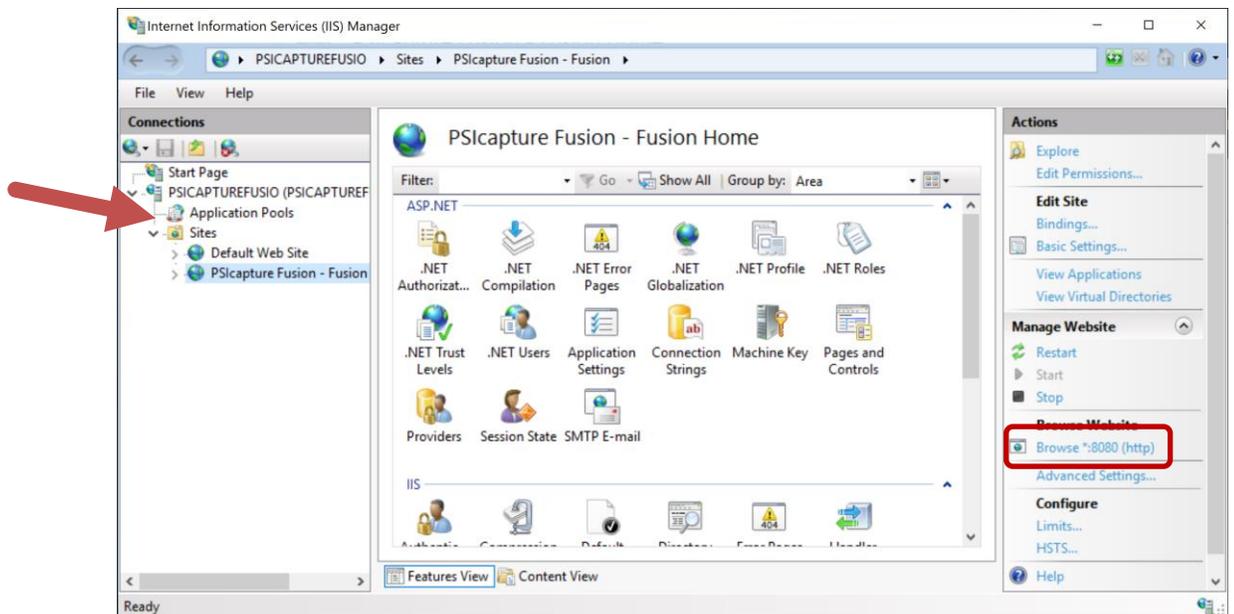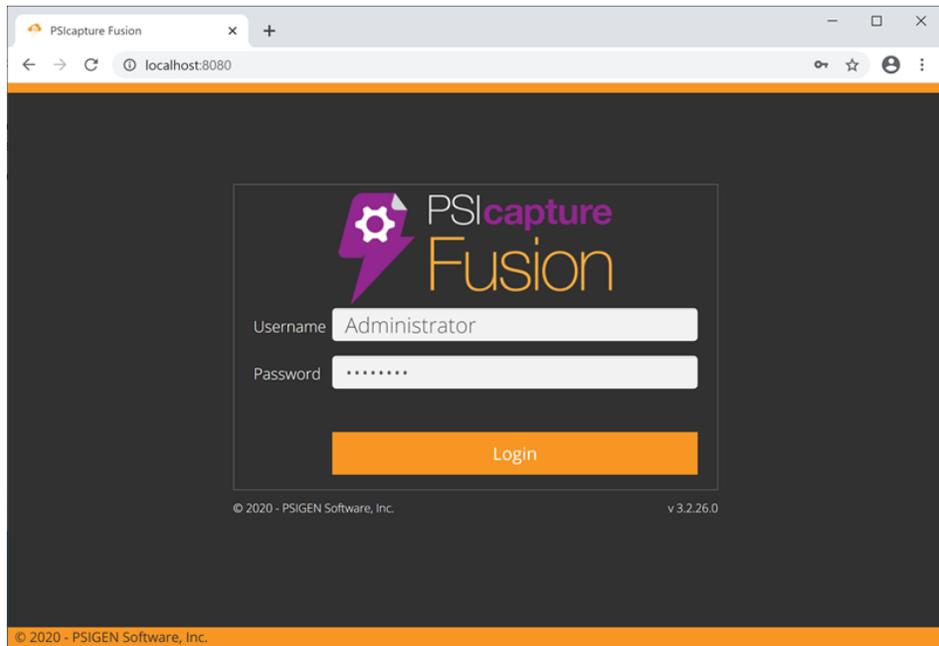
Confirm you can login successfully
- Username is Administrator
- Password is Admin-01
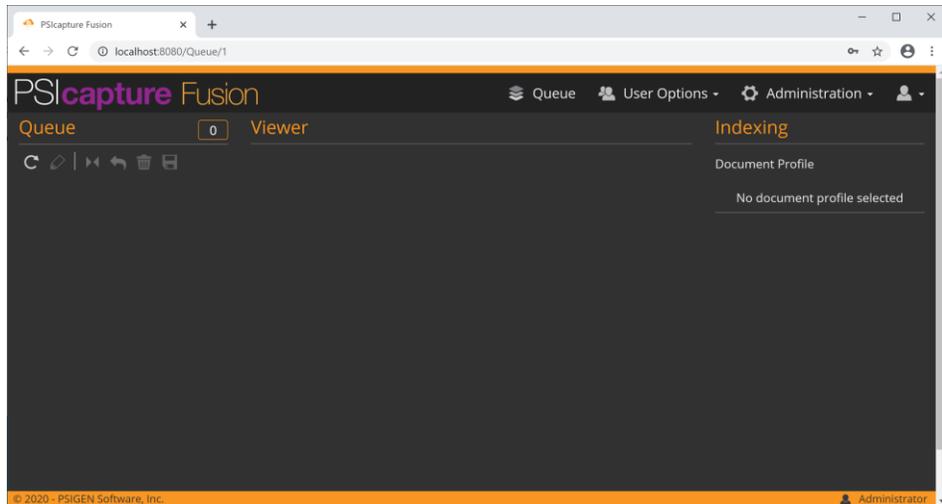
CONGRATULATIONS!!
You have now installed PSIcapture Fusion.

If you are preparing for training, continue through to the
Training Prep Walkthrough Guide.