



X1 Server Installation Guide

Welcome to X1 Server! This document provides step-by-step instructions on installing X1 Server in the following sections:

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Preparing for Installation

This installation guide provides step-by-step procedures for installing X1 Server.

- If this is the first time you are installing X1 Server, continue to the next section: [Minimum System Requirements](#).
- If you are upgrading from an earlier version of X1 Server, see [Upgrading X1 Server](#) on page 2 of this document before continuing.
- If you have already installed X1 Server and now want to expand to a multi-node configuration, refer to Chapter 4, *Managing X1 Server*, of the *X1 Server Administrator Guide* for step-by-step procedures on installing multiple nodes.

Minimum System Requirements

This section lists the minimum system requirements for X1 Server. Carefully review this list and verify each requirement has been met before proceeding with installation.

- Microsoft Windows Server 2003 Service Pack 1, with IIS 6 and Active Directory, *or* Microsoft Windows Server 2000 Service Pack 4 with IIS 5 and Active Directory

The latest Microsoft patches must be installed with both options. Check for patches at <http://update.microsoft.com> before installing X1 Server.



Note The Standard, Enterprise, and Web editions of Microsoft Windows 2003 Server are all supported.

- Microsoft ASP.NET® 2.0, installed and enabled.
- 1 CPU is required, 2 CPU is recommended.
- CPU speed of 1.5 GHz minimum is recommended.
- 1 GB RAM is required, 2 GB RAM is recommended.
- 20 GB free hard disk is required, 2 or more hard drives per X1 Server implementation is recommended.

X1 Browser Client System Requirements

- Internet Explorer 5.5 and higher, OR Mozilla Firefox 1.0.7 and higher



Note ActiveX® is not required for the X1 Browser Client. The X1 Browser Client is a thin client and does not require installation by the end user.

Additional System Requirements

- Microsoft Windows Authentication and integration into an Active Directory environment.
- Network connectivity and ability to access all network directories to be included in the index.

General System Guidelines

- To calculate the required disk space needed, an initial estimate of 20% of the total size of the data to be indexed is the recommended starting point.
- Actual memory and space used is highly dependent on the components running on each node in the cluster, the number of files indexed, and the number of users accessing the system. For more information on sizing, refer to the *X1 Server Administration Guide*, or contact your X1 representative.

Upgrading X1 Server

If this is the first time you are installing X1 Server, skip this section and go to [Pre-installation Checklist](#) on page 3.

If you have an earlier version of X1 Server installed, read this section and complete the procedures below.

- If you are upgrading from X1 Server version 2.0 or 2.0.1, you will need to perform a full uninstall of the existing software before installing the new version. Refer to the

documentation that came with your earlier version of X1 Server for uninstall procedures. After the uninstall is complete, return to the [Pre-installation Checklist](#) on page 3 of this document for instructions on installing the new version.

- If you are upgrading from X1 Server version 2.5, the installer for the new version will either save your settings and any indexes through the **Upgrade** option, or remove the current settings and indexes and create new ones through the **Clean Install** option.

To upgrade, follow either the single node or multiple node procedure below, according to your current implementation.

Procedure Performing a Single Node upgrade from X1 Server version 2.5

- 1 Launch the installer.

The installer will automatically detect the current installed version of X1 Server.

- 2 To select the Upgrade option, where settings and indexes are saved, select **Upgrade**. To remove old settings and indexes, click **Clean Install**.

- 3 Click **Next**.

An uninstall progress indicator may appear.

- 4 In the **Credentials** screen, supply the *yourdomain\X1IndexServices* username and password and click **Next**.

- 5 In the **Shortcuts** screen, select a Program Group where you want the shortcuts to appear.

- 6 Click **Next**.

- 7 Installation begins. You may see a progress dialog while the components of X1 Server are installed and started. The upgrade is complete. Continue to [Verifying Installation](#) on page 8.

Procedure Performing a Multiple Node upgrade from X1 Server version 2.5

- 1 On the first remote node, go to the Microsoft Windows Start menu and select **Administrative Tools < Services**.

- 2 Stop the X1EE Service Manager and the X1EE Remote Agent services.

- 3 Repeat steps 1 and 2 for each remote node.

- 4 For the central node, perform the [Performing a Single Node upgrade from X1 Server version 2.5](#) procedure above.

- 5 For each remote node, perform the [Performing a Single Node upgrade from X1 Server version 2.5](#) procedure above.

The upgrade is complete.

Pre-installation Checklist

Before proceeding with installation, you will run the X1 System Requirements verifier to confirm that important requirements listed in the [Minimum System Requirements](#) section of this document:

Procedure Run the X1 System Verifier

- 1 Double-click on the X1 System Verifier executable.

The X1 System Verifier opens and checks if system requirements have been met.

- 2 Review the status of each requirement in the **Pass** column:

- **Pass:** Green checkmark ✓
- **Fail:** Red X ✗
- **Warning:** Yellow exclamation mark !

- 3 Clicking on a system requirement will display the value and description of the requirement, if available, in the **Value** and **Description** sections.

- 4 If all requirements are marked Pass, go to the [Configure User Account and Access Privileges](#) section.

- 5 For requirements marked Fail, click on the requirement to view any available details, then correct the problem. For ASP.NET errors, see the [Confirm ASP.NET and IIS are Enabled](#) section below for details on how to correct the problem.

- 6 Click the **Refresh** button.

- 7 For requirements marked with a Warning, click on the requirement to view any available details, then correct the problem and click the **Refresh** button.

- 8 Once all settings have been marked Pass, you are ready to proceed.

Confirm ASP.NET and IIS are Enabled

If the X1 System Verifier marked all system requirements as Pass, you may continue to the next section. If the ASP.NET requirement was marked Fail, you can correct the problem following the procedure below.

Before beginning installation, you must confirm that ASP.NET and IIS are enabled on the system where X1 Server will be installed.

Before ASP.NET can be enabled, confirm that it has been installed. To confirm that ASP.NET is installed, click on the Microsoft Windows Start menu and select **Administrative Tools < Internet Information Services (IIS) Manager**, then select Web Service Extensions in the left pane and verify that ASP.NET is present and allowed.

After you have confirmed ASP.NET is installed, confirm that it is enabled.

The following procedure is a Microsoft Windows Server 2003 procedure, provided here for your convenience. Refer to your Microsoft Windows Server 2003 for definitive documentation when in doubt.

Procedure Enable ASP.NET and IIS

- 1 From the Microsoft Windows Start menu, point to **Control Panel** and select **Add or Remove Programs**.

The **Add or Remove Programs** dialog box opens.

- 2 In the **Add or Remove Programs** dialog box, select **Add or Remove Windows Components**.

The **Windows Components Wizard** dialog box opens.

- 3 In the **Components** list, select **Application Server** and click **Details**.

The **Application Server** dialog box opens.

- 4 In the **Subcomponents** list, click to select **ASP.NET**.
- 5 Click **OK** to close the **Application Server** dialog box.
- 6 In the **Windows Components Wizard** dialog box, click **Next** to configure ASP.NET.
- 7 When the configuration is complete, click **Finish**.
- 8 Repeat steps 3-7 for IIS.
- 9 Close the **Add or Remove Programs** dialog box.

Configure User Account and Access Privileges

The following procedure uses placeholders for the following values:

- *yourdomain*: Replace with your domain.
- *servername*: Replace with your server name.

Procedure Set up accounts and groups

- 1 Log in to *yourdomain* using credentials with domain administrator privileges.
- 2 Create a user account named **X1IndexServices**.
- 3 Create a group named **X1Users**.
- 4 Add the **X1IndexServices** user created in Step 2 to the **X1Users** group created in Step 3.
- 5 Add the qualified users from your list of users you want to add to the **X1Users** group created in Step 3.
- 6 Grant the **X1Users** group read privileges to the data you will be indexing on *fileserver*. You can grant write access, if needed, and can also grant access to other file servers in this step if needed.
- 7 Log in to *servername* as the local system administrator. Do not log in as a domain user in this step.
- 8 Confirm that *servername* belongs to *yourdomain*.
- 9 Add the *yourdomain***X1IndexServices** account to *servername*'s local administrator group. Do not add the account to the domain in this step.
- 10 Logout of *servername*.

Identify the Fully Qualified Domain Name for the Server

Before beginning installation, you should identify the fully qualified domain name for your server.

The following procedure is a Microsoft Windows Server 2003 procedure, provided here for your convenience. Refer to your Microsoft Windows Server 2003 for complete documentation when necessary.

Procedure Identify the fully qualified domain name for the server

- 1 Click on the Microsoft Windows Start menu and select **Run**.

The **Run** dialog box appears.

- 2 In the Run dialog box, type `CMD` in the text field.

A command prompt window appears.

- 3 At the prompt, type `ipconfig/all` and press Enter.

The command prompt window returns the fully qualified domain name for your server, combining the host name and primary DNS suffix into a format similar to the following:

servername.yourdomain.com



Note Your fully qualified domain name may include additional values, such as *us.yourdomain.com*. In this case, your fully qualified domain name would become *servername.us.yourdomain.com*.

- 4 Write down the fully qualified domain name for use in the next section and close the command prompt window.

You are ready to install X1 Server.

Installing X1 Server

Before installing X1 Server, confirm you have completed all steps in the [Pre-installation Checklist](#) section.

Select the install option you wish to use:

- **Simple:** If this is the first time X1 Server is being installed, this option is recommended. It installs the full server, with all necessary components and configurations enabled.
- **Advanced:** This option provides several additional install options. It allows you to install the Cluster Manager alone, to install another node of the X1 Server, or to install the X1 Server without some of the standard components. These options are typically used after one instance of the X1 Server is already installed and running.

The procedures below use the following variables:

- *yourdomain*: The domain where you are installing the server. Substitute this value with your actual domain name.
- *servername*: The name of the server you are installing. Substitute this value with your actual server name.

Procedure Simple: Install X1 Server

- 1 Log in to *servername* as the *yourdomain\X1IndexServices* domain user.
- 2 Save a copy of the X1 Server installer to the Desktop.
- 3 Double-click on the installer to start installation.

A progress indicator may appear while the installer is prepared for use.

- 4 In the **Welcome** screen of the installer, click **Simple**.
- 5 In the **License** screen of the installer, review the license and accept the license agreement, then click **Next**.
- 6 In the **Credentials** screen, supply the *yourdomain*\X1IndexServices username and password and click **Next**.
- 7 In the **Installation Path** screen of the installer, view the location where X1 Server will be installed. To change the location, use the **Browse** button.
- 8 Click **Next**.
- 9 If you would like to configure the first mountpoint on X1 Server during installation, provide the path to the network directory you want the mountpoint to index. The mountpoint will be named **mountpoint0** initially; it can be modified or removed after installation using the Cluster Manager. If you prefer, you can skip this step and create mountpoints later.
- 10 Click **Next**.
- 11 Installation begins. You may see a progress dialog while the components of X1 Server are installed and started.

Installation is complete.

Procedure Advanced: Install X1 Server

- 1 Log in to *servername* as the *yourdomain*\X1IndexServices domain user.
- 2 Save a copy of the X1 Server installer to the Desktop.
- 3 Double-click on the installer to start installation.
A progress indicator may appear while the installer is prepared for use.
- 4 In the **Welcome** screen of the installer, click **Advanced** or **Simple**.
- 5 In the **License** screen of the installer, review the license and accept the license agreement, then click **Next**.
- 6 In the **Components** screen of the installer, select **Typical** and click **Next**.



Note You can select the **Custom** option if you are an advanced user of X1 Server and know you do not want to install all components. Do not select the **Cluster Node** or **Cluster Manager** options if this is the first time you are installing X1 Server. These options are used only for installing additional nodes in the X1 Server cluster.

- 7 In the **Installation Path** screen of the installer, view the location where X1 Server will be installed. To change the location, use the **Browse** button.
- 8 In the **Server** screen of the installer, supply either the fully qualified domain name, IP address, or short name (NETBIOS) of the server and the default location where the first index should be created.
- 9 If the location you specified for the index was a new directory, you will be prompted to accept the creation of a new directory. Click **Yes**.
- 10 If you would like to configure the first mountpoint on X1 Server during installation, provide the path to the network directory you want the mountpoint to index. The mountpoint will be named **mountpoint0** initially; it can be modified or removed

after installation using the Cluster Manager. If you prefer, you can skip this step and create mountpoints later.

A progress indicator may appear while components are installed.

- 11** In the **Shortcuts** screen, select a Program Group where you want the shortcuts to appear.
- 12** Click **Next**.
- 13** Installation begins. You may see a progress dialog while the components of X1 Server are installed and started.

Installation is complete.

Verifying Installation

To verify installation was successful, confirm the final install screen displays the message **Installation has completed successfully**, and no warnings or errors are displayed.

Continue to the [Getting Started](#) section to start working with X1 Server.

If warnings or error messages indicate the install was unsuccessful, you can navigate to the following directory to view install logs:

```
C:/Program Files/X1 Enterprise Server/x1ee/logs/
```

If the install did not proceed far enough to create this directory, a log file named **x1eesetup.log** will appear on your Desktop instead.

Open and view the messages in each log file for more information on the problems encountered during installation.

Getting Started

After you have verified installation was successful, you are ready to start working with X1 Server.

Review the introduction to X1 Server in Chapter 1, *Overview of X1 Server*, of the *X1 Server Administrator Guide* to understand some of the common concepts and management tasks you will need to work with X1 Server.

X1 Server is managed through the Cluster Manager, a Graphical User Interface (GUI) for management tasks. To start working with X1 Server, open the Cluster Manager.

To start the Cluster Manager, navigate to the **X1 Enterprise Server** directory from the Microsoft Windows Start menu and select **Cluster Manager**. A progress indicator may appear while the Cluster Manager is starting. After the Cluster Manager has started, you can begin performing management tasks.

To familiarize yourself with the functionality and tasks managed through the Cluster Manager, review Chapter 2, *Using the Cluster Manager*, of the *X1 Server Administrator Guide*.

The first step in working with X1 Server is configuring the server. See Chapter 3, *Configuring X1 Server*, of the *X1 Server Administrator Guide* for detailed step-by-step procedures.

Quick Start

If you are an experienced X1 user, or you must begin working with X1 Server immediately, you can choose to review the background information in the *X1 Server Administrator Guide* at a later time and focus directly on the following Quick Start steps:

Procedure Quick Start

- 1** Launch the **Cluster Manager**. For detailed instructions, see the “Starting the Cluster Manager” section in Chapter 2, *Using the Cluster Manager*, of the *X1 Server Administrator Guide*.
- 2** Expand the **Central Node Group**. For detailed instructions, see the “Levels of Detail in the Cluster Pane” section of Chapter 2, *Using the Cluster Manager*, of the *X1 Server Administrator Guide*.
- 3** Add a mountpoint through the **Manage File Connectors** dialog box. For detailed instructions, see the “Add and Configure a New Mountpoint” section of Chapter 3, *Configuring X1 Server*, of the *X1 Server Administrator Guide*.
- 4** Configure an index update schedule for the new mountpoint. For detailed instructions, see the “Add and Configure a New Mountpoint” section of Chapter 3, *Configuring X1 Server*, of the *X1 Server Administrator Guide*.
- 5** Start the mountpoint scan manually, or wait for the update schedule to automatically start the mountpoint scan. For detailed instructions, see the “Start a Mountpoint Scan” section of Chapter 4, *Managing X1 Server*, of the *X1 Server Administrator Guide*.
- 6** Configure user permissions for the default saved search through the **Manage Federation Engine** dialog box. For detailed instructions, see the “Setting Search Permissions” section of Chapter 4, *Managing X1 Server*, of the *X1 Server Administrator Guide*.
- 7** Wait for a minimum of ten minutes while indexing begins and data is added to the index, then open the browser client to view results from the default saved search. For detailed instructions, see the “Testing Searches” section of Chapter 6, *Deploying the X1 Clients*, of the *X1 Server Administrator Guide*.
- 8** To view results in the X1 Desktop Client, add the server in the X1 Desktop Client. For detailed instructions, click on **Help < X1 Desktop Client Help**, then search for “Add Network Searches” in the Help.

Uninstalling X1 Server

X1 Server includes an uninstall program that can be accessed at any time by going to the Microsoft Windows Start menu and navigating to **Programs < X1 Server < Uninstall**.

If the uninstall program is not available, or you wish to uninstall manually, you can do so at any time using the manual uninstall procedure below.

Procedure Uninstall X1 Server manually

- 1** Stop the **X1EE Remote Agent**, **X1EE Service Manager**, **X1 Web Indexer** services using the Microsoft Windows Service Manager.
To open the Microsoft Windows Service Manager click on the Microsoft Windows **Start** window and point to **All Programs > Administrative Tools > Computer Management**, then select **Services**.
- 2** From the **Services Manager**, stop the **World Wide Web Publishing** service.
- 3** Verify all java processes are stopped using a Microsoft Windows command prompt window. To open a command prompt window, click on the Microsoft Windows **Start** menu and select **Run**, then type **CMD** in the text field.
- 4** After the command prompt window is open, type the following command at the prompt:

```
taskkill /im java.exe /f
```
- 5** Click on the X1 Server Uninstaller to launch the X1 Server Uninstaller, if available. Follow the step in the uninstall program to complete the uninstall. If the uninstall program is not available, continue to the next step in this procedure.
- 6** Delete the folder where you installed X1 Server. By default, this location is **C : / Program Files / X1 Enterprise Server /**.
- 7** Repeat steps 1 and 2 to restart the **World Wide Web Publishing** service.

Uninstallation is complete.



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