Docsvault Small Business Installation Guide

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

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📝 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 reinstall Docsvault to ensure a smooth Firebird installation.

⚠ 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.

ⓘ Information:
- Docsvault uses TCP/UDP 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 ent orkstat ons meet the m n mum re ommended hard are and so t are re u rements

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 or Windows XP
Disk Space required	20 MB + additional for data storage
.NET Framework	Version 1.1.4322 (V2.0 not supported)

Docsvault Client

Requisite	Recommended
Processor	Pentium III
Memory	256 MB RAM or higher
Display Resolution	1024*768
Operating system	Windows 2K or Windows XP
Disk Space required	30 MB
.NET Framework	Version 1.1.4322 (V2.0 not supported)

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 1.1 is freely available from their download center website," *www.microsoft.com/downloads/*". Once on their website, search for the ".NET Framework Version 1.1.4322 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.
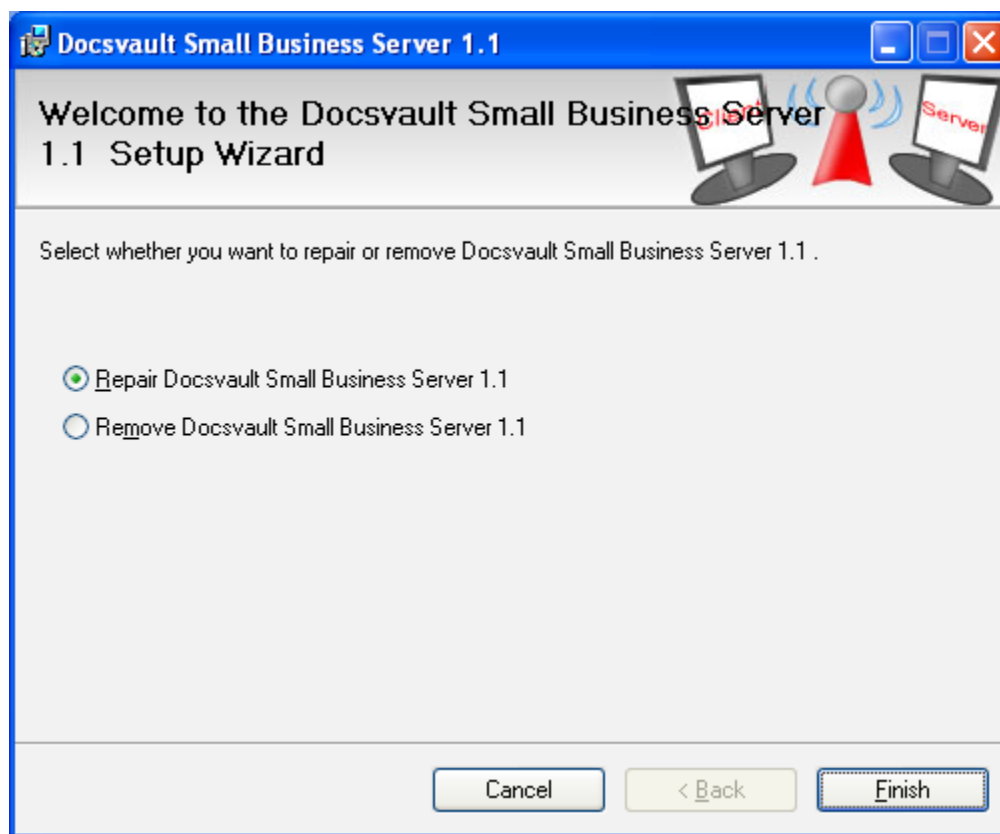
Reinstall/Repair Docsvault on the Client

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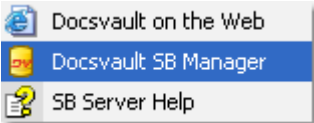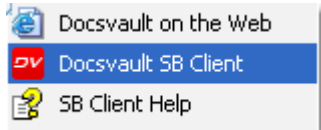
Important:
- Before uninstalling Docsvault Server, please make sure that you take backup of data files by using the 'Export Repository' feature from the Docsvault Server Manager.
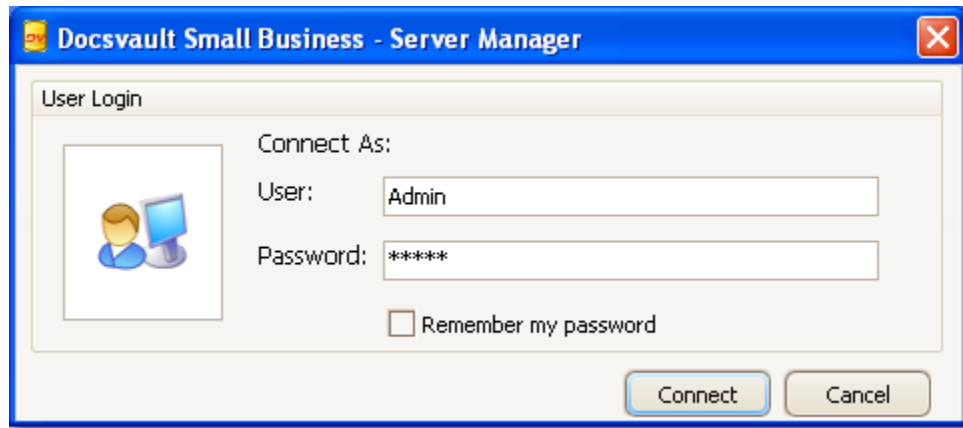
Launching and Activation

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

Launching Docsvault

Launching Docsvault	Server Manager	Client
On the **Desktop**, double click the **Docsvault icon**.		
In the **System tray** (right bottom corner near the clock), right click **Docsvault icon.**		
Start Menu, select **Start\ Programs \Docsvault Small Business**	Docsvault on the Web Docsvault SB Manager SB Server Help	Docsvault on the Web Docsvault SB Client SB Client Help

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

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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.
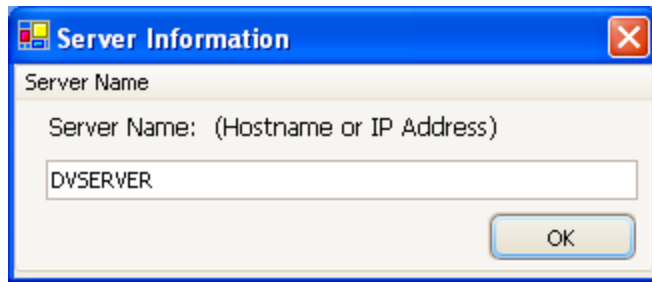

Security:
- Only the Administrator user or the members of the Administrators Group can log into the Docsvault Server Manager.
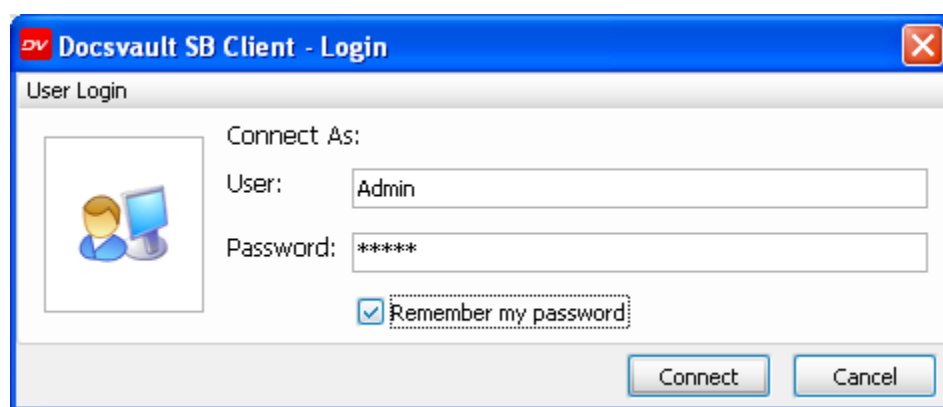

Running the Docsvault client for the first time:

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/ UDP 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 trail period. During the 30-day evaluation period, all the features of the program are fully functional. At the end of the trail period the program will stop functioning and will ask for an **Activation key**. Please visit our website 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.
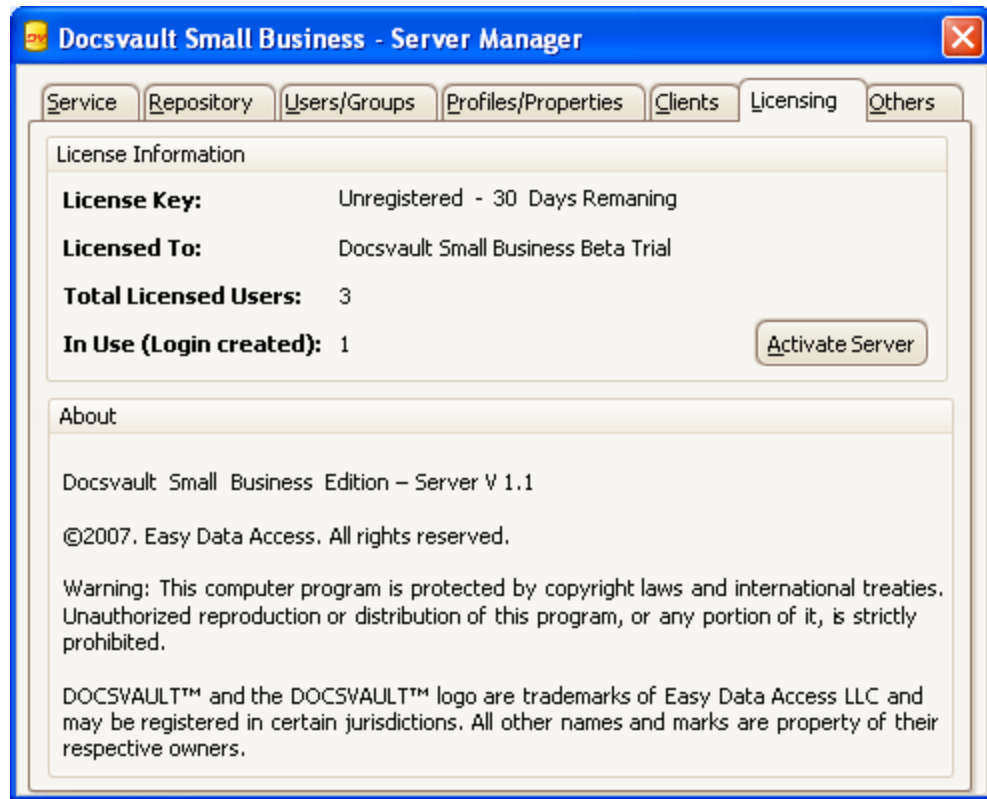
Licensing tab

- 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.

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

Additional Users 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

Easy Data Access

5988 Mid Rivers Mall Drive
St. Charles, MO 63304

Web Site: http://www.Docsvault.com
E-mail: Support@edaUSA.com