Xerox

DocuShare®

DocuShare
Installation Guide

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Before you begin installation   1

This chapter contains the system requirements and installation information that you need to install or upgrade a DocuShare site. Before you begin an installation, read this chapter to make sure your server meets minimum requirements and that you are prepared with the information required by the install Wizard.

DocuShare license information

- If your installation is a 30-day trial version and you want to continue use of DocuShare after the trial expires, contact a Xerox DocuShare sales representative, call our sales team at 1-800-735-7749 (US and Canada), or email us at dsbu.sales@xerox.com.

- If your installation is a non-trial version of DocuShare, if you are upgrading your site, or you have purchased an add-on, Xerox DocuShare or your DocuShare reseller will provide instructions for obtaining a license.

DocuShare technical support

Your site is covered by DocuShare technical phone support for 30 days from the date you **obtained** a license. If you require technical assistance, go to the *Related Links* on your site home page. To purchase extended support, contact DocuShare sales.

System requirements

Note: *Before installing or upgrading, go to docushare.xerox.com for the latest system requirements.*

Minimum server requirements

DocuShare and DocuShare Education

Intel or AMD platforms

❑ Windows 2003 Server R2 or SP2 Standard and Enterprise (32 and 64 bit)

❑ Windows 2008 Server SP2 Standard and Enterprise (32 and 64 bit)

❑ Windows 2008 Server R2 SP1 Standard and Enterprise (64 bit)

❑ Red Hat Enterprise Linux ES 5 (32 and 64 bit)

❑ 3.0 GHz Intel Pentium 4 or AMD Athlon MP processor or better

❑ 3 GB RAM or higher (32 bit) / 4 GB RAM or higher (64 bit)

❑ 20 GB of free disk space

❑ Ethernet network interface

Sun SPARC platform

❑ Solaris 10 with current patch clusters

❑ UltraSPARC III processor or better

❑ 4 GB RAM or higher

❑ 20 GB of free disk space

❑ Ethernet network interface

Virtual server

❑ VMware ESX Server

❑ An average use installation requires for each virtual server; a minimum of 4 GB virtual memory and 40 GB of free disk space for the operating system and DocuShare software.

❑ If a database and stored documents are on the same virtual server; a minimum of 8 GB virtual memory and 200 GB of free disk space.

❑ A high use installation requires for each virtual server; a 64 bit OS, 16 GB virtual memory, and 2 TB of free disk space.

DocuShare Enterprise

Intel or AMD platforms

❑ Windows 2003 Server R2 or SP2 Enterprise (64 bit)

❑ Windows 2008 Server R2 SP1 or SP2 Enterprise (64 bit)

❑ Red Hat Enterprise Linux ES 5 (64 bit)

❑ 3.0 GHz Intel Pentium 4 or AMD Athlon MP processor or better

❑ 8 GB RAM or higher

❑ 40 GB of free disk space

❑ Ethernet network interface

Sun SPARC Platform

❑ Solaris 10 with current patch clusters

❑ UltraSPARC III processor or better

❑ 8 GB RAM or higher

❑ 40 GB of free disk space

❑ Ethernet network interface

Virtual Server

❑ VMware ESX Server

❑ An average use installation requires for each virtual server; a minimum of 4 GB virtual memory and 40 GB of free disk space for the operating system and DocuShare software.

❑ If a database and stored documents are on the same virtual server; a minimum of 8 GB virtual memory and 200 GB of free disk space.

❑ A high use installation requires for each virtual server; a 64 bit OS, 16 GB virtual memory, and 2 TB of free disk space.

DocuShare Web Client requirements (all product editions)

Web browsers

❑ Microsoft Internet Explorer 6 SP3, 7, or 8

❑ Mozilla Firefox 3.5 or 3.6

❑ Apple Safari 4.0 or 5.0

WebDAV

❑ Windows XP Professional with Office 2003/2007/2010

❑ Apple Mac OS X 10.6

DocuShare Education and DocuShare support

Web servers

❑ IIS 6 on Windows 2003 Server

❑ IIS 7 or 7.5 on Windows 2008 Server (review the Windows installation to make sure that all of the IIS Application Development and Management Tool components are installed on the server)

❑ SunONE/Sun Java System Web Server 6.1 on Solaris 10

❑ Apache Web Server 2.2.9

Databases

❑ IBM DB2 (for upgrading customers only)

❑ Microsoft SQL Server 2005 SP3

❑ Microsoft SQL Server 2005 Express Edition

❑ Microsoft SQL Server 2008 R2 or SP2

❑ Oracle 10.2 or 11.2

❑ PostgreSQL 8.4.4

Note: *DocuShare requires a database connector for the Microsoft SQL Server and Oracle databases.*

LDAP

❑ Sun Java Directory Server Enterprise Edition 6.x

❑ Microsoft Active Directory

DocuShare Enterprise supports

Web servers

❑ IIS 6 on Windows 2003 Server

❑ IIS 7 or 7.5 on Windows 2008 Server (review the Windows installation to make sure that all of the IIS Application Development and Management Tool components are installed on the server)

❑ SunONE/Sun Java System Web Server 6.1 on Solaris 10

❑ Apache Web Server 2.2.9

Databases

❑ Microsoft SQL Server 2008 SP2 Enterprise Edition

❑ Oracle 11.2

LDAP

❑ Sun Java Directory Server Enterprise Edition 6.x

❑ Microsoft Active Directory

Information required for DocuShare installation

The install Wizard asks questions about how you want the site installed. You may accept the defaults, but there is some required information that you should have before starting the installation. After installation, the administrator of the site can change most of the information that was provided during installation.

Information that you need for an installation include:

❑ Web server installation information:

   •   Windows platform: If you choose to use Microsoft IIS as your web server, load IIS during Windows Server software installation. Choose **Tomcat interacts with IIS** from the Wizard Web Server Interaction window. This choice installs the DocuShare Tomcat servlet engine and the software that connects the Tomcat engine to the IIS web server. If you choose to install Tomcat with IIS, you need to declare an IIS port number to use if you do not accept the default port number.

      If you choose to install a web server other than IIS, you must follow the installation instructions for that web server. The web server must be installed and running before you begin the DocuShare software installation. In this case, choose **Tomcat only** from the Web Server Interaction window.

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   Caution: WebDAV does not work if your DocuShare site is set up to use IIS via the Tomcat/IIS bridge connection. Your site must be configured to use an Apache server. See the Web Server Bridge chapter of this guide for information on creating a bridge to an Apache server.

   •   Refer to the Web Server Bridge section of this guide for instruction on how to edit specific files to create a bridge between your web server and the Tomcat servlet.

❑ Web server options:

   •   A fully qualified DNS hostname (such as *sales.acme.com)* or the IP address for the server. You cannot use aliases or WINS names.

   •   The server root (the default is docushare).

   •   Whether you want to run the server as HTTP or HTTPS. Choose HTTPS only if you configured your web server for HTTPS service.

❑ Database installation information:

   •   If you choose to install the default Microsoft SQL Express database, you can accept the default database port number or enter one of your own.

   •   If you choose to install a different database, refer to the Database Configuration section of this guide for installation information.

❑ Crucial ports and pathnames:

   •   A designated port for the Tomcat servlet (default port=8080)

   •   A designated port for the RMI server (default port=1099)

   •   A designated location for document repository

   •   A fully qualified DNS name for the SMTP mail server

   •   A designated port for the SMTP server (default port=25)

   •   A designated port for the Tomcat Web Bridge (default port=8009)

- • A designated port for the Tomcat Web servlet (default port=8005)

❑ What type of DocuShare installation you want installed:

- • DocuShare with FTP scan feature. This installation installs SMB scan service and an FTP scan service to receive documents. Make sure your site security rules allow the use of FTP.

- • DocuShare without FTP scan feature. This installation installs only SMB scan service.

- • DocuShare Archive Server. This installation installs the Archive Server software.

❑ What type of user can access the site; Guest (anyone), User (only registered users), or Administrator (only registered administrators).

❑ Who can create new user accounts on the site; Guests, Registered Users, or Administrators.

❑ Who can create new group accounts on the site; Registered Users or Administrators.

❑ The default user level that is assigned to all new user accounts; Read-only, DocuShare User, or CPX User. User levels are license dependent, so the CPX level is available only if your site is licensed for CPX users.

❑ How do you want to display dates; US English (mm/dd/yy) or International English (dd/mm/yy).

❑ A unique site admin password and the email address of the site administrator.

❑ A location on your server where you want the Wizard to install the DocuShare software.

❑ For Windows platforms, decide how you want to control stopping and starting DocuShare; either AutoStart or manually through the Services window.

DocuShare on a Windows platform $\quad$ 2

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **InstallLog.txt** in the Temp directory of the server. At a command prompt; go to **%temp%**, then enter **>dir** to display the logs in Temp. After the installer creates the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory; where it stores the remaining installation information. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: ***docushare.exe -P docushareLog.cleanUp=false***.

Install DocuShare

Before you begin

1. Review Chapter 1 of this guide to make sure your server meets the minimum requirements for DocuShare installation and that you have gathered the information required by the install Wizard.

2. If you have chosen not to install the DocuShare supplied web server, make sure you have installed and configured the web server of your choice, and that web server is running before you begin DocuShare installation.

3. If you have chosen not to install the DocuShare default database, make sure you have installed and configured the database of your choice, and that database is running before you begin DocuShare installation.

4. For an easier installation, we recommend that you install DocuShare on a clean server; one with newly installed operating system software.

5. If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances. Failure to do so can later result in indexing problems and in situations where stopping one instance of DocuShare stops all instances.

Start the installation

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Caution: If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances.

1. Log into the server as a Windows server administrator.

2. Launch the DocuShare software install Wizard by doing one of the following:

    • **If you are installing from a product media:** Insert the DocuShare media into the server drive. If the installer does not open automatically, open the media, locate and double-click **setup.bat**.

    • **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server and unzip the file. Open the file, locate and double-click **docushare.exe**.

    Be patient; it takes several minutes before the system displays the first install Wizard screen.

3. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

4. Click **Next** to advance the installation or click **Back** to return to a previous page to make a change.

    Before the installer loads DocuShare, the Wizard allows you to make changes to your choices. After installation, the administrator of the site has the authority to change most of the information that was provided during installation; using either the Admin UI or a command prompt window.

5. In the database configuration window, select a database option then click **Next** and enter the configuration information for your database.

    If you selected the SQL Server Express database, enter a Database User Password (at least eight characters, with a mix of upper/lower case and numbers, select Named Instance to create a new database, and select **Install SQL Server Express**.

    A reboot message appears, at the completion of reboot, restart the DocuShare installation.

6. In the Web Server Interaction window, select how you want the web server to connect with the Tomcat servlet engine.

    • Select **Tomcat/IIS** if you installed IIS as part of your operating system software and want to use IIS as your web server.

    • Select **Tomcat only** if you installed a web server other than IIS. At the end of the installation, you will have to manually edit some files to connect the web server to the Tomcat servlet.

    *Note:If you later want to use IIS as your web server, refer to the **Create a bridge to an IIS web server** section of this guide.*

7. In the Windows service setup window, select **Install the DocuShare Windows Service**.

    Running DocuShare as a service on your Windows server is recommended. If your DocuShare server is in a clustered environment, do not select DocuShare Windows Service AutoStart; the clustered resource group will start DocuShare.

Finish the installation

1. When the installation successfully completes, click **Finish** to close the installer.

2. Remove the product media from the server drive.

3. Reboot the server.

4. If you selected Tomcat only, refer to Web Server Bridge chapter of this guide to edit specific files to create a bridge between your web server and the Tomcat servlet.

5. After the server restarts; if you selected DocuShare with FTP scan feature, use the IIS Manager to disable the IIS FTP service.

6. If you did not set DocuShare to run as an autostart service, do **one** of the following:

    •   Enter **<DSHome>\bin\start_docushare** in a command prompt window to start DocuShare.

    •   In the Administrative Tool, in the Services application, select and **start** the DocuShare service.

    DocuShare initial startup automatically updates the search indexes; allow five minutes before attempting to connect to the site through a browser.

7. If the site uses SSL and you selected IIS as your web server, follow these instructions to close the Tomcat servlet port to prevent unauthorized access to the Tomcat web servlet though that port.

    a. Stop DocuShare by entering the command, **stop_docushare**.
    b. Run the **dssetup** command and change the status of the **Tomcat http port** to **off**.
    c. Start DocuShare by entering the command, **start_docushare**.
    d. Reboot the system if you are using IIS.

License the site

1. Use a browser to connect to your newly installed site.

    •   The default URL is http://<fully qualified DNS name>:8080/docushare.

    •   If DocuShare was installed in the home directory on your web site, the URL is:
        http://<fully qualified DNS name>:<port>/

    •   If DocuShare was installed in a subdirectory on your web site, the URL is:
        http://<fully qualified DNS name>:<port>/virtual web directory name/

    •   If you installed IIS on your server, then the :<port> component of the URL is not used. For example: http://<fully qualified DNS name>/docushare

    •   If you installed only Tomcat on your server, then the :<port> component of the URL is 8080 (default).

    •   If you changed the server root to **root** during the installation, the /docushare (default) component of the URL is not required. For example, http://<fully qualified DNS name> or http://<fully qualified DNS name>:8080

2. Use the admin password you set during installation and log into the site as *admin*.

3. On the navigation bar, click **Admin Home**.

4. From the Administration menu, click **Site Management | License.**

5. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

6. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

7. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

8. Refer to the *Administrator Guide* for information on post-installation site configuration, such as setting up your site to use SSL.

Uninstall DocuShare

If you select to retain the content store, the uninstall Wizard does not remove the DocuShare directory that includes your DocuShare repository content. To be safe, before uninstalling DocuShare move the repository content to another storage media by using the DocuShare command line utility, **dsexport**. Refer to the *DocuShare Command Line Utilities Guide* for details.

Uninstall removes all installed language packs.

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Caution: The DocuShare uninstaller only removes DocuShare, not the installed database. You should back up data for all Windows applications sharing the database. If you are using the SQL Server Express database, back up all data to a secure location.

To uninstall DocuShare:

1. In **Administrative Tools**, select and open the **Services** application.

2. Select **DocuShare,** and then select **STOP** the service.

3. In the **Control Panel**, select and open the **Add/Remove** application.

4. Scroll and select **DocuShare**, click **Remove**, and then follow the onscreen instructions.

5. After Add/Remove uninstalls DocuShare, manually delete the directory where DocuShare was installed.

Uninstall SQL Server Express database

The uninstall Wizard does not remove the installed SQL Server Express database. After you have uninstalled and removed all DocuShare files, follow this procedure to remove the SQL Server Express database files.

Note: Before you begin, refer to the Microsoft website for any updated uninstall instructions.

1. If you have not done so already, **back up all data in the database to a secure location**.

2. In the **Control Panel**, select and open the **Add/Remove** application.

3. Select **Microsoft SQL Server 2005**, then click **Remove**.

4. The Component Selection page appears; select **Remove SQL Server 2005 instance components**.

5. Select **Workstation Components**.

6. The Confirmation page appears, listing the components to remove.

7. Click **Finish** to complete the SQL Server Express uninstall.

8. Then the process has completed, you must now remove the SQL Native Client.

9. In the **Control Panel**, select and open the **Add/Remove** application.

10. Select **Microsoft SQL Native Client**, then click **Remove**.

11. A window appears asking you to confirm the removal of the SQL Native Client, click **Yes**.

    The SQL Server Express software and Native Client are removed from your drive.

Upgrade DocuShare

A DocuShare upgrade utility is included with the software install Wizard. The utility can take sites as low as v5.0.3 and upgrade them to the current version of DocuShare.

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **DocuShareInstallLog.txt** in the C:..\Temp directory of your server. After the installer creates the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory where it stores the remaining installation data. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: ***docushare.exe -P docushareLog.cleanUp=false***

Before you start the upgrade procedure

❑ A day prior to upgrading the site, inform users that the site will be down

   1. Go to **Site Management I Site Operations**.

   2. In the **Admin Message** field, enter a message telling users when the site will be unavailable and for how long; then select **Yes** in the **Show Admin Message** field.

   3. Click **Apply**.

❑ Review the information required for DocuShare software installation presented in Chapter 1. Record all of your current configuration settings so you can enter them in the upgrade Wizard windows.

❑ From the Administration menu, click **Site Management | License.** On the **License** page, locate and write down the **Host ID** number of the server.

❑ Stop all automated or programmatically generated activities; especially those that use the Content Intake Manager, Content Rules, or Scan to DocuShare services.

❑ Close site access

   1. Log into the DocuShare site as *admin*.

   2. Go to **Site Management I Access Policies**.

   3. Set the **Site Access Authority** to Administrator, then click **Apply**.

   4. Go to **Site Management I Site Operations**.

   5. In the **Admin Message** field, enter a message telling users that the site is going down in ten minutes, select **Yes** in the **Show Admin Message** field, then click **Apply**.

   6. After ten minutes, enter the message *DocuShare is currently in read-only mode* in the **Admin Message** field.

   7. In the **System Mode** field, select **Read Only**.

   8. In the **Show Admin Message** field select **Yes**.

   9. Click **Apply**.

❑ Backup the IDOL database

   1. Make sure the target directory exists and is empty before starting backup. The target directory is represented as <exportdir> in the command.

   2. Run the command **idoltool.bat -s export <exportdir>**.

❑ Backup the site database

1. In your database server manager, stop the database.

2. Perform a system backup of your DocuShare site.

3. When the backup is finished, start the database.

    The database must be running for the DocuShare Installer to upgrade the database schema.

4. If you are using a Microsoft SQL Server database, run **exec sp_fulltext_database enable** on the server to enable full text search.

❑ Clear the event queue

1. Go to **Site Management I Site Operations**.

2. In the **System Mode** field, select **Read Write** and select **No** in the **Show Admin Message** field; then click **Apply**.

3. Go to **Services and Components | Subscription**.

4. Set the **Weekly Notification Day** to the current day of the week, and set the **Weekly Notification Hour** and **Weekly Notification Minute** to five minutes from the current time; then click **Apply**.

5. Wait ten minutes before proceeding with the upgrade.

    This allows the DocuShare notification service to send all subscribed notifications and clear the event queue. Failure to clear the event queue before starting the upgrade results in the lost of all events waiting in the queue.

❑ Stop DocuShare

1. Log into the server as a Windows server administrator.

2. In the Administrator Tool, select and open the Services application, select **DocuShare** and **stop** the service.

    Close all Windows applications that are currently open on the server.

Start the upgrade

1. Launch the DocuShare software install Wizard by doing one of the following:

    •   **If you are installing from a product media:** Insert the DocuShare media into the server drive. If the installer does not open automatically, open the media, locate and double-click **setup.bat**.

    •   **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server and unzip the file. Open the file, locate and double-click **docushare.exe**.

    *Note: If you want the installer to save all configuration and upgrade data, start the upgrade in a command prompt window by entering the command line: **docushare.exe -P docushareLog.cleanUp=false**.*

2. When the Upgrade Option window appears, select **Upgrade**.

    Be patient; it takes several minutes for the system to load and start the installer.

3. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

Finish the upgrade

1. When the upgrade successfully completes, click **Finish** to close the installer.

2. Reboot the server.

3. After the server restarts, if you did not set DocuShare to run as an autostart service, do **one** of the following:

   • Enter **<DSHome>\bin\start_docushare** in a command prompt window to start DocuShare.

   • In the Administrative Tool, in the Services application, select and **start** the DocuShare service.

4. If your DocuShare site uses LDAP over a secure SSL channel, you need to import the SSL certificate into the newly installed **dstrust store**. Instructions for importing the LDAP SSL Certificate are in the *LDAP Active Directory Guide* that is located on the Help page of your DocuShare site.

5. The DocuShare Installer stops the IIS service during the upgrade and restarts it at completion. If the installer does not restart the IIS service, open a command prompt window and enter: **net start w3svc**.

License the site

1. Use a browser to connect to your newly upgraded site and login as *admin*.

2. From the Administration menu, click **Site Management | License.**

3. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

4. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

5. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field. Do not use your old site license nor a trial license.

Post upgrade tasks

1. Reset user levels for all user accounts on your site. If you upgraded from DocuShare 5.x, all user accounts are now set to the CPX level. You must now activate and set each account to either Read-Only or DocuShare user levels as appropriate.

   Refer to the *DocuShare Administrator Guide* for information on user levels and changing user levels through **Account Management I Users I Change User Level**.

2. Run database optimization as defined in the *DocuShare Administrator Guide* database optimization procedures.

3. To access customized VDF and image files, the upgrade installer relocates these files to <DSHome>\DSUpgrade\BackUpDir.0\amber.jar and <DSHome>\DSUpgrade\BackUpDir.0\root.jar.

   Note: VDF files customized to work with DocuShare 5.x or older are not upgraded by the installer and do not work with this release of DocuShare. Refer to the DocuShare VDF Reference Guide to migrate your custom VDFs to the current DocuShare release.

4. If you changed the Subscription Notification settings to clear the event queue, go to the **Services and Components | Subscription** administration page and return the **Weekly Notification Day**, **Hour**, and **Minute** to their values prior to the upgrade.

5. Go to **Site Management I Access Policies**.

6. Return the **Site Access Authority** to the pre-upgrade setting, then click **Apply**.

Index the site

After completing DocuShare upgrade and licensing, index the site and verify that index is working correctly.

*Note: If you are upgrading from version **6.5.3**, some of the steps below are not required. The steps not required are indicated.*

1. Stop DocuShare.

2. In a command window, run <DSHome>\bin**idoltool -s resetserver all y**. (**Not required for upgrades from 6.5.3**.)

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Caution: The idoltool -s resetserver all y command clears the IDOL search indexes. Run this immediately before running dsindex index_all.

3. *Optional*: To increase the allocation of available memory for IDOL on 64-bit Windows, run the appropriate **idolsetup.bat** command according to the amount of RAM on the server.

   • 4–8 GB RAM: <DSHome>\bin**idolsetup.bat ..\config\idol_default.config**

   • 8–16 GB RAM: <DSHome>\bin**idolsetup.bat ..\config\idol_medium.config**

   • 16–32 GB RAM: <DSHome>\bin**idolsetup.bat ..\config\idol_large.config**

   • 32+ GB RAM: <DSHome>\bin**idolsetup.bat ..\config\idol_unlimited.config**

   Note: At least 6 GB of RAM is recommended on a 64-bit Windows server.

4. Start DocuShare.

5. Run <DSHome>\bin**dsindex index_all**. (**Not required for upgrades from 6.5.3**.)

6. Review the **recoverIndex.log** file written to <DSHome>\logs directory. The file lists the handles of the documents that could not be content indexed. (**Not required for upgrades from 6.5.3**.)

7. Run <DSHome>\bin**verifyIndex.bat** to verify that the documents in the repository have been indexed. (**Not required for upgrades from 6.5.3**.)

8. If DocuShare was configured for LDAP, continue with the following steps. If your site does not use LDAP, you are finished with this procedure.

9. If DocuShare was configured for LDAP; start DocuShare, log into DocuShare as admin and go to Admin Home.

10. From the Administration menu, click **Account Management | LDAP Accounts | Bind Group**.

    Note: These last two steps invoke a schema update to replace incorrect schema information with up-to-date attribute values from the LDAP server.

11. On the Bind Group page, set the **Keywords LDAP Attribute** to **cn**. Click **Apply**.

12. On the same Bind Group page, remove the **Keywords LDAP Attribute** entry. Click **Apply**.

Update DocuShare software or add a language

Patches, updates, and additional languages for DocuShare software are available, and are easily installed using the DocuShare install Wizard.

❑ Before you install software updates or language packs, make sure the selected update is compatible with your version of DocuShare. Go to **About DocuShare**, on your site home page or in the Administration Menu, to locate your version number.

❑ If you are installing a language, go to **Site Management | License**. If the language is not listed under **Active Language**, you must obtain a new license string to use the new language.

❑ If documentation is supplied with an update, read the documentation before starting the installation.

Install a software update or a language

1. Log into the DocuShare server as a Windows administrator.

2. In the Windows Administrator Tool, select and open the Services application, select **DocuShare** and **stop** the service.

3. Launch the DocuShare software update Wizard by doing one of the following:

    • **If you are installing from a product media:** Insert the DocuShare media into the server drive. If the installer does not open automatically, open the media, locate and double-click **dsUpdate.exe**.

    • **If you downloaded software from the web:** Download the file to a temporary directory on your server and unzip the file. Open the file, locate and double-click **dsUpdate.exe**.

    Be patient; it takes a few minutes to load and start the installer.

4. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.

5. When asked to select an update, check the appropriate **update** or **language** and browse to the location of the corresponding update **jar** file, and then click **Add Update**.

6. When the installation successfully completes, click **Finish** to close the installer.

7. In the Windows Administrator Tool, select and open the Services application, select **DocuShare** and **start** the service.

8. Use a browser to connect to your site, and log in as an administrator.

9. If your specific update requires a new license (as in the case of adding a language) go to **Site Management | License.**

10. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

11. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

12. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

13. If your specific update was a language installation, refer to the *Administrator Guide* for information on enabling and selecting default languages for your site.

DocuShare on a Solaris platform   3

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **DocuShareInstallLog.txt** in the **/var/tmp** directory of your server. After the installer has created the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory; where it stores the remaining installation information. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: *./docushare -P docushareLog.cleanUp=false*.

Install DocuShare

Before you begin

1. Review Chapter 1 of this guide to make sure your server meets the minimum requirements for DocuShare installation and that you have gathered the information required by the install Wizard.

2. If you have chosen not to install the DocuShare supplied web server, make sure you have installed and configured the web server of your choice, and that web server is running before you begin DocuShare installation.

3. If you have chosen not to install the DocuShare supplied database, make sure you have installed and configured the database of your choice, and that database is running before you begin DocuShare installation.

4. For an easier installation, we recommend that you install DocuShare on a clean server; one with newly installed operating system software.

5. If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances. Failure to do so can later result in indexing problems and in situations where stopping one instance of DocuShare stops all instances.

Start the installation

⚠️

Caution: If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances.

1. Log into the server as a UNIX server administrator (root).

2. Launch the DocuShare software install Wizard by doing one of the following:

• **If you are installing from a product media:** Insert the DocuShare media into the server drive. If necessary, mount the media as root. Open the media. In the root directory, locate and double-click **docushare**.

• **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server and extract the **tar** file. Then, in a command prompt window go to **<DSHome>/<Solaris>/ DocuShare** and enter **docushare**.

   Be patient; it takes several minutes before the system displays the first install Wizard screen.

3. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

4. Click **Next** to advance the installation or click **Back** to return to a previous page to make a change.

   Before the installer loads DocuShare, the Wizard allows you to make changes to your choices. After installation, the administrator of the site has the authority to change most of the information that was provided during installation; using either the Admin UI or a command prompt window.

5. In the database configuration window, select a database option then click **Next** and enter the configuration information for your database.

   If you selected PostgreSQL, enter the Database User Password and select **Create Database**.

6. In the Web Server Interaction window, select **Tomcat only**.

7. In the UNIX Account Parameters window, enter the appropriate information.

   The default is **nobody**, which allows any user with an UNIX account to login and start DocuShare.

   If you installed scan to DocuShare, you must be logged in as root to start DocuShare and to enable the scan feature. For non-root users to enable the scan to DocuShare feature, the FTP server default port (port 21) must be changed to another port that is above port 1024 (ftpd.conf) and the Xerox Work Centres used for scanning must be able to specify this port.

Finish the installation

1. When the installation successfully completes, click **Finish** to close the installer.

2. Remove the product media from the server drive.

3. Set your UNIX virtual display buffer to operate within an X Windows system.

   DocuShare operates in an X Windows environment; set the display buffer to use all of the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.

4. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

   At initial startup, DocuShare automatically updates the search indexes. Wait five minutes before you access the site with a browser.

> **Note:** *To prevent the Search Service from stopping when you exit the shell, use either the* ***start_docushare.sh bg*** *or the* ***start_docushare.sh bg &*** *command to start DocuShare in background mode.*

5. If you installed **Scan-to-DocuShare via FTP**, disable the UNIX FTP service on your UNIX system.

> **Note:** *If Scan-via-FTP is installed, you must be root to start DocuShare to enable the scan feature. To enable the Scan-via-FTP feature by non-root users, the FTP server default port (port 21) must be modified to another port above port 1024 (ftpd.conf) and the Xerox Work Centres must be able to specify this port.*

   a. Log into the server as a UNIX server administrator (root).

   b. From the Start menu, select **Service Configuration**.

   c. In the Service Configuration window, de-select **wu-ftpd**.

License the site

1. Use a browser to connect to your newly installed site.

   • The default URL is http://<fully qualified DNS name>:8080/docushare.

   • If DocuShare was installed in the home directory on your web site, the URL is: http://<fully qualified DNS name>:<port>/

   • If DocuShare was installed in a subdirectory on your web site, the URL is: http://<fully qualified DNS name>:<port>/<subdirectory_path>/

   • If you installed Apache on your server, then the :<port> component of the URL is not used. For example: http://<fully qualified DNS name>/docushare

   • If you installed only Tomcat on your server, then the :<port> component of the URL is 8080 (default).

2. Use the admin password you set during installation and log into the site as *admin*.

3. On the navigation bar, click **Admin Home**.

4. From the Administration menu, click **Site Management | License.**

5. On the **License** page, locate and write down the **Host ID** exactly as displayed.

6. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

7. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

8. Refer to the *Administrator Guide* for information on post-installation site configuration, such as setting up your site to use SSL.

Uninstall DocuShare

Uninstall does not remove the DocuShare directory that includes your DocuShare repository content. To be safe, before uninstalling DocuShare move the repository content to another storage media by using the DocuShare command line utility, **dsexport**. Refer to the *DocuShare Command Line Utilities Guide* for details.

Uninstall removes all installed language packs.

⚠️

Caution: The DocuShare uninstaller only removes DocuShare, not the installed database. You should backup data for all Solaris applications sharing the database.

To uninstall DocuShare:

1. Log into the server as a UNIX server administrator (root).

2. Stop the DocuShare server by doing the following:

    a. Open a command prompt window
    b. Change the directory to **<DSHome>/bin**
    c. Enter **./stop_docushare.sh**

3. Change the directory to **<DSHome>/_uninst**.

4. Enter **./doc_uninstall**, then follow the onscreen instructions.

5. After doc_uninstall uninstalls DocuShare, manually delete the directory where DocuShare was installed.

Upgrade DocuShare

A DocuShare upgrade utility is included with the software install Wizard. The utility can take sites as low as v5.0.3 and upgrade them to the current version of DocuShare.

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **DocuShareInstallLog.txt** in the **/var/tmp** directory of your server. After the installer has created the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory where it stores the remaining installation information. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: *./docushare -P docushareLog.cleanUp=false*.

Before you start the upgrade procedure

❑ A day prior to upgrading the site, inform users that the site will be down

   1. Go to **Site Management I Site Operations**.

   2. In the **Admin Message** field, enter a message telling users when the site will be unavailable and for how long; then select **Yes** in the **Show Admin Message** field.

   3. Click **Apply**.

❑ Review the information required for DocuShare software installation presented in Chapter 1. Record all of your current configuration settings so you can enter them in the upgrade Wizard windows.

❑ From the Administration menu, click **Site Management | License.** On the **License** page, locate and write down the **Host ID** number of the server.

❑ Stop all automated or programmatically generated activities; especially those that use the Content Intake Manager, Content Rules, or Scan to DocuShare services.

❑ Close site access

   1. Log into the DocuShare site as *admin*.

   2. Go to **Site Management I Access Policies**.

   3. Set the **Site Access Authority** to Administrator, then click **Apply**.

   4. Go to **Site Management I Site Operations**.

   5. In the **Admin Message** field, enter a message telling users that the site is going down in ten minutes, select **Yes** in the **Show Admin Message** field, then click **Apply**.

   6. After ten minutes, enter the message *DocuShare is currently in read-only mode* in the **Admin Message** field.

   7. In the **System Mode** field, select **Read Only**.

   8. In the **Show Admin Message** field select **Yes**.

   9. Click **Apply**.

❑ Backup the IDOL database

   1. Make sure the target directory exists and is empty before starting backup. The target directory is represented as <exportdir> in the command.

   2. Run the command **idoltool.sh -s export <exportdir>**.

❑ Backup the site database

1. In your database server manager, stop the database.

2. Perform a system backup of your DocuShare site.

3. When the backup is finished, start the database.

   The database must be running for the DocuShare Installer to upgrade the database schema.

4. If you are using a Microsoft SQL Server database, run **exec sp_fulltext_database enable** on the server to enable full text search.

❑ Clear the event queue

1. Go to **Site Management I Site Operations**.

2. In the **System Mode** field, select **Read Write** and select **No** in the **Show Admin Message** field; then click **Apply**.

3. Go to **Services and Components | Subscription**.

4. Set the **Weekly Notification Day** to the current day of the week, and set the **Weekly Notification Hour** and **Weekly Notification Minute** to five minutes from the current time; then click **Apply**.

5. Wait ten minutes before proceeding with the upgrade.

   This allows the DocuShare notification service to send all subscribed notifications and clear the event queue. Failure to clear the event queue before starting the upgrade results in the lost of all events waiting in the queue.

❑ Stop DocuShare

1. Log into the server as a UNIX server administrator (root).

2. In a command prompt window, cd to **<DSHome>/bin** and enter **./dsservice.sh -shutdown DocuShare** to stop the server.

Start the upgrade

To have DocuShare save all configuration and upgrade data, start the upgrade in a Command Prompt window by entering the command line: **docushare.exe -P docushareLog.cleanUp=false**

1. Log into the server as a UNIX server administrator (root).

2. Launch the DocuShare software install Wizard by doing one of the following:

   • **If you are installing from a product media:** Insert the DocuShare media into the server drive. If necessary, mount the media as root. Open the media. In the root directory, locate and double-click **docushare**.

   • **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server and extract the **tar** file. Then, in a command prompt window go to **<DSHome>/ <Solaris>/DocuShare** and enter **docushare**.

3. When the Upgrade Option window appears, select **Upgrade**.

   Be patient; it takes several minutes for the system to load and start the installer.

4. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

5. If the Wizard detects that your current IDOL server is 32 bit, it will upgrade IDOL to the 64 bit version and prompt you to reindex the site after upgrading completes. Follow the *Index the site* procedure that is presented later in these upgrade instructions.

   If the Wizard detects that your current IDOL server is 64 bit, it will silently upgrade IDOL to the latest 64 bit version, and you can skip the *Index the site* procedure.

Finish the upgrade

1. When the upgrade successfully completes, click **Finish** to close the installer.

2. Remove the product media from the server drive.

3. Set your UNIX virtual display buffer to operate within an X Windows system.

   DocuShare operates in an X Windows environment; set the display buffer to use all of the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.

4. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

   At initial startup, DocuShare automatically updates the search indexes. Wait five minutes before you access the site with a browser.

   Note: *To prevent the Search Service from stopping when you exit the shell, use either the **start_docushare.sh bg** or the **start_docushare.sh bg &** command to start DocuShare in background mode.*

5. If you installed **Scan-to-DocuShare via FTP**, disable the UNIX FTP service on your UNIX system.

   Note: *If Scan-via-FTP is installed, you must be root to start DocuShare to enable the scan feature. To enable the Scan-via-FTP feature by non-root users, the FTP server default port (port 21) must be modified to another port above port 1024 (ftpd.conf) and the Xerox Work Centres must be able to specify this port.*

   a. Log into the server as a UNIX server administrator (root).
   b. From the Start menu, select **Service Configuration**.
   c. In the Service Configuration window, de-select **wu-ftpd**.

6. If your DocuShare site uses LDAP over a secure SSL channel, you need to import the SSL certificate into the newly installed **dsstrust store**. Instructions for importing the LDAP SSL Certificate are in the *LDAP Active Directory Guide* that is located on the Help page of your DocuShare server.

License the site

1. Use a browser to connect to your newly upgraded site and login as *admin*.

2. From the Administration menu, click **Site Management | License.**

3. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

4. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

5. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field. Do not use your old site license nor a trial license.

Post upgrade tasks

1. Reset user levels for all user accounts on your site. If you upgraded from DocuShare 5.x, all user accounts are now set to the CPX level. You must now activate and set each account to either Read-Only or DocuShare user levels as appropriate.

   Refer to the *DocuShare Administrator Guide* for information on user levels and changing user levels through **Account Management I Users I Change User Level**.

2. Run database optimization as defined in the *DocuShare Administrator Guide* database optimization procedures.

3. To access customized VDF and image files, the upgrade installer relocates these files to <DSHome>\DSUpgrade\BackUpDir.0\amber.jar and <DSHome>\DSUpgrade\BackUpDir.0\root.jar.

   Note: VDF files customized to work with DocuShare 5.x or older are not upgraded by the installer and do not work with this release of DocuShare. Refer to the DocuShare VDF Reference Guide to migrate your custom VDFs to the current DocuShare release.

4. If you changed the Subscription Notification settings to clear the event queue, go to the **Services and Components | Subscription** administration page and return the **Weekly Notification Day**, **Hour**, and **Minute** to their values prior to the upgrade.

5. Go to **Site Management I Access Policies**.

6. Return the **Site Access Authority** to the pre-upgrade setting, then click **Apply**.

Index the site

Note: If the Wizard detects that your current IDOL server is 32 bit, it will upgrade IDOL to the 64 bit version and prompt you to reindex the site after upgrading completes.
If the Wizard detects that your current IDOL server is 64 bit, it will silently upgrade IDOL to the latest 64 bit version, and you can skip this procedure.

After completing DocuShare upgrade and licensing, index the site and verify that index is working correctly.

Note: If you are upgrading from version **6.5.3**, *some of the steps below are not required. The steps not required are indicated.*

1. Stop DocuShare.

2. In a command window, run <DSHome>\bin**idoltool -s resetserver all y**. (**Not required for upgrades from 6.5.3**.)

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Caution: The idoltool -s resetserver all y command clears the IDOL search indexes. Run this immediately before running dsindex index_all.

3. *Optional*: To increase the allocation of available memory for IDOL on 64-bit Solaris, run the appropriate **idolsetup.sh** command according to the amount of RAM on the server.

   • 4–8 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_default.config**

   • 8–16 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_medium.config**

   • 16–32 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_large.config**

   • 32+ GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_unlimited.config**

4. Start DocuShare.

5. Run <DSHome>\bin**dsindex index_all**. (**Not required for upgrades from 6.5.3**.)

6. Review the **recoverIndex.log** file written to <DSHome>\logs directory. The file lists the handles of the documents that could not be content indexed. (**Not required for upgrades from 6.5.3**.)

7. Run <DSHome>\bin**verifyIndex.sh** to verify that the documents in the repository have been indexed. (**Not required for upgrades from 6.5.3**.)

8. If DocuShare was configured for LDAP, continue with the following steps. If your site does not use LDAP, you are finished with this procedure.

9. If DocuShare was configured for LDAP; start DocuShare, log into DocuShare as admin and go to Admin Home.

10. From the Administration menu, click **Account Management | LDAP Accounts | Bind Group**.

    Note: These last two steps invoke a schema update to replace incorrect schema information with up-to-date attribute values from the LDAP server.

11. On the Bind Group page, set the **Keywords LDAP Attribute** to **cn**. Click **Apply**.

12. On the same Bind Group page, remove the **Keywords LDAP Attribute** entry. Click **Apply**.

Update DocuShare software or add a language

Patches, updates, and additional languages for DocuShare software are available, and are easily installed using the DocuShare install Wizard.

❑ Before you install software updates or additional languages, make sure the selected update is compatible with your version of DocuShare. Go to **About DocuShare**, on your site home page or in the Administration Menu, to locate your version number.

❑ If you are installing a language, go to **Site Management | License**. If the language is not listed under **Active Language**, you must obtain a new license string to use the new language.

❑ If documentation is supplied with an update, read the documentation before starting the installation.

Install a software update or a language

1. Log into the server as a UNIX server administrator (root).

2. In a command prompt window, cd to **<DSHome>/bin** and enter **./dsservice.sh -shutdown DocuShare** to stop the server.

3. If you are downloading software updates or a language package from the web, download the software to a temporary directory on your DocuShare server and unzip and extract the package.

   If you are installing the update software or a language package from a CD, insert the CD into the server CD drive. If necessary, mount the CD as root.

4. In the software directory, open the Solaris directory.

5. In the Solaris directory, open the DocuShare directory and double-click **dsUpdate** to start the update installation Wizard. If you work from a command prompt window, cd to the DocuShare directory and run **./dsUpdate -console** to start the installation.

   Be patient; it takes a few minutes to load and start the installer.

6. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.

7. When asked to select an update, check the appropriate **update** or **language**, and then click **Add Update**.

8. When the installation successfully completes, click **Finish** to close the installer.

9. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

10. Use a browser to connect to your site, and log in as an administrator.

11. If your specific update requires a new license (as in the case of adding a language) go to **Site Management | License.**

12. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

13. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

14. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

15. If your specific update was a language installation, refer to the *Administrator Guide* for information on enabling and selecting default languages for your site.

DocuShare on a Linux platform 4

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **DocuShareInstallLog.txt** in the **/tmp** directory of your server. After the installer has created the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory; where it stores the remaining installation information. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: *./docushare -P docushareLog.cleanUp=false*.

Install DocuShare

Before you begin

1. Inspect your operating system for, and install if missing, the following Linux software libraries:

    • Compat-gcc-34-c++-3.4.6-4

    • Compat-libgcc-296-2.96-138

    • Compat-gcc-34-3.4.6-4

2. Review Chapter 1 of this guide to make sure your server meets the minimum requirements for DocuShare installation and that you have gathered the information required by the install Wizard.

3. If you have chosen not to install the DocuShare supplied web server, make sure you have installed and configured the web server of your choice, and that web server is running before you begin DocuShare installation.

4. If you have chosen not to install the DocuShare supplied database, make sure you have installed and configured the database of your choice, and that database is running before you begin DocuShare installation.

5. For an easier installation, we recommend that you install DocuShare on a clean server; one with newly installed operating system software.

6. If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances. Failure to do so can later result in indexing problems and in situations where stopping one instance of DocuShare stops all instances.

Start the installation

⚠️

Caution: If you have other instances of DocuShare running on the same server, make sure those instances are running before installing additional instances.

1. Log into the server as a UNIX server administrator (root).

2. Launch the DocuShare software install Wizard by doing one of the following:

    • **If you are installing from a product media:** Insert the DocuShare media into the server drive. If necessary, mount the media as root. Open the media. In the root directory, locate and double-click **docushare**.

    • **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server, then unzip and extract the **tar** file. Then, in a command prompt window go to **<DSHome>/<Linux>/DocuShare** and enter **docushare**.

    Be patient; it takes several minutes before the system displays the first install Wizard screen.

3. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

4. Click **Next** to advance the installation or click **Back** to return to a previous page to make a change.

    Before the installer loads DocuShare, the Wizard allows you to make changes to your choices. After installation, the administrator of the site has the authority to change most of the information that was provided during installation; using either the Admin UI or a command prompt window.

5. In the database configuration window, select a database option then click **Next** and enter the configuration information for your database.

    If you selected PostgreSQL, enter the Database User Password and select **Create Database**.

6. In the Web Server Interaction window, select **Tomcat only**.

7. In the UNIX Account Parameters window, enter the appropriate information.

    The default is **nobody**, which allows any user with an UNIX account to login and start DocuShare.

    If you installed scan to DocuShare, you must be logged in as root to start DocuShare and to enable the scan feature. For non-root users to enable the scan to DocuShare feature, the FTP server default port (port 21) must be changed to another port that is above port 1024 (ftpd.conf) and the Xerox Work Centres used for scanning must be able to specify this port.

Finish the installation

1. When the installation successfully completes, click **Finish** to close the installer.

2. Remove the product media from the server drive.

3. Set your UNIX virtual display buffer to operate within an X Windows system.

    DocuShare operates in an X Windows environment; set the display buffer to use all of the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.

4. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

    At initial startup, DocuShare automatically updates the search indexes. Wait five minutes before you access the site with a browser.

> **Note:** *To prevent the Search Service from stopping when you exit the shell, use either the* **start_docushare.sh bg** *or the* **start_docushare.sh bg &** *command to start DocuShare in background mode.*

5. If you installed **Scan-to-DocuShare via FTP**, disable the UNIX FTP service on your UNIX system.

> **Note:** *If Scan-via-FTP is installed, you must be root to start DocuShare to enable the scan feature. To enable the Scan-via-FTP feature by non-root users, the FTP server default port (port 21) must be modified to another port above port 1024 (ftpd.conf) and the Xerox Work Centres must be able to specify this port.*

    a. Log into the server as a UNIX server administrator (root).

    b. From the Start menu, select **Service Configuration**.

    c. In the Service Configuration window, de-select **wu-ftpd**.

License the site

1. Use a browser to connect to your newly installed site.

   - The default URL is http://<fully qualified DNS name>:8080/docushare.

   - If DocuShare was installed in the home directory on your web site, the URL is:
     http://<fully qualified DNS name>:<port>/

   - If DocuShare was installed in a subdirectory on your web site, the URL is:
     http://<fully qualified DNS name>:<port>/<subdirectory_path>/

   - If you installed Apache on your server, then the :<port> component of the URL is not used. For example: http://<fully qualified DNS name>/docushare

   - If you installed only Tomcat on your server, then the :<port> component of the URL is 8080 (default).

2. Use the admin password you set during installation and log into the site as *admin*.

3. On the navigation bar, click **Admin Home**.

4. From the Administration menu, click **Site Management | License.**

5. On the **License** page, locate and write down the **Host ID** exactly as displayed.

6. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

7. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

8. Refer to the *Administrator Guide* for information on post-installation site configuration, such as setting up your site to use SSL.

Uninstall DocuShare

Uninstall does not remove the DocuShare directory that includes your DocuShare repository content. To be safe, before uninstalling DocuShare move the repository content to another storage media by using the DocuShare command line utility, **dsexport**. Refer to the *DocuShare Command Line Utilities Guide* for details.

Uninstall removes all installed language packs.

⚠️

Caution: The DocuShare uninstaller only removes DocuShare, not the installed database. You should backup data for all Linux applications sharing the database.

To uninstall DocuShare:

1. Log into the server as a UNIX server administrator (root).

2. Stop the DocuShare server by doing the following:

    a. Open a command prompt window
    b. Change the directory to **<DSHome>/bin**
    c. Enter **./stop_docushare.sh**

3. Change the directory to **<DSHome>/_uninst**.

4. Enter **./doc_uninstall**, then follow the onscreen instructions.

5. After doc_uninstall uninstalls DocuShare, manually delete the directory where DocuShare was installed.

Upgrade DocuShare

A DocuShare upgrade utility is included with the software install Wizard. The utility can take sites as low as v5.0.3 and upgrade them to the current version of DocuShare.

Installation logs

The DocuShare installer records all **initial** installation activity and stores it in **DocuShareInstallLog.txt** in the **/tmp** directory of your server. After the installer has created the DocuShare directory, it creates a second **DocuShareInstallLog.txt** file in the home directory where it stores the remaining installation information. To save the initial DocuShareInstallLog file, start the installation process in a command prompt window by entering the command: **./docushare -P docushareLog.cleanUp=false**.

Before you start the upgrade procedure

❑ A day prior to upgrading the site, inform users that the site will be down

  1. Go to **Site Management I Site Operations**.

  2. In the **Admin Message** field, enter a message telling users when the site will be unavailable and for how long; then select **Yes** in the **Show Admin Message** field.

  3. Click **Apply**.

❑ Review the information required for DocuShare software installation presented in Chapter 1. Record all of your current configuration settings so you can enter them in the upgrade Wizard windows.

❑ From the Administration menu, click **Site Management | License.** On the **License** page, locate and write down the **Host ID** number of the server.

❑ Stop all automated or programmatically generated activities; especially those that use the Content Intake Manager, Content Rules, or Scan to DocuShare services.

❑ Close site access

  1. Log into the DocuShare site as *admin*.

  2. Go to **Site Management I Access Policies**.

  3. Set the **Site Access Authority** to Administrator, then click **Apply**.

  4. Go to **Site Management I Site Operations**.

  5. In the **Admin Message** field, enter a message telling users that the site is going down in ten minutes, select **Yes** in the **Show Admin Message** field, then click **Apply**.

  6. After ten minutes, enter the message *DocuShare is currently in read-only mode* in the **Admin Message** field.

  7. In the **System Mode** field, select **Read Only**.

  8. In the **Show Admin Message** field select **Yes**.

  9. Click **Apply**.

❑ Backup the IDOL database

  1. Make sure the target directory exists and is empty before starting backup. The target directory is represented as <exportdir> in the command.

  2. Run the command **idoltool.sh -s export <exportdir>**.

❑ Backup the site database

1. In your database server manager, stop the database.

2. Perform a system backup of your DocuShare site.

3. When the backup is finished, start the database.

    The database must be running for the DocuShare Installer to upgrade the database schema.

4. If you are using a Microsoft SQL Server database, run **exec sp_fulltext_database enable** on the server to enable full text search.

❑ Clear the event queue

1. Go to **Site Management I Site Operations**.

2. In the **System Mode** field, select **Read Write** and select **No** in the **Show Admin Message** field; then click **Apply**.

3. Go to **Services and Components | Subscription**.

4. Set the **Weekly Notification Day** to the current day of the week, and set the **Weekly Notification Hour** and **Weekly Notification Minute** to five minutes from the current time; then click **Apply**.

5. Wait ten minutes before proceeding with the upgrade.

    This allows the DocuShare notification service to send all subscribed notifications and clear the event queue. Failure to clear the event queue before starting the upgrade results in the lost of all events waiting in the queue.

❑ Stop DocuShare

1. Log into the server as a UNIX server administrator (root).

2. In a command prompt window, cd to **<DSHome>/bin** and enter **./dsservice.sh -shutdown DocuShare** to stop the server.

Start the upgrade

To have DocuShare save all configuration and upgrade data, start the upgrade in a Command Prompt window by entering the command line: **docushare -P docushareLog.cleanUp=false**

1. Log into the server as a UNIX server administrator (root).

2. Launch the DocuShare software install Wizard by doing one of the following:

•   **If you are installing from a product media:** Insert the DocuShare media into the server drive. If necessary, mount the media as root. Open the media. In the root directory, locate and double-click **docushare**.

•   **If you downloaded DocuShare from the web:** Download the file to a temporary directory on your server, then unzip and extract the **tar** file. Then, in a command prompt window go to **<DSHome>/ <Linux>/DocuShare** and enter **docushare**.

3. When the Upgrade Option window appears, select **Upgrade**.

    Be patient; it takes several minutes for the system to load and start the installer.

4. Follow the onscreen instructions; accept the defaults or enter your own configuration information.

Finish the upgrade

1. When the upgrade successfully completes, click **Finish** to close the installer.

2. Remove the product media from the server drive.

3. Set your UNIX virtual display buffer to operate within an X Windows system.

   DocuShare operates in an X Windows environment; set the display buffer to use all of the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.

4. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

   At initial startup, DocuShare automatically updates the search indexes. Wait five minutes before you access the site with a browser.

   Note: To prevent the Search Service from stopping when you exit the shell, use either the ***start_docushare.sh bg*** or the ***start_docushare.sh bg &*** command to start DocuShare in background mode.

5. If you installed **Scan-to-DocuShare via FTP**, disable the UNIX FTP service on your UNIX system.

   Note: If Scan-via-FTP is installed, you must be root to start DocuShare to enable the scan feature. To enable the Scan-via-FTP feature by non-root users, the FTP server default port (port 21) must be modified to another port above port 1024 (ftpd.conf) and the Xerox Work Centres must be able to specify this port.

   a. Log into the server as a UNIX server administrator (root).
   b. From the Start menu, select **Service Configuration**.
   c. In the Service Configuration window, de-select **wu-ftpd**.

6. If your DocuShare site uses LDAP over a secure SSL channel, you need to import the SSL certificate into the newly installed **dsstrust store**. Instructions for importing the LDAP SSL Certificate are in the *LDAP Active Directory Guide* that is located on the Help page of your DocuShare server.

License the site

1. Use a browser to connect to your newly installed site and login as *admin*.

2. From the Administration menu, click **Site Management | License.**

3. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

4. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

5. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field. Do not use your old site license nor a trial license.

Post upgrade tasks

1. Reset user levels for all user accounts on your site. If you upgraded from DocuShare 5.x, all user accounts are now set to the CPX level. You must now activate and set each account to either Read-Only or DocuShare user levels as appropriate.

   Refer to the *DocuShare Administrator Guide* for information on user levels and changing user levels through **Account Management I Users I Change User Level**.

2. Run database optimization as defined in the *DocuShare Administrator Guide* database optimization procedures.

3. To access customized VDF and image files, the upgrade installer relocates these files to <DSHome>\DSUpgrade\BackUpDir.0\amber.jar and <DSHome>\DSUpgrade\BackUpDir.0\root.jar.

Note: VDF files customized to work with DocuShare 5.x or older are not upgraded by the installer and do not work with this release of DocuShare. Refer to the DocuShare VDF Reference Guide to migrate your custom VDFs to the current DocuShare release.

4. If you changed the Subscription Notification settings to clear the event queue, go to the **Services and Components | Subscription** administration page and return the **Weekly Notification Day**, **Hour**, and **Minute** to their values prior to the upgrade.

5. Go to **Site Management I Access Policies**.

6. Return the **Site Access Authority** to the pre-upgrade setting, then click **Apply**.

Index the site

After completing DocuShare upgrade and licensing, index the site and verify that index is working correctly.

*Note: If you are upgrading from version **6.5.3**, some of the steps below are not required. The steps not required are indicated.*

1. Stop DocuShare.

2. In a command window, run <DSHome>\bin**idoltool -s resetserver all y**. (**Not required for upgrades from 6.5.3**.)

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Caution: The idoltool -s resetserver all y command clears the IDOL search indexes. Run this immediately before running dsindex index_all.

3. *Optional*: To increase the allocation of available memory for IDOL on 64-bit Linux, run the appropriate **idolsetup.sh** command according to the amount of RAM on the server.

    • 4–8 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_default.config**

    • 8–16 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_medium.config**

    • 16–32 GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_large.config**

    • 32+ GB RAM: <DSHome>\bin**idolsetup.sh ..\config\idol_unlimited.config**

4. Start DocuShare.

5. Run <DSHome>\bin**dsindex index_all**. (**Not required for upgrades from 6.5.3**.)

6. Review the **recoverIndex.log** file written to <DSHome>\logs directory. The file lists the handles of the documents that could not be content indexed. (**Not required for upgrades from 6.5.3**.)

7. Run <DSHome>\bin**verifyIndex.sh** to verify that the documents in the repository have been indexed. (**Not required for upgrades from 6.5.3**.)

8. If DocuShare was configured for LDAP, continue with the following steps. If your site does not use LDAP, you are finished with this procedure.

9. If DocuShare was configured for LDAP; start DocuShare, log into DocuShare as admin and go to Admin Home.

10. From the Administration menu, click **Account Management | LDAP Accounts | Bind Group**.

    Note: These last two steps invoke a schema update to replace incorrect schema information with up-to-date attribute values from the LDAP server.

11. On the Bind Group page, set the **Keywords LDAP Attribute** to **cn**. Click **Apply**.

12. On the same Bind Group page, remove the **Keywords LDAP Attribute** entry. Click **Apply**.

Update DocuShare software or add a language

Patches, updates, and additional languages for DocuShare software are available, and are easily installed using the DocuShare install Wizard.

❑ Before you install software updates or additional languages, make sure the selected update is compatible with your version of DocuShare. Go to **About DocuShare**, on your site home page or in the Administration Menu, to locate your version number.

❑ If you are installing a language, go to **Site Management | License**. If the language is not listed under **Active Language**, you must obtain a new license string to use the new language.

❑ If documentation is supplied with an update, read the documentation before starting the installation.

Install a software update or a language

1. Log into the server as a UNIX server administrator (root).

2. In a command prompt window, cd to **<DSHome>/bin** and enter **./dsservice.sh -shutdown DocuShare** to stop the server.

3. If you are downloading software updates or a language package from the web, download the software to a temporary directory on your DocuShare server and unzip and extract the package.

   If you are installing the update software or a language package from a CD, insert the CD into the server CD drive. If necessary, mount the CD as root.

4. In the software directory, open the Linux directory.

5. In the Linux directory, open the DocuShare directory and double-click **dsUpdate** to start the update installation Wizard. If you work from a command prompt window, cd to the DocuShare directory and run **./dsUpdate -console** to start the installation.

   Be patient; it takes a few minutes to load and start the installer.

6. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.

7. When asked to select an update, check the appropriate **update** or **language**; then click **Add Update**.

8. When the installation successfully completes, click **Finish** to close the installer.

9. In a command prompt window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare.

10. Use a browser to connect to your site, and log in as an administrator.

11. If your specific update requires a new license (as in the case of adding a language) go to **Site Management | License.**

12. On the **License** page, locate and write down the **Host ID** number exactly as displayed.

13. Follow the instructions that Xerox DocuShare or your DocuShare reseller provided to obtain a site license string.

14. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

15. If your specific update was a language installation, refer to the *Administrator Guide* for information on enabling and selecting default languages for your site.

Database configuration 5

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Caution: **In many instances, correct installation and configuration of a database requires the expertise of a qualified database administrator.**

Oracle

On the Oracle side

Before starting the DocuShare software installation, the Oracle database administrator must:

- Create a DocuShare/Oracle user and a tablespace.

  If you choose to use an existing Oracle database or prefer to manually create and define an Oracle tablespace, the following is an example of a typical DocuShare tablespace creation script.

  ```
  CREATE TABLESPACE <name> DATAFILE <file> SIZE <size> AUTO EXTEND ON NEXT 512K
  MAXSIZE UNLIMITED EXTENT MANAGEMENT LOCAL AUTOALLOCATE;
  ```

- Designate a location on the Oracle system that has the required space for the new tablespace file.

- Set character encoding to AL32UTF8 if the system will be operating with multibyte characters.

- Change the value of nls_length_semantics from byte to char if the system will be operating with multibyte characters. If the value of nls_length_semantics is byte, the max length of DocuShare is different from the max length of DB because 1 multi-byte character in UTF-8 is 3byte.

Connect role

DocuShare 5.x had a Connect role that gave the DocuShare user account the authority to create Oracle connections, table, and sequence privileges. If upgrading from DocuShare 5.x to DocuShare 6, an additional role, CTXAPP, must be granted to Oracle database users. CTXAPP is required by the DocuShare Extensible Database Service (XDB). DocuShare 6 installation automatically grants both Connect and CTXAPP roles to the DocuShare user account.

The database administrator can grant the CTXAPP role to DocuShare users by logging on as either SYSTEM or as a user with DBA privileges and entering:

```
SQL> GRANT CTXAPP, CREATE SEQUENCE to <DS user>.
```

Oracle

For Oracle 10.2.0.4, the Connect role has been stripped of the create table and create sequence privileges.These privileges need to be restored. If an Oracle 9.x or 10.1 database is upgraded to 10.2.0.4, the database administrator needs to make sure that the following roles are present:

- Connect
- Create table
- Create Sequence
- CTXAPP

Grant all of these roles simultaneously by entering:

```
SQL> GRANT Connect, Create Table, Create Sequence, CTXAPP to <DS User>;
```

On the DocuShare side

To configure DocuShare to work with Oracle, the install Wizard requires a valid Oracle system account or an account with DBA privileges. The install Wizard uses the Oracle system account to create a new DocuShare/Oracle user account and to designate the new tablespace as the default for the new DocuShare/Oracle account.

When creating the database connection, the install Wizard works in the following order.

1. Creates a new Oracle user account for DocuShare.
2. Creates a new default tablespace for the new Oracle user account.
3. Creates DocuShare tables.
4. Populates the tables with initial data.

If for any reason a step fails, the Wizard stops the installation. Common reasons for stopping the installation include the user account and tablespace the install Wizard creates already exist.

Fields in the install Wizard Oracle database page:

- **Database User** — the account that DocuShare uses to log into the database
- **Database User Password** — the password for the Database User account
- **Database Port** — the port that DocuShare uses to connect to the database
- **Tablespace Name** — the name of the tablespace where the database stores all DocuShare data
- **Indexspace Name** — the name of the tablespace where the database stores all DocuShare indices
- **Database SID** — the unique name of the Oracle database instance
- **Database Host Name** — the name of the database server
- **Create Tablespaces** — select if tablespace entered in the Tablespace Name field has not been created, and you want the Wizard to create the tablespace for you
- **Create User** — select if the user name entered in the Database User field has not been created, and you want the Wizard to create the user account for you

SQL Server

On the SQL Server side

Before starting the DocuShare software installation, make sure of the following:

- If you install the database on the same server as you install your DocuShare site, set the maximum memory use to 50% of the physical RAM of the server.

On the DocuShare side

Fields in the install Wizard SQL Server database page:

- **Database User** — the account that DocuShare uses to log into the database

- **Database User Password** — the password for the Database User account

- **Database Port** — the port that DocuShare uses to connect to the database

- **Database Name** — the name of the database used to store DocuShare data

- **Database Host Name** — the name of the database server

- **Database Instance Name** — the name of the database instance that you want DocuShare to use

- **Use Database Default Instance** — select if you want to use the default database instance and leave the Database Instance Name field blank

- **Use Database Named Instance** — select if you want to use a named database instance and enter that name in the Database Instance Name field

- **Create Database** — select if a database has not been created and you want the Wizard to create the database for you

PostgreSQL

Windows platform

On the PostgreSQL side

Before starting the DocuShare software installation, the PostgreSQL database administrator must do the following:

- Create a DocuShare/PostgreSQL tablespace by logging into the database server as **postgres**, and running the command **createdb –E UNICODE <DocuShare Database Name>**. Give the tablespace a unique name.
- Enable TCP/IP connectivity, unless it was enabled during database software installation.

On the DocuShare side

Note: The install Wizard creates the system user account for the database. If you already have a system user account for PostgreSQL, do not use it for the DocuShare installation. Use the account that the Wizard creates.

To configure DocuShare to work with PostgreSQL, the install Wizard requires the following information:

- **Database User** — the account that DocuShare uses to log into the database
- **Database User Password** — the password for the Database User account
- **Database Port** — the port that DocuShare uses to connect to the database
- **Tablespace Name** — the name of the tablespace where the database stores all DocuShare data
- **Database Host Name** — the name of the database server
- **Create Database** — select if a database has not been created and you want the Wizard to create the database for you

Solaris platform

On the PostgreSQL side

Before starting the DocuShare software installation, the PostgreSQL database administrator must to the following:

- Create a DocuShare/PostgreSQL tablespace by logging into the database server as **postgres**, and running the command **createdb –E UNICODE <DocuShare Database Name>**. Give the tablespace a unique name.
- Enable TCP/IP connectivity, unless it was enabled during database software installation.

On the DocuShare side

Note: *The install Wizard creates the system user account for the database. If you already have a system user account for PostgreSQL, do not use it for the DocuShare installation. Use the account that the Wizard creates.*

To configure DocuShare to work with PostgreSQL, the install Wizard requires the following information:

- **Database User** — the account that DocuShare uses to log into the database
- **Database User Password** — the password for the Database User account
- **Database Port** — the port that DocuShare uses to connect to the database
- **Tablespace Name** — the name of the tablespace where the database stores all DocuShare data
- **Database Host Name** — the name of the database server
- **Create Database** — select if a database has not been created and you want the Wizard to create the database for you

Linux platform

On the PostgreSQL side

Before starting the DocuShare installation, the PostgreSQL database administrator must do the following:

- Create a DocuShare/PostgreSQL tablespace by logging into the database server as **postgres**, and running the command **createdb –E UNICODE <DocuShare Database Name>**. Give the tablespace a unique name.
- Enable TCP/IP connectivity, unless it was enabled during database software installation.

On the DocuShare side

Note: *The install Wizard creates the system user account for the database. If you already have a system user account for PostgreSQL, do not use it for the DocuShare installation. Use the account that the Wizard creates.*

To configure DocuShare to work with PostgreSQL, the install Wizard requires the following information:

- **Database User** — the account that DocuShare uses to log into the database
- **Database User Password** — the password for the Database User account
- **Database Port** — the port that DocuShare uses to connect to the database
- **Tablespace Name** — the name of the tablespace where the database stores all DocuShare data
- **Database Host Name** — the name of the database server
- **Create Database** — select if a database has not been created and you want the Wizard to create the database for you

DB2

The database must be established and running before you start a DocuShare software installation.

On the DB2 side

Before starting the DocuShare software installation, the DB2 database administrator must do the following:

- Create a DocuShare/DB2 user and tablespace.

  The database administrator can choose to create the tablespace manually and during the DocuShare installation, specify the tablespace to use, or let the DocuShare install Wizard create the tablespace.

  A manually created tablespace must have a 32K bufferpool. DocuShare requires both a regular and a system temporary tablespace, each with a 32K bufferpool.

  As an option, the database administrator can create a large tablespace to store LOBs and an index tablespace to store site indexes.

  If you choose to use an existing DB2 database or prefer to manually create and define an DB2 tablespace, the following is an example of a typical DocuShare tablespace creation script.

  ```
  CREATE BUFFERPOOL DSBP IMMEDIATE SIZE 250 PAGESIZE 32 K;
  ```

  ```
  CREATE REGULAR TABLESPACE DSDATADMS PAGESIZE 32 KMANAGED BY DATABASE USING (FILE
  'C:\DB2\Db2Data\DSData' 3200)EXTENTSIZE 16 OVERHEAD 10.5 PREFETCHSIZE 16
  TRANSFERRATE 0.14 BUFFERPOOL DSBP DROPPED TABLE RECOVERY ON;
  ```

  ```
  CREATE LARGE TABLESPACE DSLargeDms PAGESIZE 32 K MANAGED BY DATABASE USING (FILE
  'C:\DB2\Db2Data\Docushare' 3200) EXTENTSIZE 16 OVERHEAD 10.5 PREFETCHSIZE 16
  TRANSFERRATE 0.14 BUFFERPOOL DSBP ;
  ```

  ```
  CREATE SYSTEM TEMPORARY TABLESPACE DSTEMPDMS PAGESIZE 32 K MANAGED BY SYSTEM
  USING ('C:\DB2\Db2Temp') EXTENTSIZE 16 OVERHEAD 10.5 PREFETCHSIZE 16
  TRANSFERRATE 0.14 BUFFERPOOL DSBP;
  ```

- Designate a location on the DB2 system that has the required space for the new tablespace file.

On the DocuShare side

To configure DocuShare to work with DB2, the install Wizard requires the following information:

- **Database User** — the account that DocuShare uses to log into the database
- **Database User Password** — the password for the Database User account
- **Database Port** — the port that DocuShare uses to connect to the database
- **Database Name** — the name of the database used to store DocuShare data
- **Tablespace Name** — the name of the tablespace where the database stores all DocuShare data
- **Large Tablespace Name** — the name of the tablespace where the database stores LOBs
- **Indexspace Name** — the name of the tablespace where the database stores all DocuShare indices
- **Database Host Name** — the name of the database server
- **Create Database** — select if a database has not been created and you want the Wizard to create the database for you

When creating the database connection, the install Wizard works in the following order. If for any reason a step fails, the Wizard aborts the installation. Common reason for aborting the installation include the user account and tablespace the install Wizard creates already exist.

1. Creates a regular tablespace with a 32K bufferpool.

2. Creates a temporary system tablespace with a 32K bufferpool.

3. Creates DocuShare tables.

4. Populates the tables with initial data.

DB2

Web server bridge 6

Create a bridge to an Apache web server

If you choose to use an Apache web server, you must manually create the bridge between the web server and the DocuShare Tomcat servlet.

During DocuShare software installation, the Wizard installs the following Apache files:

- <DSHome>/tomcat/bin/native/apacheX.X/mod_jk.so

- <DSHome>/tomcat/conf/auto/mod_jk.conf

- <DSHome>/tomcat/conf/jk/apacheX.X/httpd.conf

To manually create a bridge between an Apache web server and the DocuShare Tomcat servlet:

1. In your DocuShare directory, open the file **<DSHome>/tomcat/conf/jk/apacheX.X/httpd.conf**.

2. Copy all of the lines of code that appear in this file.

3. Locate the directory where you installed your Apache software, open the **httpd.conf** file in that directory, and paste the lines of code into that file.

4. Save the file.

5. Restart Apache.

Create a bridge to an IIS web server

If, during DocuShare installation, you choose **Tomcat only** but later decided to use IIS as your web server, you can run the DocuShare IIS Software Bridge Management Tool to create a bridge to IIS.

The IIS Software Bridge Management Tool installs the bridge dll and plugs it into the IIS software. When IIS restarts, the bridge dll loads into IIS memory. As the dll loads into memory, it accesses registry key (HKEY_LOCAL_MACHINE\Software\Apache Software Foundation) to configure runtime settings.

The settings include the logging level, log file locations, the workers.properties file, and the uriworkermap.properties file.

The workers.properties file defines the location of the ajp13 protocol, which in this case would be Tomcat. The uriworkermap.properties file defines the URLs that IIS delegates to the bridge. The install Wizard updates these files to allow the dll to function. Information about more extensive URL mapping or more complicated IIS settings, such as configuring for multiple DocuShare sites, is available on the Apache web site.

There is no need to uninstall your current IIS bridge setup; the Wizard overwrites current settings at http://tomcat.apache.org/connectors-doc/.

To use the IIS Tool to create a bridge to an IIS web server:

1. Navigate to the location of the DocuShare installation files.

2. Navigate to the \Windows\IIS directory and double-click **iistool.exe**.

   This starts the DocuShare IIS Bridge Management Tool Wizard.

3. In the next displayed window, select a location for the bridge installation; then click **Next**.

4. Enter the appropriate IIS bridge values in the displayed fields.

   This includes the Tomcat Bridge Port Number. the IIS Port Number, the DocuShare Root, and the Host DNS Name. Generally, you do not need to change the default values.

5. Click **Next**.

   The tool installs the bridge to the IIS web server.

6. When the Wizard completes installation, click **Finished** to close the window.

   The Wizard restarts IIS.

7. If necessary, remove the media from the server drive.

Note: If you have a problem installing the bridge software, use iistool.exe and install the software to the C:\program files directory.

Add-on installation 7

OCR (Optical Character Recognition)

❑ Obtain a new DocuShare site license that includes OCR. Installing software alone will not enable OCR.

❑ Verify that your server meets the minimum system requirements as are listed on the DocuShare OCR software download page.

❑ Your DocuShare server must have more than one processor and running .NET 2.0 or 3.0.

Installing OCR software

1. From your site **Help Desk**, select **Downloads**, then select **Software Extras for the DocuShare Platform**; this takes you to an external web site.

2. On the web site, select **Optional Add-on for DocuShare CPX** and then select the **Optical Character Recognition** download.

3. Download the OCR software package to a temporary directory on your DocuShare server.

4. Unzip the OCR software package to a new folder, in the temporary directory, named OCR.

5. Log into the DocuShare server as a Windows administrator.

6. In the Windows Administrator Tool, select and open the Services application, select **DocuShare** and **stop** the service.

7. In the unzipped OCR software directory, open the Win32 directory.

8. In the Win32 directory, open the DocuShare directory and double-click **dsUpdate.exe** to start the OCR installation Wizard.

   Be patient; it takes a few minutes to load and start the installer.

9. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or **Back** to return to a previous screen.

10. When asked, check the **OCR Update**, browse to and select the **ocr.jar** file, then click **OK**.

11. Click **Add Update**, then click **Next**.

12. When the installation successfully completes, click **Finish** to close the installer.

13. In the Windows Administrator Tool, select and open the Services application, select **DocuShare** and **start** the service.

14. Use a browser to connect to your site, and log in as an administrator.

15. Go to **Site Management I License** and enter your new license string.

16. Refer to the *DocuShare OCR Guide* for instructions on how to use OCR to convert scanned images into searchable document formats.

Additional languages for OCR

The OCR feature uses the default language of the installed DocuShare site. To use additional languages for OCR, you must have the language packs installed on the site and you must configure the OCR converter.xml file to accept new languages.

To add languages for OCR use:

1. In the DocuShare installation directory, go to **/config** and open the **Converters.xml** file.

2. Near the bottom of the open Converters xml file, locate the line **<language/>**.

3. Edit the line to include the desired languages.

   For example; <language/>en,fr,de</language>

4. Save and close the file.

Archive Server

Installing Archive Server software is almost identical to installing standard DocuShare software. The only difference is the type of software installation you select; in this case DocuShare Archive Server.

Refer to Chapter 1 of this guide to verify the system requirements and to make sure you have the information required by the install Wizard. System requirements for an Archive Server are the same as those for a standard DocuShare site.

❑ After you have installed the DocuShare Archive Server software, send a license request email to your DocuShare License Administrator or your DocuShare reseller or distributor. When you account is verified, you will be emailed a license string.

Install the Archive Server

1. Depending on the platform you are using, refer to that chapter of this guide.

2. Following the Install DocuShare instructions exactly as though you were installing a standard DocuShare site, but when the install Wizard displays the window asking you for the type of installation you want; select **DocuShare Archive Server**.

   Note: The Archive Server must have the same domain name as the DocuShare sites that use the Archive Server.

3. When the installation successfully completes and you have started the service, use a browser to connect to the Archive Server.

4. Follow the standard DocuShare site license procedure to license the Archive Server. Make sure you use the license string that enables Archive Server. Installing software alone does not enable the Archive Server.

5. After licensing, reboot the server.

Configure client sites to use the Archive Server

1. To configure any DocuShare site to use the Archive Server, go to **Services and Components I Archive Server** of the Admin UI of that site.

2. On the **Archive Server** page, enter the hostname and port number of the Archive Server. Enter that information in the connection test field to make sure the DocuShare site can connect to the Archive Server.

3. You can also use the Archive Server page to set how often the site polls for documents marked for archiving.

Uninstall the Archive Server

1. Depending on the platform you are using, refer to that chapter of this guide.

2. Follow the Uninstall DocuShare instructions exactly as though you were uninstalling a standard DocuShare site.