



DMS for everyone

## Installation Service

This service will cover the following items. Please keep all necessary data ready listed at the end of the documentation which will be needed at the time of installation. Installation services will be provided remotely over the internet using our remote login utility. We will need to login to the server that will host the Docsvault Server software and the workstations where you wish to install the client software.

### I. Server Side Installation & Configuration

#### 1. Install the server side software

Install the server software on the server designated by you

#### 2. Create & Configure the Database To Hold Docsvault Repository

- Install a new instance of the free SQL server express database server or use your own SQL server if you have one.
- Create a new data folder at the location specified by you.

#### 3. Configure Full Text Indexing

Install the necessary windows search engine if not installed already install necessary iFilters

#### 4. Configure Firewall

Allow Docsvault services through any firewall to ensure proper connections from the client side.

#### 5. Setup Initial Users

- Configure Active Directory settings if you wish to use your windows usernames and password to log into Docsvault. (requires a domain based network).
- Create few startup users for your system
- Set permissions for these initial users

#### 6. Configure Outgoing Email Settings

If you wish to allow users to email files from within Docsvault using Docsvault Quick Email feature or wish to subscribe to email alerts for any folder activity, you will need to provide with details about your SMTP server (typically you can get these values from your outgoing email settings in your email software).

#### 7. Setup Automatic Backups

Setup scheduled full and incremental backups for the data repository

### II. Client Side Installation

#### 1. Install Clients

- Install client software on maximum of 3 workstations and connect them to the server

#### 2. Configure Firewall

- Allow client software through the firewall to ensure proper connection with the server

## List Of Information Required:

1. Designate a server to install the Docsvault server software on. If you do not have a dedicated server grade machine you can still use any good PC in your network to host the Docsvault Server software. However we do not recommend installing the server software on a user workstation as user processes may affect the performance and functioning of Docsvault Server.
2. SQL Server: Let us know if you would wish to use your own SQL server to host Docsvault data. If you do not have any SQL server, Docsvault can automatically download and install the free SQL Server Express for you. The SQL server express database is sufficient for most situations with around 10 or fewer users.
3. Location for data storage: This folder will hold all data imported into Docsvault from anywhere. Please ensure that you have enough free space on the drive where this folder will be created. Note that this folder should be local to the server machine.
4. Few initial usernames and their security group (administrator, manager, user)
5. Do you have a domain based network and would you like to use the windows user to login into Docsvault too?
6. Outgoing email server (SMTP) details if you wish to use the quick email and file/folder activity emails
7. Location for backups. Please ensure that the location specified has ample storage space and is not on the same hard disk as the data.

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