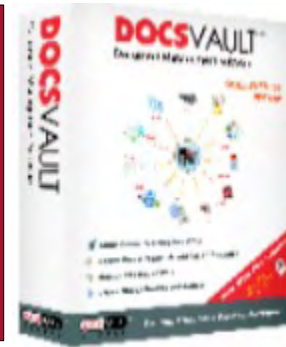


# Installation Guide

## DOCSVAULT SB EDITION 3.5

Multi User Document Management System



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

# Installing Docsvault

## 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.



### Notes:

- **Docsvault SB v3.5 now supports terminal services for Docsvault clients. You can now access Docsvault clients remotely using Microsoft Terminal Services.**



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 Operating System: 2k, XP, 32 & 64 bits Vista, Windows 7 or Windows Server 2003, 2008
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 Operating System: 2k, XP, 32 & 64 bits Vista, Windows 7
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.

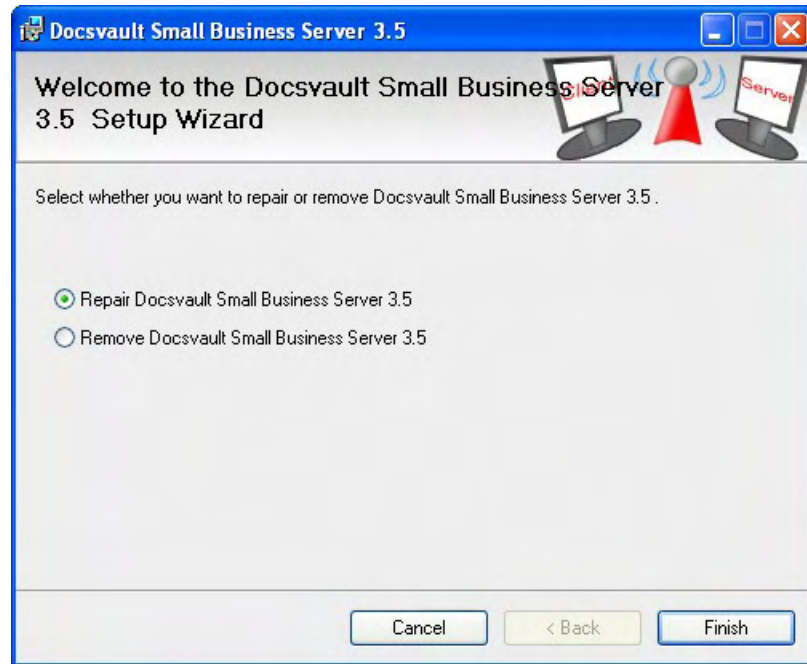
## Close Installation Wizard

- 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** and then click **Change**. You will see the following screen.



### Reinstall/Repair Docsvault on Server

- 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:





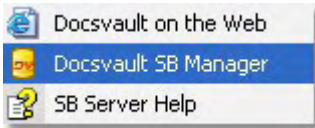
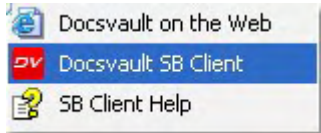
- Before uninstalling Docsvault Server, please make sure that you take backup of data files by using the 'Export Repository' feature from the Docsvault Server Manager.



## Launching and Activation

This section covers the server activation and several ways of launching the Docsvault program.

### Launching Docsvault

Launching Docsvault	Server Manager	Client
On the <b>Desktop</b> , double click the <b>Docsvault icon</b> .		
In the <b>System tray</b> (right bottom corner near the clock), right click <b>Docsvault icon</b> .		
<b>Start Menu</b> , select <b>Start\Programs\Docsvault Small Business\</b>		

## Server login



### Server Login

**Connect as :** Enter the User name and password to sign into Docsvault Server Manager.



#### Information: Running the Server Manager for the first time.

##### Default Admin User:

The default admin username/password is **admin/admin**. This user has all rights to all parts of Docsvault and cannot be deleted. However you can change the name of this user if you wish. This user can also be used to login from the client side.

##### Additional Users:

Once you log into the Server Manager, we suggest that you create additional users from the Users/Groups tab. These users can then login from the client side and will see options according to their rights. Note that all users of the Administrators group can login to the Server Manager and will have full access to all configurations

If you would like Docsvault to remember your password, check the **Remember my password** checkbox. The next time you use Docsvault, you will be authenticated automatically.



#### Security:

- Only the Administrator user or the members of the Administrators Group can log into the Docsvault Server Manager.

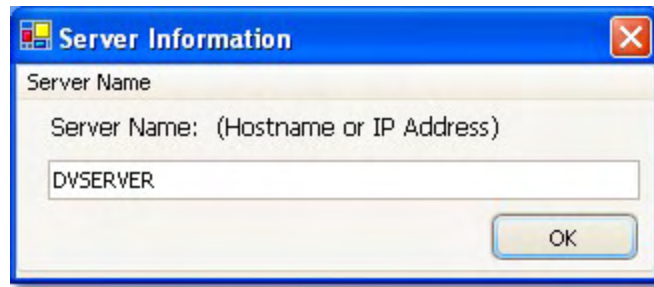


#### Note:

- Docsvault uses the Operating System's indexing engine for full text search. A message is prompted if it does not find the said component on the execution of Docsvault Server Manager application. You can ask Docsvault to automatically download and install the component on your machine by selecting 'Yes'. Note that this component can also be installed later on from 'Others' Tab. For further information refer Server Manager > Others section of your help file.

## Running the Docsvault client for the first time:

The first time you run the client program, it will ask you for Docsvault server name. Enter the host name or IP address of the machine running the Docsvault Server software on your Network.



Server Name

## Client login



User Login

**Connect As :** Enter the user login name and password created on the server side.

If you would like Docsvault to remember your password, check the **Remember my password** checkbox. The next time you use Docsvault, you will be authenticated automatically.



### Warning:

- The Microsoft or any other firewall application can prevent Docsvault from communicating with the server software or workstations. The Docsvault services 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. Docsvault uses TCP port numbers 3831 and 3050 for communications between the client and the server.



### Security:

- The Administrator can create and edit Group or User list with the names of users and assign their system rights from Docsvault Server Manager.



### Note:

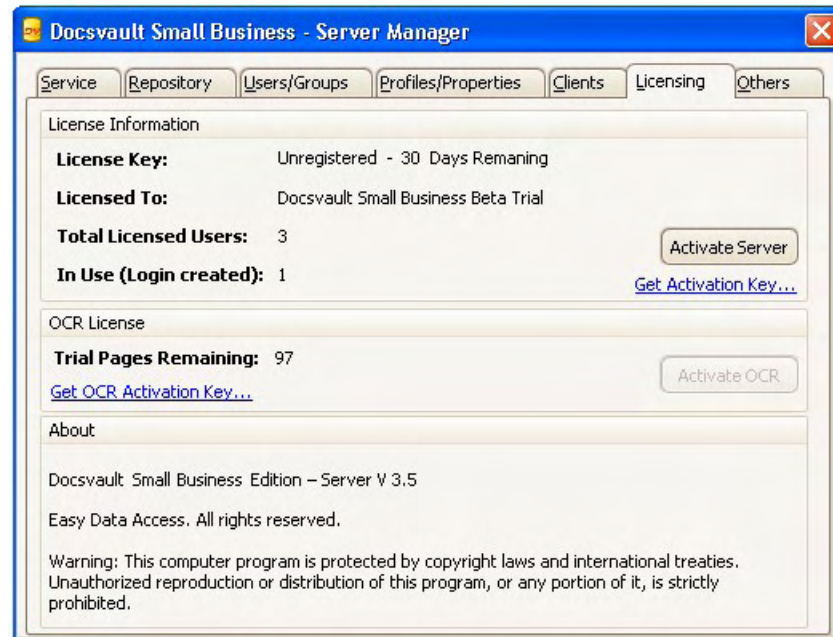
- The user can change his/her own password and profile by using 'Edit my profile' from the 'Tools' menu in the client.

## 30 Days Trial Period

The default installation allows a thirty-day trial period. During the 30-day evaluation period, all the features of the program are fully functional. At the end of the trial period the program will stop functioning and will ask for an **Activation key**. Please visit our website [www.docsvault.com](http://www.docsvault.com) to purchase the activation key.

## Activating and Registering Docsvault

- From the Docsvault Server Manager window, select the **Licence** tab and click the **Activate Server** button.



Licensing tab

- The **Activate key** form will appear. Enter the 25 character **Server key** provided to you with the retail box you have purchased. If you have purchased Docsvault online, we will send you an email with the *Activation Key*. This key will allow you to activate the product on a single Docsvault Server. Fill in the necessary registration information and click on Activate.

The screenshot shows the 'Docsvault SB - Activate Key' form. It has a 'Server Activation' section with a 'Server Key:' text box. Below is the 'Registration Information' section, with a note 'Fields with \* are required'. It includes: 'Licence To: \*' text box with a hint 'This string will be displayed in all client's status bar'; 'Contact name: \*' and 'Email: \*' text boxes; 'Country: \*' dropdown menu (showing 'United States') and 'Type of Business: \*' dropdown menu; and 'Where did you hear about us?:' dropdown menu followed by a 'Specify:' text box. An 'Activate' button is at the bottom right.

Activation Form

**Note:**

- Make sure you have an active internet connection. If you are using a firewall application, allow Docsvault to access the internet for activation which is only one time process.

## To add Additional Users

You can add additional user licenses at any time by getting additional users license keys from our website.

- On the **Docsvault Server Manager** window, select the **Licence** tab. Click on the Additional Users button, fill up the necessary information in the activation form and click on the **Activate** button

The screenshot shows a dialog box titled "Docsvault SB - Activate Key". Inside, the "Additional Users Activation" section contains three input fields: "First Name:", "Last Name:", and "Additional Users Activation Key". An "Activate" button is located at the bottom right of the dialog.

**Additional Users Activation**

## To activate OCR

Docsvault offers free 100 pages for OCR conversion. The trial version is fully functional. You can save it into searchable PDF or TIFF files and even open it in Docsvault PDF Editor or any other external PDF editor.

If you are satisfied with the trial version, you can buy a license directly from within the program i.e Docsvault Server Manager and enter the OCR activation key to turn the trial version into a license version.

- On the **Docsvault Server Manager** window, select the **Licence** tab. Click on the Activate OCR button, fill up the necessary information in the activation form and click on the **Activate** button.

The screenshot shows a dialog box titled "Docsvault SB - Activate Key". Inside, the "OCR Activation" section contains three input fields: "First Name:", "Last Name:", and "OCR Activation Key". At the bottom, there are two buttons: "Get OCR Key" and "Activate".

**OCR Activation**

## **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)