



# DocuShare 6.6

## Best Practices

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This document supports DocuShare Release 6.6 and greater

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## Installation

- Before starting DocuShare software installation, complete the pre-installation checklist that is available in the *DocuShare Customer Requirements Input Form (CRIF)*. This checklist will better prepare you for a smooth software installation.
- Verify that your system memory exceeds the DocuShare minimum system requirement. This memory requirement is in addition to the minimum memory requirement specified for your server OS.
- Refer to the *Customer Expectation Setting* document for detailed instructions on estimating required disk space for your installation. You should plan for growth; estimating how many documents are you going to add or update each month; what is the life span of an average document; are you going to archive documents after one year or after seven years?
- Install DocuShare software on a dedicated server. Sharing resources with other applications on a server can impact DocuShare performance.

## Server administrator rights

- DocuShare site administrators should have local administrator/root access rights to the server OS where DocuShare is installed; to install and update software, run command line utilities, and view and edit configuration files.

## Access policies

- For a greater degree of site control, set the Account Management | Access Policies to those shown in this illustration.

Name	Value
Site Access Authority	User
Registry Access Authority	User
Account Creation Authority	Administrator
Group Creation Authority	Administrator

- **Site Access Authority** - Set to User means only DocuShare user accounts can access content on the site. You can set Site Access Authority to Guest if the site has the optional Guest feature. A Guest setting means anyone connecting to the site has access to site content, except content with specific permissions that restrict Guest access.
- **Registry Access Authority** - Only DocuShare user accounts can view site account information.
- **Account Creation Authority** - Only DocuShare users with Administrator status can create new user accounts on the site.
- **Group Creation Authority** - Only DocuShare users with Administrator status can create new group accounts on the site.

## Persistent login

- In Site Management | Account Policies, select **Allow User to Remain Logged In**.

Enabling *Allow user to Remain Logged In* places a checkbox on the site Login page. During log in, if the user checks the box, DocuShare places a cookie on the users computer. As long as the user does not log out of DocuShare, the cookie logs the user back in whenever the user reconnects to the DocuShare site.

Enabling persistent login is not recommended for secure installations or for sites that are accessed openly over the Internet.

## Permissions

- Define content permissions as soon as possible. Best practice is to create the Taxonomy (Site Layout) before you install DocuShare software. Set each top level collection permission to act as the parent for all child collections; sub-collections inherit permissions from the top level collection.

## Administrator accounts

DocuShare provides three types of administrator accounts:

**Site Administrators** have full access to the Administration UI and to all DocuShare content.

**Content Administrators** can not access all of the Administration UI, but they can access all DocuShare content.

**Account Administrators** can only create new user accounts.

- After DocuShare installation, immediately set up additional administrator accounts.
- Do not have all administrators log in under the default **admin** account; it would be difficult to tell the difference between administrators when viewing site access activity in the log files. If user DJones needs to be **admin**, then create two user accounts for DJones.

Example 1: DJones is a Site Administrator. DJones would have two user accounts; a DJones account and a DJones\_SiteAdmin account. The DJones account would belong to the Account Administrator group. This would enable DJones to create new user accounts without having to login as admin.

Example 2: RSmith is a Content Administrator. RSmith would have two user accounts; an RSmith account and an RSmith\_ContentAdmin account. This way there will be less chance that the user will make a mistake while logged in as either Admin or as Content Admin.

When logging is enabled, it is easier to audit activity of each administrator.

- Another possibility is to remove the Site Administrators group from the Content Administrators group, then users within the Site Administrators group will not be able to view site content.

## Group accounts

- Create group accounts first, then apply group permissions to the root collections. As users are added to the groups, they will already have their security permissions in place.
- Make use of current work groups, if they are available. Most customers have a network that has security groups already created.
- When using LDAP for external authentication, first import groups from the LDAP server into DocuShare, then apply the appropriate security permission to the group. As users log into DocuShare, their group affiliations are created automatically.

## Custom properties

- Before creating custom object or custom properties, create a standard syntax that makes it easier to differentiate the custom property **name** from the custom property **label**. This helps identify what may be needed for FlowPort or Document Centre templates.

For example, if you create a custom property called **Invoice Number**, use an underscore to replace the space in the Name field. So **Name= Invoice\_Number** and **Label=Invoice Number**.

## Log files

- In Site Management | Repository Log Files, select **Enable Logging** to start Access and Error logging. These logs list, by User ID, any actions that were performed on objects within a site.

## Site backup

- Stop all DocuShare and MSDE services before starting backup procedures.
- Have a site backup strategy and know which folders to back up. Back up the following:
  - DSHOME/\*-\* (all applications, config files, and sub-directories)
  - DSHOME/Documents and the DocuShare database. Keep these two synchronized by backing up at the same time and setting the site in Read Only mode before and during the backup process.
- General observations about backing up a site
  - Shut down of a low volume site is faster.
  - Shut down of DocuShare 6.6 is faster than DocuShare 6.5.
  - Shut down of a 64-bit OS is faster than a 32-bit OS.

## Manual backup - with DocuShare stopped

1. Run stop\_docushare.
2. Wait 10 minutes for DocuShare to shut down and for all processes to stop completely.
3. If any DocuShare processes (excluding Dish, FileSystemFetch, and content.exe) do not stop completely, then kill those processes.
4. Run idoltool.sh -s stop content0.
5. Wait 15 minutes for the idoltool.sh stop command to either complete or return. If the idoltool.sh stop content0 hangs, keep running the command until the process shuts down.

6. If the `idoltool.sh stop content` command completes successfully and returns from the command, check to see if the `content0` and `content1` exe have shutdown.
7. If `content0` and `content1` exe have shutdown, then move on to Step 9.
8. If `content0` and `content1` do not shutdown, then kill these processes before moving on to Step 9.
9. Perform the backup procedure.
10. When backup has finished, start DocuShare.

### Manual backup- with DocuShare running

1. Allow time for IDOL to finish all the indexing jobs that are currently in queue.
2. Approximately 30 minutes before you start the backup, set DocuShare to read-only mode.
3. Monitor the DocuShare indexing queue and wait until it is empty.
4. Run **`http://localhost:9000/a=indexergetstatus`** to monitor the IDOL indexing queue. Wait until all the jobs in the queue have finished.
5. When all the jobs have finished, run **`http://localhost:9001/DREFLUSHANDPAUSE?`** to return an `indexID` (save it) which will be used to resume IDOL after the backup.
6. Perform the backup procedure.
7. When backup has finished, run **`http://localhost:9000/a=indexergetstatus&index=<indexID>&indexaction=restart`** to resume IDOL.
8. Return DocuShare to read/write mode.

### Automated backup - with DocuShare running

1. Configure automatic IDOL backup. See **`https://system.netsuite.com/app/center/center.nl/ctype.KB/it.I/id.44602/KB.195/f?category=60`** (Index/Search Server and IDOL Troubleshooting Guide - Topic 19: How to schedule automatic backups of the Index Data at regular intervals.)
2. Set DocuShare to read-only mode.
3. Perform the backup procedure on `DSHOME/documents` and the database. (Back up the entire `DSHOME` directory if needed).
4. When backup has finished, return DocuShare to read/write mode.

### For site disaster recovery

- Restore the backup files, then execute `reindexChangesSince` based on the IDOL backup date.

### Database

- Use native database tools for report generation, backup, and recovery.

### Defragment

- Defragmenting the hard drives can dramatically increase site performance. RAID volumes also benefit from defragmentation.

## DSIndex command

- Large DocuShare sites can take many hours to index. We recommend that you run the dsindex command during a slow use period, such as late at night or on the weekend.

## Set defaults on object properties

- If a DocuShare customer has an email address such as *company.com*, then set the default email address user property to *company.com*. This will save the administrator time by not having to type in individual user email addresses.

## VDF customization

- Do not make customizations directly to VDF template files. Instead, create a local directory, such as DSHOME/Amber/templates/Local or DSHOME/Amber/templates/en (or fr, es, de), to hold all of your VDF template customizations. This prevents having to recreate all of your vdf customizations if a future service pack replaces dslib.vdf.

## Refer to the Help desk

- The DocuShare site Help desk contains important and useful DocuShare documentation.
- Logged-in administrators see expanded content on the Help desk.

