1. Install Windows Server 2012 64bit.
   1. https://www.microsoft.com/en-us/download/details.aspx?id=34592
2. Install IIS
   1. Add Roles
   2. Web Server (IIS)
      1. Web Server
         1. Common HTTP Features
            1. Default Document
            2. Directory Browsing
            3. HTTP Errors
            4. Static Content
            5. HTTP Redirection
         2. Health and Diagnostics
            1. HTTP Logging
            2. Logging Tools
         3. Performance
            1. Static Content Compression
         4. Security
            1. Request Filtering
            2. Basic Authentication
            3. Central SSL Certificate Support
         5. Application Development
            1. .NET Extensibility 3.5
            2. Application Initialization
            3. ASP.NET 3.5
            4. ISAPI Extensions
            5. ISAPI Filters
         6. FTP Sever
            1. None
         7. Management Tools
            1. IIS Management Console
            2. IIS Management Scripts and Tools
            3. Management Service
3. Turn on automatic updates.
4. Install all updates.
5. Install Notepad++
6. Install Ruby
   1. <http://dl.bintray.com/oneclick/rubyinstaller/rubyinstaller-2.1.5-x64.exe>
   2. Check Add Ruby executables to your PATH.
   3. Associate .rb and .rbw files with this Ruby installation.
7. Install Ruby Development Kit
   1. Install Development Kit: <http://dl.bintray.com/oneclick/rubyinstaller/DevKit-mingw64-64-4.7.2-20130224-1432-sfx.exe>
   2. Copy or extract the devkit (you will have to create this folder) extracted files into c:\Ruby21-x64\devkit.
   3. Open Start|All Programs|Ruby 2.1.5-p273-x64 |Start Command Prompt with Ruby.
   4. Execute ‘cd C:\Ruby21-x64\DevKit’ on command prompt.
   5. Execute 'ruby dk.rb init’ on command prompt.
   6. Execute ‘ruby dk.rb review’ on command prompt.
   7. Edit ‘C:\Ruby21-x64\DevKit\config.yml’
   8. Enter ‘- C:/Ruby21-x64’ at the end the ‘C:\Ruby21-x64\DevKit\config.yml’
   9. Execute ‘ruby dk.rb install’ on command prompt.
8. Download as zip: <https://github.com/textractortechnologies/casefinder> to c:\inetpub\wwwroot\casefinder
9. Download as zip: <https://github.com/textractortechnologies/abstractor> to c:\inetpub\wwwroot\casefinder\lib\abstractor
10. Install the 64bit Java JDK to C:\Program Files\Java\jdk1.8.0\_102. <http://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html> or http://www.oracle.com/technetwork/java/javase/downloads/jre8-downloads-2133155.html
11. Install Node.js: <https://nodejs.org/>.
12. Install Microsoft SQL Server 2012.
    1. https://www.microsoft.com/en-us/download/details.aspx?id=29066
    2. Setup Roles
       1. All features with defaults
       2. Authentication Mode
          1. Mix Mode
    3. Create ‘casefinder’ database.
    4. Create ‘casefinder’ login.
    5. Create ‘casefinder’ user in ‘casefinder’ database mapped to ‘casefinder’ login.
    6. Grant ‘db\_owner’ role to ‘casefinder’ user for ‘casefinder’ database.
    7. Change password in c:\inetpub\wwwroot\casefinder\config\database.yml
13. Install the web platform installer 5.0 and Hellicon Zoo: <http://www.microsoft.com/web/downloads/platform.aspx>
    1. Add the custom feed of <http://www.helicontech.com/zoo/feed.xml>
       1. Run the web platform installer 5.0
       2. Click ‘Options’
       3. Add the link to Helicon Zoo Feed ‘http://www.helicontech.com/zoo/feed.xml’ into the ‘Custom Feeds’ text box.
       4. Click ‘Add feed’
       5. Click ‘IIS’ for the question ‘Which Web Server would you like to use?’
       6. Check ‘Enable configuration of all web application parameters’
       7. Click ‘OK’ button.
       8. After adding custom feed new Zoo tab will appear with Applications, Templates, Packages, Modules and Engines sections in it.
       9. Click the ‘Add’ button next to ‘Ruby 2.0’ and click the ‘Install’ button.
       10. At the end of the install it will end on the Configure section, just accept the default options.
       11. Close the web installer when done.
       12. Open Start|All Programs|Hellicon|Zoo|Hellicon Zoo Manager
       13. Click "applicationHost.config" (It's a tab at the top).
       14. Find the engines tag and add a new user engine after <\engines>. Make sure to save the change and choose refresh at the top of the window then close. See file ‘applicationHost.config’.
       15. A user engine should be added any time a new version of ruby comes out.
       16. Close the Hellicon Zoo Manager.
14. Add an application to IIS
    1. Open Start|All Programs|Administrative Tools|Internet Information Services (IIS) Manager
    2. In IIS right click default website and add application. The alias should be all lower case. Set the physical path to ‘C:\inetpub\wwwroot\casefinder’.
    3. Set the proper rights to the folder. Grant write access to "IIS\_IUSRS" to the folder. This should be temporary and removed once you are done with configuration.
15. Add an application to Hellicon Zoo
    1. Open Start|All Programs|Hellicon|Zoo|Hellicon Zoo Manager
    2. Click on the ‘casefinder’ application in Helicon Zoo Manager under ‘Default Web Site’
    3. In the ‘Applications’ section, click the ‘New’ button.
    4. Name it ‘Ruby2.1.rack’.
    5. Select the engine that was created in the config file: ‘ruby.2.1.x64.rack’.
    6. Ensure you have the environment variables
       1. RACK\_ENV=production
       2. RAILS\_RELATIVE\_URL\_ROOT=%APPL\_VIRTUAL\_PATH%
       3. SECRET\_KEY\_BASE
    7. The variables should of been copied over from the custom engine that was added.
    8. In the ‘Environment Variables’ section, click the button ‘New’.
    9. Set the ‘Name’ to ‘JAVA\_HOME’ and the ‘Value’ to ‘C:\Program Files\Java\ jdk1.8.0\_131’ and click ‘OK’.
    10. Click ‘Apply’ button and the next ‘Apply’ button.
    11. Click your ‘Case Finder’ in the site list on the far left, this will cause Helicon Zoo to refresh enabling the Web Console.
    12. Click the button ‘Start web console’.
    13. At the Web console type ‘gem install bundler --source http://rubygems.org’.
    14. At the Web console type ‘bundle install’.
    15. Type ‘bundle exec rake secret’ at console.
    16. Place output into ‘C:\inetpub\wwwroot\casefinder\config\secrets.yml file’.
    17. Encrypt password in database.yml and ldap.yml
        1. message\_encryptor = ActiveSupport::MessageEncryptor.new(Rails.application.secrets.secret\_key\_base)

encrypted\_data = message\_encryptor.encrypt\_and\_sign('password')

* 1. At the Web console type ‘bundle exec rake db:migrate’.
  2. At the Web console type ‘bundle exec rake abstractor:setup:system’.
  3. At the Web console type ‘bundle exec rake setup:abstractor\_schemas’.
  4. At the Web console type ‘bundle exec rake setup:roles’.
  5. At the Web console type ‘bundle exec rake setup:rules’.
  6. At the Web console type ‘bundle exec rake assets:precompile’.

1. Create API users.
2. Tomcat
   1. <http://tomcat.apache.org/download-90.cgi>
      1. Download: 32-bit/64-bit Windows Service Installer (pgp, md5, sha1)
      2. Double click on installer, and click through accepting all defaults. If all defaults are accepted, Tomcat will be installed in **C:/Program Files/Apache Software Foundation/Tomcat9.0**. This will be referred to at %TOMCAT\_HOME%.
      3. Go to this URL, and click on the “download” button <https://github.com/textractortechnologies/NLP/blob/master/artifacts/text-web-service-1.0.war>
      4. Copy file into %TOMCAT\_HOME%/webapps
3. Configure ‘C:\inetpub\wwwroot\casefinder\config\abstractor\custom\_nlp\_providers.yml’ to point to Tomcat NLP service.
4. Change Internet Information Services (IIS) Manager to prevent the application from going to sleep. The application take a minute to initialize. Keeping it awake will improve the user experience.
   1. Open Internet Information Services (IIS) Manager.
   2. Click ‘Application Pools’
   3. Click ‘Advanced Setting’
   4. In the ‘Process Model’ section set ‘Idle Time-out (minutes)’ to 0.
   5. In the ‘Recycling’ section set ‘Regular Time Interval (minutes)’ to 0.
5. Change Internet Information Services (IIS) Manager to prevent the application from going to sleep upon reboot. The application take a minute to initialize. Keeping it awake will improve the user experience.
   1. Open Internet Information Services (IIS) Manager.
   2. Click ‘Application Pools’
   3. Click ‘Basic Settings’
   4. Check ‘Start application pool immediately’
   5. Click ‘Advanced Settings’
   6. In the ‘General’ section, set ‘Start Mode’ to ‘AlwaysRunning’
   7. Click ‘Sites’
   8. Click ‘Default Web Site’
   9. Click ‘casefinder’
   10. Click ‘Basic Settings’
   11. Check ‘Enable Preload’
   12. Click ‘Advanced Settings’
   13. In the ‘General’ section, set ‘Preload Enabled’ to ‘True’.