1. PREREQUISITES

- Software on **Database server**:
  - Microsoft SQL Server 2014 or 2014 Express or higher
  - Minimum 1 CPU (more depending on number of users)
  - Minimum 4 GB (more depending on number of users)

- Software on **Fileserver**:
  - CIFS compatible server

- Microsoft **Exchange Server**:
  - Minimum 2013 or Exchange 365

- Microsoft **IIS Server on premise** or **in the cloud** :
  - Windows 2008 R2 or higher
  - Minimum **IIS 7.5**
  - Minimum 1 CPU (more depending on number of users)
  - Minimum 4 GB (more depending on number of users)
  - **.**NET framework **4.7** or higher is required.

- (optional) Microsoft Terminal Server or Citrix
- Internet connection with a download speed of at least 30 Mbps and an upload speed of at least 10 Mbps
- Minimum SAS hard disks with 15k (15.000 RPM) (Rotations per min); Best Practice SSD (Solid State Drive)

- Cicero **Web Clients**:
  - Minimum Screen resolution 1152 * 864

- Software on **Clients**:
  - Microsoft Windows 7, Windows 8 (32 or 64-bit), Windows 10
  - Some of the applications in Cicero LawPack require a .NET Framework 4.7 of higher.
    If necessary, you can download the package from http://www.microsoft.com/downloads.
  - Microsoft Office 365/2013/2016

- Usernames:
  - limit the length (and up to 20 characters)

Call Cicero (+32 2 272 03 80) to obtain
  - Training dates
  - Password Cicero v10 Setup
  - User and Password to login
  - License ID

2. NETWORK ADMINISTRATORS' INFO

- If set-up by CICERO employee or partner:
  - Access to servers
  - Provide administrator user and password
  - SQL 'sa' user and password
  - AD user with full access to the CLINET Share.
    CICERO Web uses this AD user to access the files on the File Server.
  - Exchange Admin user account with access rights to Mailboxes
    CICERO Web uses the EWS (exchange web services) to access (read / write) appointments and tasks in the various exchange mailboxes of the users.
  - Primary email addresses

3. INSTALLING THE CICERO SETUP FILE

Before starting this installation you will have to call Cicero to obtain:
  - Password Cicero v10 Setup
  - User and Password to login

DOWNLOAD EITHER THE 32-BIT OR THE 64-BIT CICERO SETUP FILE

Unpack it and place it anywhere on the Web server (it contains all the Cicero Web applications).

INSTALLATION

Use the 'Run as administrator' option.

DATA ENTRY IN SOME STEPS

Welcome

Prerequisites

SQL Database

Select or type the full name of the Database Server and enter 'sa' as username/password.

SQL Database

Select the appropriate Cicero database.

Type of installation

Enter location and select type of installation.
    Default is C:\Inetpub\wwwroot\CiceroWeb\
    Click 'Completely' (the only option available at present).
Important note
The setup installs the application in the Default Website of the Web Server!
    If you want it somewhere else, you can right click the appropriate folder in the IIS Server Manager
    and select the option 'Add application'. Then complete the fields in the dialog box:
    Alias: i.e. CiceroWeb
    Pool: i.e. CiceroWeb
    Physical path: browse to Inetpub\wwwroot\...

The remaining steps are straightforward.

UPON COMPLETION OF THE INSTALLATION THE FOLLOWING 'README' MESSAGE IS SHOWN

Cicero Web

Thank you for installing the Cicero Web Module.
With this web application, your users can access all the Cicero web applications on any location with an active Internet
    connection.

The Cicero Web Module currently comes in two versions:
1. Web application accessible via [url]/CiceroWeb/index.aspx
2. Mobile Web application accessible via [url]/CiceroWeb/index_mobile.aspx

DO NOT FORGET THAT

-   Users need the web addresses [url]/CiceroWeb/index.aspx **AND** [url]/CiceroWeb/index_mobile.aspx

-   The License ID should be completed

Please make the mobile website available from the outside (via a setting on the server).

We recommend the following things in order to uphold the safety of mobile site:
1. All mobile CICERO users must set a strong password. In the Admin application (next chapter), Settings,
the option hasStrictPasswordPolicy can be activated. Then a difficulty level for passwords will be enforced
and in addition you have to change the password every 30 days.
2. Use HTTPS URL in front of the link of the website. HTTPS encrypts between your device and the server.
This prevents hackers having access to the data traffic.
3. Secure your mobile website with a Web server certificate. You can always contact us to discuss the
implementation of these steps.

4. ADMIN - SETTINGS

Open the Cicero Web with the known Username and Password to configure the Settings via the Cicero ADMIN application.

Folders which must exist (before Settings can be saved!) and to which the Impersonation user must have sufficient access rights (either full control, or at least, read / write / modify); Replace default 'C:\CLI'> by i.e. \\$FILESERVERNAME\Clinet\

Impersonation user: Windows username who has access rights (either full control, or at least, read / write / modify) to the aforementioned folders

The **?** mark above in the right corner, gives an explanation of all the ADMIN options (a description is also added at the end of this document – 8/ ADMIN - SETTINGS).

Do not forget to **save** your settings!

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5. ADMIN - USERS

Per user :
Enter **Windows ID**, set **Password** to 'cicero', ensure **Access** is checked, enter **Primary email address**
The 'TEST' button allows you to verify whether everything is set up properly (OK).

6. CLIDOC & EXCHANGE CONFIGURATION

Open MATTERS – Document Management
At the right you will find :

CLIDoc Download

6.1 Download and Run Add-in
> **CLIDocSetup.MSI** (install the Add-in 'for all users' with appropriate access rights; make sure all Office applications are closed down by all users)

FAQ/TROUBLESHOOTING CLIDoc Addin
If CICERO CLIDoc add-in does not appear in MS Word (after msi was run):
Word - File - Options – Merge Applications - COM Add-ins - Start:
Remove Cliword if present and add CliDoc > C:\Program Files (x86)\CLIDOC\adxloader.dll
It may be necessary to start MS Word as an administrator.
FAQ/TROUBLESHOOTING CLIDoc Addin
Step 6.1 has to be repeated on every client that wants to run CICERO Web with local Office!
Step 6.1 will have to be repeated on all clients if CICERO Web Update warns that an Update of CLIDoc is
required.

6.2 Download and Import CLIDoc Settings
To be done for each user logging into Cicero Web!
Download the Settings file for the appropriate user via Matters – Document Management (save on Desktop e.g.);
Subsequently use the Settings button in Word CliDoc Addin to import the file you just saved.

> Download and Save > **CLIDocSettings.cic**
> Open **Word** – **CICERO CLIDoc Addin**– Button **Settings**
> use the button (browse / ...) next to Import Settings to find and import the saved file
> the user's data are shown; click Save

FAQ/TROUBLESHOOTING CLIDoc Settings

1/ As long as the CLIDoc Settings have not been loaded into the CLIDoc Add-in Settings, an error message will be produced while booking a document (Word, Outlook, Excel) through CLIDoc.
Error: Invalid URI : The format of the URI could not be determined

2/ Do these settings also have to be defined in Outlook or Excel?

No, the settings only have to be read in once for all Office applications.

3/ What happens to the Settings when the password is changed???

If a password is changed (StrictPasswordMandatory True), then it also has to be changed in CLIDoc. (I.e.

Download CLIDoc Settings again and read them into the CLIDoc Add-in or Change the password directly into the CLIDOC Add-in). If this is not done, you may get a 'No Access' error message.

NOTE
It is possible to download a .reg file via ADMIN > Users. When the user logs in, this .reg file can be automatically executed once.

7. CHECKLIST + TASKS FOR NETWORK ADMIN

DO NOT FORGET THAT

- Users need the web addresses [url]/CiceroWeb/index.aspx AND [url]/CiceroWeb/index_mobile.aspx
- Shortcut on Desktop for all users
- Internet Settings for all Windows users
  Trusted site, Active X components enabled, Allow Popups for trusted security zone
- Word Options – Trust Centre – Protected View – disabled options

Protected View

Protected View opens potentially dangerous files, without any security prompts, in a restricted mode to help minimize harm to your computer. By disabling Protected View you could be exposing your computer to possible security threats.

☐ Enable Protected View for files originating from the Internet
☐ Enable Protected View for files located in potentially unsafe locations ⓘ
☐ Enable Protected View for Outlook attachments ⓘ

If you want to use CiceroWeb both internally (http://localhost) AND externally, then you need to link the internal version (http://server/ciceroweb) to an external domain (in your firewall / server settings).
Users just need to know the web address [url]/CiceroWeb/index.aspx
You will still need to make changes to the settings of IIS to activate the https protocol.
We strongly recommend using the http**s**:// protocol when establishing a remote connection, i.e. a 'secure' connection for which an SSL (Secure Socket Layer) certificate is needed.
This encryption protocol secures the communication over the Internet between the web browser and the web server. With the traditional http protocol there is a risk that communications might be intercepted (through, e.g., public, open Wi-Fi networks).

- Printers
- Pdf Reader
- Microsoft SQL Backup Maintenance Plan
- File Backup of Clinet folder and Website

8. ADMIN – SETTINGS

Open the Cicero Web with the known Username and Password to configure the Settings via the Cicero ADMIN application.

Folders which must exist (before Settings can be saved!) and to which the Impersonation user must have sufficient access rights (either full control, or at least, read / write / modify); Replace default 'C:\CLI'> by i.e. \\$FILESERVERNAME\Clinet\

Impersonation user: Windows username who has access rights (either full control, or at least, read / write / modify) to the aforementioned folders

The **?** mark above in the right corner, gives an explanation of all the ADMIN options (a description is also added in this document).

Key	Default value	Explanation	Adjustments required?	Possible values
dbserver		Specifies the server where the database server is accessible.	Yes	*
dbname		The name of the CICERO-database.	Yes	*
dbusername		The username of the account (with full sa- rights) which is used to log into the database.	Yes	*
dbpassword		The password of the account used to log into the database.	Yes	*
DMSUrl	http://localhost/CiceroWeb/shortcuts/dms.aspx	The URL from where CICERO DMS is directly accessible (even from the outside, so preferably a fully qualified DNS entry which is accessible via the internal network as well). So generally it is sufficient to change only the value 'localhost'.	Yes	*
fileUploadPath	~/uploads/general/	A temporary location in the web root that is used for uploading files.	No	*
dbBackupPath	C:\SQL\BACKUP\	The **local** file path on the SQL server where backups are being placed, created from CICERO. This can only be a UNC path to another server if it is equipped with the appropriate rights. The backup will be created using the credentials of the specified account of the DB connection.	Yes	*
vcfUploadPath	~/uploads/vcf/	A temporary location in the web root that is used for uploading vcf files.	No	*
cicDocumentRoot	M:\ALL\	The set 'M-disk´ if one still uses CICERO V9.xx. If not, the same value can be entered as that of ´document root´ here.	Yes	*
documentRoot	C:\CLI\ALL\	Here a UNC path must be entered into the CICERO ALL-drive that is accessible by the IIS server using the Impersonation-user setting.	Yes	*

WebDAVUrl		If you want to use WebDAV for accessing files from the CICERO ALL-drive you must enter the URL from the WebDAV server here. This is only to be used if one does not allow direct UNC access within the internal organization and do not want to use the CICERO CLIDoc Webservices.	Optional	*
SEPARoot	C:\CLI\SEPA\	Here a UNC path must be entered to the file location where you want to save SEPA XML files. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
tempPDFRoot	C:\CLI\TMP\	Here a UNC path must be entered to the file location where you want to store all temporary files which CICERO creates. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
financeInvoiceFolder	C:\CLI\INVOICES\	Here a UNC path must be entered to the file location where you want to save generated invoices. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
batchImportFolder	C:\CLI\BATCH\	Here a UNC path must be entered to the file location where you place the files to be imported (for DMS batch import). This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
collectionFolder	C:\CLI\COLLECTION\	Folder where all the files are placed from within the automatic succession (must be UNC like other folders).	Yes	*
matRoot	C:\CLI\MAT\	Here a UNC path must be entered into the CICERO MAT-drive (where the templates are stored) which is accessible by the IIS server using the Impersonation-user setting.	Yes	*
photoRoot	C:\CLI\PHOTO\	Here a UNC path must be entered to the file location where you want to save photos of relations. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
personDocRoot	C:\CLI\PERDOCS\	Here a UNC path must be entered to the file location where you want to save documents of Relations. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*
campaignDocRoot	C:\CLI\CAMPAIGNDOCS\	Here a UNC path must be entered to the file location where you want to save documents of Campaigns. This should be accessible by the IIS server using the Impersonation-user setting.	Yes	*

maxFileSizeLimit	20000000	The maximum file size allowed during upload (in kilobytes).	No	Numerical
bufferSize	16384	The buffer size while uploading.	No	Numerical
allowedMIMEType	*	Which content types (MIME) may be uploaded.	No	* or comma seperated
allowedFileExtensions	jpg,jpeg,gif,png,bmp,tiff,pdf,doc,docx,zip,xls,xlsx,ppt,pptx,msg,txt,rar,rtf,wsd,mp3,mp4,mpg,mpeg,wav,csv	Which file extensions may be uploaded.	Optional	* or comma seperated
allowedPhotoExtensions	jpg,jpeg,gif,png,bmp,tiff	Which picture extensions may be uploaded in Relations.	Optional	* or comma seperated
impUsername	cicero	The username of the account used for impersonation. That is the account that CICERO himself 'publish' on the file system to read / write files. This user must be both on the IIS server and the file server are known and have the correct permissions.	Yes	*
impPassword	cicero	The password of the account used for impersonation.	Yes	*
impDomain	CICERO	The domain of the account used for impersonation. If not present, it may be left empty.	Optional	*
googleGeoCodeAPI	http://maps.googleapis.com/maps/api/geocode/xml?sensor=true///address=	URL to the Google-maps API.	No	-
googleMapsUrl	http://maps.google.com/maps?f=q///source=s_q///hl=nl///geocode=///q=CLIENTADDRESS///ll=GEOCODE///ie=UTF8///hq=///hnear=GOOGLEADDRESS///output=embed	URL to the Google-maps engine.	No	-
passwordMandatory	true	Determines whether a user password is required yes / no.	Optional	true/false
defaultLogonLanguage	1	Determines the default language of the login-screen (1=NL / 2=EN / 5=FR).	Optional	Numerical
showMenuFullWidth	false	Determines whether the menu bar across the width of the screen is on call yes / no (at the top).	Optional	true/false
webAppRoot	C:\Inetpub\wwwroot\CiceroWeb\	Specifies the file path on the IIS server where CICERO is installed.	Optional	*
hasStrictPasswordPolicy	false	Determines whether strict rules regarding password / login are enabled yes / no. If activated, a difficulty for the password of users will be enforced (at least 6 characters including 2 digits), then one will have to change after 30 days always the password and the password must not be equal to the current and previous password.	Optional	true/false

canEditWithOutlookLink	false	Determines whether tasks / performances with a link to outlook from the web application may be edited yes / no. If one does not make use of combination XAGENDA in V9.xx outlook links, this value will be set to false. Only when one makes full use of the web application AND V10 exchange integration as well as the CLIDoc Addin, this value will be set to true.	Optional	true/false
alwaysCheckForFileExistence	false	Provisory no longer in use. CICERO determines whether a document will check whether the document is actually still exists yes / no for each referral.	Optional	true/false
hasActiveHTTPConnection	true	Determines whether the IIS server that is installed CICERO network / internet has access to the outside. This is important for e.g. the automatic updates. If you already know in advance that there is no access, this value is set to false in order to avoid delays in use.	Optional	true/false
netbankingPAINVersion	3	Determines which SEPA PAIN standard will be used in the Netbanking module (3 = PAIN.001.001.003, 4 = PAIN.001.001.004). Currently, 4 is not yet supported by all banks.	Optional	numerical
alwaysCheckAppSettings	true	Determines whether CICERO by continuous self monitoring monitors if all settings are correct yes / no. If enabled and installing is not correct, the user will be informed about it after login.	Optional	true/false
netbankingSplitTransactionSEPA	false	Determines whether the payments should be broken down when reading in bank files.	Optional	true/false
accountingPartnerEnabled	true	Determines whether you turn on / off the accounting of V10.	Optional	true/false
advancedMonitoringEnabled	false	If advanced monitoring is enabled, you can here the rendering times per action request (for support).	Optional	true/false
rebuildIndexesOnBatch	false	Indicates whether after batch processes (bulldozer, billing) db indexes should always be optimized directly (only relevant in heavy / large environments).	Optional	true/false
billableTasksClosedPeriode	false	Allow to book billable performance in already closed accounting periods.	Optional	true/false
default0dossierOnBuyBooking	true	Specifies when booking whether purchases default the 0-file should already be filled in.	Optional	true/false
canBulkDeleteXCOMPTA	false	Determines whether items that have been created by the accounting department will / may not be removed. At the bulldozing of tasks.	Optional	true/false

cliDocEnabled	false	Determines whether one can make use of the CLIDoc Add in yes / no.	Optional	true/false
followUpCategory	AGENDA	Determines which categories default are filtered at the dashboard / follow up. The category names should one on one match the values from CICERO and can be entered comma-separated.	Optional	* or comma seperated
billingEnabled	false	Determines whether one can make use of CICERO Billing (and thus not X invoice!) yes / no. Note that those 2 cannot be used interchangeably.	Optional	true/false
taskDashboardCategory		Determines which category (-ies) default are filtered on the dashboard / performance. The category names should one on one match the values from CICERO and can be entered comma-separated.	Optional	* or comma seperated
openSearchResultInNewTab	false	Determines whether the click through from a (search) results grid has to be opened in a new tab yes / no.	Optional	true/false
defaultOverwriteExistingFilesBookme	false	Determines whether CLIdoc / Bookme can be overwritten if the selected file name already exists on the file system yes / no.	Optional	true/false
blockOnDuplicateFiles	true	Determines whether CLIdoc / Bookme allows overwriting files or by definition block it.	Optional	true/false
showRenderingTimes	false	Determines whether at the bottom of the screen a bar has to be displayed of each click action rendering time shows yes / no (for Temporary performance measurements).	No	true/false
showZeroTaskOnBilling	true	Determines whether 0-tasks should be on the invoice during Billing shown.	Optional	true/false
cicServerSideViewState	true	Determines whether ASP.NET should be stored view state server side (true) or client side (false). Default this will be server side serving a better end-user experience (faster rendering and less data traffic). If the server cannot handle this (which will be exceptional), (False) for client side can be selected.	No	true/false
cicViewStateStore	database	If one uses Server Side View State can be determined here in what form the view state should be (Session / Cache / Database) saved. Session / Cache require memory capacity of the IIS server, Database calls above capacity SQL Server.	No	*
cicViewStateTableSize	25	This setting only applies if it is chosen Vies Tate Store = Session. This determines how states view per session may be there preserved max.	No	Numerical
showMenuPlanning	false	Determines whether one can make use the module 'Planning' the application 'Tasks' yes / no.	Optional	true/false

showMenuTabTimer	True	Determines whether one can make use of the menu tab to the module 'Timer' the application 'Tasks' (bottom right) yes / no.	Optional	true/false
taskWorkflowEnabled	False	Determines whether one can make use of (sub) sub-tasks in combination with additional workflow (still in beta) yes / no.	Optional	true/false
taskDueDateThreshold	5	If one uses (sub) sub-tasks this value determines when a 'red' job to colors (number of days 'open' / 'in treatment').	Optional	Numerical
webViewInstalled	false	Determines whether the separate but yet integrated Web view application is installed yes / no. If Web View is integrated this value will automatically be put on the 'true' and will be various functionalities enabled.	Optional	true/false
mailHasDosReference	false	Determines whether outgoing emails generated by CICERO, default be provided with a file reference in the subject yes / no.	Optional	true/false
hasDirectFileAccess	true	Determines whether users of CICERO, from clients, have direct file access via UNC-path-set ('document root') yes / no. If it is not, one can possibly use Web DAV or Web connectivity is incorporated in the CLIDoc add in.	Optional	true/false
cliDocWebServiceUrl	http://localhost/CiceroWeb/	Specifies the URL that the CLIDoc Add in can approach for using the integrated Web services. This needs to be changed only at high load when one chooses to set the CLIDoc add in load balancing.	Optional	*
webserviceKey	cicero	Determines the additional web service Key to be able to access the integrated web services. These will have to be. Therefore given by the CLIDoc Add in.	Optional	*
canUseProformaBilling	false	Determines whether one can make use of proforma invoice (still in beta) yes / no.	Optional	true/false
taskDescriptionInFileName	true	Determines whether at CLIDoc / Bookme the default job description of the chosen task is included in the storage name of the document yes / no.	Optional	true/false
jumpToArchive	true	Determines when archiving a file in DMS (if archive is enabled) whether they also directly refer to the archive yes / no.	Optional	true/false
exchangeEnabled	false	Determines whether one uses exchange integration via EWS yes / no.	Optional	true/false
exchangeServer	https://sbssrv/EWS/exchange.asmx	Specifies the URL where the EWS web services is accessible by the IIS / CICERO application.	Optional	*

exchangeUser	exchangeAdministrator	The username of the account that is used for exchange-impersonation. That is the account that CICERO himself 'publish' on the exchange server. This user mailbox must have transcend rights when it comes to tasks / appointments, unless one uses' exchange Use Impersonation. In that case, on the exchange server there need to be configured some things behalf impersonation.	Optional	*
exchangePassword	exchangeAdminPwd	The password of the account that is used for exchange-impersonation.	Optional	*
exchangeDomain	domain.local	The domain of the account that is used for exchange-impersonation. If not present, it may be left empty.	Optional	*
exchangeUseImpersonation	false	Specifies whether to make use of the impersonation functionalities of the exchange server.	Optional	true/false
exchangeVersion	1	Determines the version of the Exchange server (0 = 2007/1 = 2007_SP1 / 2 = 2010/3 = 2010_SP1 and higher).	Optional	Numerical
exchangeCheckSync	false	Determines whether CICERO must continuously monitor whether there is a synchronization problem between the tasks / appointments in CICERO and exchange. (Note: performance may have impact).	Optional	true/false
exchangeTimeout	2000	Determines the default timeout in milliseconds for an EWS call.	Optional	Numerical
searchServerEnabled	false	Determines whether one wants to use SharePoint Search for indexing all CICERO documents. A separate SharePoint search server must be equipped, outside of CICERO. If enabled and configured correctly, you can use an additional search functionality in DMS.	Optional	true/false
searchServerUser		The username of the account that is used for SharePoint-impersonation. That is the account that CICERO himself 'publish' on the SharePoint server.	Optional	*
searchServerPassword		The password of the account that is used for SharePoint-impersonation.	Optional	*
searchServerDomain		The domain of the account that is used for SharePoint-impersonation. If not present, it may be left empty.	Optional	*
searchServerURL	http://searchserver/_vti_bin/search.asmx	The URL to the SharePoint search web services.	Optional	*
searchServerVersion	0	Specifies the user SharePoint version (0 = Search server express, 1 = SharePoint Search).	Optional	Numerical
Culture				

uiCulture				
useCustomCultureForAmountInput		Switch on / off switching of custom culture institutions in numerical input fields in accounting / billing.		
customCultureDecimalSeparator		Decimal separator when stabbing custom culture enabled.		
customCultureGroupSeparator		Thousands separator when stabbing custom culture enabled.		
customCultureCurrencySymbol		Currency symbol when custom culture enabled.		

Do not forget to **save** your settings!