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Xerox[®] DocuShare[®] Installation Guide

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1. Before you begin installation

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

- A new license is required for DocuShare 7.5 and for the DocuSign Connector.

System requirements

Note: Before installing or upgrading, go [here](#) for the latest system requirements.

Information required for DocuShare installation

The install Wizard asks questions about how you want the site installed.

Information that you need for an installation include:

- The DocuShare Installation type required
 - 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.
- The location on your server where you want the Wizard to install the DocuShare software. The path to the DocuShare install directory must be made up of ASCII characters. The path cannot contain multi-byte characters.
- 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 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 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.
- 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.
- For Windows platforms, decide how you want to control stopping and starting DocuShare; either AutoStart or manually through the Services window.

Software installed

The following software is installed along with the DocuShare 7.5 server software:

- DocuShare Print and Email
- Xerox® DocuShare Application Connector.
Application Connector is a URL based search that searches for all Documents and Custom Documents for given property through a URL in DocuShare. This has been extended to leverage Collection and Custom Collections in addition to Documents and Custom Documents.
- Xerox® ConnectKey for DocuShare (Windows platform only)

Note: ConnectKey for DocuShare requires configuration. See the Xerox® ConnectKey for DocuShare Setup Guide located on the Help Desk. If your site uses an Apache web server, follow the steps in the Configuration file modification for Apache web server section in the Xerox® ConnectKey for DocuShare Setup Guide to enable the ConnectKey pages in the Admin UI.

- Default database (option to use is selectable during installation)
- Language packs (languages to use are selectable during installation)

2. DocuShare on a Windows platform

Installation logs

The DocuShare installer records all initial installation activity in **InstallLog.txt**. After the installer creates the DocuShare directory, it creates a **DocuShareInstallLog.txt** file in the home directory where it stores the remaining installation data.

To save the initial InstallLog file, start the installation process in a command prompt window by entering the command: `docushare.exe -P docushareLog.cleanUp=false`.

To view the saved InstallLog file; open a command prompt window, cd to `%temp%` and enter `>dir`.

Install DocuShare (New Installs)

Before you begin

1. Review 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. See [Database configuration](#) for more details.
4. For an easier installation, we recommend that you install DocuShare on a clean server; one with newly installed operating system software.

Note: It may be required that you temporarily disable antivirus during the installation, as it may cause issues depending on the antivirus setting used. Alternatively, the user can configure anti-virus software to scan only on Writes to the `DSHOME\documents` directory. Exclude this directory from the virus scanning on Reads. Exclude all other `DSHOME` directories from virus scanning, including the index directories, including the Solr index directories in `DSHOME\Solr\server\solr`.

Note: On the server, if installing a new version of DocuShare 7.5, there cannot exist a previous install of DocuShare 7.5 with IDOL or Solr, nor a DocuShare 7 or previous version with IDOL. A new net install provides the Solr engine.

Start the installation

Caution

Running multiple DocuShare instances on a single VM with Solr is not recommended nor supported.

1. Log into the server using the Windows local server administrator account.
2. Unzip the software to a local directory.
3. Download the DocuShare software to a temporary directory on your server and unzip the file.
4. Open the file, locate, and right-click **docushare.exe** and select **Run as Administrator**.
Be patient; it takes several minutes before the system displays the first install Wizard screen.
5. Follow the onscreen instructions; accept the defaults or enter your own configuration information.
6. 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.
7. In the database configuration window, select a database option then click **Next** and enter the configuration information for your database.

For Oracle 19c, if you do not have a container or pluggable option, add **c##** to the beginning of the username in the **Database User**. For example, **c##q661b110**.

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 Express**.
8. In the Web Server Interaction window, select how you want the web server to connect with the Tomcat servlet engine.
 - Select **Tomcat interacts with 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 must manually edit some files to connect the web server to the Tomcat servlet.
9. In the Windows service setup window, select **Install the DocuShare Windows Service**.
10. Select the languages you want installed with DocuShare. Follow the instructions displayed on the wizard screen to add additional languages to the displayed choices.
11. Review the installation summary, make any necessary changes, then click **Next** to start the installation.

Finish the installation

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

Note: The Solr engine is started automatically after DocuShare 7.5 Installation in Windows.

3. After the server restarts, if you selected DocuShare with FTP scan feature, use the IIS Manager to disable the IIS FTP service, as IIS FTP service and DocuShare FTP Service uses the same port.

4. If you did not set DocuShare to run as an AutoStart service, do the following:
 - 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.
5. 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**

License the site

1. Use the admin password you set during installation and log into the site as [admin](#).
2. On the navigation bar, click **Admin Home**.
3. From the Administration menu, click **Site Management | License**.
4. On the License page, locate and write down the **Host ID** number exactly as displayed.
5. Follow the instructions that Xerox® DocuShare or your DocuShare reseller provided to obtain a site license string.
6. When you have the license string, return to the **Site Management | License** page and enter the string in the **License** field.

Post Installation

1. Refer to the [Administrator Guide](#) for information on post-installation site configuration, such as setting up your site to use SSL.
2. 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 through that port. This is usually done if you selected Tomcat to interact with IIS during the installation.

Note: Before performing these steps, ensure that you can reach the DocuShare site using IIS and HTTPS before you close the 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.

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.

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 **Add/Remove (Programs and Features)** if the site is running on a Windows 2008 Server platform).
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 2017**, then click **Remove**.
4. The Component Selection page appears; select **Remove SQL Server 2017 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 (In-Place)

Note: This is **NOT** the process for a migration to a new server. A migration to a new server would involve the installation of Solr and a subsequent full reindex of the site.

Note: DocuShare 7.0 sites running IDOL are updated to DocuShare 7.5 with IDOL. If you want to upgrade from IDOL to Solr, please contact customer support.

System requirements review

Before making any DocuShare upgrades, review the system requirements for the upgrade version, and make sure your server meets those requirements. Look carefully at the operating system, database, web server, memory, and disk space requirements for the upgrade.

The paths for update from various software version include:

- The DocuShare system must be at DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3) to update the system to DocuShare 7.5.
- If you are upgrading from DocuShare 6.6.1 R2 or 6.6.1 Update 2 or later, you **must first** upgrade to DocuShare 7. Then update DocuShare 7 to DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3).
- If you are upgrading from DocuShare 6.5.3 or earlier, upgrade to DocuShare 6.6.1 R2 before upgrading to DocuShare 7. Then update DocuShare 7 to DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3).

Installation logs

The DocuShare installer records all upgrade activity and stores it in the DocuShareInstallLog.txt file.

Before you start the upgrade procedure

- A day prior to upgrading the site, inform users that the site will be down
 - a. Go to **Site Management | Site Operations**.
 - b. 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.
 - c. Click **Apply**.
- Review the information required for DocuShare software installation presented in Chapter 1. Record all 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
 - a. Log into the DocuShare site as [admin](#).

- b. Go to **Site Management | Access Policies**.
 - c. Set the **Site Access Authority** to Administrator, then click **Apply**.
 - d. Go to **Site Management | Site Operations**.
 - e. 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**.
 - f. After ten minutes, enter the message **DocuShare is currently in read-only mode** in the **Admin Message** field.
 - g. In the **System Mode** field, select **Read Only**.
 - h. In the **Show Admin Message** field select **Yes**.
 - i. Click **Apply**.
- Close all Windows applications that are currently open on the server.
 - Backup the IDOL database
 - a. Make sure the target directory exists and is empty before starting backup. The target directory is represented as <exportdir> in the command.
 - b. Open a command prompt window (Windows) or terminal window (Linux/Solaris)
 - c. Change into the **<dshome>\ bin** directory, where <dshome> is replaced with the installation directory for DocuShare. The default installation directory is C:\Xerox\Docushare. Depending on your installation environment the path may vary.
 - d. Run the following command: **idoltool.bat -s backup <path_to_backup_directory>**, where <path to backup directory> is replaced with the path to the backup folder. For a backup folder: D:\content_backup, the command would be: **idoltool.bat -s backup D:\content_backup**

Note: The backup will need to be run on each content if you are running more than one content. The command line statement will need to be modified if you have more than one content.

- Clear the event queue
 - a. Go to **Site Management | Site Operations**.
 - b. In the **System Mode** field, select **Read Write** and select **No** in the **Show Admin Message** field; then click **Apply**.
 - c. Go to **Services and Components | Subscription**.
 - d. 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**.
 - e. 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 loss of all events waiting in the queue.
- Stop DocuShare via Services or command line depending on your installation. You must have Windows local server administrator account.
- Backup the site database
 - a. In your database server manager, stop the database.
 - b. Perform a system backup of your DocuShare site.
 - c. When the backup is finished, start the database.
 - d. The database must be running for the DocuShare Installer to upgrade the database schema.

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

Note: It is recommended that you temporarily disable your antivirus during the installation. The software may cause issues based on the antivirus used and the settings deployed.

Start the upgrade

1. Download the DocuShare software to a temporary directory on your server. Unzip and extract the file locally to the system.
2. Upgrade the system by one of two ways:
 - Open the file and locate docushare.exe. Right-click **docushare.exe** and select **Run as Administrator**.
 - 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**.
3. Be patient; it takes several minutes before the system displays the first install Wizard screen.
4. When the Upgrade Option window appears, select the appropriate **Upgrade**.
Be patient; it takes several minutes for the system to load and start the installer.
5. 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 the following:
 - In the Administrative Tool, in the Services application, select and **start** the DocuShare service.
4. If the DocuShare site uses LDAP over a secure SSL channel, you need to import the SSL certificate into in `$DSHOME\jdk\lib\security\cacerts`. For example, in the case you use your own self-signed certificate. 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 the IIS console, and restart the service.

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 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.

Post upgrade tasks

1. Run database optimization as defined in the [DocuShare Administrator Guide](#) database optimization procedures.
2. Refer to the [DocuShare VDF Reference Guide](#) to migrate your custom VDFs to the current DocuShare release.
3. 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.
4. Go to **Site Management | Access Policies**.
5. Return the **Site Access Authority** to the pre-upgrade setting, then click **Apply**.

Update DocuShare software or add a language

Patches, updates, and additional languages for DocuShare software, when available, are easily installed using the DocuShare update wizard.

- Before you install software updates, 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.
- Read the update or patch documentation before starting the installation.

Install a software update

1. Log into the DocuShare server as a Windows administrator.
2. Stop DocuShare. In a command prompt window, cd to **<DSHome>/bin** and enter **stop_docushare.bat -q**. Alternatively, the Windows Service can be stopped using the Service console of the Windows operating system.
3. Download, or copy, the software to a temporary directory on your server and unzip the file. Extract the files to a local drive.
4. Open the file and locate dsUpdate.exe. Right-click **dsUpdate.exe** and **Run as Administrator**.
Be patient; it takes several minutes before the system displays the first install Wizard screen.
5. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.
6. When asked to select an update, check the appropriate update, or browse to the location of the update **jar** file, click **Add Update**, then click **Next** to start the installation.
7. When the installation successfully completes, click **Finish** to close the installer.
8. Start DocuShare.

Install a language

1. Log into the DocuShare server as a Windows administrator.
2. Stop DocuShare.
3. Open the DocuShare software folder (not the installed software folder) and locate dsUpdate.exe. Right-click **dsUpdate.exe** and select **Run as Administrator**.
Be patient; it takes several minutes before the system displays the first install Wizard screen.
4. When asked to select a language, check the appropriate language, and then click **Next** to start the installation.
5. When the installation successfully completes, click **Finish** to close the update installer.
6. Restart DocuShare.
7. Go to **Site Management | Installed Languages** to make any changes in your default and installed language choices.

3. DocuShare on a Linux platform

Installation logs

The DocuShare installer records all initial installation activity and stores it in **InstallLog.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 InstallLog 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:

- glibc.i686
- libXau.i686
- libxcb.i686
- libX11.i686
- libXext.i686
- libXi.i686
- libXtst.i686
- libXp.i686
- libXp.x86_64
- libXmu.i686
- libXpm.i686
- glib2.i686
- pam.i686
- glibc-devel.i686
- libXrender.i686
- freetype.i686

- expat.i686
 - fontconfig.i686
 - libXft.i686
 - elfutils-libs.i686
2. Review the minimum system requirements for DocuShare installation and that you have gathered the information required by the install Wizard.
 3. Make sure you have installed and configured a supported web server, and that web server is running before you begin DocuShare installation.
 4. Make sure you have installed and configured a supported database of your choice, and that database is running before you begin the DocuShare installation.
 5. For an easier installation, we recommend that you install DocuShare on a clean server; one with newly installed operating system software. There cannot be an existing installation of DocuShare 7 or 7.5 with IDOL or Solr.

Start the installation

Caution

Running IDOL/KeyView and Solr/Tika on the same server causes conflict in the search functionality. As well, running multiple DocuShare instances on a single VM with Solr is not recommended nor supported.

1. Log into the server as a UNIX server administrator (root).
2. Download the DocuShare software file to a temporary directory on your server and extract the tar file.
3. In a terminal window, go to **<DSHome>/<Linux>/DocuShare** and enter **./docushare**.
Be patient; it takes several minutes before the system displays the first install Wizard screen.
4. Follow the onscreen instructions; accept the defaults or enter your own configuration information.
5. 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.
6. In the database configuration window, select a database option then click **Next** and enter the configuration information for your database.
If you selected Oracle 19c, and you do not have a container or pluggable installation, add **c##** to the beginning of the username in the **Database User**. For example, **c##lq661b110**.
If you selected PostgreSQL, PostgreSQL had to be installed, configured, and a database installed before installation of DocuShare. Enter the Database User Password and select **Create Database**.
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.

Finish the installation

1. When the installation successfully completes, click **Finish** to close the installer.
2. 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 the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.
3. 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.

4. 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® Multifunction Devices must be able to specify this port.

- a. Log into the server as a UNIX server administrator (root).
- b. Open a terminal window and run **systemctl stop vsftpd_service**.

Note: The Solr engine is started automatically after DocuShare 7.5 Installation in Linux. However, if Linux machine is restarted, the Solr engine must be started manually before starting DocuShare.

License the site

1. Use a browser to connect to your newly installed site. Enter the hostname.
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 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.

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 terminal window.
 - b. Change the directory to **<DSHome>/bin**
 - c. Enter **./stop_docushare.sh -q**
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

Note: This is **NOT** the process for a migration to a new server. A migration to a new server would involve the installation of Solr and a subsequent full reindex of the site.

Note: DocuShare 7.0 sites running IDOL are updated to DocuShare 7.5 with IDOL. If you want to upgrade from IDOL to Solr, please contact customer support.

System requirements review

Before making any DocuShare upgrades, review the system requirements for the upgrade version, and make sure your server meets those requirements. Look carefully at the operating system, database, web server, memory, and disk space requirements for the upgrade.

The paths for update from various software version include:

- The DocuShare system must be at DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3) to update the system to DocuShare 7.5.
- If you are upgrading from DocuShare 6.6.1 R2 or 6.6.1 Update 2 or later, you must first upgrade to DocuShare 7. Then update DocuShare 7 to DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3).
- If you are upgrading from DocuShare 6.5.3 or earlier, upgrade to DocuShare 6.6.1 R2 before upgrading to DocuShare 7. Then update DocuShare 7 to DocuShare 7.0 Update 1 Patch 3 (DS7Update1p3).

Installation logs

The DocuShare installer records all upgrade activity and stores it in the DocuShareInstallLog.txt file.

Before you start the upgrade procedure

- A day prior to upgrading the site, inform users that the site will be down
 - a. Go to **Site Management | Site Operations**.
 - b. 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.
 - c. Click **Apply**.
- Review the information required for DocuShare software installation presented in Chapter 1. Record all 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
 - a. Log into the DocuShare site as [admin](#).
 - b. Go to **Site Management | Access Policies**.
 - c. Set the **Site Access Authority** to Administrator, then click **Apply**.
 - d. Go to **Site Management | Site Operations**.
 - e. 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**.
 - f. After ten minutes, enter the message [DocuShare is currently in read-only mode](#) in the **Admin Message** field.
 - g. In the **System Mode** field, select **Read Only**.
 - h. In the **Show Admin Message** field select **Yes**.
 - i. Click **Apply**.
- Backup the IDOL database
 - a. Make sure the target directory exists and is empty before starting backup. The target directory is represented as <exportdir> in the command.
 - b. Open a terminal window.
 - c. Change into the <dshome>\bin directory, where <dshome> is replaced with the installation directory for DocuShare. The default installation directory is C:\Xerox\Docushare. Depending on your installation environment the path may vary.
 - d. Run the following command: **idoltool.sh -s backup <path_to_backup_directory>**, where <path to backup directory> is replaced with the path to the backup folder. For a backup folder: D:\content_backup, the command would be: **idoltool.sh -s backup D:\content_backup**

Note: The backup will need to be run on each content if you are running more than one content. The command line statement will need to be modified if you have more than one content.

- Clear the event queue
 - a. Go to **Site Management | Site Operations**.
 - b. In the **System Mode** field, select **Read Write** and select **No** in the **Show Admin Message** field; then click **Apply**.
 - c. Go to **Services and Components | Subscription**.

- d. 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**.
- e. 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 loss of all events waiting in the queue.

- Stop DocuShare
 - a. Log into the server as a UNIX server administrator (root).
 - b. In a terminal window, cd to **<DSHome>/bin** and enter **./stop_docushare.sh -q** to stop the server.
- Backup the site database
 - a. In your database server manager, stop the database.
 - b. Make sure the target directory exists and is empty before starting backup. The target directory is represented as **<exportdir>** in the command.
 - c. Open a terminal window.
 - d. Change into the **<dshome>\ bin** directory, where **<dshome>** is replaced with the installation directory for DocuShare. The default installation directory is C:\Xerox\Docushare. Depending on your installation environment the path may vary.
 - e. Run the following command: **./idoltool.sh -s backup <path_to_backup_directory>**, where **<path to backup directory>** is replaced with the path to the backup folder. For a backup folder: D:\content_backup, the command would be: **idoltool.sh -s backup D:\content_backup**
 - f. When the backup is finished, start the database. The database must be running for the DocuShare Installer to upgrade the database schema.
 - g. If you are using a Microsoft SQL Server database, run **exec sp_fulltext_database enable** on the server to enable full text search.

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. Download, or copy, the software to a temporary directory on your server and extract the tar file.
3. In a terminal window, go to **<DSHome>/<Linux>/DocuShare** and enter **./docushare**.
4. When the Upgrade Option window appears, select **Upgrade**.
Be patient; it takes several minutes for the system to load and start the installer.
5. 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. 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 the DocuShare features. In a headless system, an error occurs if the display buffer is not correctly set.

3. In a terminal 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.

4. 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® Multifunction Devices must be able to specify this port.

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

1. Open terminal and run **systemctl stop vsftpd.service**.

5. If the DocuShare site uses LDAP over a secure SSL channel, you need to import the SSL certificate into in \$DSHOME\jdk\lib\security\cacerts. For example, in the case you use your own self-signed certificate. 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 | Users | 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 | Access Policies**.
6. Return the **Site Access Authority** to the pre-upgrade setting, then click **Apply**.

Update DocuShare software or add a language

Patches, updates, and additional languages for DocuShare software, when available, are easily installed using the DocuShare update wizard.

- Before you install software updates, 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 documentation is supplied with an update, read the documentation before starting the installation.

Install a software update

1. Log into the server as a UNIX server administrator (root).
2. In a terminal window, cd to **<DSHome>/bin** and enter **./stop_docushare.sh -q** to stop the DocuShare server.
3. Download, or copy, the software to a temporary directory on your server and extract the package.
4. In the software directory, open the Linux directory.
5. From a terminal window, cd to the DocuShare directory and run **./dsUpdate.sh -console** to start the installation.

Be patient; it takes several minutes before the system displays the first install Wizard screen.
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 browse to the location of the update **jar** file, click **Add Update**, then click **Next** to start the installation.
8. When the installation successfully completes, click **Finish** to close the installer.
9. In a terminal window, cd to **<DSHome>/bin**, then enter **./start_docushare.sh** to start DocuShare or **start_docushare.sh console** to see the log to the console.
10. Use a browser to connect to your site and log in as an administrator.
11. If your specific update requires a new license, obtain a site license string, and apply it to the **License** field on the **Site Management | License** page.

Install a language

1. Log into the server as a UNIX server administrator (root).
2. In a terminal window, cd to **<DSHome>/bin** and enter **./dsservice.sh -shutdown DocuShare** to stop the server.
3. 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.
4. When asked to select a language, check the appropriate language, and then click **Next** to start the installation.
5. When the installation successfully completes, click **Finish** to close the update installer.
6. Restart DocuShare.
7. Go to **Site Management | Installed Languages** to make any changes in your default and installed language choices.

4. Database configuration

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 is to operate 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 7.5 installation automatically grants both Connect (gives the DocuShare user account the authority to create Oracle connections, table, and sequence privileges) and CTXAPP (required by the DocuShare Extensible Database Service (XDB)) 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>.
```

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. DocuShare supports auto-create Oracle user. For Oracle 19c, and if you do not have a container or pluggable installation, add `c##` to the beginning of the username in the Database User. For example, `c##lq661b110`.
- **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 username 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

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

5. Web server bridge

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/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 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.

File upload problems using IIS with the DocuShare desktop applications

If you have access to the DocuShare Knowledge Base, refer to <http://customer.docushare.xerox.com/s.nl/ctype.KB/it.I/id.46685/KB.193/.f?category=3> for a knowledge base article about this problem.

6. Add-on installation

OCR (Optical Character Recognition)

- Obtain a new DocuShare site license that includes OCR. Installing software alone does 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 3.5 or higher.

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, look for “**OCR Module**” and then select “**Learn more and download**”. Click **DocuShare Optical Character Recognition (OCR)** 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 | 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:

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.

Xerox® ConnectKey for DocuShare

Xerox® ConnectKey for DocuShare is installed automatically with DocuShare 7.5 installation. It now has Centos support. CentOS is a free operating system distribution based upon the Linux Kernel. As well, it also has TLS 1.2 support for security across internet connections between DocuShare and ConnectKey devices.

There is no install/uninstall option built into the DocuShare install wizard.

To uninstall or to install ConnectKey:

1. Download the software from the [Xerox Support Page](#).
2. Download and unzip the file to extract its contents to a directory on your DocuShare server.
3. Stop DocuShare.
4. In the extracted file, click **dsInstall.exe**
5. In the displayed wizard window, select either to **uninstall** or to **install** ConnectKey for DocuShare.
6. When finished, restart DocuShare.

Document Viewer

The Document Viewer add-on integrates a viewer within the Web UI that provides search, annotation, and redaction features. This embedded technology renders and displays documents within DocuShare with zero footprint. It displays a multitude of filetypes in a browser with no additional software needed. Accusoft PrismDoc Server has been upgraded to 13.x for the Document Viewer add-on.

- For new Document Viewer installation, PrismDoc 13.x runs the client and the server on the same box.
- For upgrades with Document Viewer installed, PrismDoc continues to run the client on the DocuShare server and the PrismDoc 12.x on another server.
- For upgrades without Document viewer, PrismDoc 13.x runs the client and the server on the same box.

This add-on is in English only.

System requirements

DocuShare server

- Linux and Windows only

PrizmDoc server

- Minimum of 6 CPU cores
- Minimum of 16 GB RAM
- Minimum of 100 GB of free disk space

Windows operating systems supported

- Windows Server 2008 R2 SP1 (64 bit)
- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2016
- Windows 7 (64 bit)
- Windows 8 (64 bit)
- Windows 10 (64 bit)

Linux operating systems supported

- CentOS 5.9+, 6.4+, 7 (64 bit)

Note: Assistance from Xerox Professional Services may be required for installation on the following supported Linux platforms:

- Debian 7.1 (Wheezy) (64 bit)
- Red Hat Enterprise Linux 5.9+, 6.4+, 7 (64 bit)
- Ubuntu 12.04 LTS, 13.04 (64 bit), 14.04 LTS (64 bit)

Steps for the Document Viewer add-on installation

The Document Viewer add-on installation requires the following steps:

- Install PrizmDoc Server software,
- Install Document Viewer add-on.

1 - Install the PrizmDoc Server software

The PrizmDoc server must be installed prior to installing the Document Viewer add-on.

Installation on a Windows server

1. Create a local administrator account on the server to host the document viewer service.

Note: Install the PrizmDoc Server software on a server other than the one used to run DocuShare.

2. On that server, open a command prompt by selecting **Run as Administrator**.

3. Enter and run the following command:
Start PrizmDocServer.exe ServiceUser=<serverName>\PrizmUser ServicePassword=<password> InstallFolder=<installDir> -s -l output.log
4. After the PrizmDoc Server software is installed, license the viewer by running **<installDir>\plu\plu.exe**; then select **I have purchased a license, select OEM, and** enter the required information.
5. After licensing the PrizmDoc Server software, go the Windows Services page and start the Prizm service.
6. Verify the installation by going to **<http://localhost:18681/admin>**.

Installation on a Linux server

1. Verify that either LibreOffice or OpenOffice have been installed on your DocuShare server. If neither are installed, in a command window run **yum install cairo** to install the Cairo library.
2. Uncompress the Centos RPM Package Manager into a directory on the server.
3. In a terminal window, navigate to the directory you used in Step 2.
4. As root, run the command **yum install -y --nogpgcheck *.rpm**.
5. Navigate to **/usr/share/prizm** and run the command **setup.sh**.
6. For **install type**, answer with **deploy**.
7. For the next **install type**, answer **OEM**.
8. For **license path**, enter the path to the license file that is located on your server.
9. Wait for the setup to complete; it then starts the document viewer server.
10. Verify the installation by going to **<http://localhost:18681/admin>**.
11. Install the Microsoft core fonts from **wget <http://www.itzgeek.com/msttcore-fonts-2.0-3.noarch.rpm> rpm -Uvh msttcore-fonts-2.0-3.noarch.rpm**.

These fonts are required when burning-in annotations and redactions.

When configuring the PrizmDoc Server, note the following parameters and values. You need them later when installing the Document Viewer add-on.

PrizmDoc Configuration Field Name	Value
Service User	PrizmDoc service username. Required if running on a Windows server; ignore if running on Linux.
Service User Password	Password for the PrizmDoc service user. Required if running on a Windows server; ignore if running on Linux.
Document Viewer Installation Folder	The absolute path to the PrizmDoc install folder. Required if running on a Windows server; ignore if running on Linux.
PrizmDoc Server Host	Path to the server hosting the PrizmDoc Server software.
PrizmDoc Server Port	The port used by the PrizmDoc Server.
PrizmDoc Server Protocol	The protocol can be either HTTP or HTTPS.

2 - Install the Document Viewer add-on

Installation on a Windows server

1. Log into your DocuShare server as a Windows administrator.
2. In a command prompt window, go to **<DSHome>/bin** and enter **stop_docushare.bat -q**.
3. Download, or copy, the DocuShare 7.5 Document Viewer add-on software to a temporary folder on your server and decompress the file.
4. Open the folder, then locate and double-click **dsInstall**. Be patient; it takes several minutes before the system displays the first install Wizard screen.
5. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.
6. When asked to select an update, check the appropriate add-on by selecting **Install DocuShare Document Viewer**, then click **Next** to start the installation.
7. In the **PrizmDoc Config** window, enter the corresponding values in the displayed fields (refer to table above), and then click **Confirm**.
8. When the installation successfully completes, click **Finish** to close the installer.
9. In a command prompt window, go to **<DSHome>/bin** and enter **start_docushare.bat** to start DocuShare, or enter **start_docushare.bat console** to view the log on the console.
10. Use a browser to connect to your site and log in as an Administrator.
11. Obtain a new site license string that includes the Document Viewer and enter that string into the **License** field on the **Site Management | License** page.

Note: The Document Viewer page is visible in the Administration Menu | Services and Components menu once your Document Viewer is licensed.

12. If for any reason you want to change your Document Viewer configuration, go to **Administration Menu | Services and Components | Document Viewer**.

Note: For any change to take effect, you must restart the PrizmDoc Server service and then restart DocuShare.

Installation on a Linux server

1. Log into your DocuShare server as a UNIX server administrator (root).
2. In a terminal window, go to **<DSHome>/bin** and enter **./stop_docushare.sh -q**.
3. Download, or copy, the DocuShare 7.5 Document Viewer add-on software to a temporary folder on your server and decompress the file.
4. Open the folder, then locate and double-click **dsInstall**. Be patient; it takes several minutes before the system displays the first install Wizard screen.
5. Once the install Wizard begins, follow the onscreen instructions. Click **Next** to proceed or click **Back** to return to a previous screen.
6. When asked to select an update, check the appropriate add-on by selecting **Install DocuShare Document Viewer**, and then click **Next** to start the installation.
7. In the **PrizmDoc Config** window, enter the corresponding values in the displayed fields (refer to table above), and then click **Confirm**.
8. When the installation successfully completes, click **Finish** to close the installer.
9. In a terminal window, go to **<DSHome>/bin** and enter **start_docushare.sh** to start DocuShare, or enter **start_docushare.sh console** to view the log on the console.
10. Use a browser to connect to your site and log in as an Administrator.
11. Obtain a new site license string that includes the Document Viewer and enter that string into the **License** field on the **Site Management | License** page.

Note: The Document Viewer page is visible in the Administration Menu | Services and Components menu once your Document Viewer is licensed.

12. If for any reason you want to change your Document Viewer configuration, go to **Administration Menu | Services and Components | Document Viewer**.

Note: For any change to take effect, you must restart the PrizmDoc Server service and then restart DocuShare.