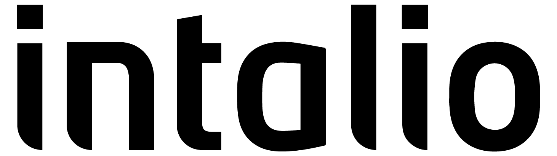
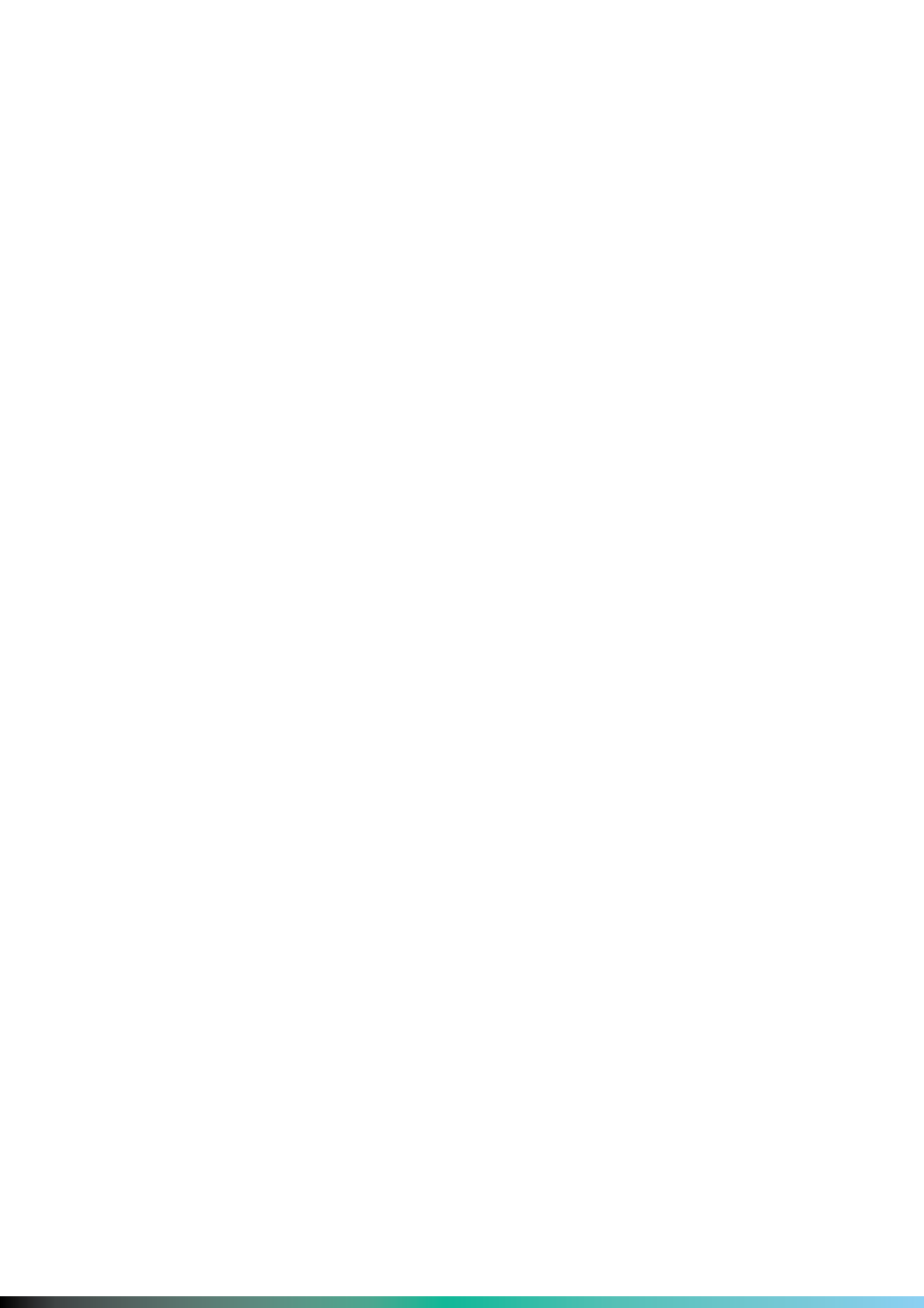
**** 

Version: 3.1.0

Intalio IAM

Installation Guide – Windows (EN)

**Vision.**

Making business simple by connecting people, processes and content.

Intalio is an international software provider with 30 years of innovation in the field of Content and Process Services. By combining cutting-edge technologies with AI and Machine Learning to introduce advanced Line of Business solutions, Intalio managed to become a trusted leader in Digital Transformation across the US, Europe, and the MENA region.

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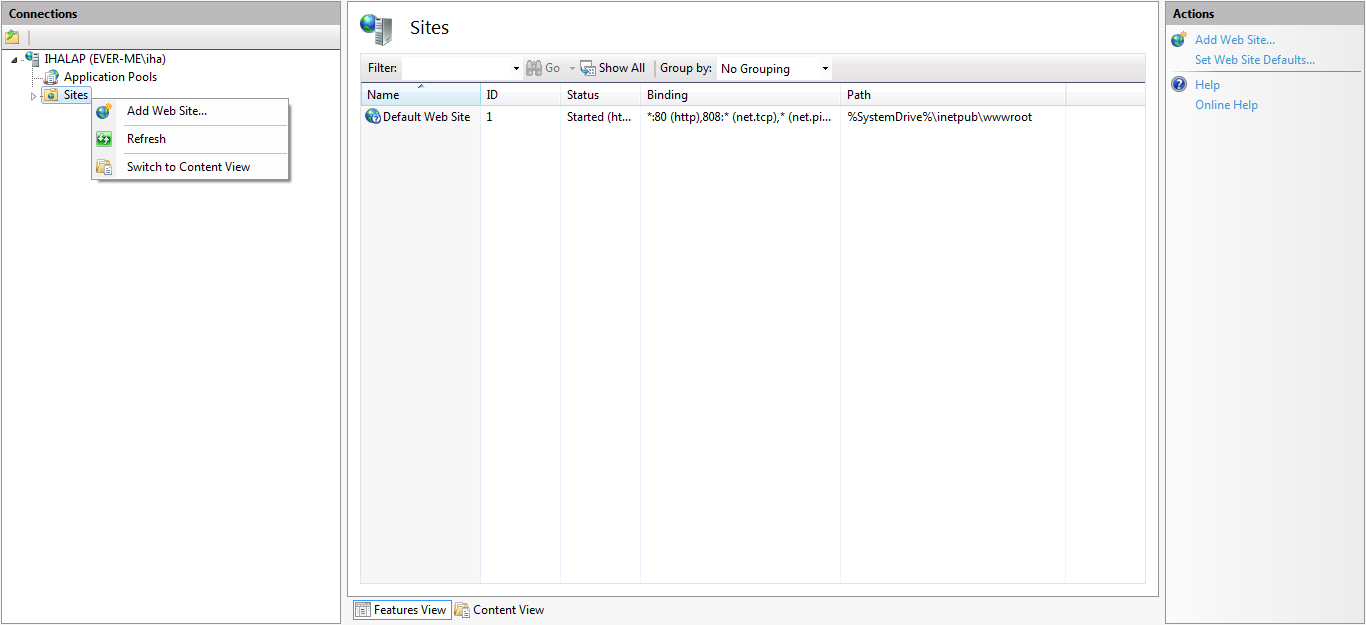
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1. Pre-Installation Requirements

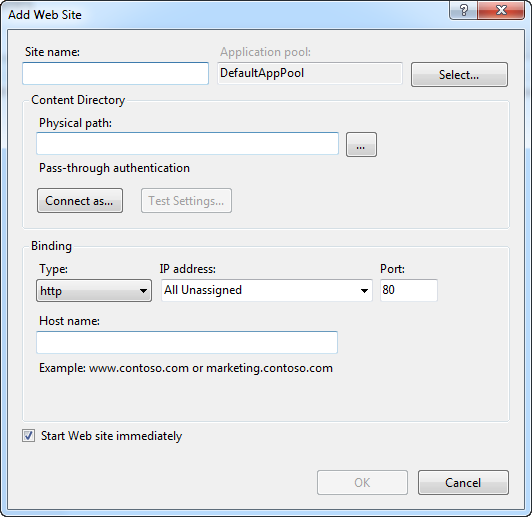
Note: Requirements and prerequisites can be found in the compatibility matrix document.

1. Deployment
   1. IIS Configuration
      1. Add Website

Right click on the “sites” node on the left:



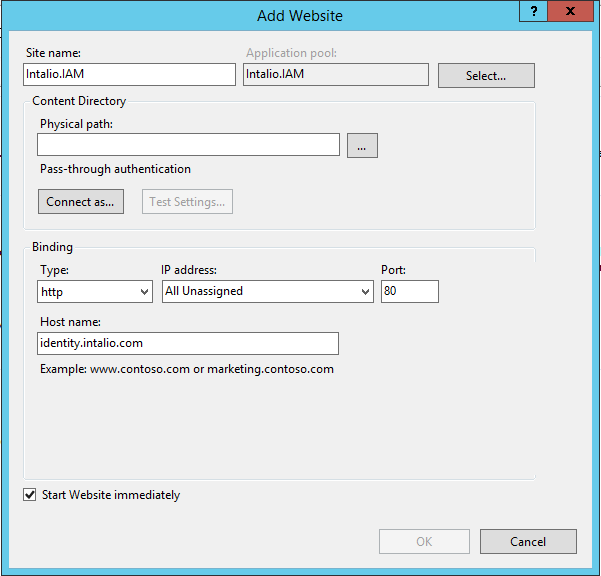
Click on “Add Web Site…” the following window will open:



Insert the site name: “**Intalio.IAM”.**

Note: Product DNS name must be unique, example: identity.intalio.com.

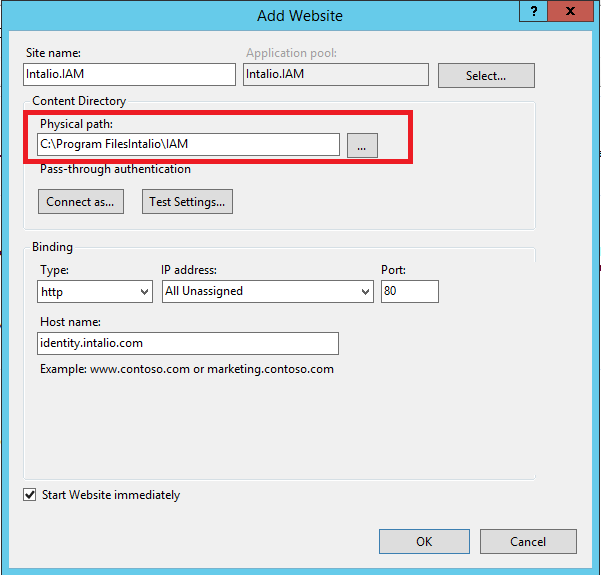
An application pool with the same name will be created.



Place the content of the IAM package under the following location: “C:\Program Files\Intalio\IAM”.

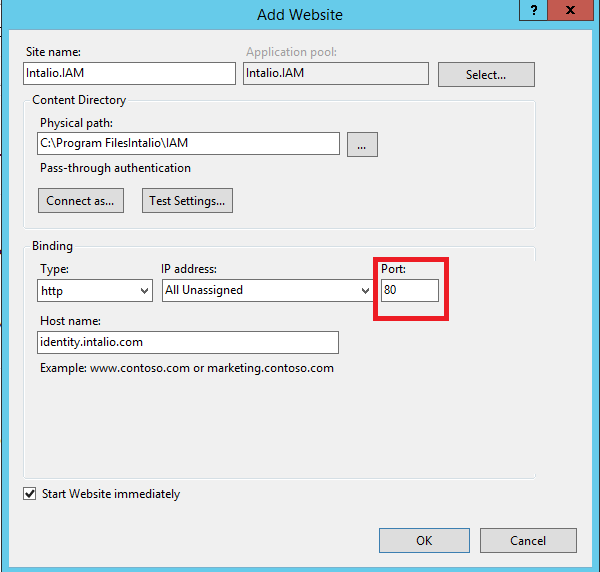
To fill the “physical path” field:

* Copy the root path of the IAM package and paste it in the field:

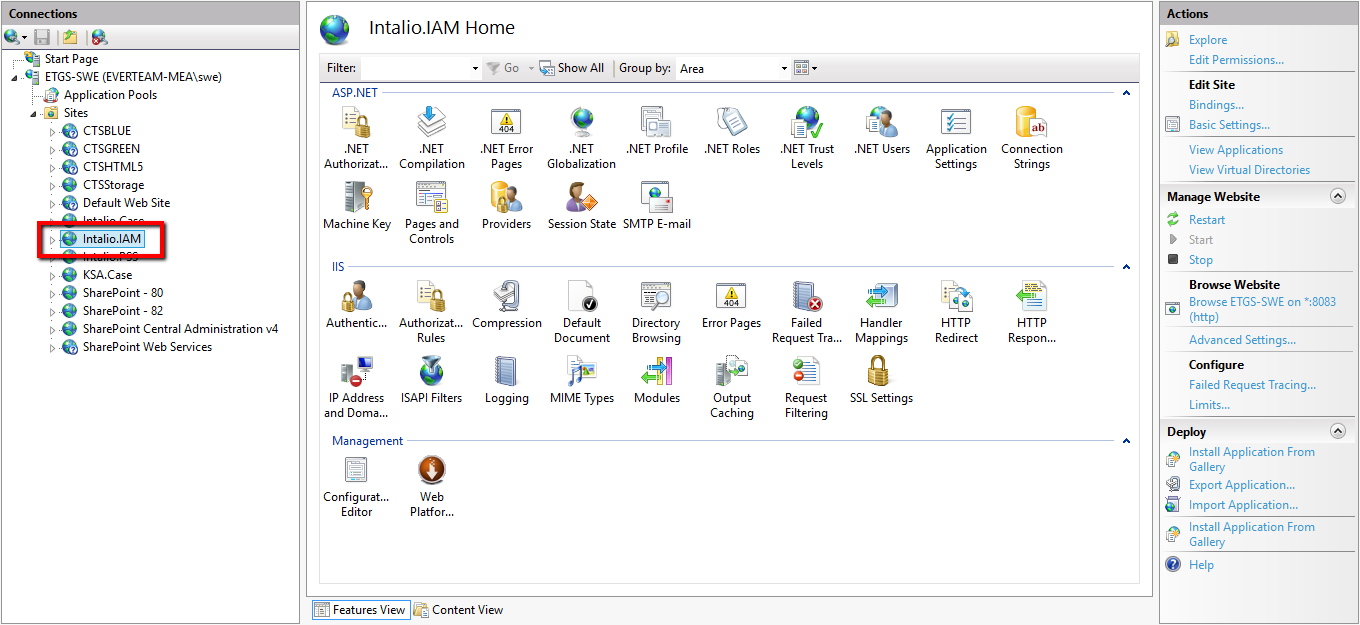


Note: You can test settings by clicking on "Test Settings…" button.

* Define the Port number (for example: 80):

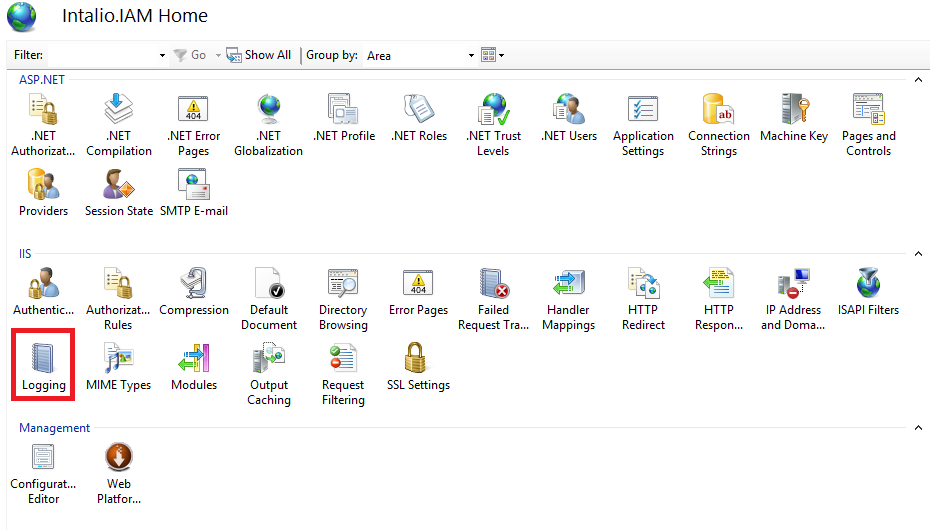


Click on "OK"; the website node will appear in the left frame as shown below:

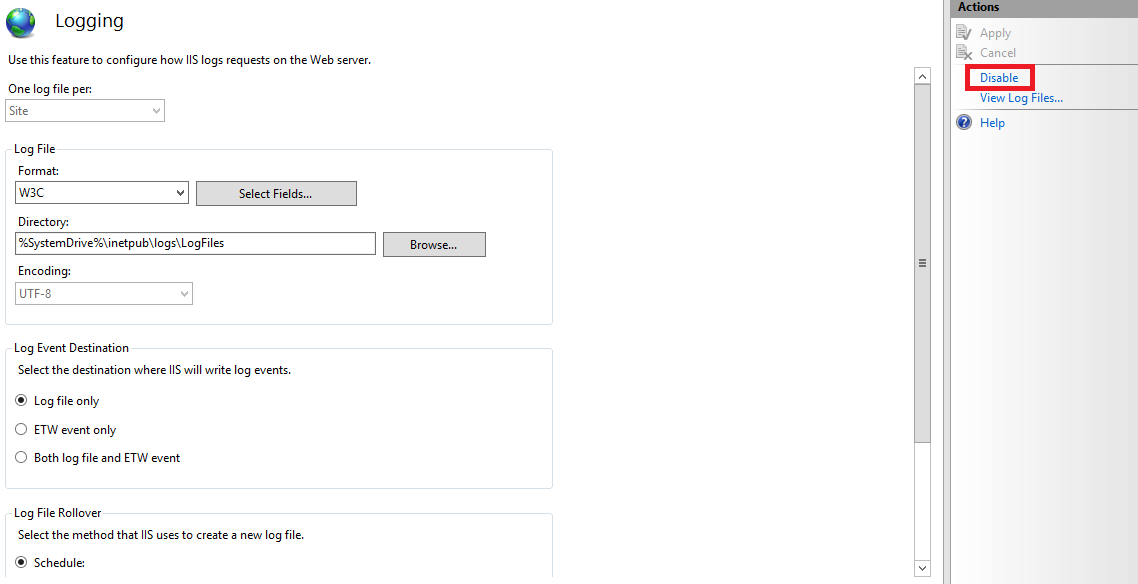


* + 1. Disable Logging

Click on the created site “Intalio.IAM”, then double-click on “logging”.

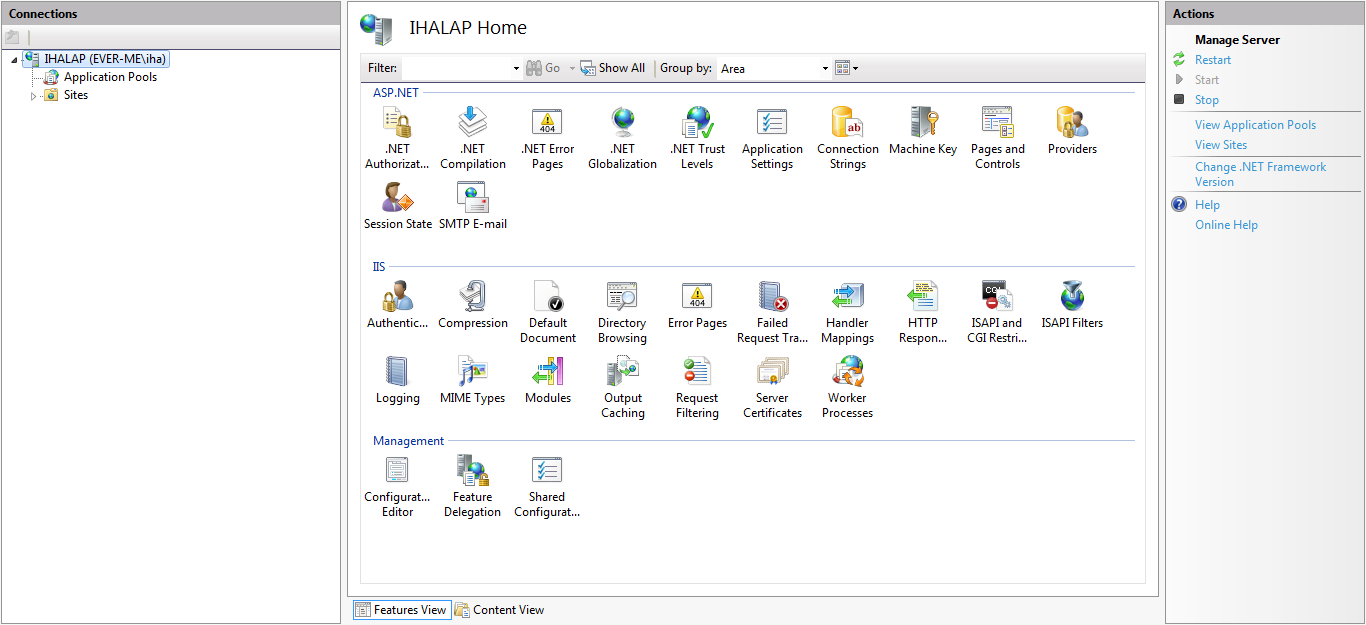


Click on “Disable”.

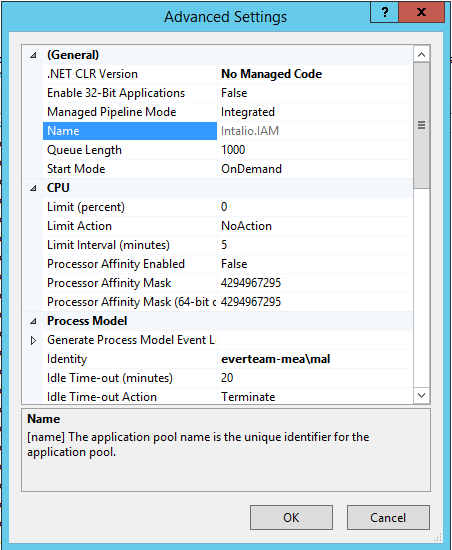


* + 1. Edit Application Pool

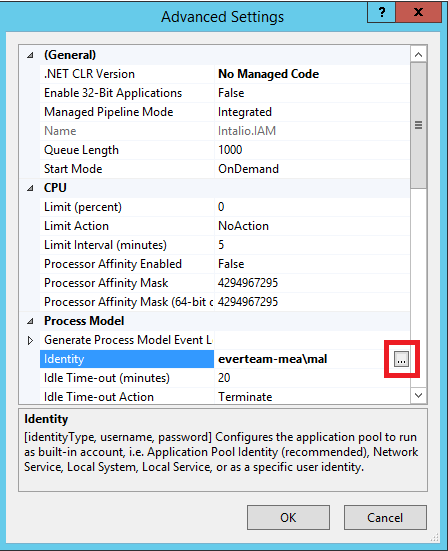
Expand the main node appearing in the left frame and click the “Application Pools” node:



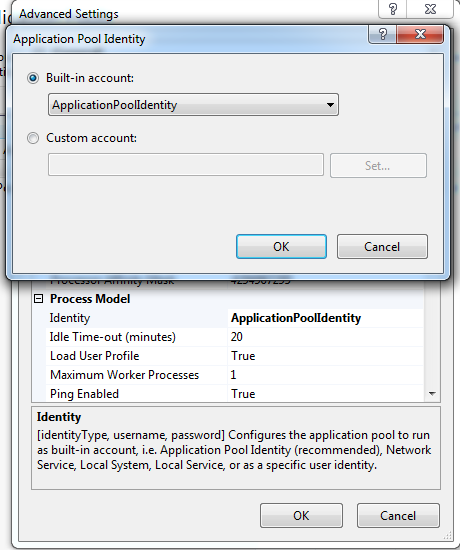
To define the user identity, right click on the added application Pool “Intalio.IAM” and click on “Advanced Settings”; the following window will open:



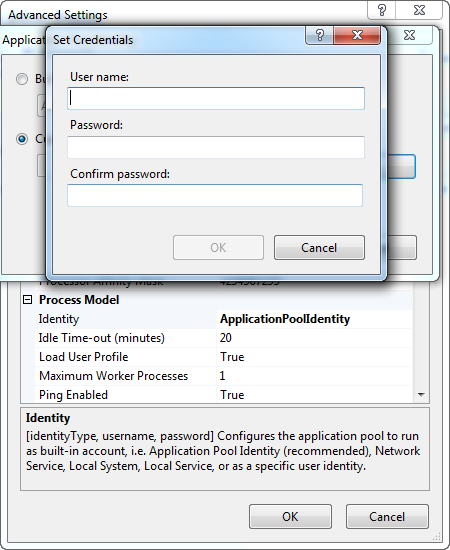
In “Process Model” section select “identity” row, the icon will appear:



Click on; the following window will open:



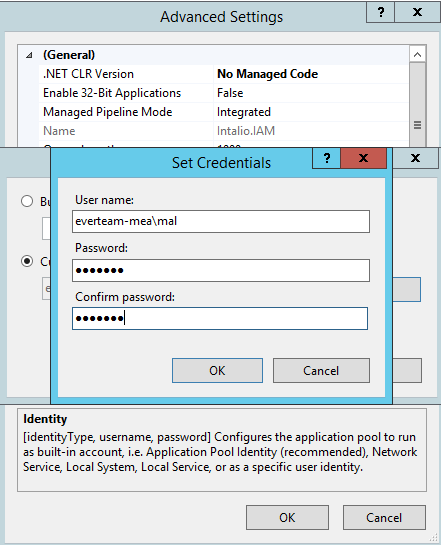
Select “custom Account” radio button and then click on “Set” in order to set the credentials; the following window will open:



Insert the “User name”, “Password” and “Confirm password”.

Note: the user must have administrator permission on:

* The site folder.
* The database in case “Windows authentication mode” is used. Check [section 2.2.1](#ConnectionString).



Click ok in all forms to save your changes.

* 1. Appsettings Configuration
     1. Connection String

The connection string can be:

* Plain text.
* Encrypted.

2.2.1.1. Plain Text

Go to **“Intalio.IAM” à “appsettings.json”** and edit the highlighted keys in the ConnectionStrings section.

* Microsoft SQL Server

Use one of the below modes:

* + Windows authentication.

*"DbConnection":*

*"Server=ETGS-MAL\\SQL14;Database=IAM;MultipleActiveResultSets=true;Integrated Security=True;"*

* + SQL server authentication.

*"DbConnection":*

*"Server=ETGS-*

*MAL\\SQL14;Database=IAM;MultipleActiveResultSets=true;Integrated Security=False;User=ES;Password=ES;"*

* PostgreSQL.

*"DbConnection": "User ID=postgres;Password=P@$$w0rd;Server=localhost;Port=5432;Database=IAM;Integrated Security=true;Pooling=true;"*

* MYSQL.

*"DbConnection": "Server=localhost;Database=iam;Uid=root;Pwd=P@$$w0rd;"*

* Oracle.

*"DbConnection": "User ID=IAM;Password= IAM;Data Source=localhost:1521/orcl.everteam-mea.com"*

Note: You must create IAM user in Oracle having privileges to create and modify schemas before running the app for the first time.

For Oracle, the package will work with a new database only, due to a known Hangfire issue, which does not create its related tables on Oracle database. For Hangfire to open and function properly, “Hangfire.Oracle.Install.sql” needs to be executed on the Oracle CTS database before starting the CTS application (the file can be found in the package).

2.2.1.2. Encrypted

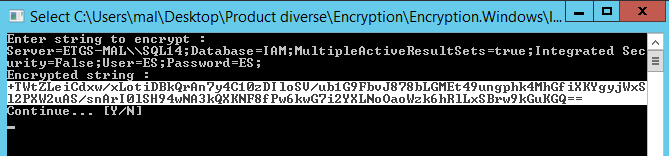
To use an encrypted connection string in IAM, edit **appsettings. json** and add the following:

*"IsConnectionStringEncrypted": "true"*

In the **DbConnection**section, replace its plain text value with its related encrypted value.

The encrypted connection string can be obtained using the encryption tool **Encryption.Windows** provided in the package under **/Tools/Encryption.**

Double click **Intalio.Encryption.exe** enter the plain text value and get its encryption:



The appsettings should be similar to the following:

*{*

*"Logging": {*

*"LogLevel": {*

*"Default": "Information",*

*"Microsoft": "Warning",*

*"Microsoft.Hosting.Lifetime": "Information"*

*}*

*},*

*"AllowedHosts": "\*",*

*"ConnectionStrings": {*

*"DbConnection": "+TWtZLeiCdzq+4PWOhRxY8DPLctlkMh3U32/HCoORGEanAMYrWdusOnLgOw9QC7+G2vxiObqLOE+jgzy9eIC23PqJqo+8Wx+4RcBR74et1T027KHyam0Ic02xrd1eBCYqQNHvbrAkuyjXAAxwwX1hnw7ZMUQivQl"*

*},*

*"DatabaseType": "PostgreSQL",*

*"IsConnectionStringEncrypted": "true"*

*}*

* + 1. Database Type

Go to **“Intalio.IAM” à “appsettings.json”** and select one value of Database Type, based on the chosen connection string, as follows:

*For PostgresSQL:*

*“DatabaseTypes”: “PostgresSQL”*

*For MSSQL:*

*“DatabaseTypes”: “MSSQL”*

*For Oracle:*

*“DatabaseTypes”: “Oracle”*

* + 1. Jobs

Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |
| --- | --- |
| **Configuration** | **Description** |
| **EnableBackgroundJobs** | To enable/disable background jobs (integration jobs). If disabled, only data source page is displayed from integration section |
| **SchedulePollingInterval** | Hangfire Server periodically checks the schedule to enqueue scheduled jobs to their queues, allowing workers to execute them. By default, check interval is equal to 15 seconds, but you can change it by setting the SchedulePollingInterval property |
| **StatsPollingInterval** | Interval which Hangfire UI periodically checks the database |

* + 1. Health Check

Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |  |  |
| --- | --- | --- | --- |
| **Configuration** | | **Description** | |
| **HealthChecks > Name** | | Application name. | | This section (Name, URI) should be added for each application to be monitored. |
| **HealthChecks > Uri** | | Application URI. | |
| **SystemEmail** | | The list of emails that should receive health check notifications is assigned to this value. | | |
| **EvaluationTimeInSeconds** | | Number of elapsed seconds between health checks. | | |
| **MinimumSecondsBetweenFailureNotifications** | | The minimum seconds between failure notifications to avoid receiver flooding. | | |

* + 1. Cookie Life Time

Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |
| --- | --- |
| **Configuration** | **Description** |

|  |  |
| --- | --- |
| **PersistentCookieLifeTime** | Support configuring the persistent cookie lifetime from the appsettings (cookie lifetime when remember me is checked)  The default lifetime of the specified cookie is 604800 seconds (7 days) |

* + 1. OpenInIframe

Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |
| --- | --- |
| **Configuration** | **Description** |

|  |  |
| --- | --- |
| **OpenInIframe** | Enable IAM to open in iframe to allowed urls separated by ,. |
| **Enabled** | When true, open iframe feature is enabled. |
| **URLs** | List of URL that are allowed to open in iframe. |

* + 1. Cors

Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |
| --- | --- |
| **Configuration** | **Description** |

|  |  |
| --- | --- |
| **CORS** | Cross-Origin Resource Sharing (CORS) is an HTTP-header based mechanism that allows a server to indicate any origins (domain, scheme or port) other than its own from which a browser should permit loading resources. |
| **URLs** | List of URL that are allowed to use IAM for security reasons. |

* + 1. ProxyServer

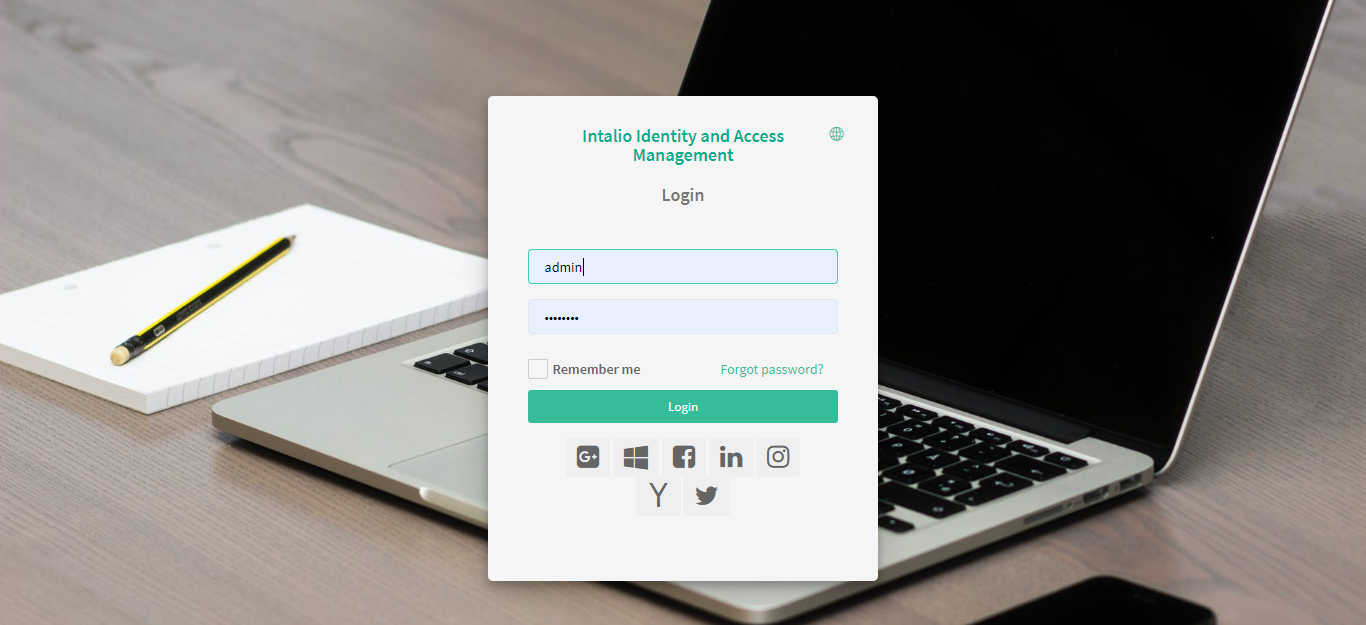
Go to “**Intalio.IAM**” à “**appsettings.json**” and edit the following values:

|  |  |
| --- | --- |
| **Configuration** | **Description** |

|  |  |
| --- | --- |
| **ProxyServer** | Name of the proxy server and is used when the environment is using proxy server. |

* 1. Test the installation

Login with Intalio IAM URL to test that the application is working correctly:



Enter the admin credentials, the system should redirect you to the following:

