eDoc Organizer Business Edition Administrator Guide

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1 Introduction

1.1 Introduction 4

1.2 System Requirements 5

2 Setup

2.1 Server Setup 8

2.2 Client Setup 21

3 Additional Information

3.1 Data Migration Wizard 29

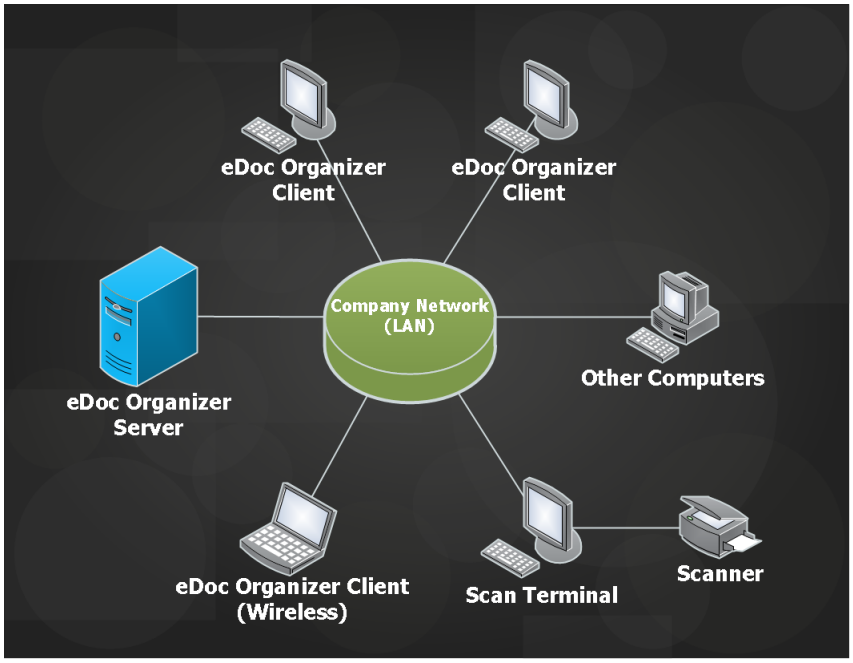
3.2 Install Server as Windows Service 31

3.3 Troubleshooting 37

Introduction

Introduction

eDoc Organizer Business Edition enables multiple users to simultaneous access a central eDoc Organizer data repository. This product is targeted at businesses that have between 2-20 users and an office network (LAN) that can allow multiple users access to the central repository. eDoc Organizer Business Edtion has a Client-Server architecture and requires installation of a central server and multiple distributed clients.



In a typical deployment scenario the eDoc Organizer Business Server and its database will be setup on one computer and the rest of the computers will install the eDoc Organizer Business Client software to connect to the server.

Because eDoc Organizer Business Edition is targeted for small businesses, it does not require you to have a particular WIndows Server Edition Operating System installed in your organization. eDoc Organizer Business Server can be run on any Computer with Windows XP or above.

System Requirements

eDoc Organizer Business Edition has a Client-Server architecture and requires installation of a central server and multiple distributed clients. Typically the eDoc Organizer Business Server and its database will be setup on one computer and the rest of the computers will install the eDoc Organizer Business Client software to connect to the server.

All computers have to be on the same Network for eDoc Organizer Business Edition client and server components to be able to talk to each other.

Server Hardware Requirements

- **Processor**: Pentium 4/AMD Athlon or higher
- **Memory**: 4 GB RAM or higher
- **Disk Space**: 250 GB or higher

Server Software Requirements

Supported operating systems: Windows 8, Windows 7, Windows Server 2003, Windows Server 2008, Windows Server 2008 R2, Windows Vista, Windows XP

Required Prerequisite Software (Installed automatically by the installer):

- Microsoft SQL Server 2008 Express Edition
- Windows Installer 4.5
- Microsoft .NET Framework 3.5 SP1
- Microsoft .NET Framework 4
- Windows PowerShell 1.0

Client Hardware Requirements

- **Processor**: Pentium 4/AMD Athlon or higher
- **Memory**: 2 GB RAM or higher
- **Disk Space**: Approximately 500 MB is required for installation and temporary storage
- **Display Resolution**: 1024*768 or above @ 96 dpi
- **For Scanning**: TWAIN or WIA complaint scanner for direct scanning. Any other scanner for scanning through alternate import methods.

Client Software Requirements

Supported operating systems: Windows 8, Windows 7, Windows Server 2003, Windows Server 2008, Windows Server 2008 R2, Windows Vista, Windows XP

Required Prerequisite Software (Installed automatically by the installer):

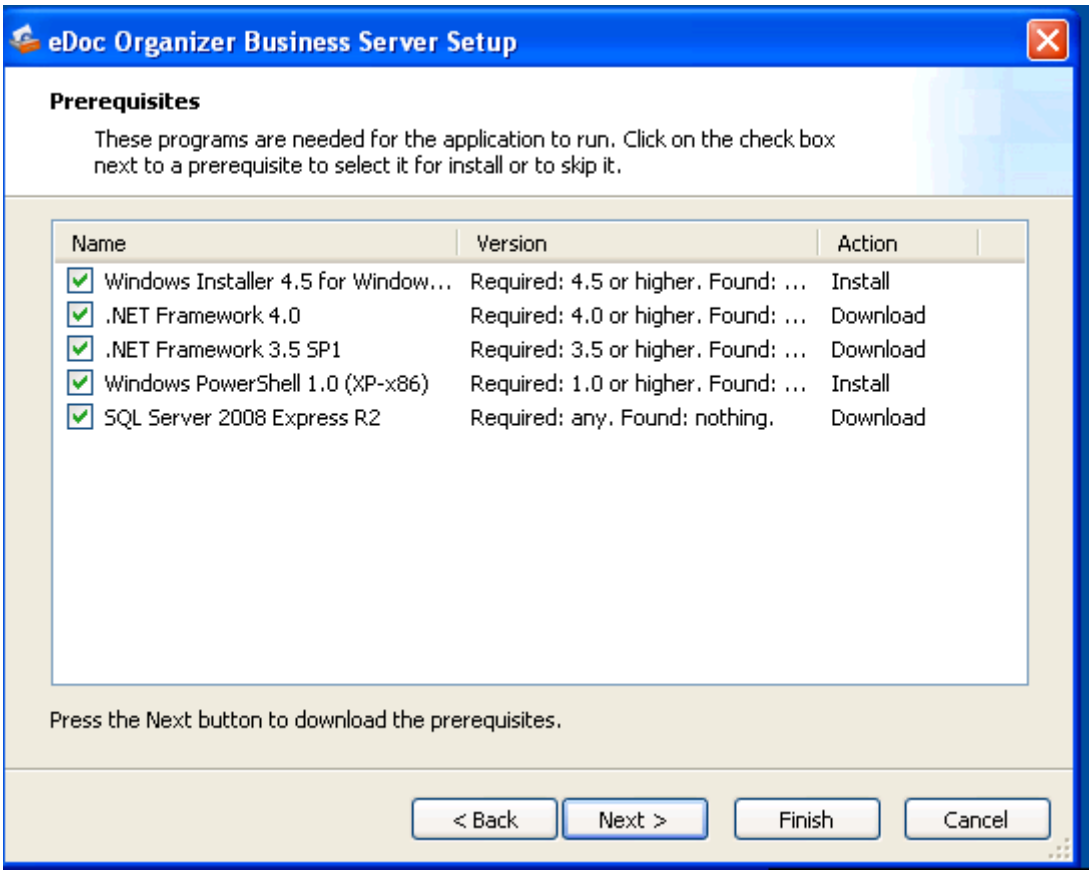
- Windows Installer 4.5
- Microsoft .NET Framework 4

Setup

Server Setup

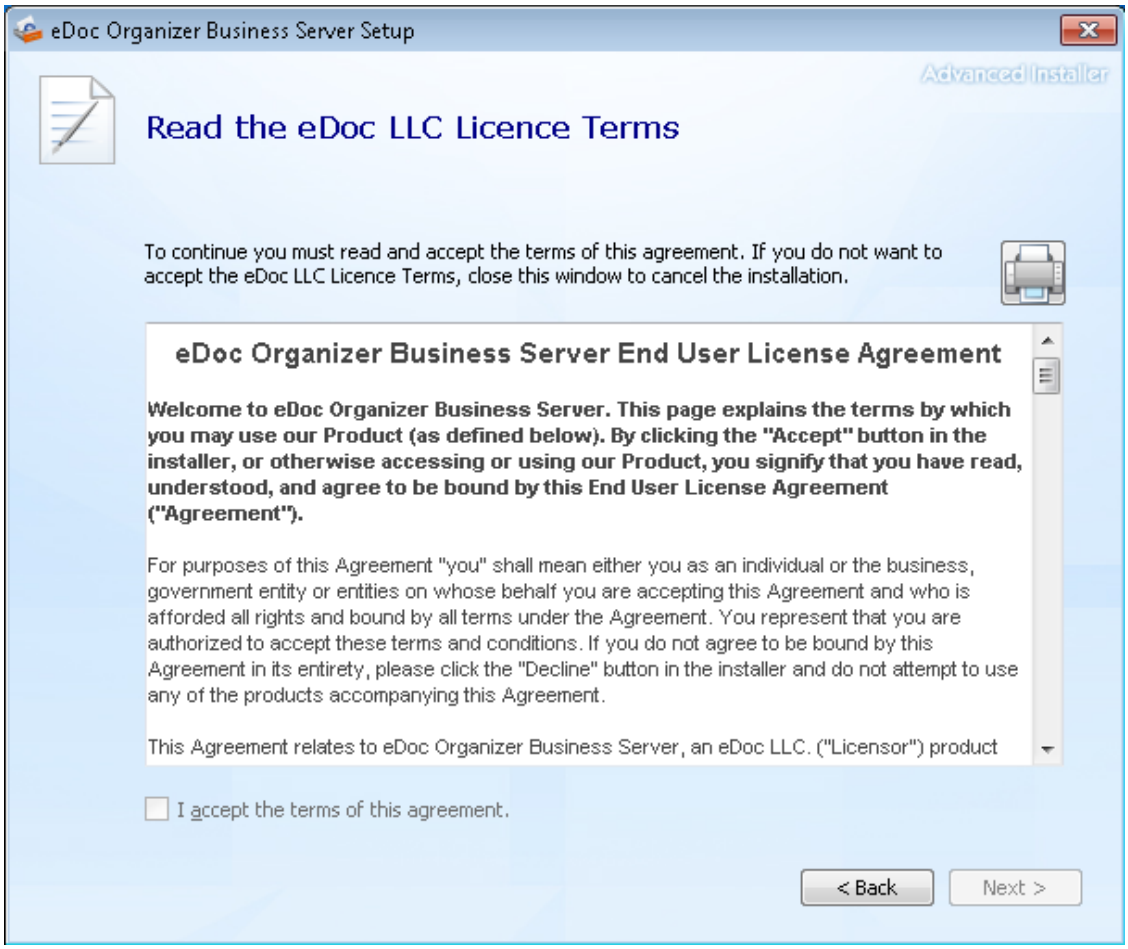
To install eDoc Organizer Business server start by double clicking on the **eDoc Organizer Business Server.exe** file located in the download package.

Prerequisites

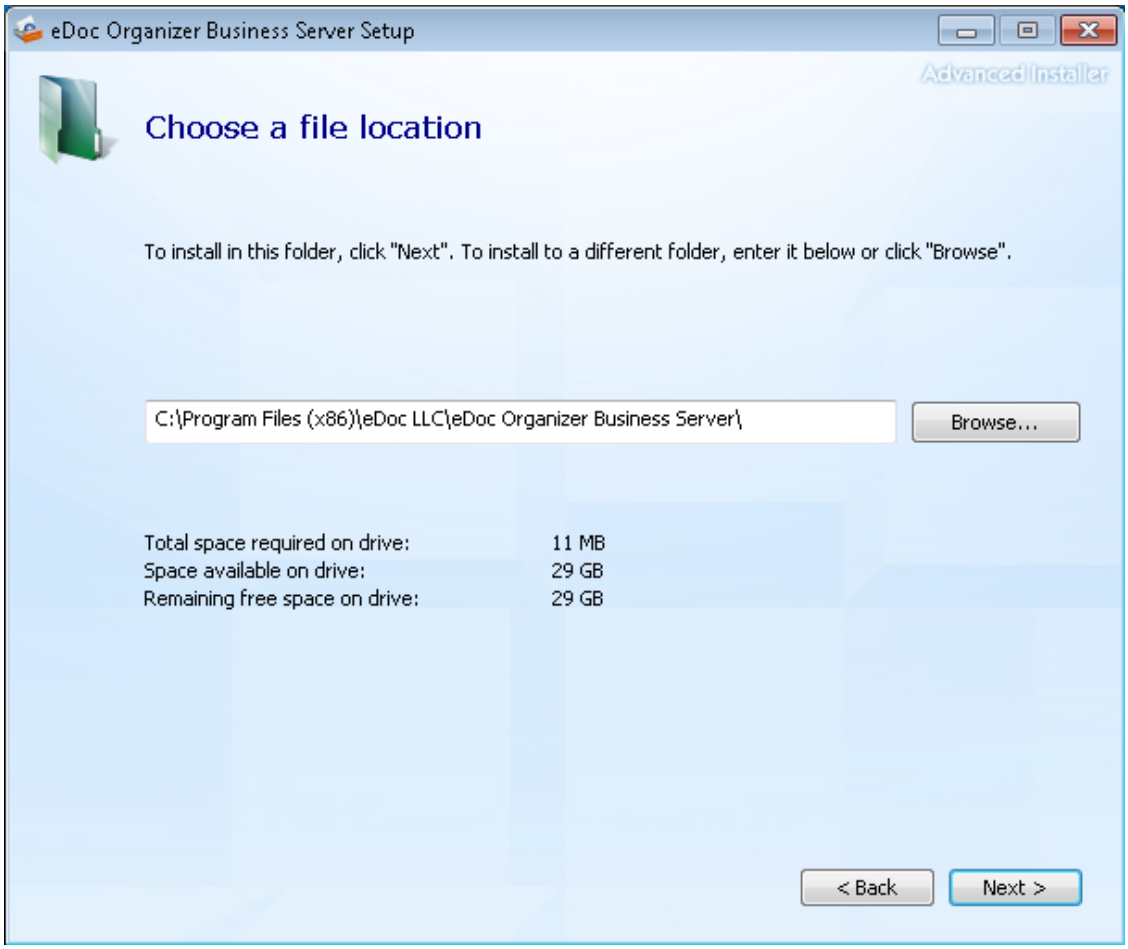


Note: If your computer doesn't have the required software to run eDoc Organizer Business Server the setup program will ask you to install those components first. Please install these required components before proceeding.

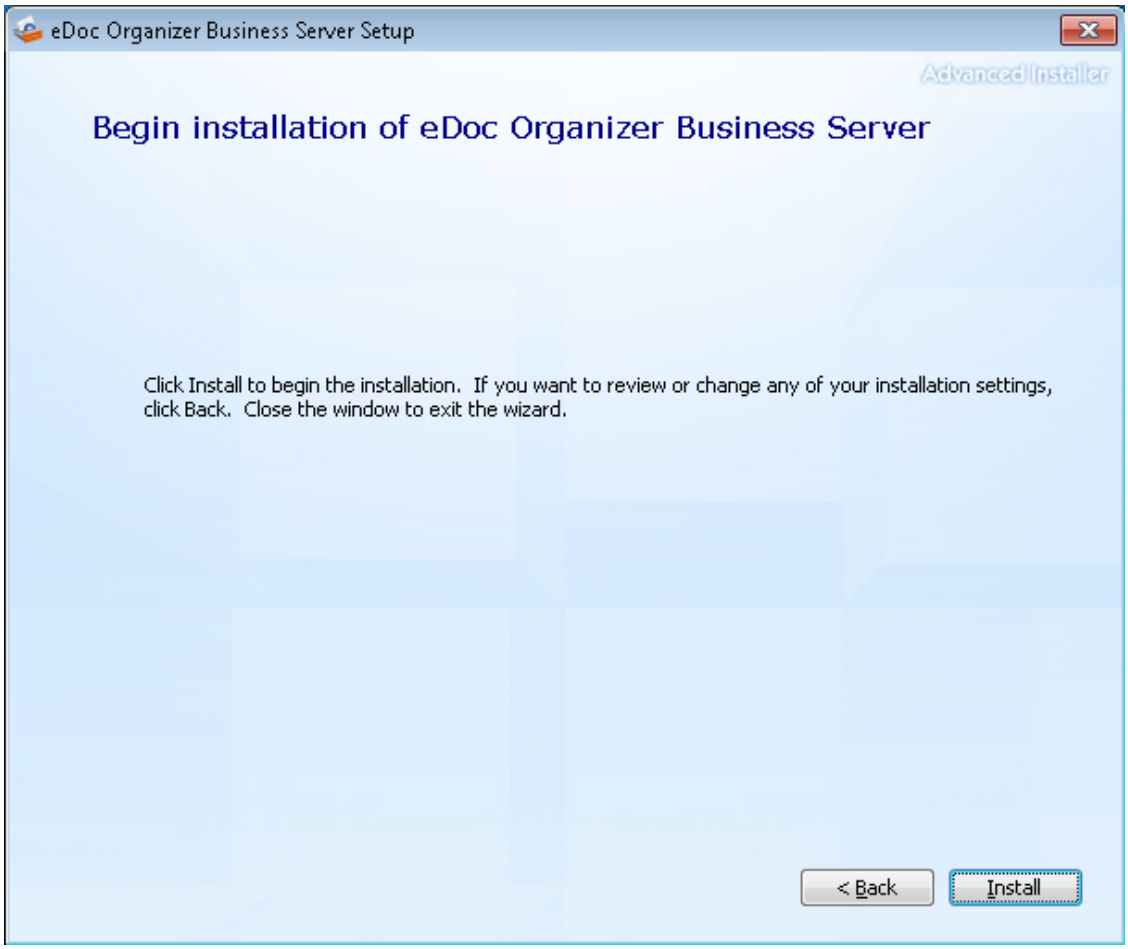
Click *Next* on the welcome Dialog.



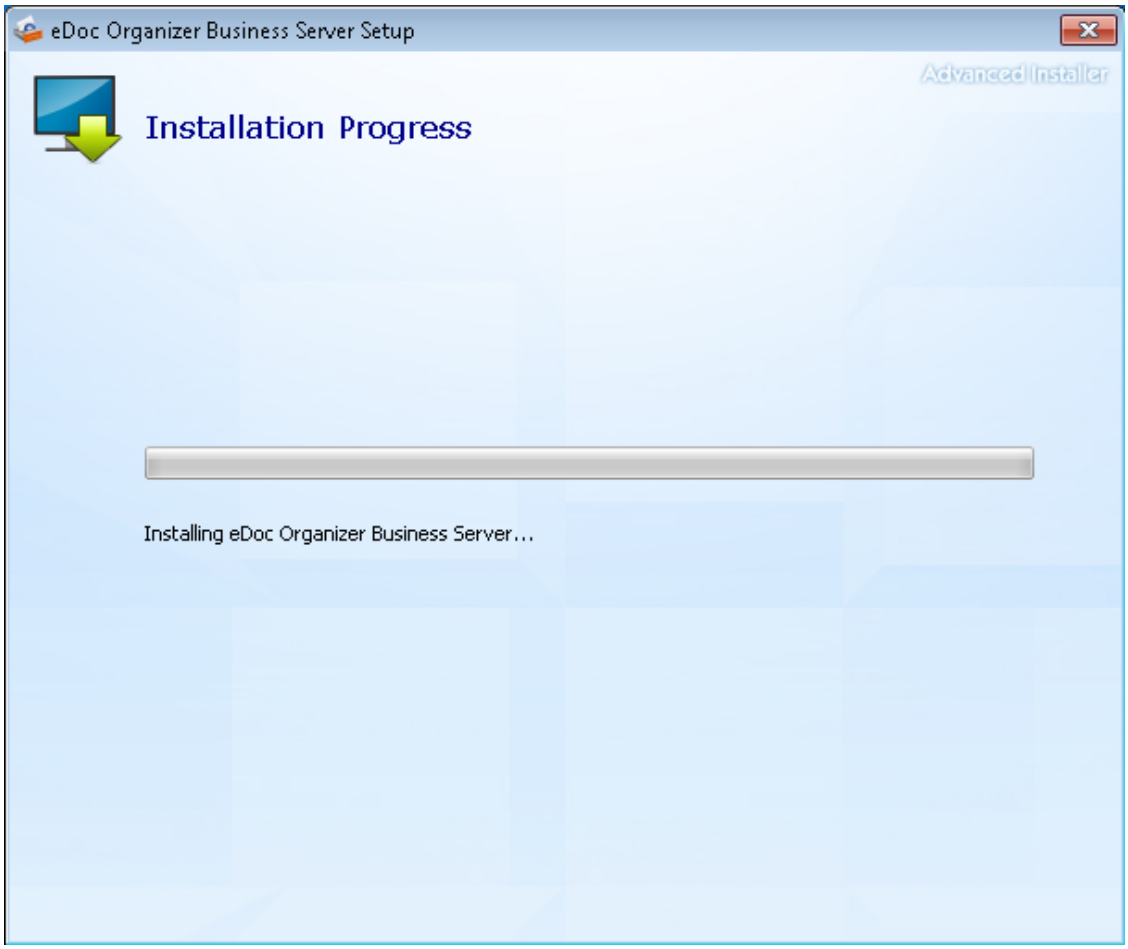
Please read the eDoc Organizer Business Server End User License Agreement carefully. If you agree with the terms of the license agreement, click *I accept* and then click *Next.*



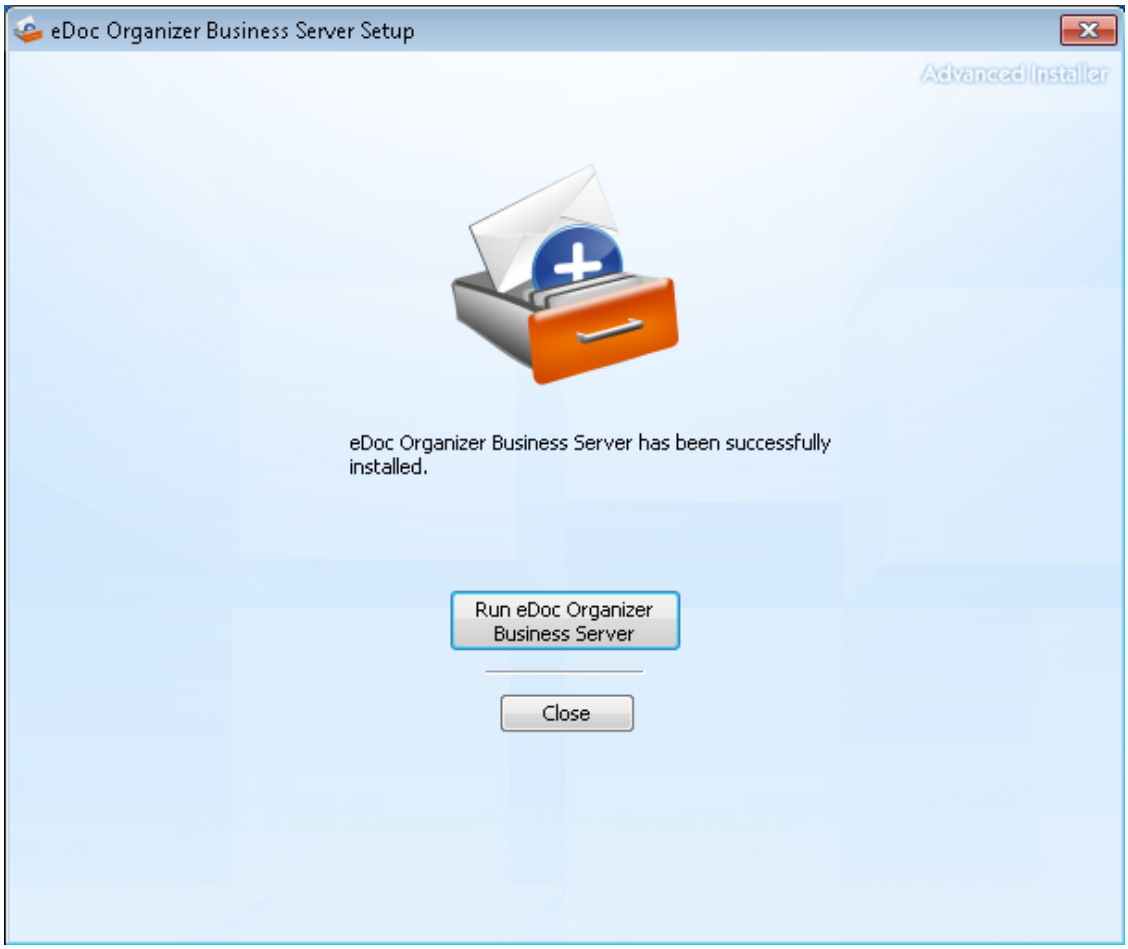
Select the folder where you would like to install eDoc Organizer Business Server and click *Next*.



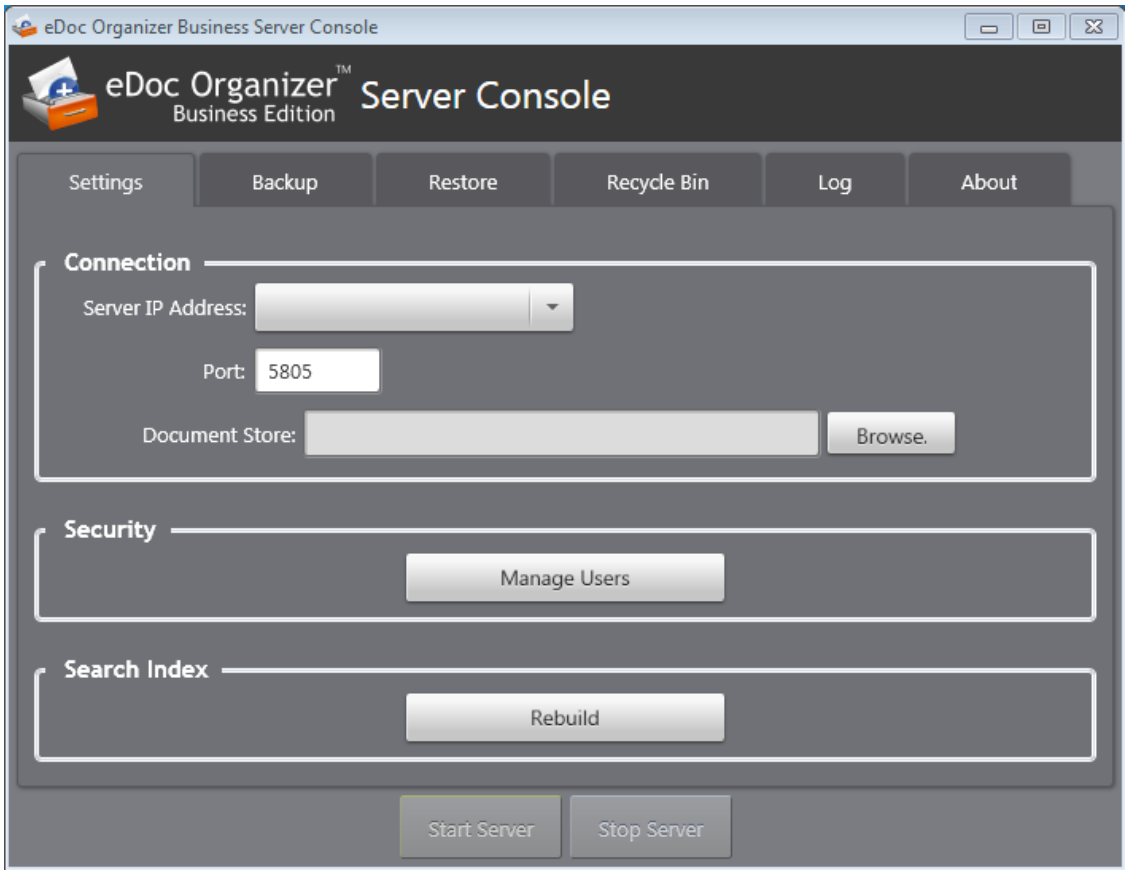
Click *Install* on the Confirm Installation Dialog to start the installation process.



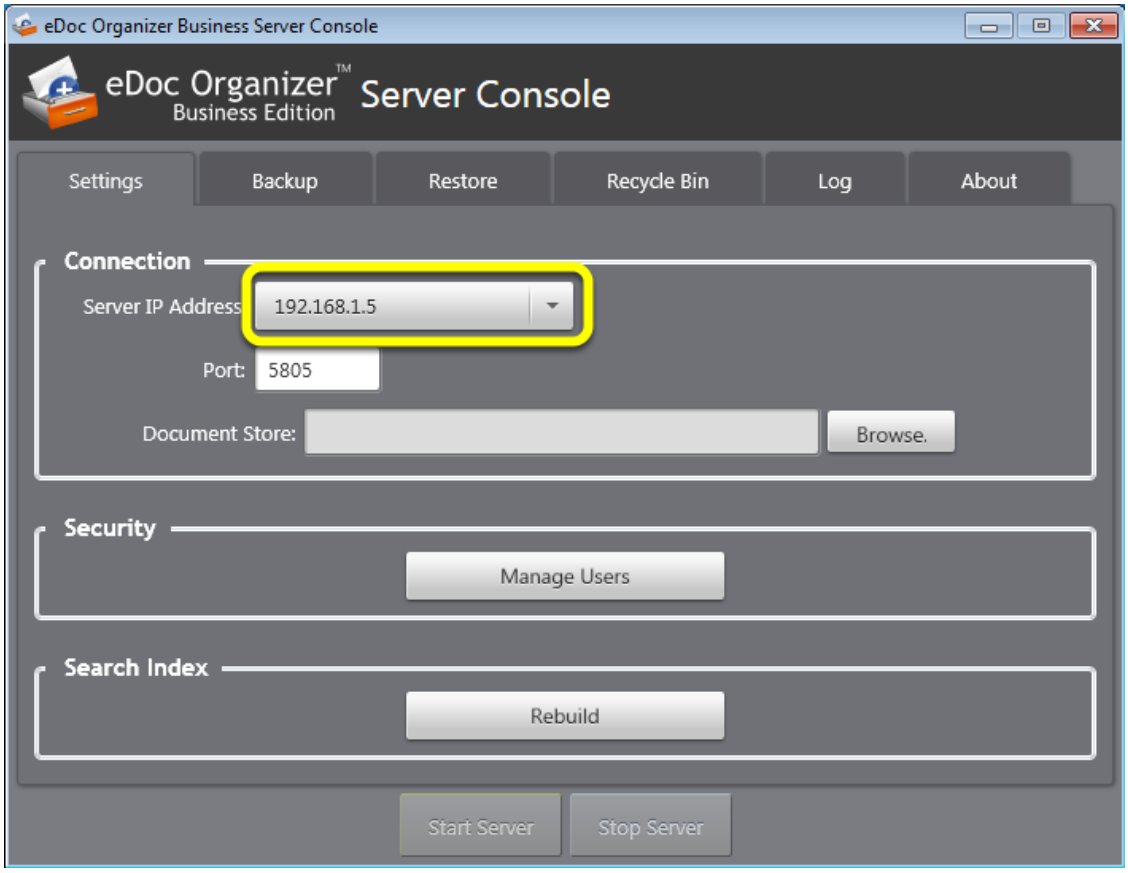
Please wait for the installation to complete. Click *Yes* on any windows security message you get at the time of installation.



Click *Run eDoc Organizer Business Server* on the Installation Complete Dialog to start the server console.

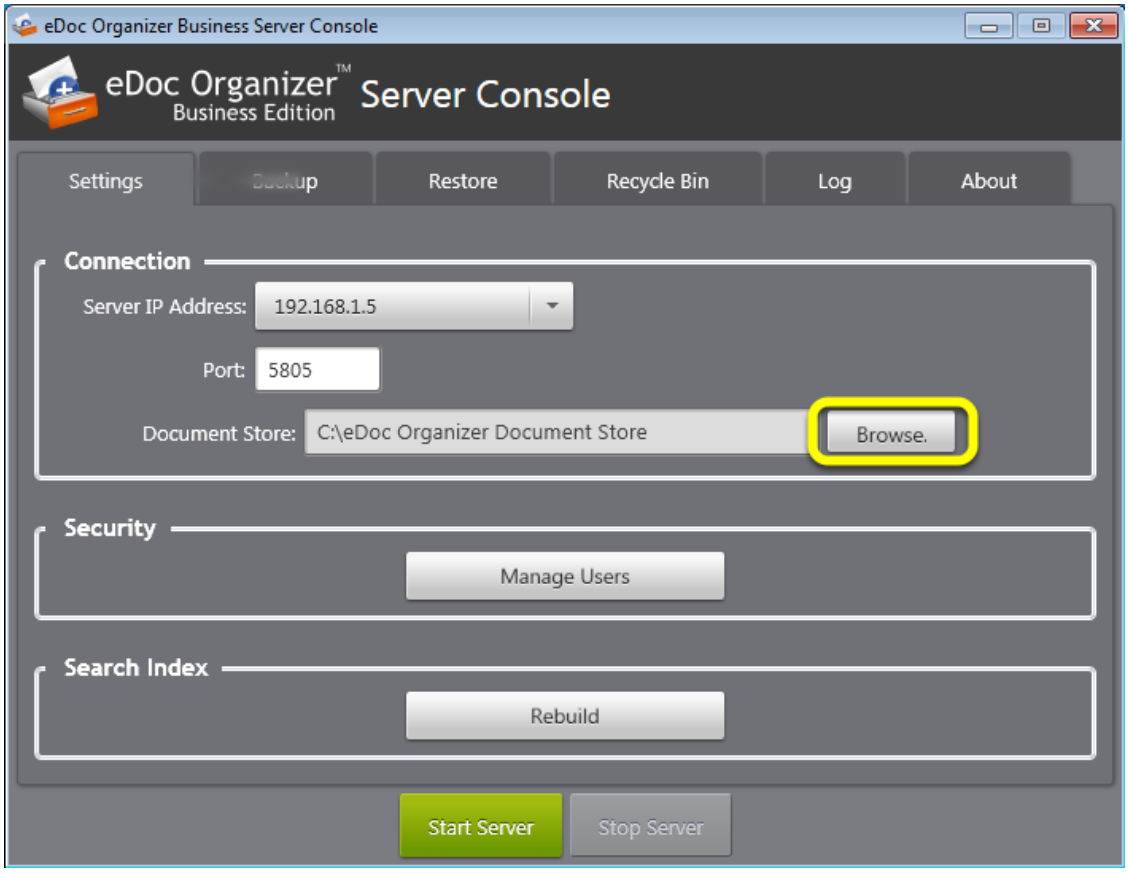


eDoc Organizer Business Server Console will start up

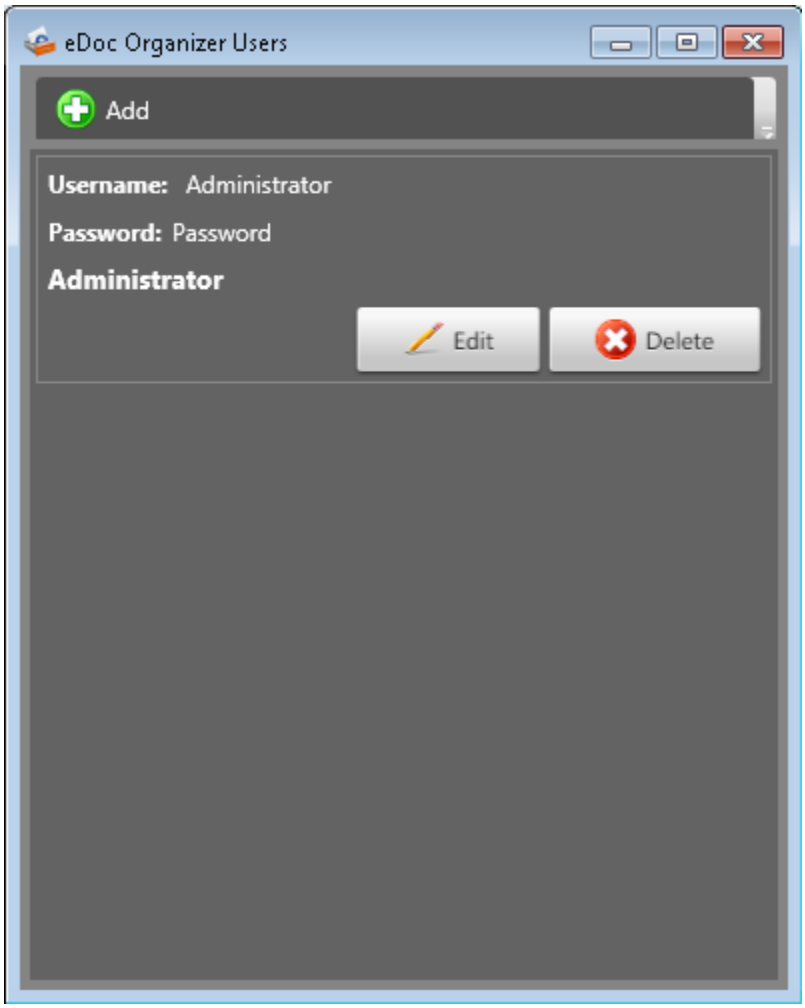


From the Server IP Address drop down list select the Intranet IP Address. This IP address will be used to connect the clients to the server.

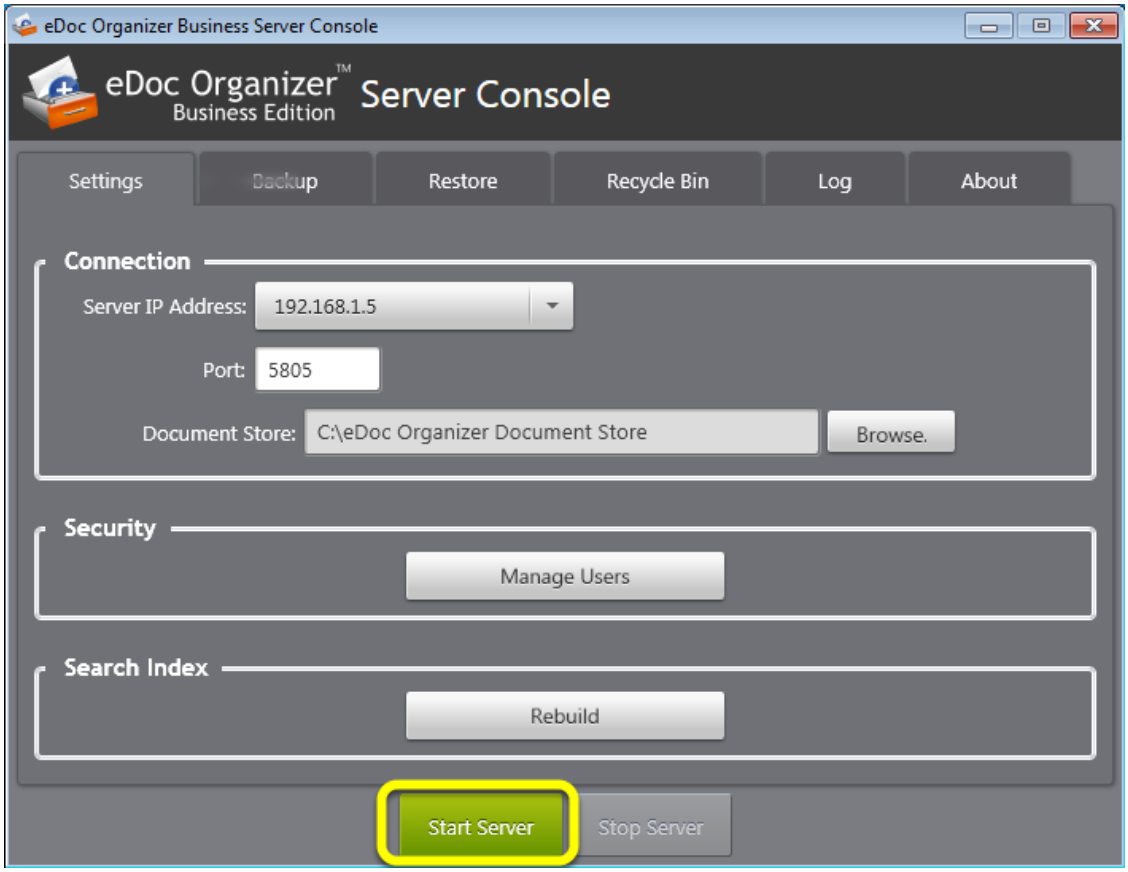
Please ensure that the clients can reach the server through this IP address. The IP address should not be a 127.0.0.1 loop back IP address for the computer.



Click the Browse button and select an empty folder on the the computer to use as the document storage location.

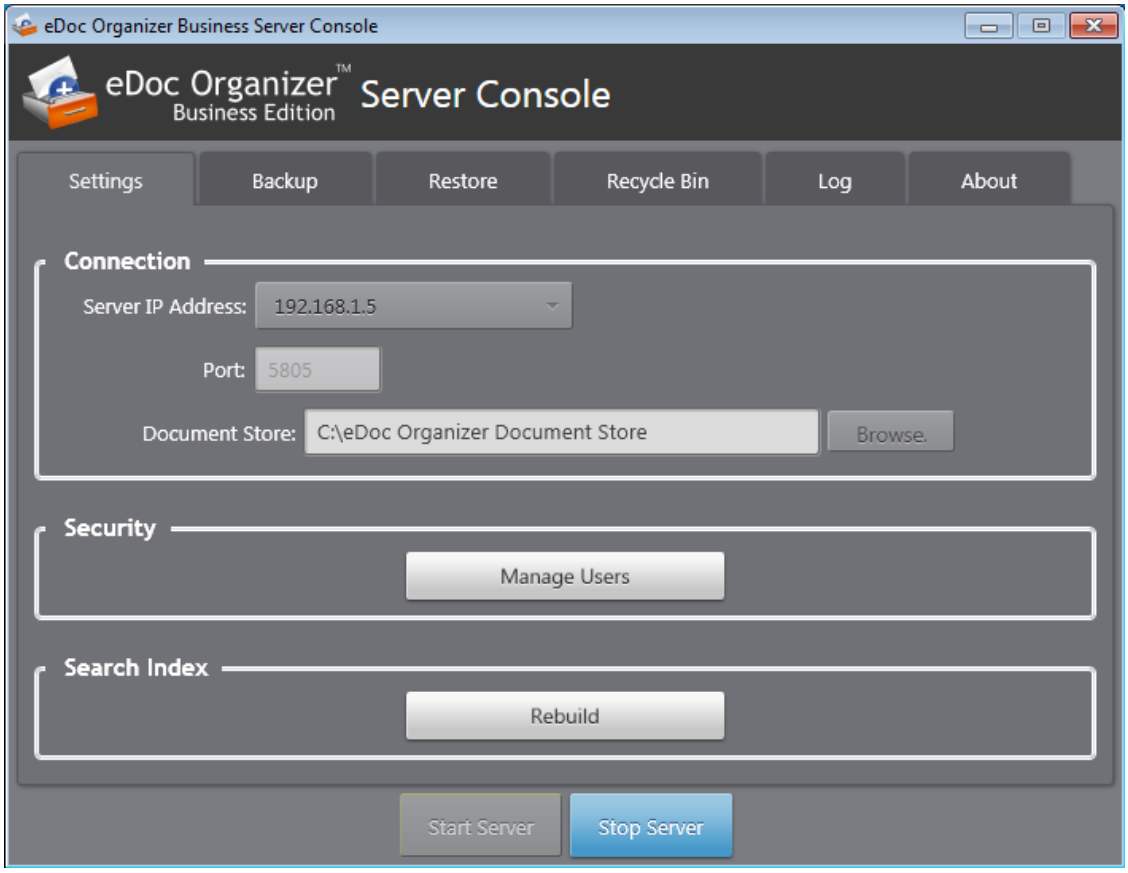


Note: The default install of eDoc Organizer Network Edition adds an administrator user to the system automatically. Click on Manage Users button to add more users.



Click *Start Server* button to start the eDoc Organizer Business Server. Once the server is started the clients will be able to connect to it via the network.

Note: If you have a Firewall or other Security program installed on the server machine, you might be prompted to allow "edoc.organizer.server.exe" or "eDoc Organizer Server" access to your network. Please ensure that the program is granted access to communicate via your firewall on the port number (5805 by default) you have specified.

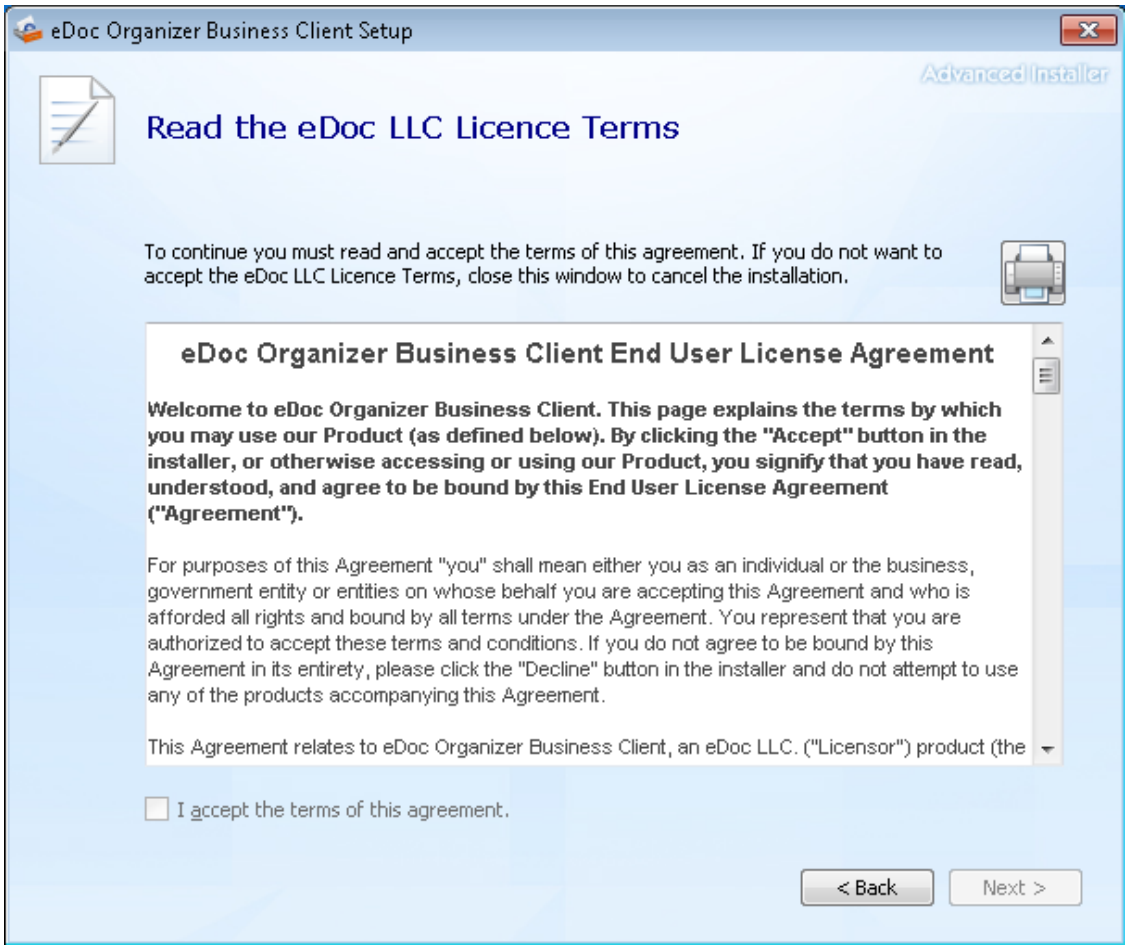

eDoc Organizer Business Server Console
eDoc Organizer™
Business Edition
Server Console
Settings
Backup
Restore
Recycle Bin
Log
About
Connection
Server IP Address:
192.168.1.5
Port:
5805
Document Store:
C:\eDoc Organizer Document Store
Browse...
Security
Manage Users
Search Index
Rebuild
Start Server
Stop Server

Client Setup

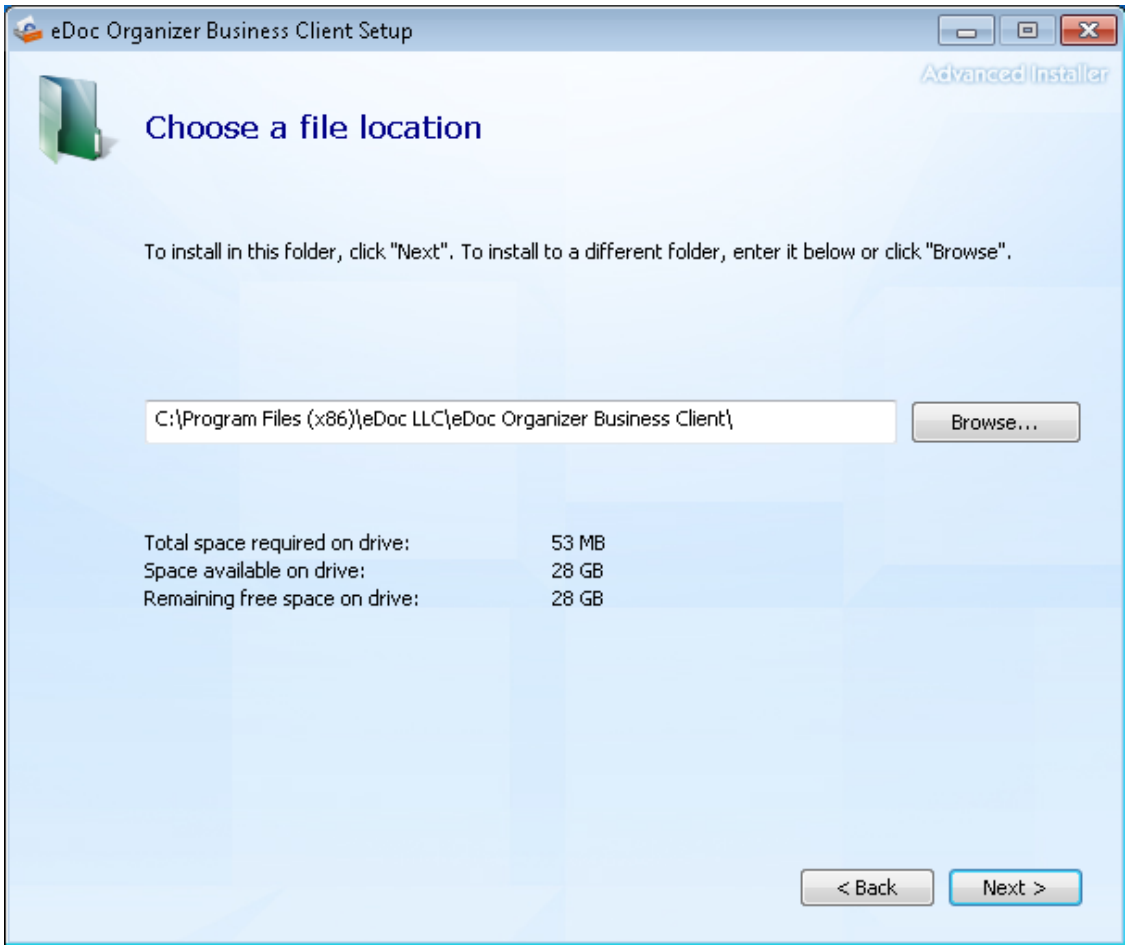
To install eDoc Organizer Business Client start by double clicking on the **eDoc Organizer Business Client.exe** file located in the download package.

Note: If your computer doesn't have the required software to run eDoc Organizer Business Client the setup program will ask you to install those components first. Please install these required components before proceeding.

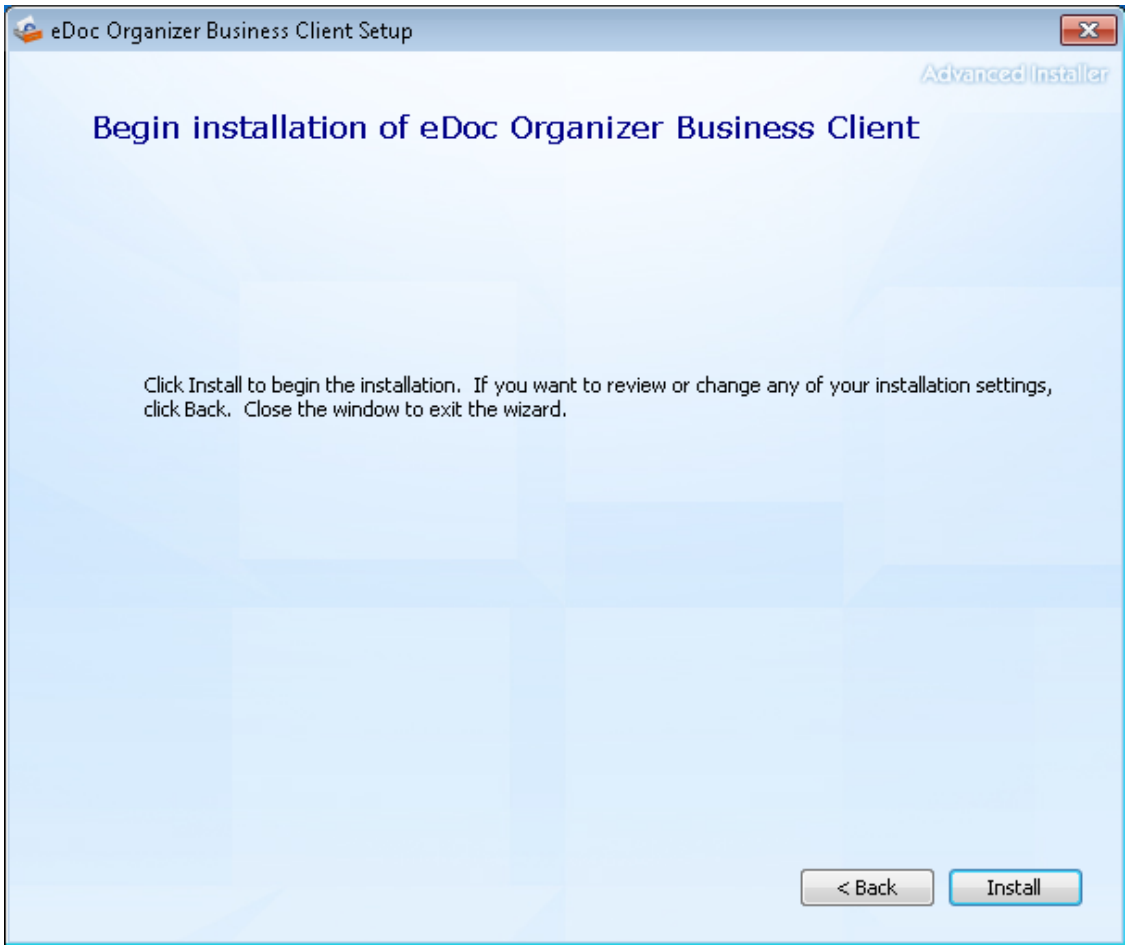
Click *Next* on the welcome Dialog.



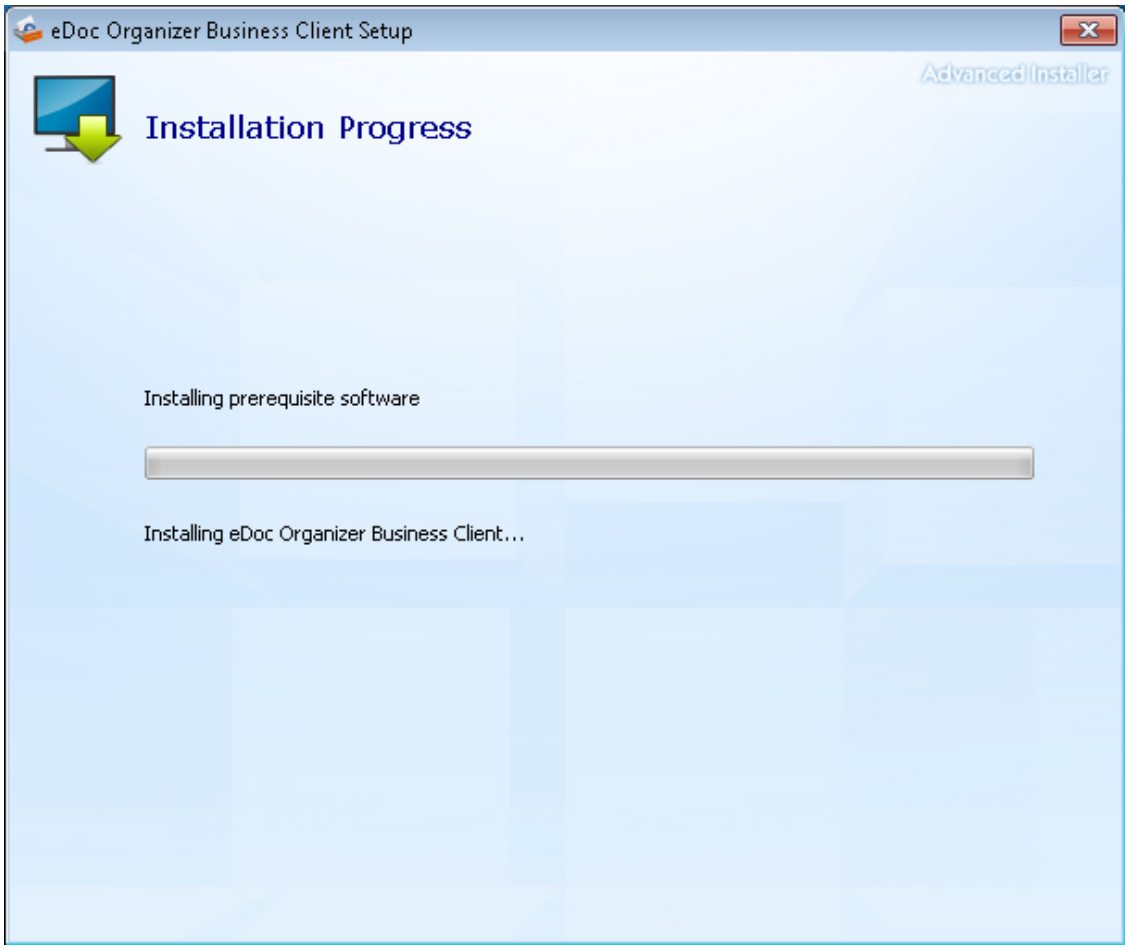
Please read the eDoc Organizer Business Client End User License Agreement carefully. If you agree with the terms of the license agreement, click *I accept* and then click *Next.*



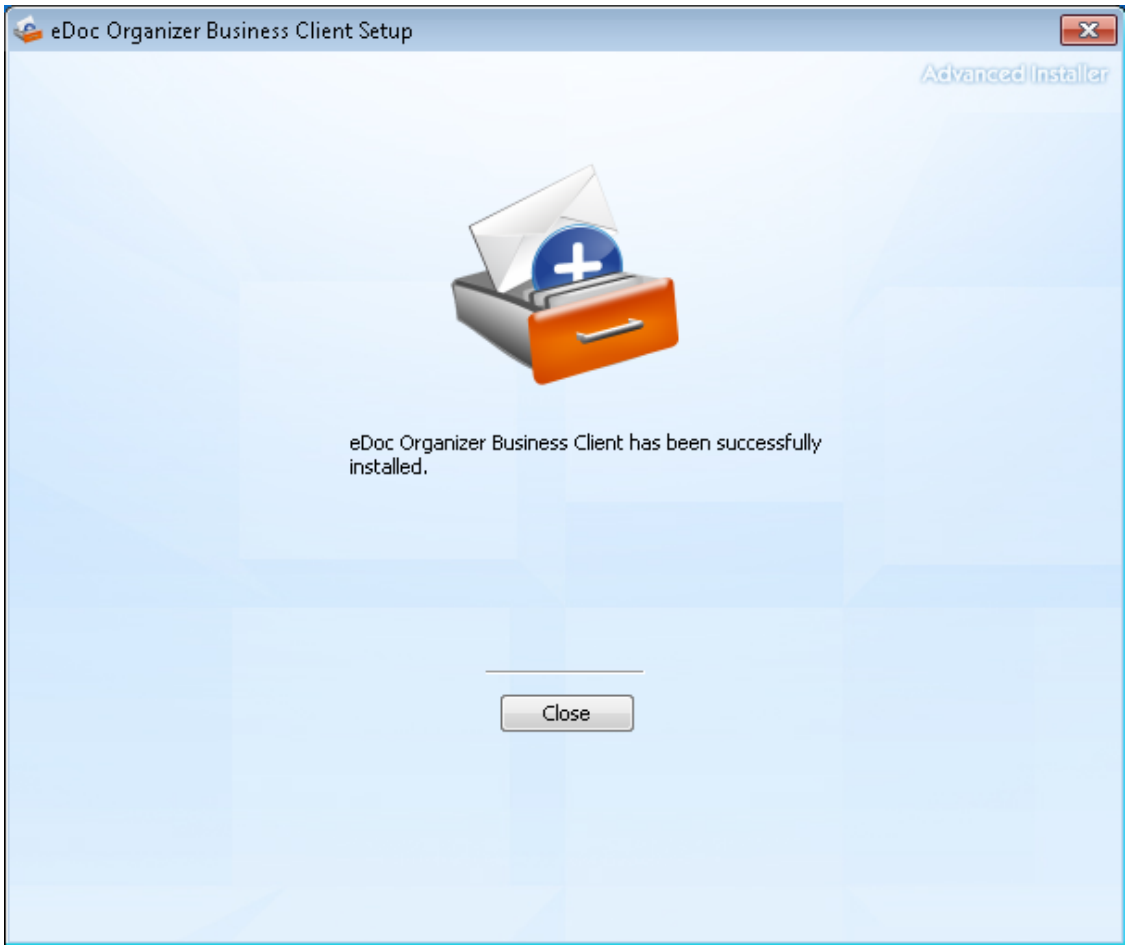
Select the folder where you would like to install eDoc Organizer Business Client and click *Next*.



Click *Install* on the Confirm Installation Dialog to start the installation process.



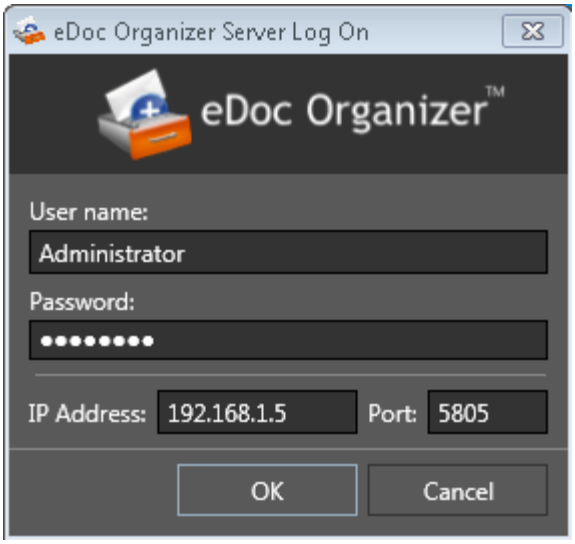
Please wait for the installation to complete. Click Yes on any windows security message you get at the time of installation.



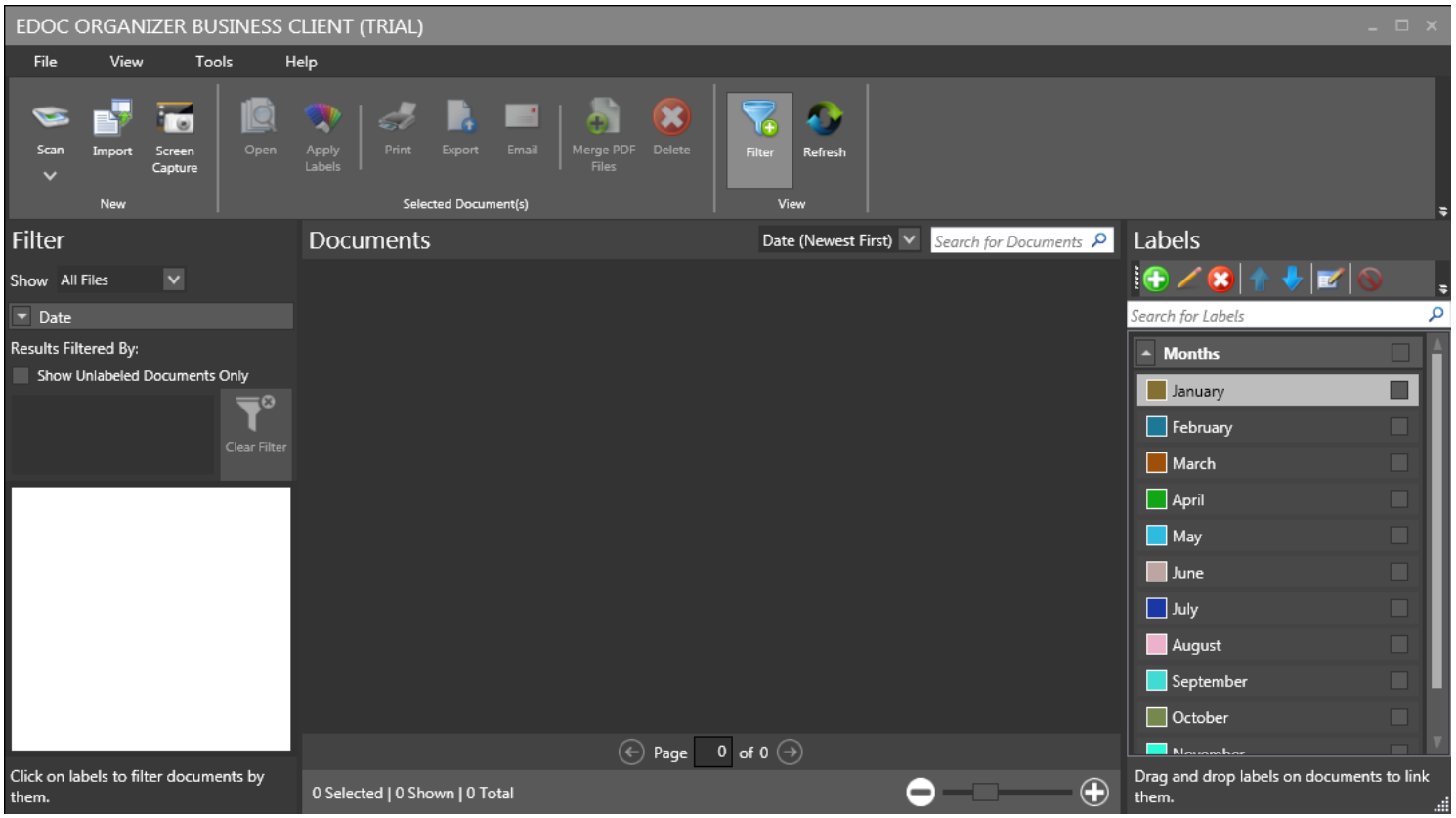
Click *Close* on the Installation Complete Dialog.

Start eDoc Organizer Business Client by going to *Start* > *All Programs* > *eDoc Organizer Business Client* > *eDoc Organizer Business Client* menu shortcut created by the installer.

Note: You will have to provide User name and Password to all users along with the IP address and port number (default 5805) that the server is listening on so that they can log into the eDoc Organizer Business Client application.



On the Log On screen enter the User name and Password along with the Server IP address and port number and click OK.



Once eDoc Organizer Business client is up and running the users can start using it to Store and Organize their documents.

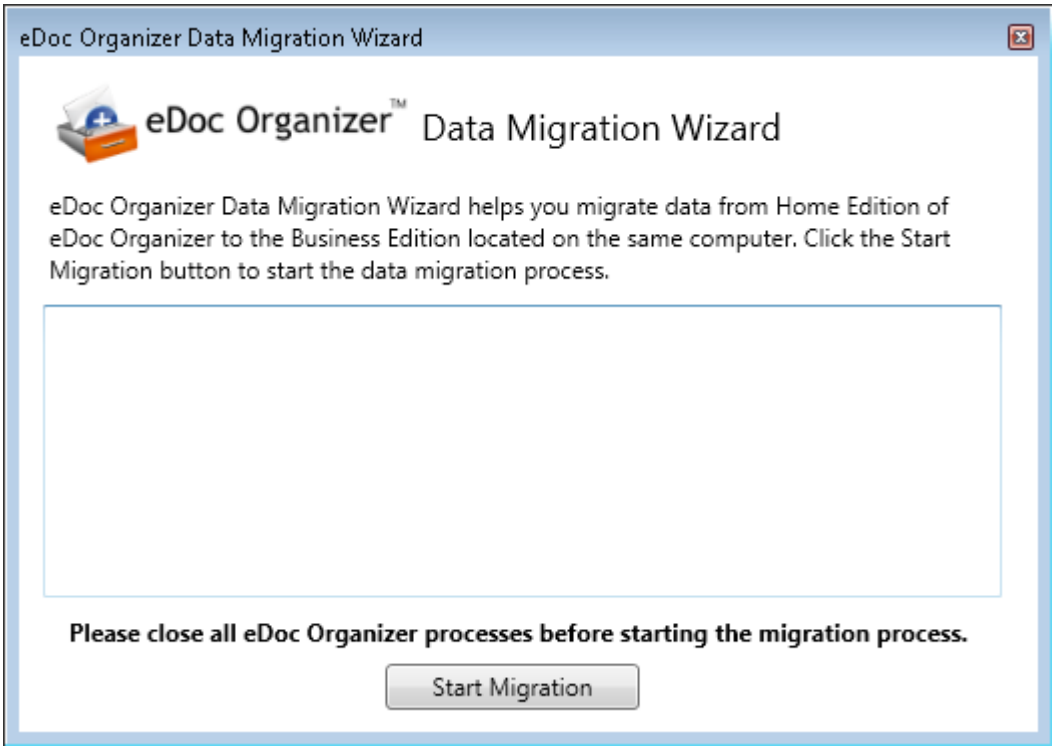
Additional Information

Data Migration Wizard

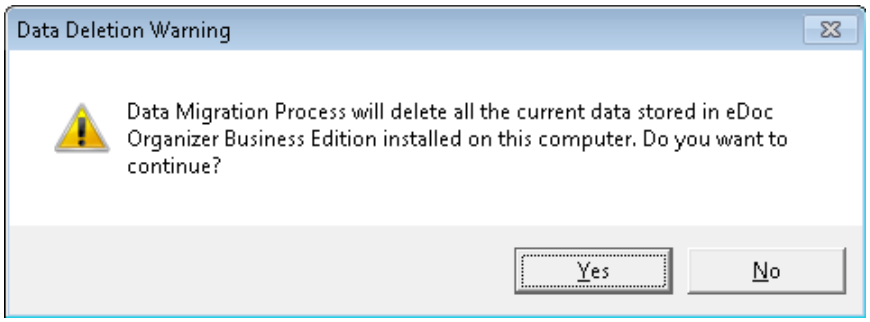
Data Migration Wizard allows you to transfer data from eDoc Organizer Home Edition to eDoc Organizer Business Edition (on the same computer). To start the migration wizard go to Start > All Programs > eDoc Organizer Business Server > Data Migration Wizard menu item.

Data Migration Wizard requires Microsoft SQL Server Compact 4.0 to be installed on the server. Please download and install it directly from the Microsoft Download Website at http://www.microsoft.com/en-us/download/details.aspx?id=17876

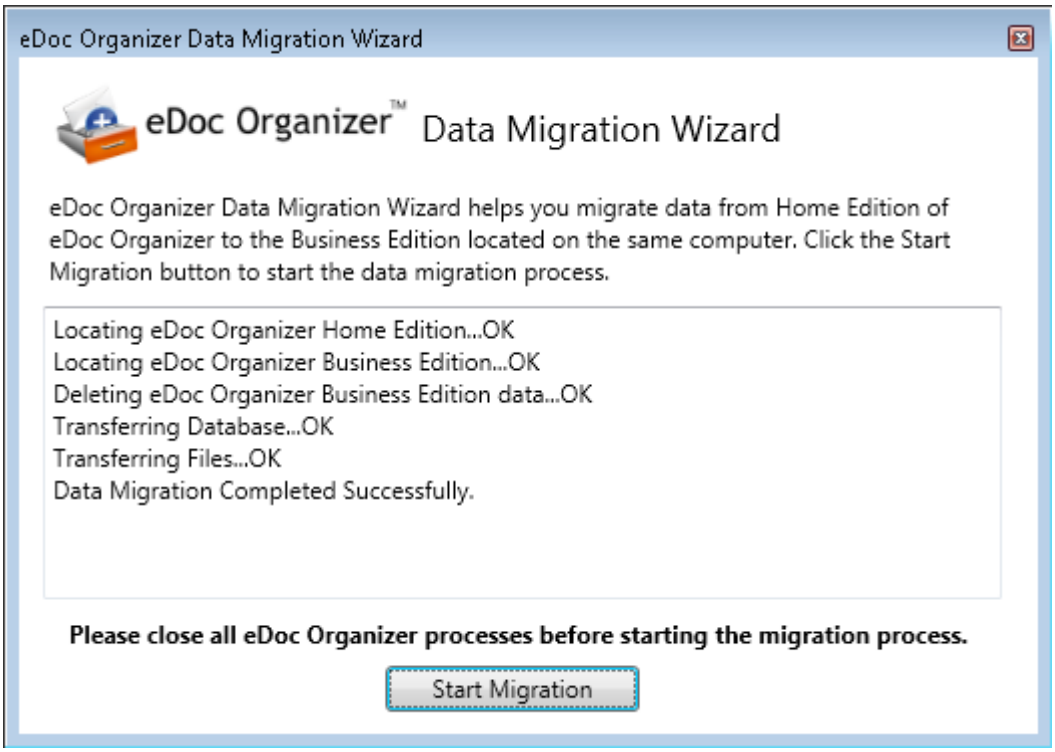
Data Migration Wizard Window



Click on the *Start Migration* button.



You will be warned that all existing data from your Business Edition will be delete. If you want to continue, click *Yes.*

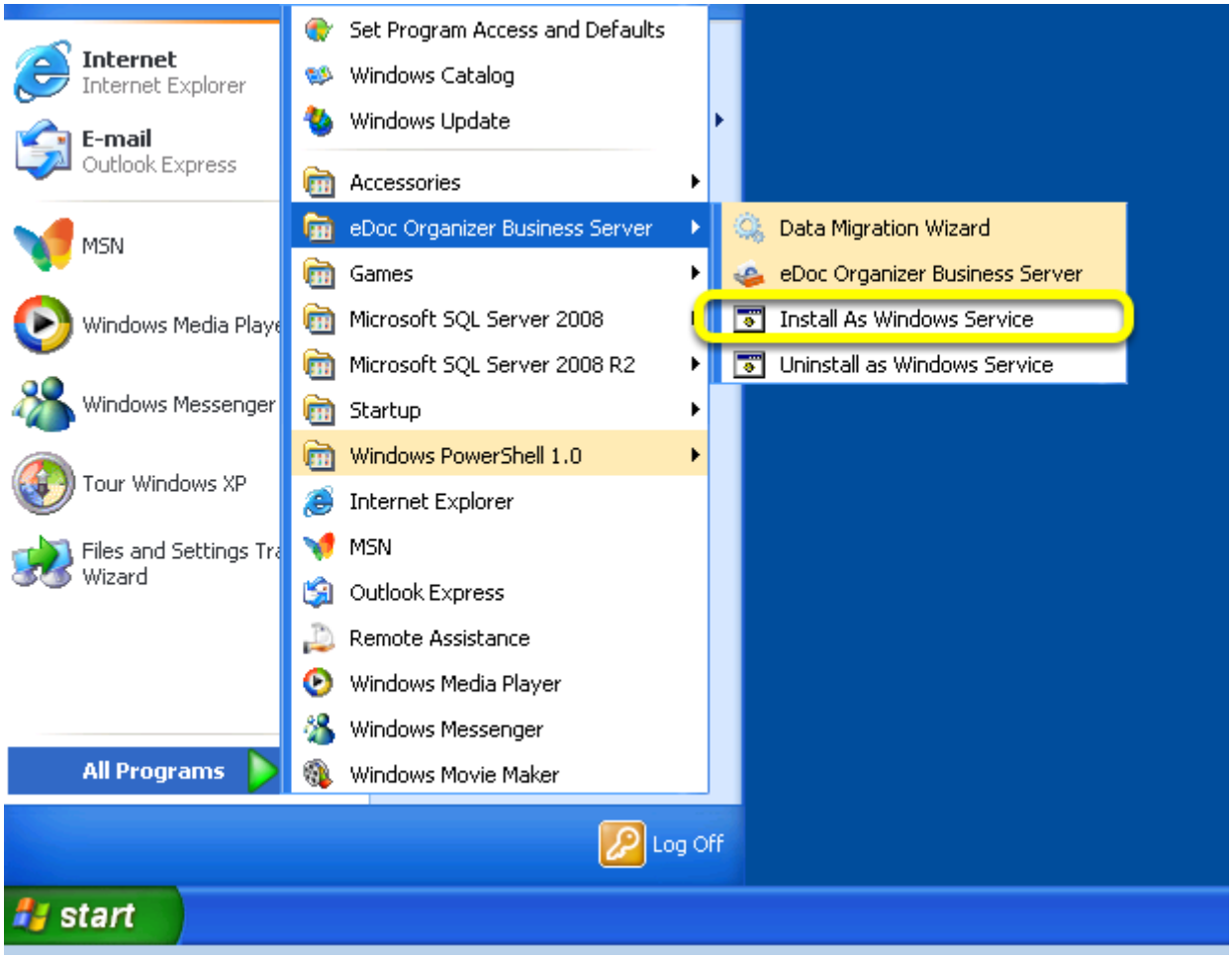


Data transfer successful message.

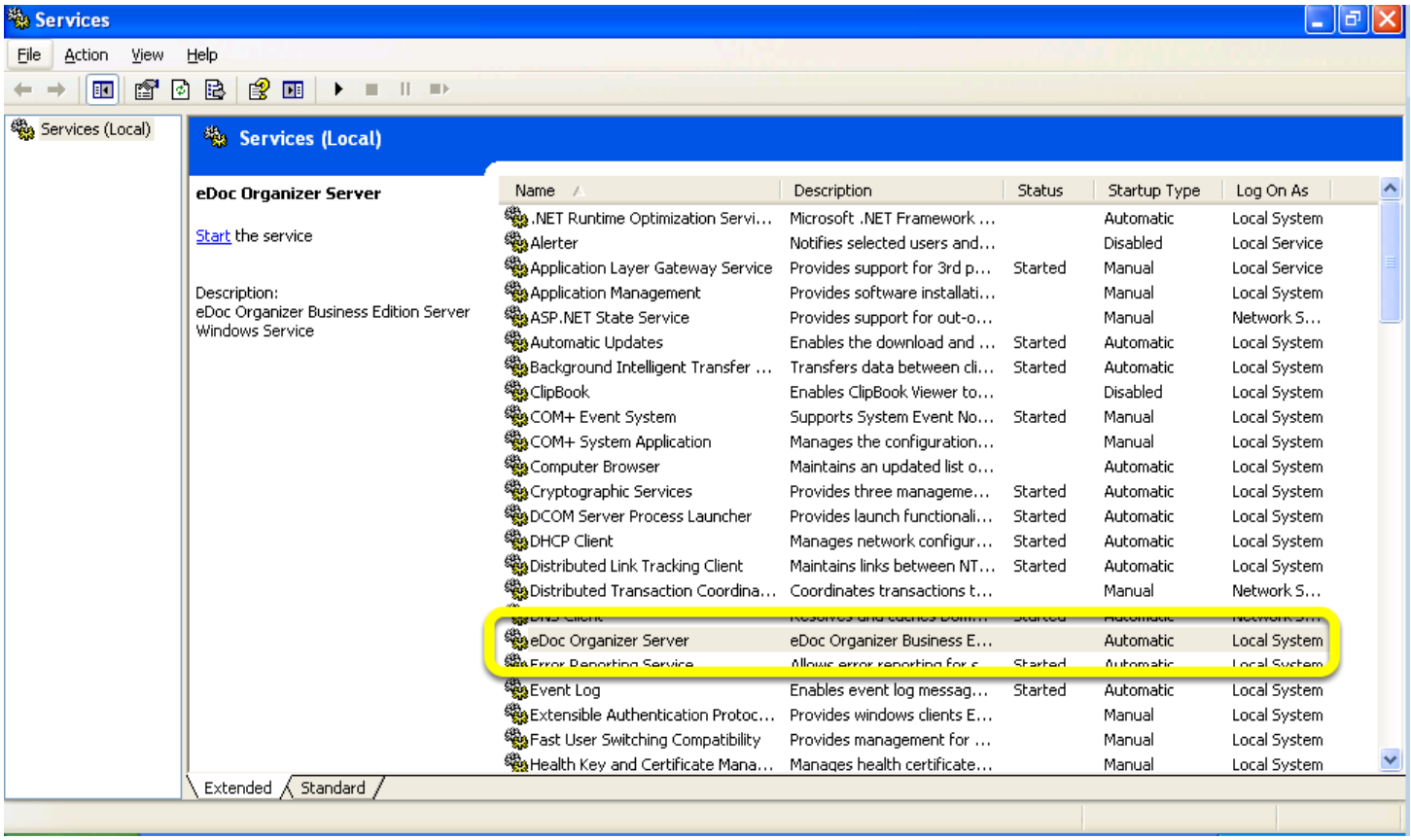
Install Server as Windows Service

eDoc Organizer Business Server can be installed and run as a Windows Service. This allows the server to start up automatically every time windows starts up without the need for a user to log in and start the server manually.

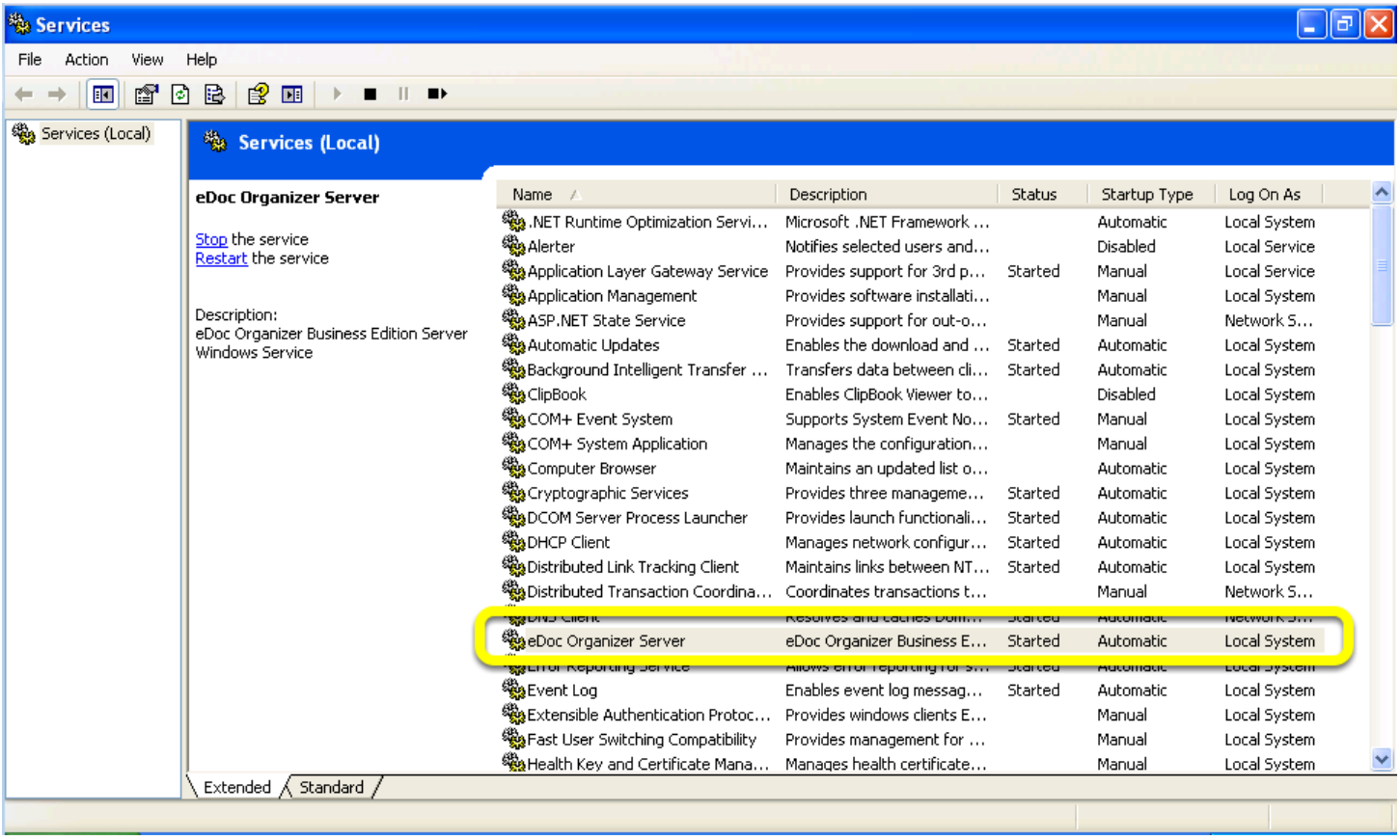
Note: You should configure and test eDoc Organizer Business Server using the eDoc Organizer Business Server Console and ensure it is funcitoning properly before setting it up to run as a Windows Service.



To install eDoc Organizer Business Server as a Windows Service, go to Start > All Programs > eDoc Organizer Business Server > Install as Windows Service menu item.



Open Services Console and start eDoc Organizer Server by right clicking on it and clicking on Start in the context menu.



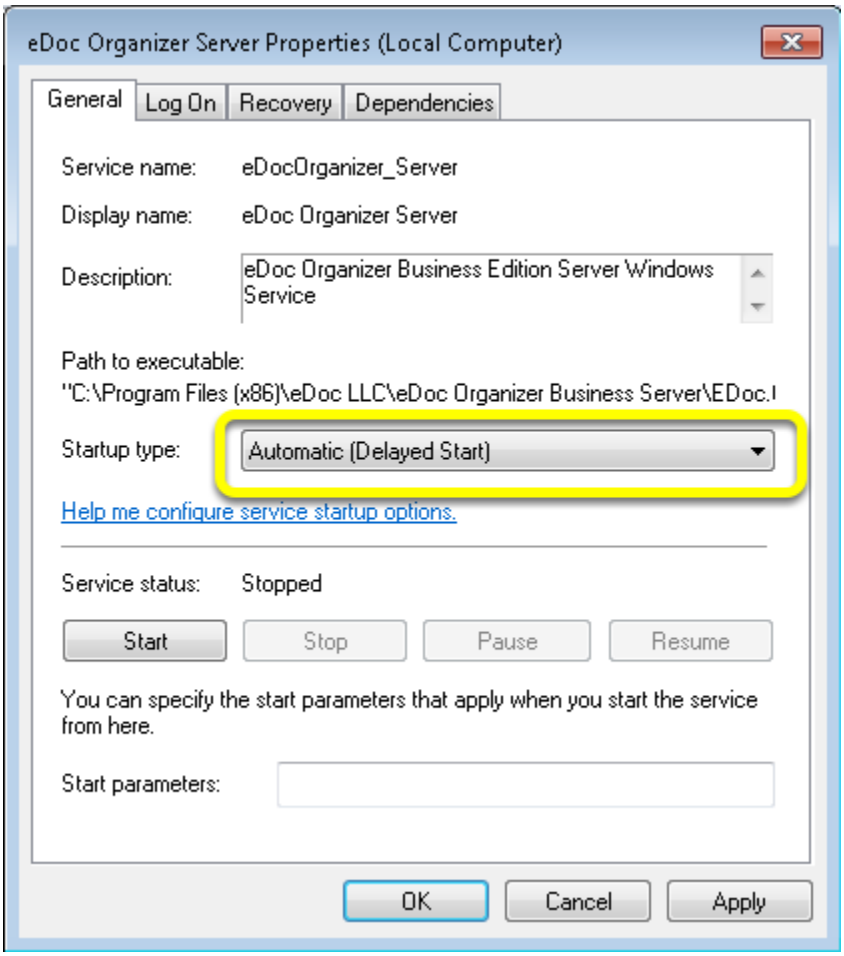
Make sure that Clients can still connect to the server.

If you are unable to connect, make sure that your firewall if configured correctly to allow the server to listen on the specified port.

Troubleshooting Windows Service Startup Issues

Restart your server to ensure that the eDoc Organizer Server WIndows Service starts up automatically after a reboot. If it doesn't, it is probably because it is starting up before Microsoft SQL Server service and stopping automatically because it cannot connect to the database server. There are two ways you are correct the problem:

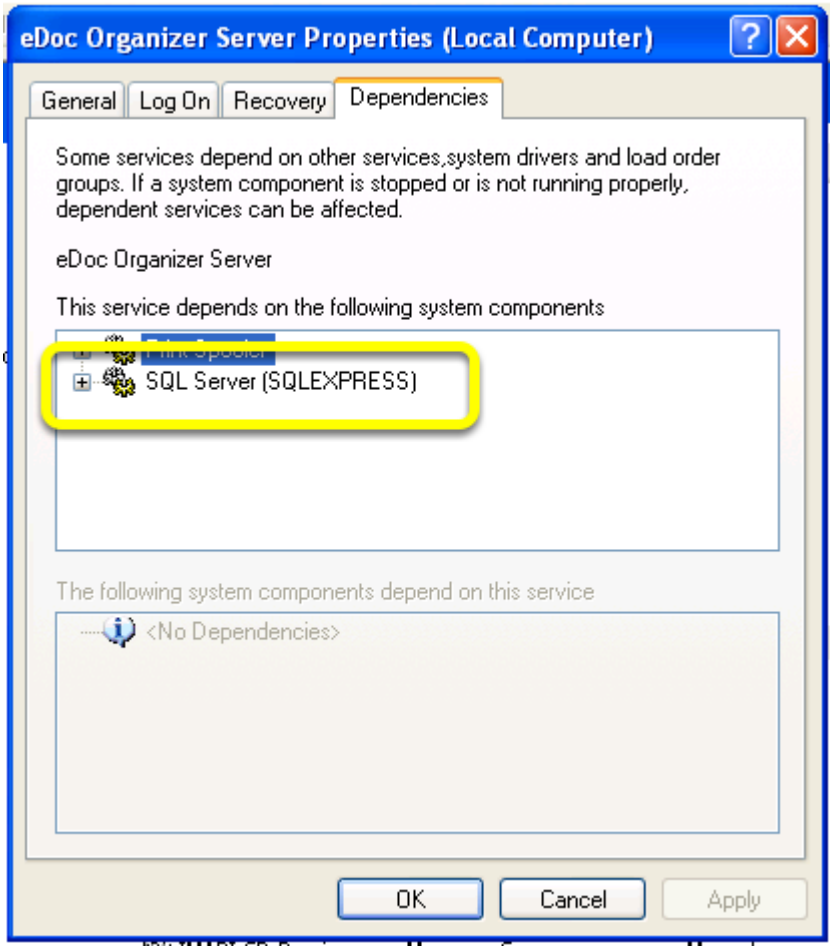
1. Set Windows Service startup type to Automatic (Delayed Start)



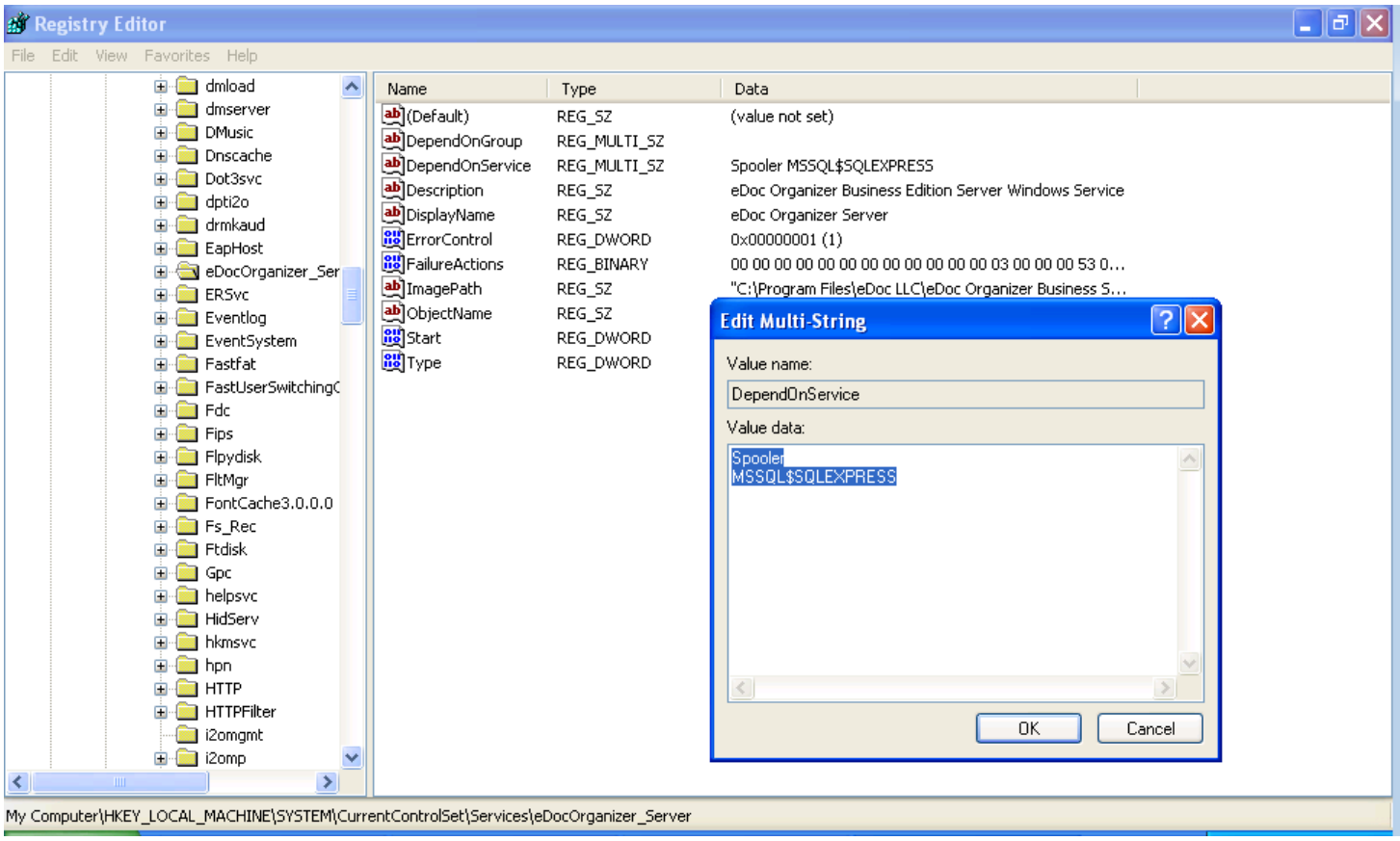
Windows 7 and higher versions of Windows have a new startup type for Services: *Automatic (Delayed Start).*

*S*etting eDoc Organizer Server service's Startup type to Automatic (Delayed Start) will ensure that it starts up after Microsoft SQL Server is up and running.

2. Make eDoc Organizer Server service dependent on SQL Express service

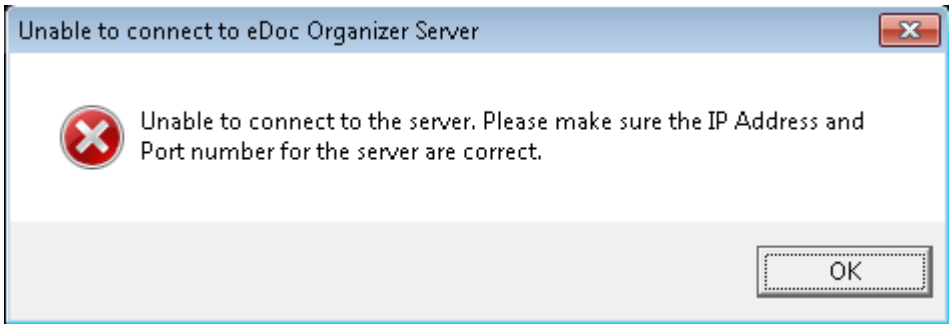


On older operating systems, you can set eDoc Organizer Server service to be dependent upon SQL Express service to ensure that it starts up after Microsoft SQL Server.



Please refer to the following microsoft article for details on how to make a service dependent on another service: http://support.microsoft.com/kb/193888

Why is my eDoc Organizer Client not able to connect to the Server? I get the following message below.



If you belive that you have entered the correct information (IP Address and Port Number) in the Server Log On dialog and you still keep receiving this error it most likely is a Firewall issue on the Server or the Client computer. Configure your firewall software to allow communiation on the Port specified in the configuration. It might be easier to add the Client and Server applications themseleves to your firewalls exception list rather than configure the individual firewall port rules.