

Installation Guide DOCSVault


Document Management System for everyone

6

- ❖ Centralized Documents
- ❖ Create Paperless Office
- ❖ Secure Documents
- ❖ Backup and Records Retention
- ❖ Incredibly Easy to Install, Learn, and Use

Installing Docsvault

This section provides step-by-step instructions to install **Docsvault Small Business Edition's Server and Client sides**. Please read the following information carefully.

 All the steps are performed on Windows 7 and the steps and screens may differ slightly depending on your Operating System.



Firewall Warning:

Firewall applications can prevent communication between Docsvault Client and Server. Follow the steps below to ensure that proper firewall rules have been created to allow Docsvault traffic to pass through the firewall.

1. If your firewall is application based (ex: Windows Firewall, Norton, McAfee, etc.)

The following Docsvault executables i.e Docsvault server and client along with the necessary MS SQL Server executables should be added to the exemptions/allowed list of the firewall. Docsvault installer automatically adds the necessary executables to the firewall exception list for the built-in Windows firewall.

Docsvault Client side:

dvClient.exe (by default located at C:\Program Files\Docsvault SB\Client\)

Docsvault Server side:

dvServer.exe (by default located at C:\Program Files\Docsvault SB\Server\)

sqlservr.exe (by default located at C:\Program Files\Microsoft SQL Server\MSSQL10_50.DOCSVAULT\MSSQL\Binn\
(Note: Replace MSSQL10_50.DOCSVAULT by your actual SQL instance folder if you used your own SQL server to host Docsvault db)

sqlbrowser.exe (by default located at "C:\Program Files\Microsoft SQL Server\<90 or 100>\Shared\")

2. If your firewall is port based or if you require port forwarding from your router to the Docsvault server

Open/forward the following ports:

TCP Port 3831: To allow connection to the Docsvault Server Service (dvServer.exe)

UDP Port 1434: This SQL Server Browser service listens for incoming connections to a named instance of SQL server hosting Docsvault db and provides the client the TCP port number that corresponds to that named instance.

TCP Port for SQL server instance hosting Docsvault database: The Docsvault's instance of SQL server listens on a dynamic port (between 49152 & 65535) selected randomly by the SQL server. The SQL clients first connect to the browser service (port# 1434) to know the exact port number a named instance of SQL server is listening to for the requested database.

To learn how to find out the current port number used by SQL SERVER, see <http://www.docsvault.com/redir/sb/connection.TS.redir.htm>



Installing Docsvault Server and Client on the same machine

It is fine to install both the server and the client on the same machine for testing and for occasional usage by the admin. However it is **NOT** recommended to use the client installation on server for normal daily usage. The Docsvault server will be serving multiple clients in the network and hence it is advisable to install it on a dedicated machine where no user works normally.

System Requirements

For a successful installation and use of Docsvault Small Business Edition, make sure that your server and client workstations meet the minimum recommended hardware and software requirements

Docsvault Server

Requisite	Recommended Minimum
Processor	Pentium /AMD dual code or higher (Server grade recommended for 10+ users)
Memory	4 GB RAM or higher
Display Resolution	1024*768 or above @ 96 dpi
Operating system	Windows XP SP3, Vista (32 or 64 bits), Win 7 & 8 (32 or 64 bits) or Windows Server 2003, 2008, 2008 R2
Database Engine:	Microsoft SQL Server 2008 or 2008 R2 with full text indexing and FILESTREAM support. (The free SQL 2008 R2 Express edition is installed by default)
Disk Space required	120 MB for Docsvault Server application data, 500+ MB - SQL server plus space for data storage
.NET Framework	Version v4.0 (plus v3.5 SP1 if installing SQL server on same machine)
Installer	Windows Installer v4.5 or above

Docsvault Desktop Client

Requisite	Recommended Minimum
Processor	Pentium 4/AMD Athlon or higher
Memory	2 GB RAM or higher
Display Resolution	1024*768 or higher @ 96 dpi
Operating system	Windows: XP, Vista (32 or 64 bits), Win 7 & 8 (32 or 64 bits)
Disk Space required	110 MB
.NET Framework	Version 4.0
MS Office Integration	MS Office 2007/2010(32 or 64 bit)
For Scanning	Any TWAIN complaint scanner for direct scanning. All other scanners for scanning through alternate import methods.

Docsvault Web Server [Enterprise edition]

Requisite	Recommended Minimum
Processor	Pentium/AMD dual code or higher (Server grade recommended for 10+users)
Memory	4 GB RAM or higher
Operating System	Vista (32 or 64 bits), Win 7 & 8 (32 or 64 bits) or Windows Server 2008, 2008 R2
IIS Server	IIS 7.X or higher with asp.net support

Disk Space	30 MB
.Net Framework	Version 4.0
Installer	Windows Installer v4.5 or above

Docsvault Web Client [Enterprise edition]

Requisite	Recommended Minimum
Processor	Pentium 4 /AMD Athlon or higher
Memory	2 GB RAM or higher
Browser	IE 9.x or higher
Flash	Flash Player 9.0.24 or greater



Information:

- The Microsoft .Net Framework and Windows Installer are available for free from Microsoft's download center [website http://www.microsoft.com/downloads/en/default.aspx](http://www.microsoft.com/downloads/en/default.aspx) . Once on the Microsoft download website, search for the appropriate version of the ".NET Framework Redistributable" or "Windows Installer

Installing Docsvault Server & Desktop Client



Choosing the Server Computer

Docsvault does not need any special server grade computer if you are a small group of 5 - 10 users. You can designate any dedicated PC with a good processor, ample Memory (2 GB+) and enough available hard drive space for storing files imported in Docsvault. It is recommended that the Docsvault server be installed on a dedicated machine where no user works normally. This will avoid interference from other user interactive applications and prevent any possible performance deterioration.



Optional Components Installed Automatically By Docsvault by user's choice

- **MS SQL Server 2008 R2 Express:** If you do not have any existing sql server database in your network, you can instruct the 'Docsvault Configuration Wizard' to automatically download and install a free MS SQL Server 2008 R2 Express Advanced Services edition.

Installing Docsvault Server

This procedure outlines all of the steps necessary for you to perform a brand new installation of Docsvault.

Part I - Installation of Program Files

- Log in to Windows using an account with administrative rights (or rights to install software)
- Run the installation file **Docsvault_SB_Server.msi** and follow the on screen instructions
- On the License Agreement page, read the license agreement and if you accept the license terms click on **I Accept**, and then click the **Next** button.
- **Select Installation Folder:** Installation folder contains the program files for Docsvault Server application. By default the installer will choose **C:\Program files\Docsvault SB\ Server**. You can change the location of program folder by clicking on the **Browse** button. It is recommended that you keep the default path as this folder will contain only the program files, **NOT** the actual data imported into Docsvault.
- Click on **Next** button to go to the '**Confirm Installation**' window.
- On completion click the **Close** button. You can now launch the Docsvault Server Manager from the desktop icon to start the server configuration wizard.

Part II - Configuration of Docsvault Server

When you start the 'Docsvault Server Manager' for the first time after installation, the 'Server Configuration Wizard' will start automatically. This wizard includes the following steps:

Step 1: Installing/Selecting a Database

First you will be asked to specify a **SQL Server 2008 R2 Express Database**. You can either specify your own **Microsoft SQL 2008/2008 R2** to host the database or allow Docsvault to install a new **Microsoft SQL 2008 R2 Express** instance on your machine.

❖ Letting Docsvault install a New MS SQL Server Express Instance

- Select this option to allow Docsvault to install a MS SQL Server 2008 R2 Express instance

- **Specifying Docsvault Administrator User Password**

Enter a password for Docsvault administrator user 'admin'. **Note:** that the same password will also be used for a SQL user named '**DVSBSA**' inside the sql database. This user DVSBSA is used to connect clients to the Docsvault database hosted by the SQL server. This is done for the sake of simplicity during initial configuration. You may change the Docsvault 'admin' user password to anything later on from the Server Manager dialog.



Strong Password Requirements

Most domain based networks and Server OS require a strong password. If you provide a weak password that does not match the password policy of your domain or server OS, SQL installation will fail. It is a good idea to use a strong password even if you are not restricted by such password policies since this password will be used to connect Docsvault clients in the network to the SQL server.

- **Selecting Database & Documents Location**

The installer will create a '**DVSB Data**' folder at the location specified for Data Storage. Select a drive that has plenty of free space available as this folder will grow in size as more and more documents are imported in the future.

Note: Due to SQL server database limitations, networked shared folders and NAS devices cannot be used to store Docsvault data. We recommend that you use an internal hard drive to store you data as they are more reliable than the external hard drives.

- Click on **Next** button to continue.

Installing New MSSQL Database



Manually downloading proper SQL Server Express installation file for offline installations

Docsvault Configuration Wizard will download SQL server express install file during the configuration. If you do not have an active Internet connection on the Server where the server is being configured, you can download the following file and place it in the Docsvault Server Program folder before you start the server configuration.

Please download the SQL server installation file and place it in the Docsvault Program folder (**C:\Program Files (x86)\Docsvault SB\Server\SQL**) after installing Docsvault but before the configuration process starts.

SQL Server 2008 R2 Express with Advanced Services:

For 32 bit OS:

<http://www.docsvault.com/downloads/supplements/shared/SQL/X86/SQL.RAR>

For 64 bit OS:

<http://www.docsvault.com/downloads/supplements/shared/SQL/X64/SQL.RAR>

❖ Specifying your own MSSQL Server 2008/2008 R2

Docsvault Server Configuration

Docsvault Database Setup & Configuration
This screen will help you create a database required for storing documents & metadata information

Choose one option:

☐ Let Docsvault download & install a new MSSQL Server Express instance on this computer

☒ Specify your own MSSQL Server 2008/2008 R2 database

Server Instance: [Browse instances...](#)
(ex. SQLServer\Instancename)

Database User:

User password: [Verify](#)

Select Database:

Database Server Requirements:
1. Ensure FILESTREAM is enabled
2. Ensure Full-Text Search is installed and enabled
For more info, see Installation Guide or click help below

Enter a **password** for Docsvault Administrator User 'admin':

Admin Password: Re-enter Password:

Note: If you choose your own db server, you will be responsible for backing up the database regularly as Docsvault will not be able to backup databases not created by Docsvault.

< Back Next > Cancel Help

Using Existing MSSQL Database

- Select the option to 'Specify your own MSSQL ...' to use your existing MSSQL Server 2008/2008 R2. **See database requirements below.**
- Click on the 'Browse network instances...' link to display all instances of the Database Engines installed on your network.
Note: You can also specify the server instance by typing it manually in SQLServer\Instance_Name format if the 'browse instance' does not list the desired database that you know is running and accessible.
- Enter username and password for user who has permissions to create database tables and click the **Verify** link to see all

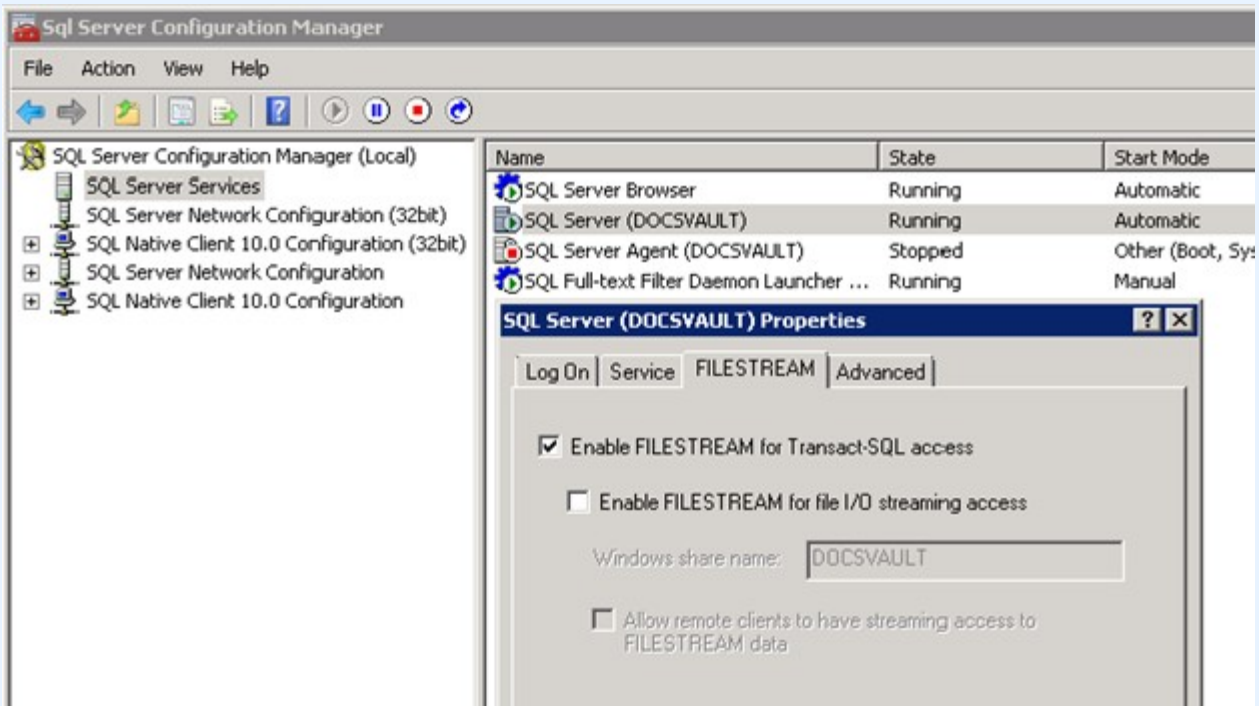
databases accessible to the specified db user.

- From the list, select the **database** to create Docsvault data tables in. If you choose a database that already has Docsvault data in it, setup will automatically attach to that database.



Database Server Requirements

1. Docsvault needs either an empty database or a database with Docsvault data in it. Databases that have some other data in them cannot be used.
2. Ensure FILESTREAM is enabled.
 - Open SQL Server Configuration Manager (Start > Programs > Microsoft SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager)
 - Navigate to the SQL Server Services node and from the right pane open the properties dialog for the SQL Server service from its right click menu
 - Click the FILESTREAM tab and select the checkbox to enable FILESTREAM for Transact-SQL access

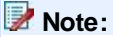


3. Ensure Full-Text Search feature is installed and enabled

SQL Full-Text Indexing service named 'SQL Full-text Filter Daemon Launcher' should be installed and running on the server hosting the SQL database for Docsvault. If you do not have the full text feature installed, you will need to install that before you can configure the Docsvault database.

Docsvault Admin

In the Admin Password text box, enter the password for Docsvault Administrator User 'admin'. **Note:** that the same password will also be used for a SQL user named '**DVSBSA**' inside the sql database. This user DVSBSA is used to connect clients to the Docsvault database hosted by the SQL server. This is done for the sake of simplicity during initial configuration. You may change the Docsvault 'admin' user password to anything later on from the Server Manager dialog.

**Note:**

Docsvault cannot backup user specified database. Therefore it is the responsibility of the end user to regularly backup the database using other backup tools on their SQL server.

Docsvault Database Backup Configuration

This step will allow you to set the backup schedule for Docsvault database. The backup location can be taken on the **Local drive** or **Network share or NAS drive**. Select the appropriate option and specify the location for the backup files. For Network location, windows **username** and **password** is required to run the SQL server service.

By default, following schedule is set by Docsvault (*ref the image below*) which can be changed at any time from **Repository > Backup** node in Docsvault Server Manager.

Installation Summary

- Clicking on the **Next** button will display the summary of Docsvault Server configuration. It is important that you make a note of the usernames and passwords on this page. You may save this summary page as a PDF file by clicking on the 'Save As PDF' link in the bottom right of the page.



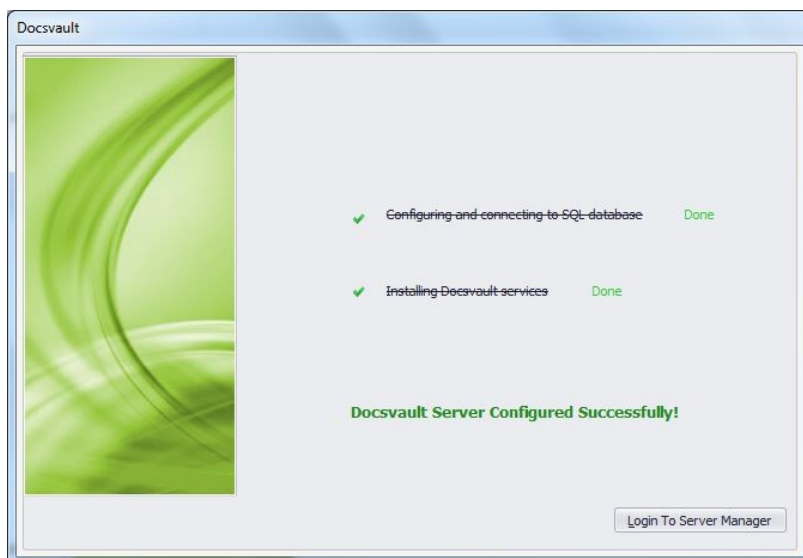
Summary of Docsvault Server configuration

- Click on the **Finish** button to complete Docsvault Server configuration. The configuration and necessary installation will now start and you will see the following progress window.



Installation Time

If you let Docsvault installer install the SQL Server express on this machine, it may take up to 30+ minutes to complete the download, installation and configuration process depending on your download and CPU speed. Please be patient during this process and refrain from using other programs during this install.



Docsvault Server Configured successfully

If you have need any more information while installing or configuring MS SQL Server, click [here](#) .

Installing Desktop Client

Once the Docsvault server is installed and configured, it is now time to install the clients on the network.



Number of Client Installations

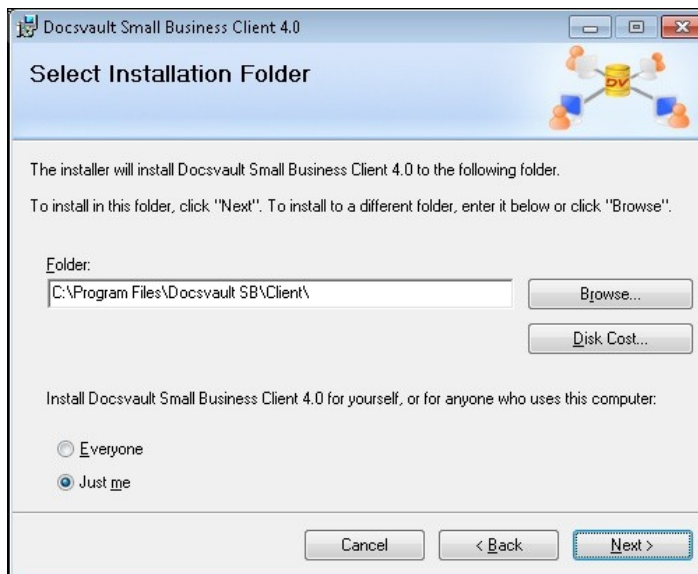
You are free to install as many clients as you wish in your network. The client installation count does not depend on the number of user licenses you have. The users can log into their Docsvault account from any computer in your network that has the Docsvault client installed.

Client Installation Wizard

On each workstation you wish to install the client on, run the **Docsvault_SB_Client.msi** from the downloaded installation package and follow the on screen instructions

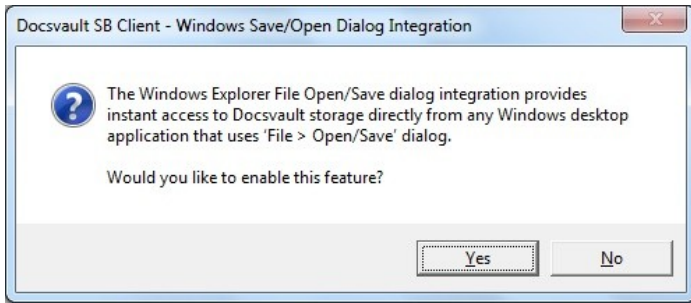
Select Installation Folder

- **Installation folder** contains the program files for Docsvault. By default the program files will be copied to '**C:\Program files \Docsvault SB\Client**'. You may change this location if you wish, however we recommend that you accept the default names and structures provided during installation



Program Folder Selection Screen


- Click on **Next** button to go to the '**Confirm Installation**' window.
- Docsvault can integrate into Windows Explorer Open and Save dialogs to save and open files from any applications. Select 'Yes' to allow this integration if desired.




- On completion click the **Close** button.

Installing Web Client [Enterprise edition]

The Docsvault Web installer will walk you through the installation and initial configuring of the Docsvault web application. Please ensure that IIS is enabled and running on the machine before installing the Docsvault Web application.

 **Note:**
Docsvault web application is only available in **Docsvault Enterprise Edition**

- Run the installation file **Docsvault_Web.msi** and follow the on screen instructions
- On the License Agreement page, read the license agreement and if you accept the license terms click on **I Accept**, and then click the **Next** button.
- **Select Installation Folder:** Installation folder contains the program files for Docsvault web application. By default the installer will choose '**C:\Program files\Docsvault Web**'.

 **Note:**
If you are using the Docsvault web application within your own website you may want to choose the right folder within your website folder to install the program files to. However, doing this is optional.

- Click on **Next** button to go to the '**Confirm Installation**' window.
- Select anyone of the following method of hosting Docsvault web application:

❖ Using Existing website

- Select this option to allow Docsvault web to configure with the existing web site.
- **Select Site:** Select the existing web site configured on the current IIS server using the drop down list box e.g. `http://example.com`
- **Application Name:** Enter the virtual directory alias e.g. *if your website is accessible at `http://example.com` and you want to access Docsvault Web app at `http://example.com/DMS`, set this value to 'DMS'*
- **Docsvault Server Name:** Enter the hostname/IP of the machine running the Docsvault server software e.g. `dvServer` or `192.168.1.25`

The screenshot shows a window titled 'DOCSVAULT' with a blue header and a cloud icon. Below the header, the text 'Select the appropriate method of hosting this application' is displayed. There are two radio buttons: 'Existing website' (selected) and 'Create new website'. Under 'Existing website', there is a 'Select Site:' dropdown menu with 'Default Web Site' selected, a 'Refresh' link, an 'Application Name:' text box with 'Docs' (with a note '(Virtual sub-directory)') and an 'Access URL:' text box with 'http://192.168.1.25/Docs'. Below this, there is a section titled 'Specify the hostname/IP of the machine running the Docsvault server software' with a 'Docsvault Server Name:' text box containing 'dvServer'. A 'Next >' button is at the bottom right.

Existing website

❖ Create new website

- Select this option to run the Docsvault web application under new domain name. The installer will bind this domain to the Docsvault web app.
- **Host Name:** Enter the host name e.g *example.com*. Note that the hostname should be unique name that does not match any of the existing hostnames bound to the IIS server.
- **Port:** Enter the Port number on which this site will be accessed (by default 80).
- **Docsvault Server Name:** Enter the hostname/IP of the machine running the Docsvault server software e.g dvServer or 192.168.1.25

DOCSVAULT

Select the appropriate method of hosting this application

☐ Existing website ☒ Create new website

Host Name: Port:

Access URL:

Note: Please consult your IT support to ensure that this machine is accessible from the Internet using the specified hostname & port

Specify the hostname/IP of the machine running the Docsvault server software

Docsvault Server Name:

Next >

Creating new website

Once set up you should now be able to browse to the Docsvault Web Interface at <http://my-specified-domain.com>



Important Security Note:

By default, connections to the web application are not secure which could be acceptable to your organization when accessing the web server within your local LAN. However, in most cases, you would be accessing the web app over the internet and we strongly recommend the use of SSL certificates to secure connections to the web app. This can be configured from the IIS Manager dialog in Windows.

Reinstall or Repair Docsvault

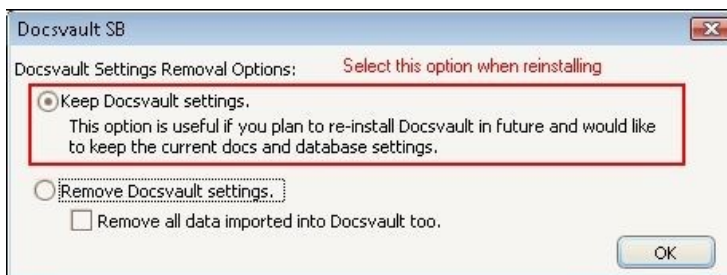
If you accidentally delete or alter files that are required by Docsvault, Docsvault will not perform correctly and you might get error messages while running the program. You can attempt to fix this problem by reinstalling or repairing Docsvault.

- In the **Control Panel**, double-click **Programs and Features**
- In the uninstall dialog that opens select **Docsvault Small Business Client** and then click **Change**. You will see the following screen.



- To repair the current installation, select **Repair** and then click the **Finish** button.
- To reinstall Docsvault, select **Remove** and click the **Finish** button

During the uninstall process you will have a choice to keep or remove the current Docsvault settings. If you plan to reinstall Docsvault **MAKE SURE TO KEEP** Docsvault settings. The installer will not show the configuration wizard again when installing the program again if it detects previous settings.



Warning:

If you choose to remove all imported data into Docsvault, it will not be possible to recover it afterwards. Please make a backup of your current repository folder or use the export feature from Docsvault Server Manager to export all your existing data before starting the uninstall process.

Uninstall Docsvault

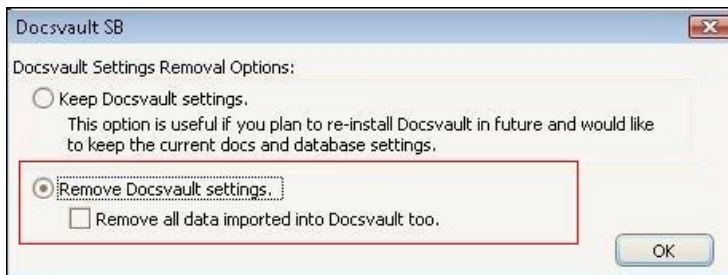
When you uninstall Docsvault, all components are removed. This means that even if you have reinstalled or repaired Docsvault, the uninstallation removes all Docsvault program files from your system.

- In the **Control Panel**, double-click **Programs and Features**
- In the uninstall dialog that opens select **Docsvault Small Business Client** and then click **Change**. You will see the following screen.



- To uninstall Docsvault, select Remove and click the **Finish** button

During the uninstall process you will have a choice to keep or remove the current Docsvault server settings. If you wish to uninstall Docsvault completely you can select the **Remove Docsvault settings** option. You may also choose to remove all the data that you have imported into Docsvault by checking the "Remove all data..." checkbox.



Warning:

If you choose to remove all imported data into Docsvault, it will not be possible to recover it afterwards. Please make a backup of your current repository folder or use the export feature from the Docsvault Server Manager to export all your existing data before starting the uninstall process.

Technical Support

For any product related or general customer service questions that may arise, please use our online Technical Support or contact us by email at: Support@edaUSA.com

Easy Data Access

Web Site: <http://www.Docsvault.com>

E-mail: Support@edaUSA.com