

Technical Data

v5

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Docsvault - Document Management Software

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1 Technical Data

1.1 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 4/AMD Athlon or higher
Memory	2 GB RAM or higher
Display Resolution	1024*768 or above @ 96 dpi
Operating system	Windows XP SP3, Vista (32 & 64 bits), 7 (32 & 64 bits) or Windows Server 2003, 2008
Database Engine:	Microsoft SQL Server 2008 or 2008 R2 with full text indexing and filestream support. (The free SQL 2008 R2 Advanced Services edition is included by default)
Disk Space required	120 MB for Docsvault Server application data + Space for db & documents storage
.NET Framework	Version 4.0
Installer	Windows Installer v4.5 or above

Docsvault Client

Requisite	Recommended Minimum
Processor	Pentium 4/AMD Athlon or higher
Memory	1 GB RAM or higher
Display Resolution	1024*768 or higher @ 96 dpi
Operating system	Windows: XP, Vista (32 & 64 bits), 7 (32 & 64 bits)
Disk Space required	80 MB
.NET Framework	Version 4.0
MS Office Integration	MS Office 2007/2010(32 & 64 bit)
For Scanning	Any TWAIN compliant scanner for direct scanning. All other scanners for scanning through alternate import methods.



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

1.2 Server Recommendations

Up to 5 Users

Docsvault does not need any special server grade computer if you are a small group of around 5 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.

Up to 25 Users

We recommend an entry level server with Xeon (or equivalent) processor, 4GB Ram and a Server 2003 or above OS.

Up to 100 Users

Depending on the document storage load and number of active connections a good entry to mid-level server with dual/Quad processors, 8GB RAM, SQL Server Standard or Enterprise Edition and a server 2003 or above OS.

1.3 Space Requirements

For document storage

The space requirements are primarily dependent on the format of the files being saved. The following estimates are for scanned files using Docsvault scanning interface. Typically, formats with text type data occupy significantly less space than say scanned files or image/media files.

Since document scanning is usually done in B&W, we will use this mode of scanning for our explanation. A usual black & white 1-page scan with 200 dpi resolution will take about 70-100 KB (Kilo Bytes) of space. If you plan on using OCR feature, the suggested scan at 300 dpi for 1-page will take around 150 to 200 KB (This includes the scan + the embedded OCR'ed text). Note that the size requirement will be more or less than these average values depending on the page density (the amount of text in the page).

Let's consider higher values for our calculation i.e. 100 KB/page for normal scan and 200 KB/page for OCR'ed scans. Since Hard drives today are measured in terms of GB (1 Gigabytes = 1,048,576 Kilobytes), we can scan $1048576/100 = 10,485$ pages/GB and $1048576/200 = 5,243$ pages (OCR'ed)/GB.

Note that these are theoretical calculations and are meant for planning. The actual storage size will depend on many factors like file formats, scan clarity & color, etc.

1.4 Scanner Recommendations

Docsvault can use any TWAIN based scanner for scanning directly from its built-in scanning interface. Although Docsvault should work with any TWAIN scanner, we recommend dedicated scanner machines for use with Docsvault.

If your office uses departmental MFP scanners, you can setup dedicated routes from those scanners into Docsvault per user or per department, etc.

1.5 Database Engine

SQL Server

Docsvault uses the SQL server database for data storage. The Docsvault Configuration Wizard will automatically download and install the free MS SQL Server 2008 R2 Express Edition if you do not have an existing SQL server. The use of free SQL server express edition quite adequate for use up to 20-25 users. For 25+ users, use of SQL server workgroup or above is recommended.

Docsvault does not embed the actual document files inside the database file but stores only the meta data associated with documents and other information in the db file. The actual data files are stored on the server hard disk using the SQL 'FileStream' feature.

Server Best Practices

Use Internal Hard Drives:

Although you can create the repository folder on an external USB drive that is directly attached to the server machine, internal drives are recommended as they are more reliable. Note that due to the FileStream feature limitation of the SQL server, repository folders cannot be placed on shared network folders or NAS devices.

User Redundant Storage Systems:

Storing repository folder on RAID-1 or RAID-5 disks is recommended. However, if you do not have RAID system on your server, ensure that you take regular backups of your data.

Backup Your Data:

The most important & critical part of any Document Management Software is your data. In case of a disaster, everything else can be replicated other than your data if you do not have proper backups. Please take regular backups of your repository using Docsvault's inbuilt backup feature or using any external backup software that you might already use. Here are some points to keep in mind:

- Avoid taking backups on the same physical hard drive as your data (even if it's a different drive letter). This is because if your hard drive fails due to any reason you will lost both the data and its backup.
- On a regular basis test your backups by doing mock restores on test systems
- You can use external hard drives, network shares/drives or NAS devices for backups
- Move backups offsite on regular basis to insure against calamities in your office. As an alternate solution, online backup services are very affordable these days.

See "Data Backup" topic in this guide for more information on backups in Docsvault.

1.6 Trial & Licensing

The 30 days trial downloaded from the Docsvault website is the full-fledged software with all features in working condition with the following limitations:

- Only 10 users can be created in the system
- The software will stop working after 30 days if not activated
- The OCR add-on will process only 100 PDF files during the trial

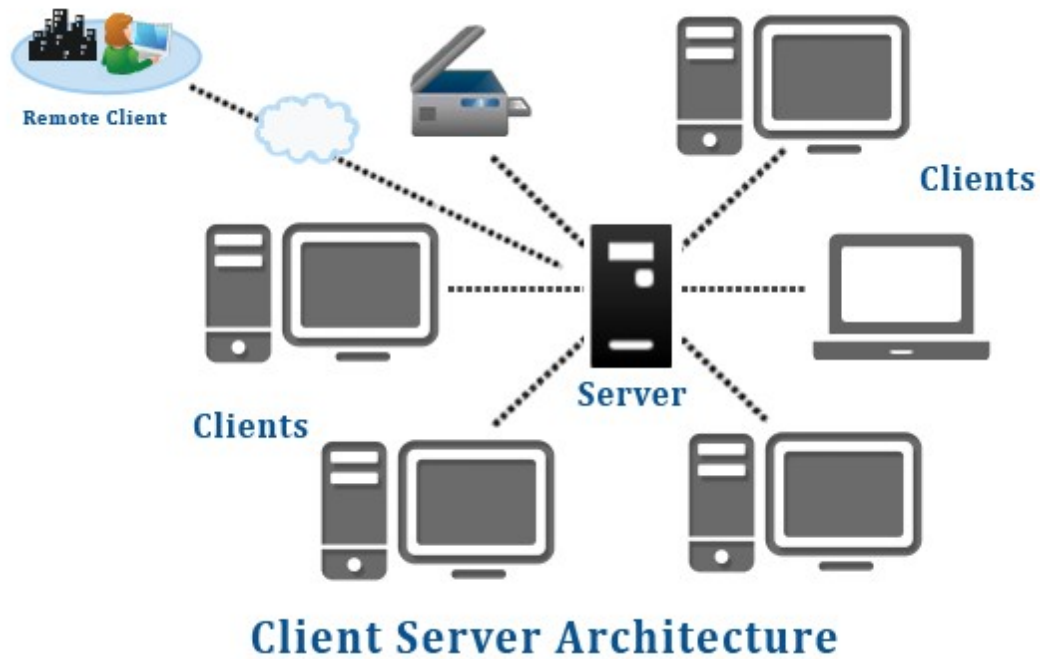
There is no need to reinstall the software if you purchase a license. Activating the software simply removes the time limitations on the same trial software and activates the total number of licenses users in the system.

Docsvault follows the named user licensing model. So for example a 20 user license will allow creation of 20 usernames in the system. The licensing of the software is controlled from the server side. So you are free to install the client software on as many workstations as required.

Note that the main user 'admin' is a fully functional user that can be used to login from client sides as well and is part of the total number of licensed users.

2 Docsvault Concept & Architecture

Docsvault is a Server – Client based software with the server part of the software installed on a central server computer and the client part of the software installed on various workstations. All data storage is done on the server computer



2.1 Server Side Components

Important Server Side Components:

Docsvault Server Manager

This is the dialog to manage the server side of Docsvault software. The Server Manager dialog can be invoked from a Desktop Icon or from the Windows Start Menu.

Docsvault Services

The following tasks run as Windows services on the Docsvault server:

Docsvault Server Service: Provides connection services to client installations in network

Docsvault Alerts Service: Manages various system and user specified alerts

Docsvault Background Jobs Service: Performs various background jobs for Docsvault server

Docsvault OCR Service: OCRs scanned and image based PDFs imported into Docsvault

Essential Database Services (if SQL database server is installed by Docsvault)

SQL Server (DOCSVAULT): SQL server service for Docsvault instance

SQL Full-text Filter Daemon Launcher (DOCSVAULT): Indexes contents of documents imported into Docsvault and makes them searchable

SQL Browser: Provides SQL server connection information to Docsvault clients

2.2 Data Files Storage

All files and meta data storage is handled by the SQL server. It is recommended that you use a separate hard drive (or a separate drive letter if you cannot spare a dedicated disk) to store your data.

If you let Docsvault install the SQL server express instance:

The data is store under folder named “**DVSB Data**” at a location that you specify during the initial configuration. The “DVSB Data” folder consists for the following:

- “**DB**” folder containing the SQL database files
- “**DVFStream**” folder containing the actual files imported into the system.

If you use your own SQL server for data storage:

The imported files will be stored in a folder named “DVFStream” on the same location as the database file for Docsvault on your SQL server.

2.3 Remote Access

Docsvault allows the following methods to remotely access Docsvault when outside of the local network

Windows Terminal Services

All features of Docsvault are tested to work under Terminal Services with the exception of scanning using local scanners on the client side, which is not possible in terminal sessions due to TS limitations.

VPN

Docsvault clients are fully functional using this method of remote connection.

2.4 Networking & Firewalls

Docsvault uses following ports for communication between the server and the clients:

- **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.

For more information on defining a static port for your SQL server or on port forwarding from your router to the Docsvault, visit the following page on our website: <http://www.docsvault.com/resources/troubleshooting/connection.TS.htm>

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")

2.5 Full Text Indexing Requirements

- **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. By default, Docsvault installs the SQL server database on the same machine as the Docsvault server. So if you did not specify your own SQL server during installation, SQL server machine is the same as the Docsvault server machine.
- **iFilter:** To have full text searching capability for specific extension you need to have its corresponding iFilter installed on the machine where the SQL server database for Docsvault is running. The search service already includes iFilters for many file types as listed in the 'Full-Text Search' node of the Docsvault Server Manager dialog.

By default, the operating system might not have the iFilters necessary to index popular file types such as .PDF, .docx, .xlsx, etc. See 'Adding More File Types' topic on the following webpage for further information on adding new file types for content search. <http://www.docsvault.com/resources/troubleshooting/fulltextindexing.TS.htm>

2.6 User Authentication

Docsvault supports two authentication methods that can be used in combination with each other.

- **Docsvault authentication:** Usernames and passwords are managed in Docsvault database
- **Windows authentication:** You can import usernames from active directory (LDAP). However the user

& password authentication is done by your domain server. Using this method, users can also login to Docsvault without being prompted for username and password if they are already logged into their Windows accounts.

2.7 Data Backup

All the documents and associated meta-data are handled by the SQL server. So backing up the SQL server database for Docsvault will serve as a complete backup.

If the SQL server was installed by Docsvault installer, you can setup scheduled full and differential backups in the Docsvault Server Manager with advanced options like verification and maximum number of backup sets to keep. The backup storage medium can be a logical drive such as your hard drive, a separate storage device such as an external removable hard disk or a network storage device or share.

Default Backup Schedule

During the initial repository configuration, Docsvault will automatically schedule following backups at a location specified by you. You may change this later on from the Server Manager dialog.

Full: At 10.00 PM every Sunday of every week

Differential: At 10.00 PM every Mon, Tue, Wed, Thu, Fri, Sat of every week

Total # of full backup sets to keep: 3

When using your own SQL server to host Docsvault database, any backup system that is compatible with Microsoft SQL Server with support for FileStream backup can be used.

Docsvault - Document Management Software

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

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