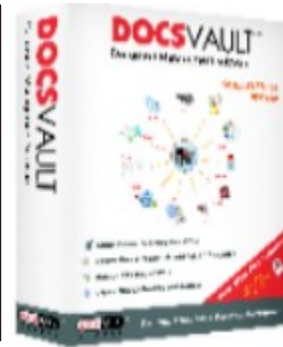


## Installation Guide

# DOCSVAULT SB 3.0

Multi User Document Management System



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

# Installation Guide

## Installing Server and Client

This section provides step-by-step instructions to install **Docsvault Small Business Edition's Server and Client sides**. Please read the following carefully. For further assistance, you can contact our support team by submitting a ticket on [www.docsvault.com](http://www.docsvault.com)



### Security Applications Warning:

- Firewall applications can prevent communication between Docsvault Client and Server. The Docsvault executables i.e Docsvault server and client along with the Firebird service on the server should be added to the exemptions/allowed list of the firewall. If you have any personal firewall application like McAfee, ZoneAlarm, Norton etc. or if Microsoft's inbuilt firewall is on, it can block Docsvault from accessing the network. Normally, such firewalls will warn the user when Docsvault tries to access the network. Just instruct your firewall to always allow Docsvault to access the network. However if the firewall does not pop up such warnings, you will need to explicitly add the following Docsvault executables to your firewall exceptions/allowed rules:

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\)

- fbserver.exe (by default located at C:\Program Files\Docsvault SB\Server\Firebird\bin\)

If your firewall is port based, please allow TCP traffic on these two ports - 3050 and 3831.

- If you have a registry protecting application installed on your machine it should popup a message asking for your permission to allow the installer to create its registry keys. However some applications might silently block the installers access to the registry which may lead to improper installation. In such case you might have to turn off or add Docsvault installer to the allowed list of any such security application before installing Docsvault.
- If your OS is **Windows Vista**, make sure the User Account Control option in Vista is turned off. This can be done from the Control Panel > User Accounts and by clicking on the 'Turn User Access Control on or off' link. You can turn this option back on if you wish once the installation is successful.



### Notes:

- Docsvault uses Firebird SQL server as its backend which will be installed automatically. However, if your PC already has Firebird installed, then Docsvault will attempt to use the current Firebird installation. If Docsvault is unable to locate the path of Firebird or if the default server admin password has been changed by some other application, then a pop-up dialog form will prompt you for the current password for the SYSDBA user. Enter the current password and the path where the Firebird Database Server is located. (Example: C:\Program Files\Firebird\Firebird\_1\_5).
- If Firebird server exists and no other application is using it, please uninstall it and then install Docsvault to ensure a smooth Firebird installation.



### Information:

- Docsvault uses TCP port numbers 3831 and 3050 for communications between the client and the server.

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
Processor	Pentium 4 or AMD Athlon
Memory	512 MB RAM or higher
Display Resolution	1024*768
Operating system	Windows 2K, 2K Server, XP, Vista 32bits
Disk Space required	20 MB + additional for data storage
.NET Framework	Version 2.0

## Docsvault Client

Requisite	Recommended
Processor	Pentium III
Memory	512 MB RAM or higher
Display Resolution	1024*768
Operating system	Windows 2K, XP, Vista 32 bits
Disk Space required	30 MB
.NET Framework	Version 2.0
MS Office Integration (Optional)	MS Office XP and above

If your PC meets these requirements, you're ready to install **Docsvault**.



### Note:

- You must have administrative permissions to install this program.
- The Microsoft .Net Framework 2.0 is freely available from their download center website," [www.microsoft.com/downloads/](http://www.microsoft.com/downloads/)". Once on their website, search for the ".NET Framework Version 2.0 Redistributable Package" in the top search bar.



#### Information: Choosing the Server Computer

- Docsvault does not need any special server grade computer if you are a small group of 5 - 15 users. You can designate any PC with good processor, ample Memory (512 MB) and enough available hard drive space for storing files imported in Docsvault.



#### Security:

- Docsvault installation requires that the installer have administrator permission to create folders and files and make necessary registry entries.

## Installing Docsvault Server

### Initiate Installation Wizard

- 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. By default the installer will choose '**C:\Program files\Docsvault SB\ Server**'. You have the option of changing 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 data files.
- Click on **Next** button to go to the '**Confirm Installation**' window.

### Select Data Folder

- During the installation progress, you will be asked to select a **Data Folder** that will store all documents imported in Docsvault and other related meta data. 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.



#### Warning:

- Do not select a network drive or shared folder for the Data Folder. The Data Folder should reside on a drive that is physically connected to your computer.

### Close Installation Wizard

- On completion click the **Close** button. You can now launch the Docsvault Server Manager from the desktop icon.

## Installing Docsvault Client



### Note:

- You are now ready to install the client software on all the machines that would be used to access the central documents repository on the server. Run the Docsvault Client installation file on each of the client workstations.

### Initiate Installation Wizard

- For each workstation installation run the **Docsvault\_SB\_Client.msi** and follow the on screen instructions.

### Select Installation Folder

- **Installation folder** contains the program files for Docsvault. The install program will create a default program folder '**C:\Program files\Docsvault SB\Client\**'. You can change the location if you wish. However we recommend that you accept the default names and structures provided during installation.
- Click on **Next** button to go to the '**Confirm Installation**' window.

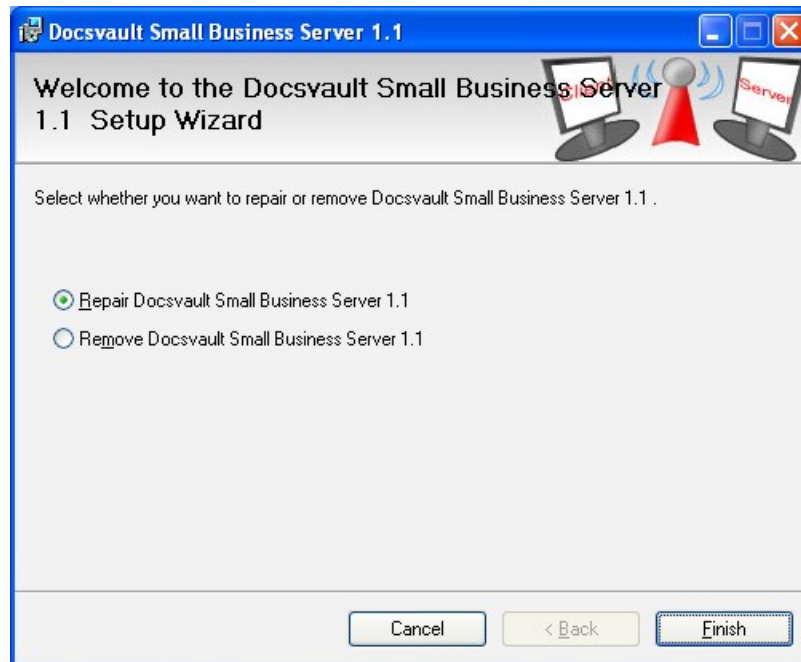
### Close Installation Wizard

- On completion click **Close** button.

If you accidentally delete or alter files that are required by Docsvault, Docsvault might 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.

## Reinstall or Repair Docsvault

- In the **Control Panel**, double-click **Add or Remove Programs**.
- In the **Add or Remove Programs** window, select **Docsvault Small Business Server** or **Docsvault Small Business Client** and then click **Change**. You will see the following screen.



### Reinstall/Repair Docsvault on the Client

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



#### Important:

When asked for Data Folder, make sure your current repository path (where 'Docsvault data folder' is installed) is listed correctly or else a new repository will be created.

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.

## Uninstall Docsvault

- In the **Control Panel**, click **Add or Remove Programs**.
- In the **Add or Remove Programs** window select Docsvault Small Business Server or Docsvault Small Business Client depending on your installation type. Then click the **Remove** button and follow the instructions



### Note:

- During the Server uninstallation, Docsvault gives you the option of retaining your current data folder which contains all documents in the repository. Select **Yes**, if you want to use it when you install Docsvault in future.



### Warning:

- Selecting 'No' will delete the existing Docsvault repository and all documents and information stored in current Docsvault repository will be lost.



### Important:

- Before uninstalling Docsvault Server, please make sure that you take backup of data files by using the 'Export Repository' feature from the Docsvault Server Manager.

## **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](mailto:Support@edaUSA.com)

## **Easy Data Access**

Web Site: <http://www.Docsvault.com>  
E-mail: [Support@edaUSA.com](mailto:Support@edaUSA.com)