

# FORTRA



## Webdocs Installation Guide

## **Copyright Terms and Conditions**

---

Copyright © Fortra, LLC and its group of companies. All trademarks and registered trademarks are the property of their respective owners.

The content in this document is protected by the Copyright Laws of the United States of America and other countries worldwide. The unauthorized use and/or duplication of this material without express and written permission from Fortra is strictly prohibited. Excerpts and links may be used, provided that full and clear credit is given to Fortra with appropriate and specific direction to the original content.

202501091045 - 2.2.0

# Table of Contents

<b>Before You Begin</b>	<b>4</b>
System Requirements and Notes	4
Enabling and Setting TCP/IP in Microsoft SQL Server	6
Setting the Authentication Mode in Microsoft SQL Server	9
<b>Installing Webdocs Windows</b>	<b>15</b>
Using the Webdocs Setup Wizard	15
<b>After You are Done</b>	<b>17</b>
Optional IIS Autostart Configuration	17

# Before You Begin

Read this section before you install Webdocs Windows.

Webdocs Windows is a windows application that runs as two parts, a Website in IIS with a Windows Service (Application Server), and a SQL Database. The Webdocs Windows installer will install and configure all parts.

NOTE: Fortra installers should automatically run with elevated access, but if you experience a permissions issue while executing it, please run it as administrator.

## System Requirements and Notes

Minimum system requirements are the base installation requirements that make the product function. Your individual circumstances may warrant different requirements based on number of users, number of documents imported each day, routes processed per day, etc. It is recommended that you work with your assigned professional services team to determine the best requirements for your individual organization's situation. It's important to also consider that Windows itself is going to use resources. Your organization most likely has antivirus scanning and backup software that will also use resources. Add these requirements to your minimums when sizing a system to run Webdocs Windows.

Virtualized environments are standard across the industry and Webdocs Windows is generally deployed in a 2 server virtualized environment where the application runs on server 1 (App Server) and the database runs on server 2 (SQL Server). Many organizations choose to run SQL Server as a shared resource among several products and services. It is important to consider the total workload of all products when sizing shared resources and not just the minimum requirements listed below. Be sure to review CPU workloads and ensure that VMs are not competing for processing power.

Network Attached Storage is often configured after installation as the location of physical document storage for Webdocs Windows. It is optional in the table below, however most organizations utilize this method for ease of backup and disaster recovery operations.

See the table overleaf for minimum and recommended requirements.

<b>Component</b>	<b>Minimum</b>	<b>Recommended</b> for larger workloads
<b>CPU (App Server)</b>	2 cores (Intel Skylake or equivalent virtual CPUs)	4 cores (Intel Skylake or equivalent virtual CPUs)
<b>CPU (SQL Server)</b>	2 cores (Intel Skylake or equivalent virtual CPUs)	4 cores (Intel Skylake or equivalent virtual CPUs)
<b>RAM (APP Server)</b>	16 GB (50 Users)	24-32 GB
<b>RAM (SQL Server)</b>	8 GB	16 GB
<b>Disk (App Server)</b>	250 GB SSD (fast IOPS, especially for temp/logs/cache)	500 GB SSD
<b>NAS (Document Storage)</b>	250 GB (2-5 million documents)	1 TB
<b>Disk (SQL Server)</b>	100 GB SSD	2500 GB SSD
<b>Network</b>	1 Gbps Ethernet	1 Gbps Ethernet
<b>OS</b>	Windows Server 2019 Standard	Windows 2025 Datacenter
<b>SQL Server</b>	SQL Server 2019 Standard (64-bit)	SQL Server 2022 Enterprise (64-bit)
<b>.NET Runtime</b>	.NET Framework 4.7.2 with latest patches	.NET Framework 4.8 with latest patches
<b>IIS Version</b>	IIS 10 (included with Windows Server 2016-2025)	IIS 10 (included with Windows Server 2106-2025)

# Enabling and Setting TCP/IP in Microsoft SQL Server

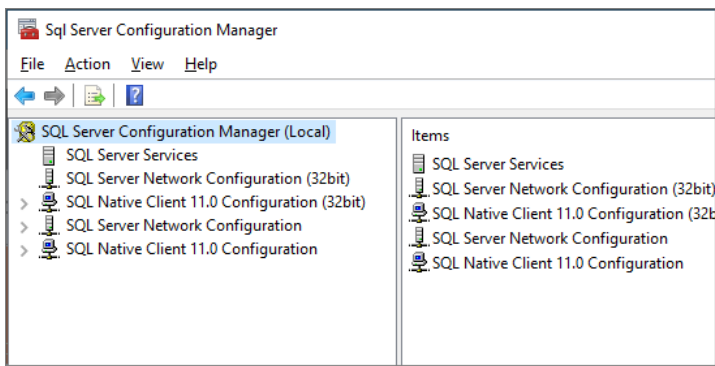
Before installing Webdocs follow the process to enable and set TCP/IP in Microsoft SQL Server. Make sure the requirements are installed or present on the Webdocs server.

**NOTE:**

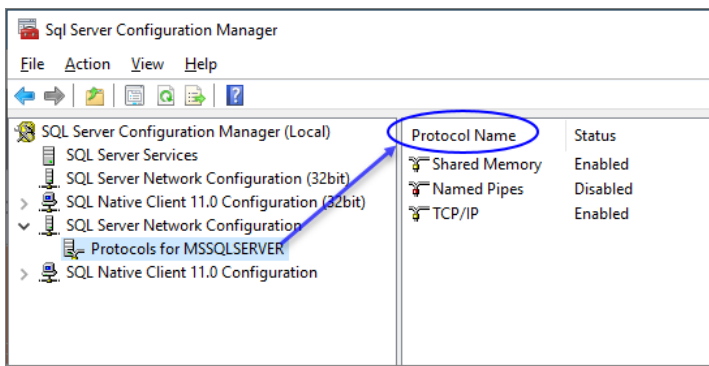
These instructions show you how to enable and set TCP/IP in Microsoft SQL Server using a version of Microsoft SQL Server that has been configured with an instance name. Depending on how you configured Microsoft SQL Server, your version of Microsoft SQL Server may not use an instance name.

## Steps

1. Open SQL Server Configuration Manager on the Webdocs server.  
SQL Server Configuration Manager displays.



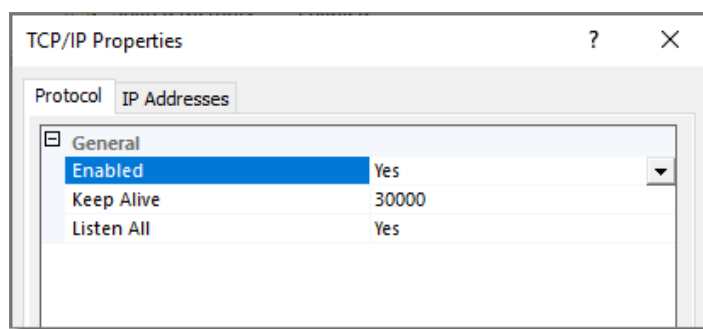
2. Click: **SQL Server Configuration Manager (Local) > SQL Server Network Configuration > Protocols for SQLEXPRESS**, where **SQLEXPRESS** is the Microsoft SQL Server instance name.  
Protocol names display.



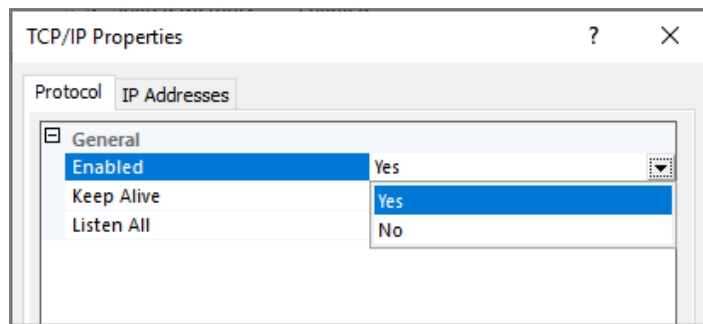
### 3. Enable TCP/IP:

- a. Right-click **TCP/IP** and choose **Properties**.

TCP/IP displays.

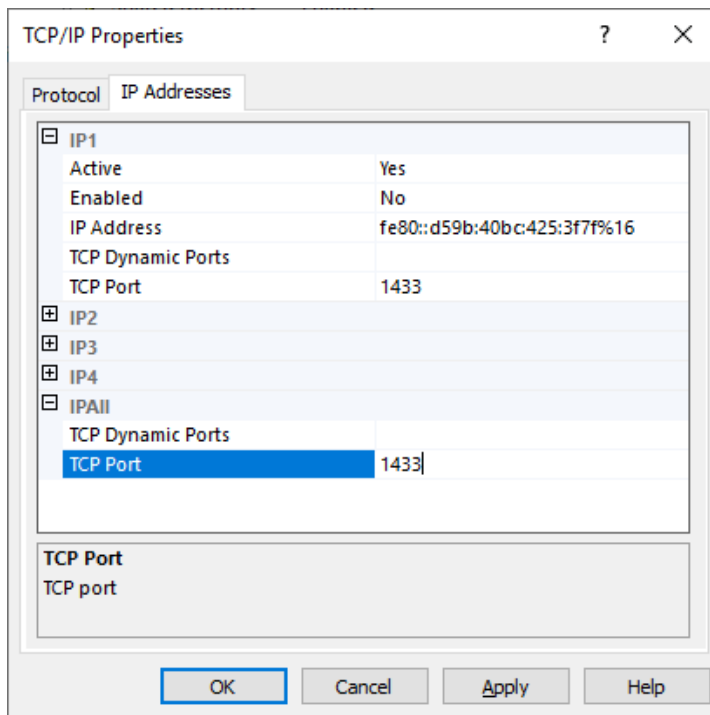


- b. To enable TCP/IP, in **Enabled**, choose **Yes**.



- c. Click the **IP Addresses** tab.

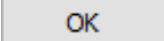
The IP Addresses display.



d. Under **IPAll**, type **1433** in the **TCP Port** row:

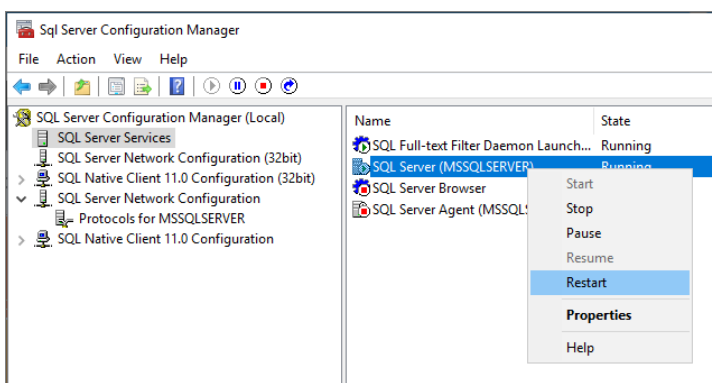
e. Click **Apply** .

A dialog box displays that warns you to restart the service before the changes will take effect.

f. Click **OK**  to exit the TCP/IP Properties dialog box.

4. Under **SQL Server Configuration Manager (Local)**, click **SQL Server Services**.

5. Right-click **SQL Server (SQLEXPRESS)**, where **SQLEXPRESS** is the Microsoft SQL Server instance name, and click **Restart**.



The service stops and restarts, and TCP/IP is enabled and set.

# Setting the Authentication Mode in Microsoft SQL Server

Before you can install Webdocs, you need to select SQL Server and Windows authentication in Microsoft SQL Server.

**NOTE:**

This setting is only required for the install process. After Webdocs is running it is no longer needed.

Setting the Authentication Mode in Microsoft SQL Server is divided into the following steps:

1. [Connecting to Microsoft SQL Server](#)
2. [Selecting SQL Server and Windows Authentication](#)
3. [Setting the Authentication Mode Security](#)
4. [Restarting Microsoft SQL Server](#)

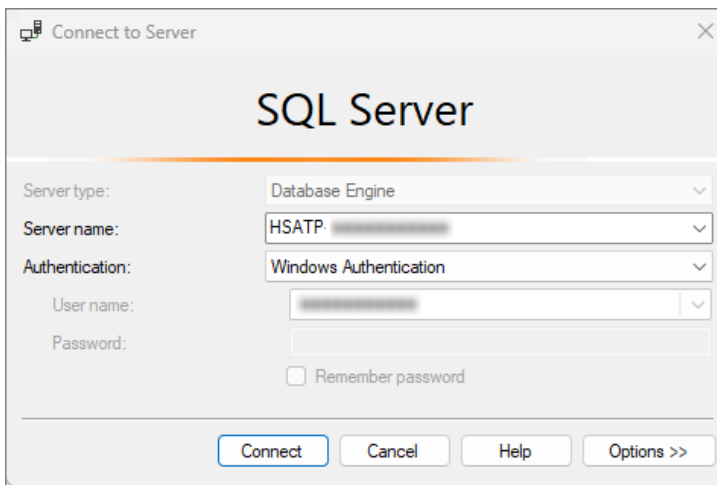
**NOTE:**

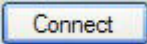
These instructions show you how to set the authentication mode in Microsoft SQL Server using a version of Microsoft SQL Server that has been configured with an instance name. Depending on how you configured Microsoft SQL Server, your version of Microsoft SQL Server may not use an instance name.

## Connecting to Microsoft SQL Server

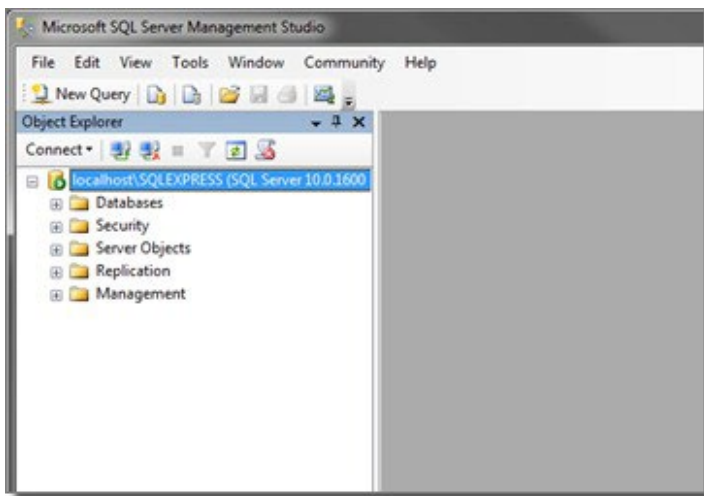
### Steps

1. Open Microsoft SQL Server Management Studio on the Webdocs server.  
Connect to Server displays.



2. In **Authentication**, choose **Windows Authentication**.
3. Click **Connect** .

Microsoft SQL Server Management Studio displays.

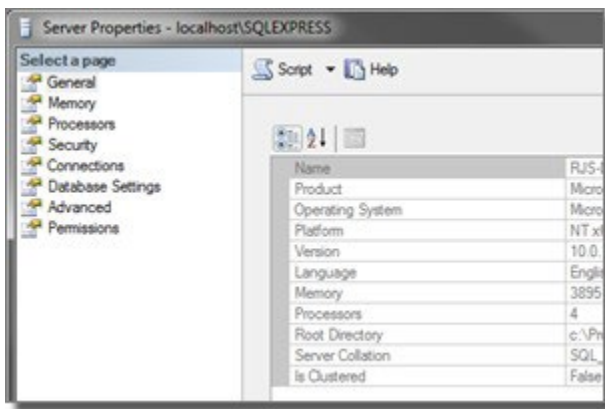


You are connected to Microsoft SQL Server.

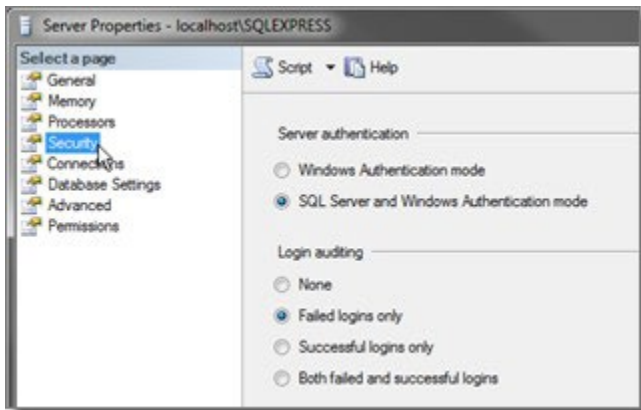
## Selecting SQL Server and Windows Authentication

### Steps

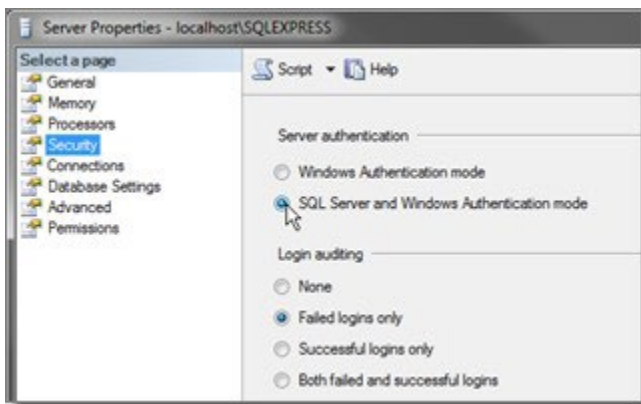
1. In Microsoft SQL Server Management Studio, right-click **RJS-DEV-005\SQLEXPRESS**, where **RJS-DEV-005** is the Microsoft SQL Server name and **SQLEXPRESS** is the Microsoft SQL Server instance name, and choose **Properties**.  
Server Properties displays.



2. Under **Select a page**, click **Security**.



3. Under **Server authentication**, make sure **SQL Server and Windows Authentication mode** is selected.



4. Click **OK** .

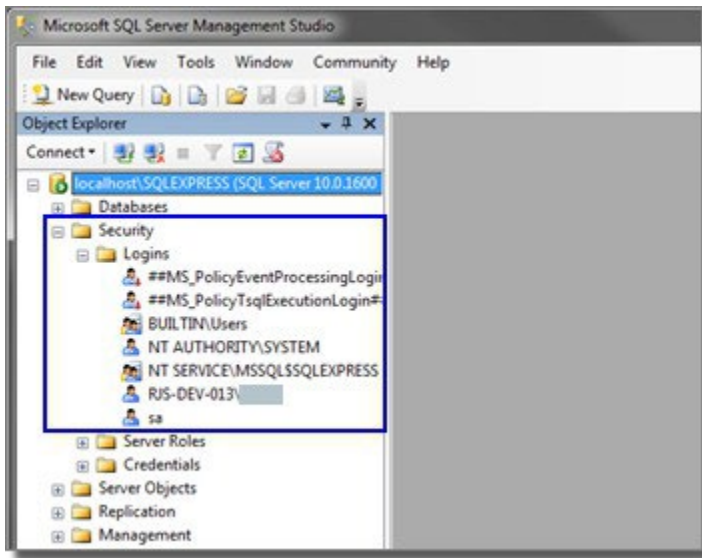
SQL Server and Windows Authentication mode is selected.

## Setting the Authentication Mode Security

### Steps

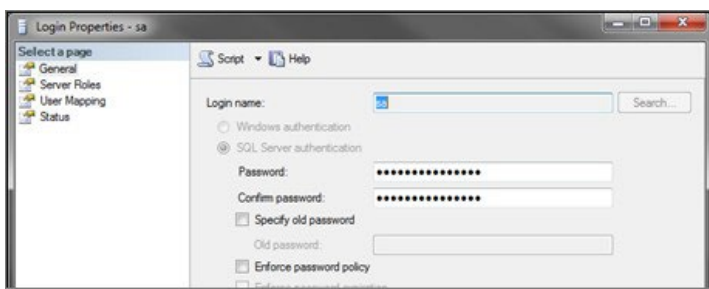
1. In Microsoft SQL Server Management Studio, under **RJS-DEV-005\SQLEXPRESS**, where **RJS-DEV-005** is the Microsoft SQL Server name and **SQLEXPRESS** is the Microsoft SQL Server instance name, expand **Security > Logins**.

The contents of Logins display.

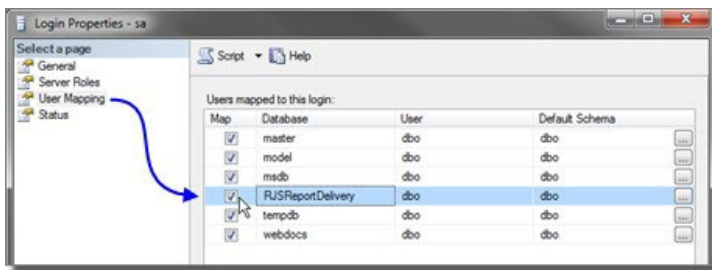


2. Right-click **sa** and click **Properties**.

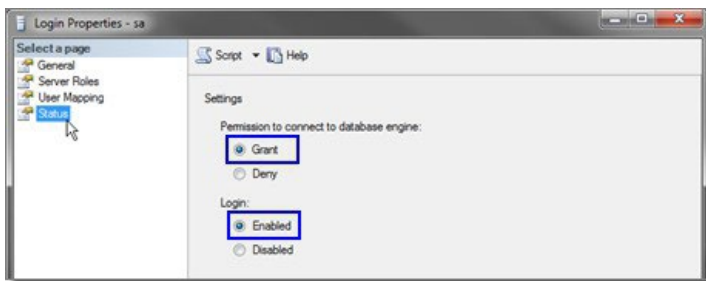
Login Properties - sa displays.



3. In **Password**, type a password.
4. In **Confirm password**, re-type the password.
5. Under **Select a page**, click **User Mapping** and make sure **webdocs** is checked.



6. Under **Select a page**, click **Status** and make sure of the following:
- **Permission to connect to database engine** is set to **Grant**.
  - **Login** is set to **Enabled**.



7. Click **OK** .

The authentication mode security is set.

## Restarting Microsoft SQL Server

### Steps

1. In Microsoft SQL Server Management Studio, right-click **localhost\SQLEXPRESS**, where *localhost* is the Microsoft SQL Server name and *SQLEXPRESS* is the Microsoft SQL Server instance name, and click **Restart**.



A dialog box displays, asking if you want to restart Microsoft SQL Server.

2. Click **Yes**  .

The Service Control gauge displays, telling you the progress of restarting Microsoft SQL Server. When the Service Control gauge no longer displays, Microsoft SQL Server is restarted and the authentication mode is set in Microsoft SQL Server.

# Installing Webdocs Windows

Follow these instructions to install Webdocs Windows.

## Using the Webdocs Setup Wizard

To download the Webdocs Set-Up Wizard, visit the [Fortra Support Portal](#) .

### Best Practices:

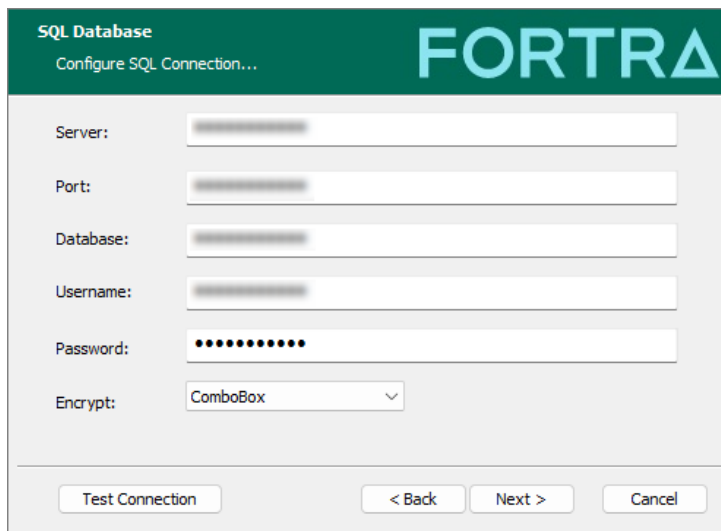
- Download and complete the Setup Wizard at a time when you can call Fortra during business hours. You may need to talk to technical support to get certain user names, passwords, and authorization codes.
- Make a backup of the database first.

**NOTE:**

If you are using routing and want to manage routes from the Webdocs server, install the Webdocs Route Designer on the server. If you want to manage routes on another system, after you have installed Webdocs on the Webdocs server, run the Webdocs installer again on the other system and only install the Webdocs Route Designer component.

### During installation:

- In **Server**, type the connection to the database server. Depending on how you configured Microsoft SQL Server, use either the format server\instance or server, where server is the Microsoft SQL Server name and instance is the Microsoft SQL Server instance name. Neither the server name nor the instance name are case-sensitive.



SQL Database  
Configure SQL Connection...

**FORTRA**

Server:

Port:

Database:

Username:

Password:

Encrypt:

**NOTE:**

To find Microsoft SQL Server instance names, open SQL Server Configuration Manager. The instance names display under SQL Server Services.

- Press the **Test Connection**  button to test the Microsoft SQL Server connection.

# After You are Done

Congratulations! Webdocs Windows is now installed. Read the following for additional information and your next steps.

After installation, contact Fortra if you do not have:

- The Webdocs default administrator name and password.
- The Webdocs URL.

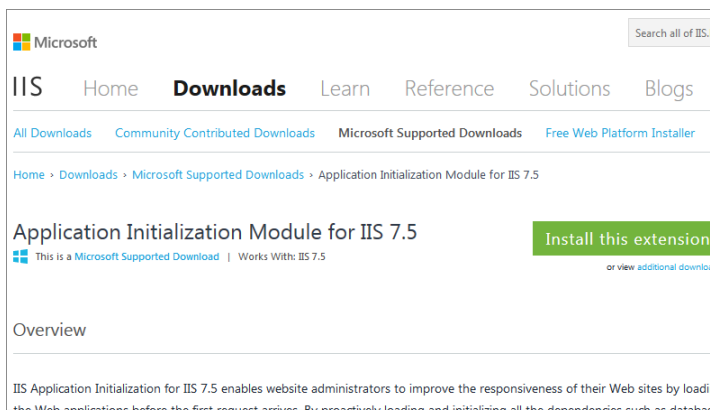
To finish the Webdocs installation process, continue with the remaining sections that follow.

## Optional IIS Autostart Configuration

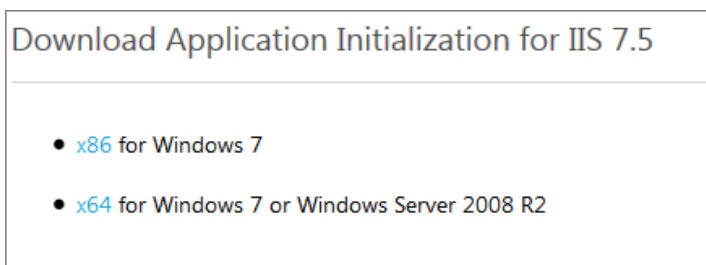
### Install IIS Application Initialization Feature

#### Windows Server 2008 R2

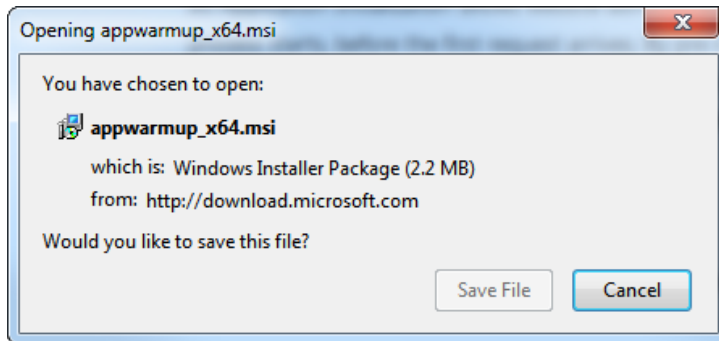
1. Open a web browser and visit the **Application Initialization Module** download page on the IIS.NET website.



2. Scroll to the bottom of the page to find the module's download links.



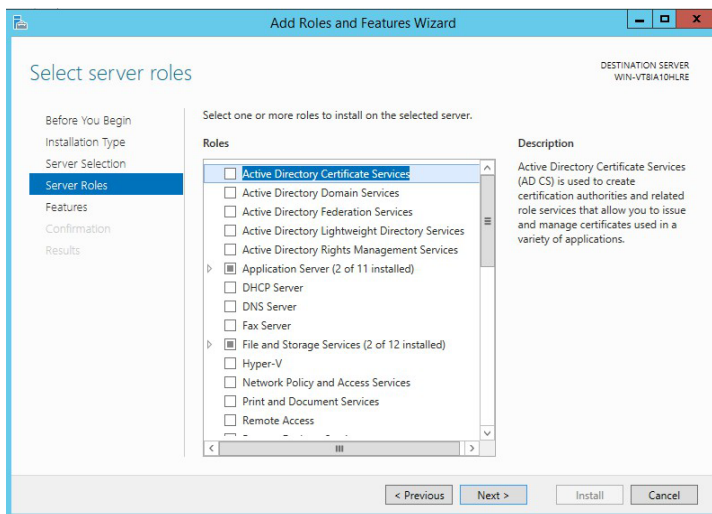
- Click on the **x64** link to begin the module download.



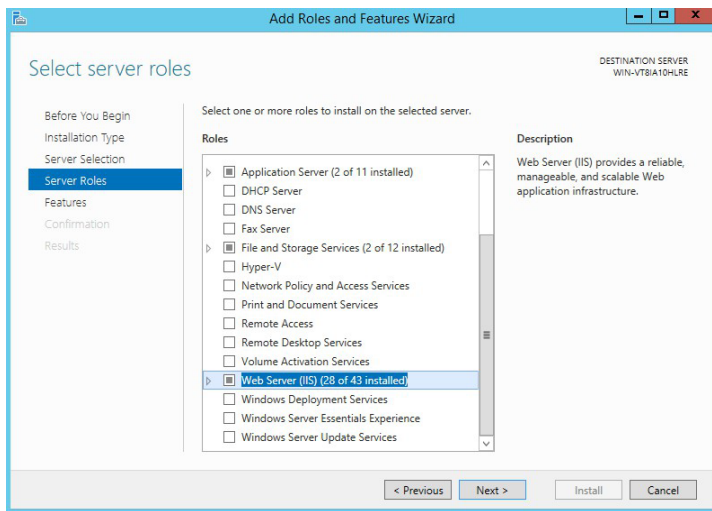
- Once the download completes, run the downloaded installer and walk through all installer dialogs until completion.
- After the installer finishes, Windows will require a reboot in order to finish installing the module and make the new settings usable.

## Windows Server 2012 and 2012 R2

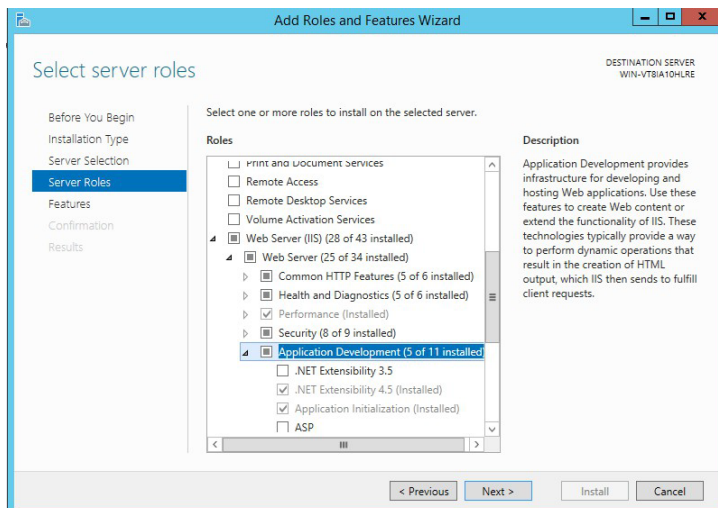
- Open the Windows Server **Add Roles and Features Wizard** and step through until reaching the **Server Roles** category.



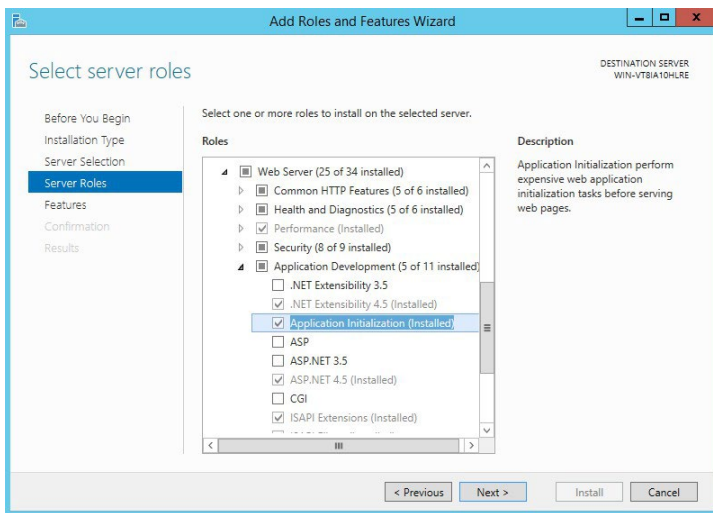
- In the **Roles** pane, scroll down the list of roles and find the **Web Server (IIS)** role.



- Expand the **Web Server (IIS)** role and expand the features **Web Server** and **Application Development**.



- Select the **Application Initialization** feature by clicking the check box to the left of the feature name.



5. Click **Next** and finish the wizard to have Windows install the required features.

## Configure Application Pool Start Mode and Web Site Preload

### Windows Server 2008 R2

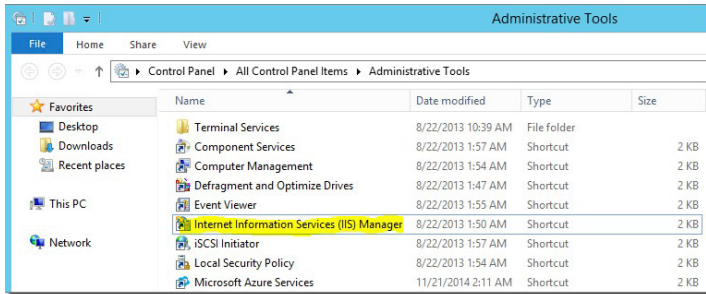
1. Open the global IIS configuration file with a text editor. The default location is `C:\Windows\System32\inetsrv\config\applicationHost.config`.
2. Edit the Webdocs application pool and website global settings highlighted below. Add any properties that don't exist yet.

```
<system.applicationHost>
...
<applicationPools>
...
  <add name="WebDocsApplicationPool"
        autoStart="true"
        startMode="AlwaysRunning" ... >
...
</add>
</applicationPools>
...
<sites>
...
  <site name="WebDocs" id="1">
    <application ...
      applicationPool="WebDocsApplicationPool"
      preloadEnabled="true" ... >
...
    </application>
  </site>
</sites>
...
</system.applicationHost>
```

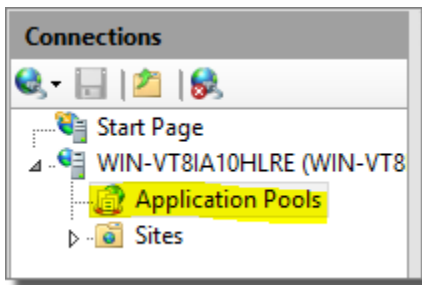
3. Save the **applicationHost.config** file and restart IIS.

### Windows Server 2012 and 2012 R2 – Application Pool Start Mode

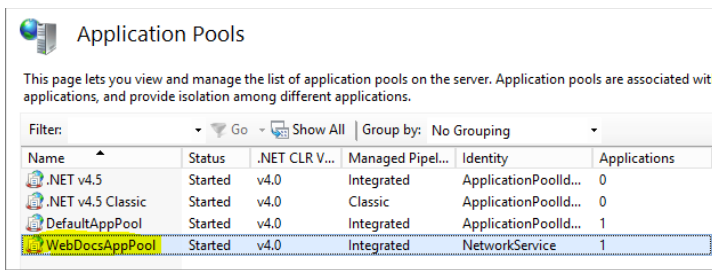
## 1. Open Internet Information Services (IIS) Manager.



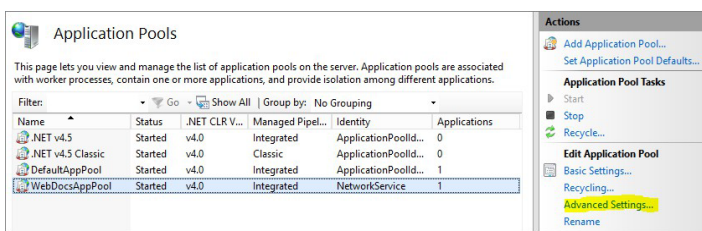
## 2. In the **Connections** pane, select the **Application Pools** node, revealing the Application Pools pane in the main view.



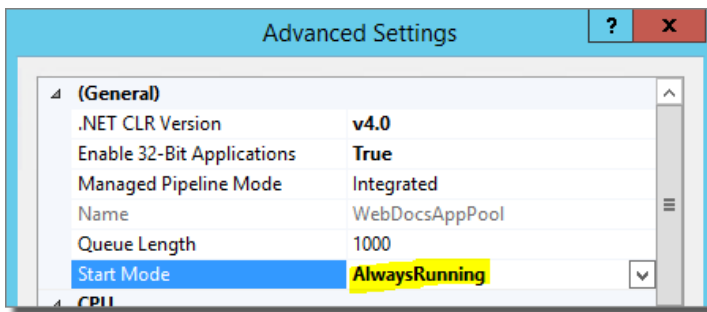
## 3. Select the Webdocs application pool.



## 4. Click **Advanced Settings...**



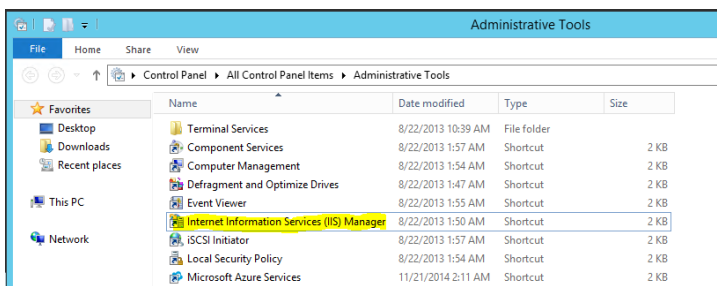
## 5. Locate the **Start Mode** option under the General group and set it to **AlwaysRunning**.



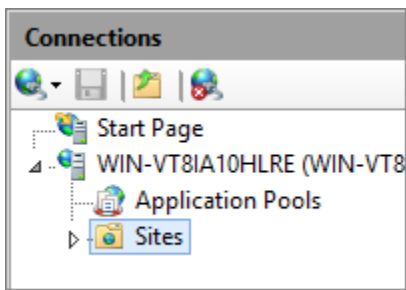
6. Click **OK**.

## Server 2012 and 2012 R2 – Web Application Preload

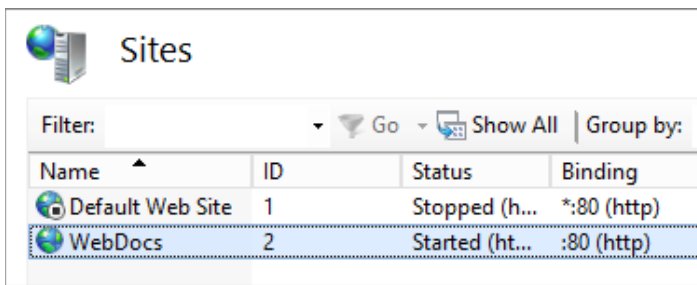
1. Open **Internet Information Services (IIS) Manager**.



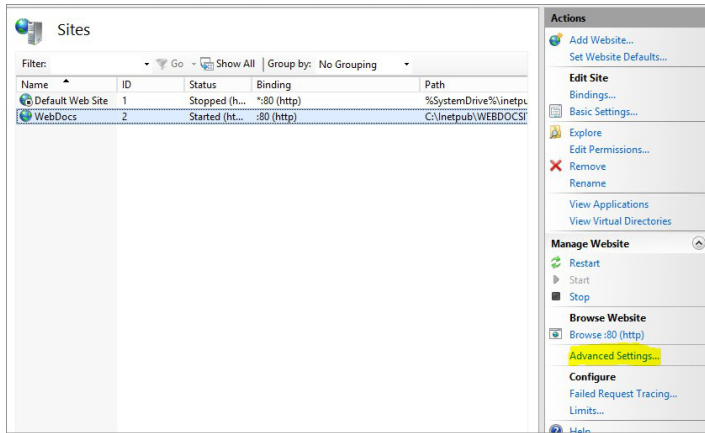
2. In the **Connections** pane, select the **Sites** node, revealing the Sites pane in the main view.



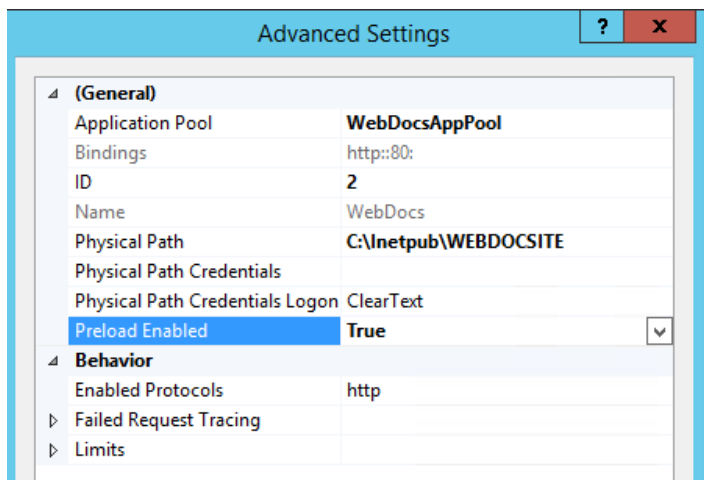
3. Select the **Webdocs** site.



#### 4. Click **Advanced Settings...**



#### 5. Locate the **Preload Enabled** option under the General group and set it to **True**.



#### 6. Click **OK**.