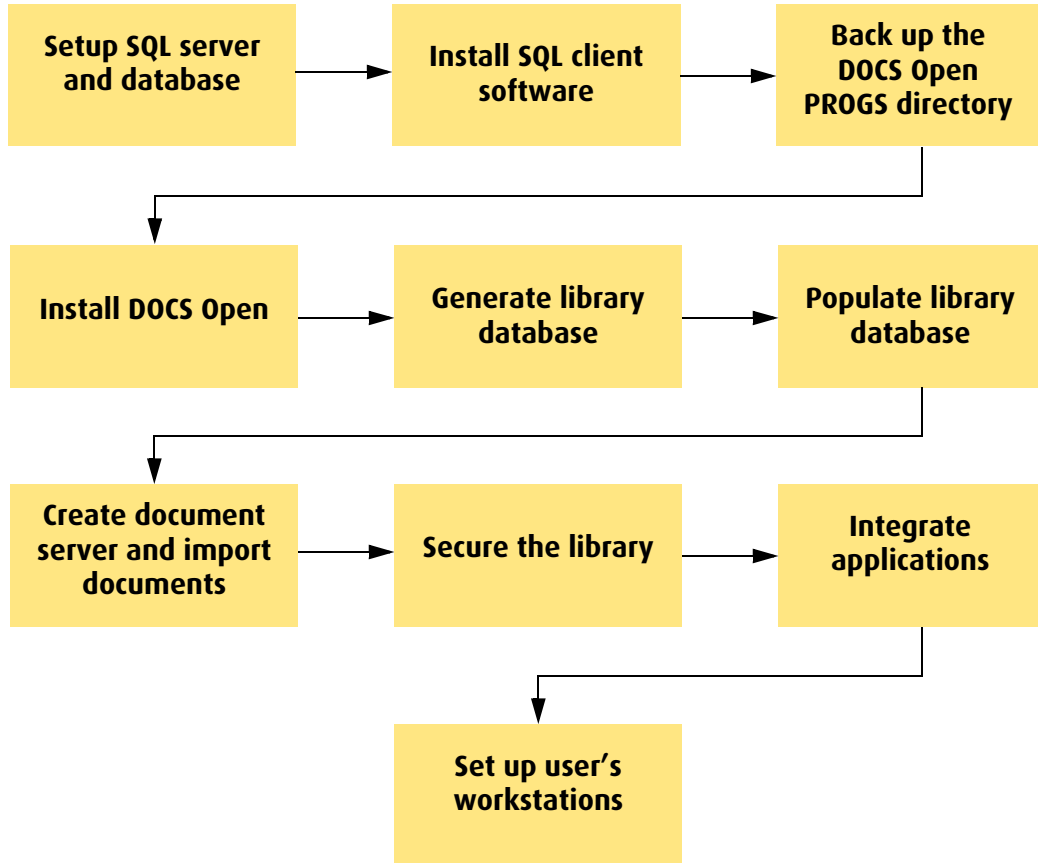


DOCS Open[®]

QUICK START GUIDE

Setting Up DOCS Open



Setting Up DOCS Open

For detailed instructions on all steps, see the *DOCS Open Setup and Administration Guide*.

1 Set up the SQL database.

Before installing DOCS Open, install your SQL database engine and create a database to contain the DOCS Open library.

The library database holds detailed information about each document. It also describes:

- ▶ The applications that are integrated with DOCS Open.
- ▶ The users and groups who have access to documents.
- ▶ The names and locations of document servers.
- ▶ Other information pertaining to management of your documents and the DOCS Open system itself.
- ▶ Archival data.

DOCS Open supports the following SQL database engines on all platforms supported by their respective vendors:

- ▶ Microsoft SQL Server 2000 and Microsoft SQL Server 7.0 for Windows NT and Windows 2000.
- ▶ Oracle 8 and Oracle 8i for Windows NT, Windows 2000, NetWare NLM, and several implementations of UNIX.
- ▶ Sybase System 11.9 and 12.0 for Windows NT, Windows 2000, NetWare NLM (Sybase 11 only), and several implementations of UNIX.

See the manual *Setting Up a DOCS Library Database* or your vendor's documentation for more information.

2 Install the SQL client software.

The SQL client software allows a client machine to connect to the library database. The client software for your SQL server must be installed on all DOCS Open workstations. See the manual *Setting up a DOCS Library Database* for instructions.

3 Back up the DOCS Open PROGS directory.

If you are upgrading an existing DOCS Open installation, we recommend that you back up your current directory and choose a new installation directory.

4 Install the DOCS Open software.

Once you have created the SQL database, you should then install the DOCS Open software and documentation. At a minimum, you need to install the module called DOCS Open for Windows. You can install other modules later as you find the need for them. For installation instructions, see Chapter 2 of the *DOCS Open Setup and Administration Guide*.

5 Generate the library database.

After the DOCS Open software is installed, the setup program offers you the option of generating the library, a process that sets up the DOCS Open tables in the SQL database. You can generate the library during installation, or you can generate it after installation by running Library Generator from within DOCS Open. This utility must be run, whether you are upgrading or installing for the first time. For instructions on generating the library, see the manual *Setting Up a DOCS Library Database*.

6 Populate the library database with your organization's data.

The library generation process populates the SQL database with the standard information for all DOCS Open libraries. It also gives you the option of synchronizing network users with DOCS Open users (that is, copying network users and groups into the database so that you do not have to add each one manually).

- ▶ Select feature, utility, and version control options for all users.
- ▶ Add Document Types. To import Document Types from an ASCII text file, use the DOCS Open Database Import utility.
- ▶ Add users and groups. There are several methods for adding users:
 - Synchronize users and groups in the library database with network users and groups.
 - Add users manually with Library Maintenance>People.
 - Import users from an ASCII text file with the Database Import tool.
- ▶ Create groups of users that require the same rights and features. By default, all users are members of the group DOCS_USERS. There are two methods for adding groups to the library database:
 - Synchronize with network groups.
 - Add groups manually with Library Maintenance>Groups.
- ▶ Set up remote libraries.
- ▶ Customize forms and database tables.

The manual *Setting Up a DOCS Library Database* lists the library maintenance tasks that must be performed as part of the DOCS Open setup. Read Chapter 8, “Library

Maintenance,” in the *DOCS Open Setup and Administration Guide* for more information about loading your organization’s data into the database.

7 Creating a document server and importing existing documents into it.

A document server is an area designated for storage of documents. All electronic documents in your DOCS Open library will be stored on one or more document servers.

Once a document server has been designated, you can import existing electronic documents into it, or you can link them to DOCS Open without changing their directory structure or name. During the import process, DOCS Open creates a Document Profile in the SQL database for each imported document. For instructions on importing documents, see the Document Import Help.

See “Document Servers” in Chapter 8 of the *DOCS Open Setup and Administration Guide* for instructions.

8 Securing the library.

DOCS Open provides security features to protect documents from unauthorized access. Before you turn DOCS Open over to users, you will need to determine:

- ▶ How you will allow users to access the SQL database.
- ▶ What level of security you can obtain for the servers where documents are stored.

Once you have made these determinations, you will then need to take the appropriate steps to secure your library in the manner best suited to your organization. For instructions on security implementation, see Chapter 4 of the *DOCS Open Setup and Administration Guide*.

9 Integrate applications.

Many popular office applications, including word processors and spreadsheets, can be integrated with DOCS Open. Integration means that when users launch an application from the DOCS Open Desktop, DOCS Open intercepts the application's native file-management commands, such as Save and Open, and replaces them with DOCS Open commands. This permits easy storage and retrieval of documents in the library.

DOCS Open supports integration with several electronic mail applications, allowing users to attach documents, or references to documents, to e-mail messages. DOCS Open also supports a group of utilities called compatible applications, which are programs that process files produced by an integrated application. A grammar checker that runs against WordPerfect files, for example, may be considered a compatible application.

The steps for integrating each of the supported applications are described in Chapter 3 of the *DOCS Open Setup and Administration Guide*.

10 Set up users' workstations.

- ▶ **Point to DOCS Open in users' search path.** Once you have set up DOCS Open on the network, make sure that the DOCS Open program directory (by default, C:\PROGRAM FILES\HUMMINGBIRD\DOCSOPEN\PROGS) is listed in the search path of each user's workstation. On Windows 95 and Windows 98 workstations, long search paths are truncated, so we recommend that you place the DOCS Open directory near the beginning of the path statement. If the path changes, Windows 95 and Windows 98 users must restart their computers to reflect the change.
- ▶ **Create local copies of the PCDOCS.INI file.** The PCDOCS.INI file contains various settings used by DOCS Open. This file is located in the DOCS Open directory, and its settings apply to all network users. If individual users want certain settings to be different for them, you can handle their requests by placing a copy of PCDOCS.INI in the user's local Windows directory and modifying it as needed. See the Admin Help file for more information about settings in the PCDOCS.INI file.
- ▶ **Install a SQL client on every DOCS Open workstation.** To have the appropriate connection information written to the Windows registry, SQL client installation and configuration must be done for all workstations using DOCS Open. For instructions, see the manual *Setting Up a DOCS Library Database*.

About DOCS Open

DOCS Open was designed as a comprehensive document management platform. No matter the document type—word processing, spreadsheet, image, multimedia—DOCS Open provides a secure infrastructure to store, locate, and manage document-based information.

System Utilities

The DOCS Open System Utilities menu, available from DOCS Open Desktop>Options>System Utilities, provides access to the following modules offering a variety of time-saving tasks. Many of these tools can help you customize DOCS Open to fit the needs of your organization more specifically.

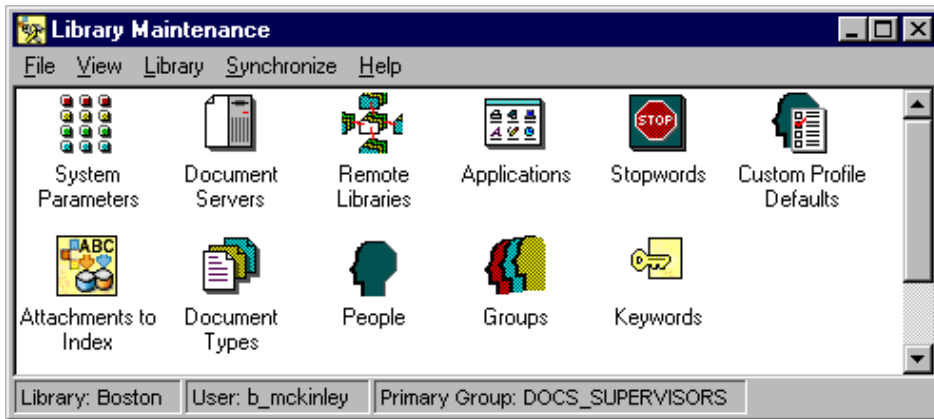


Install DOCS Unplugged

This menu option allows you to install DOCS Unplugged from the DOCS Open Desktop. For more information, refer to Chapter 12 of the *DOCS Open Setup and Administration Guide*.

Library Maintenance

The Library Maintenance tool makes it easy to maintain the database tables that store the Author, Document Type, Group, etc., along with server information and system defaults. This tool allows you to set up and configure System Parameters, Document Servers, Remote Libraries, People, Groups, Applications, Document Types, Custom Profile Defaults, Stopwords, Keywords and so forth. For more information, refer to Chapter 8 of the *DOCS Open Setup and Administration Guide* or to the Library Maintenance online Help.



Document Import

The Document Import utility allows you to import preexisting documents into DOCS Open, automatically creating profiles for each document. This utility also allows you to link preexisting documents to DOCS Open without changing their original directory structure or name. For more information, refer to the Document Import online Help.

Database Import

If your organization has an electronic file containing database information, the Database Import utility allows you to import data from this file into your DOCS Open primary library or remote libraries. This can save you from manually entering data into auxiliary databases, such as the People table. For more information, refer to the Database Import online Help.

Storage Management

The Storage Management utility allows you to Archive, Restore, Move, or Delete existing documents. For specific information about Storage Management functions, see the Storage Management online Help.

Full-Text Indexing

If you set up a dedicated indexer for your organization, this feature allows users to search the contents of all documents within a specific database. You can set up individual users or groups with rights to perform content searches, or allow all of your users this right. Once configured, the Indexer is basically maintenance free and will continually update the full-text database.

DOCS Open supports Verity and SearchServer search engines. SearchServer runs against DOCSFusion 3.5 or greater. A user can only run one index collection at a time on his or her workstation and can select the collection by modifying the PCDOCS.INI file or Groups utility in Library Maintenance. For more information about setting up and selecting indexers or search engines, refer to Chapter 9 of the *DOCS Open Setup and Administration Guide* or the Full-Text Indexing online Help.

Forms Designer

DOCS Open Designer provides a method for customizing your organization's forms, tables, and columns. This utility gives you, the administrator, the ability to personalize various objects in DOCS Open to best suit your installation. For more information on customizing forms, refer to the manual, *DOCS Designer and Data Dictionary* or to the DOCS Designer online Help.

Cost Recovery

The Cost Recovery module enables you to extract information from the Activity table and other associated tables for the purpose of client billing. You can extract the necessary information from DOCS Open and use it with an ASCII file created in a third-party time and billing program. For more information, see the Cost Recovery online Help.

Hardware and Software Requirements for DOCS Open

Operating System	Windows 95, Windows 98, Windows 2000 Professional, or Windows NT 4.0	
Memory	Minimum:	32 MB with Windows 95 64 MB with Windows 98, Windows 2000 Professional, or Windows NT 4.0
	Recommended:	64 MB with Windows 95 128 MB with Windows 98, Windows 2000 Professional, or Windows NT 4.0
Processor	Minimum:	Pentium 166 MHz
	Recommended:	Pentium II 233 MHz or greater
Disk Space	Minimum:	80 MB
	Recommended:	200 MB

Where to Look for Information

DOCS Open 3.9.6 provides two comprehensive Help files: an Admin Help file that contains information on each DOCS Open utility and a User Help file that contains task-orientated information for end-users. You can access these Help files from the DOCS Open Admin program group menu: Start>Programs>DOCS Open 3.9.6 Admin>Admin Help or Users' Help. The chart below lists the topics covered in each Help file.

Admin Help File	Library Maintenance	Storage Management
	Indexer	DOCS Designer
	Document Import	Data Dictionary
	Database Import	DOCS Open File Listing
	DOCS Reports	DOCS Open INI File Settings
	Cost Recovery	Initialization and Maintenance Utilities
User's Help File	DOCS Open Desktop	
	DOCS Unplugged	
	DOCS Routing	