

DocuBrain® TechDoc SharePoint Mirror Installation Guide



A DocuBrain® Product

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Assumptions

This guide provides instructions on how to install the TechDoc SharePoint Mirror. It is assumed that TechDoc 8 or newer has already been installed on the machine that will be mirroring a SharePoint 2007, SharePoint 2010, or SharePoint 2013 installation. The TechDoc SharePoint Mirror may work on other versions of Windows with other versions of SharePoint, but it has only been tested with Windows Server 2008 R2, Windows Server 2012, and SharePoint 2007, SharePoint 2010, and SharePoint 2013.

This guide assumes that all steps are performed by someone who has both a TechDoc account and SharePoint account with administrative privileges.

TechDoc Configuration

- Using an account with Admin privileges, log in to the TechDoc Document Manager that SharePoint files are to be mirrored to.
- Create a user account to be used by the SharePoint Mirror software. Specify a cabinet such as "/SharePoint" for the user's home folder. The user must be a Normal User with the following privileges: Create Folder, Modify Folder, Delete Folder, Create Document, Modify Document, Delete Document, Create Generation, Modify Generation, Delete Generation, and Lists.
- If you want SharePoint documents to have a unique Doc Type, create that Doc Type now.
- Next, modify the System Properties associated with SharePoint, which all start with the prefix "SharePoint".
 - SharePointAutoDocNumber - The mask used to create SharePoint doc numbers. You can use the codes shown to come up with your own number scheme. A good starting point might be SHAREPOINT-%y-%#####. This will insert the current year for %y and a zero-filled eight digit number for %#####.
 - SharePointCabinet - The top level cabinet or folder where SharePoint documents and folders will reside. You should use the cabinet that you specified above when creating the user account.
 - SharePointDocCategory - The abbreviation of the Doc Category to use when creating a document via SharePoint. Make sure the Doc Category you select allows documents to be stored on this TechDoc server.
 - SharePointDocReadAccess - The default read access value when creating a document via SharePoint. You will need to determine what the appropriate value is for your configuration.
 - SharePointDocTitle - The optional title to use when creating a document via SharePoint. Normally you should leave this empty and let SharePoint decide what each file should be titled.
 - SharePointDocType - The abbreviation of the Doc Type to use when creating a document via SharePoint. If you created a Doc Type above, enter its abbreviation now or enter in the abbreviation of the existing Doc Type that you wish to use.
 - SharePointDocWebSearch - The default web search value when creating a document via SharePoint. You will need to determine what the appropriate value is for your configuration.
 - SharePointFolderDescription - The optional description to use when creating a folder via SharePoint. Normally you should leave this empty and let SharePoint decide what each folder description should be.

- SharePointFolderReadAccess - The read access value to use when creating a folder via SharePoint. You will need to determine what the appropriate value is for your configuration.
- This completes the configuration of the TechDoc settings for mirroring.

Install the TechDoc Mirror for SharePoint 2007

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc Mirror 8 Installer "TechDocMirror8MOSS2007.exe".
- You will be presented with the TechDoc Mirror 8 Welcome dialog, click Next to continue.
- You will be presented with the TechDoc SharePoint Mirror License Agreement screen. Read the agreement. If you agree, check the box next to "I accept the terms in the License Agreement" and click Next to continue. If you do not agree, click abort to cancel the installation.
- Now the Choose Install Location dialog will be displayed. Select a location to unpack the TechDoc Mirror SharePoint solution and click Install to continue.
- You will be presented with the Completing the TechDoc Mirror 8 Setup dialog. On this dialog, check the box next to "Show Instructions" and click Finish.
- The installation procedures web page should now be displayed. If it has not automatically loaded, locate and open the file "TechDocMirror8MOSS2007.html" in the installation directory. Follow the instructions to install the solution on SharePoint.

Install the TechDoc Mirror for SharePoint 2010

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc Mirror 8 Installer "TechDocMirror8MOSS2010.exe".
- You will be presented with the TechDoc Mirror 8 Welcome dialog, click Next to continue.
- You will be presented with the TechDoc SharePoint Mirror License Agreement screen. Read the agreement. If you agree, check the box next to "I accept the terms in the License Agreement" and click Next to continue. If you do not agree, click abort to cancel the installation.
- Now the Choose Install Location dialog will be displayed. Select a location to unpack the TechDoc Mirror SharePoint solution and click Install to continue.

- You will be presented with the Completing the TechDoc Mirror 8 Setup dialog. On this dialog, check the box next to "Show Instructions" and click Finish.
- The installation procedures web page should now be displayed. If it has not automatically loaded, locate and open the file "TechDocMirror8MOSS2010.html" in the installation directory. Follow the instructions to install the solution on SharePoint.

Install the TechDoc Mirror for SharePoint 2013

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc Mirror 8 Installer "TechDocMirror8MOSS2013.exe".
- You will be presented with the TechDoc Mirror 8 Welcome dialog, click Next to continue.
- You will be presented with the TechDoc SharePoint Mirror License Agreement screen. Read the agreement. If you agree, check the box next to "I accept the terms in the License Agreement" and click Next to continue. If you do not agree, click abort to cancel the installation.
- Now the Choose Install Location dialog will be displayed. Select a location to unpack the TechDoc Mirror SharePoint solution and click Install to continue.
- You will be presented with the Completing the TechDoc Mirror 8 Setup dialog. On this dialog, check the box next to "Show Instructions" and click Finish.
- The installation procedures web page should now be displayed. If it has not automatically loaded, locate and open the file "TechDocMirror8MOSS2013.html" in the installation directory. Follow the instructions to install the solution on SharePoint.

SharePoint 2007 Configuration

- Using an Administrator account, log into the Central Administration and click the "Operations" tab.
- Under the "Topology and Services" section, click "Services on server".
- On the "Services on Server" screen, click "comment" on the services table to display all of the SharePoint services and then click the "TechDoc SharePoint Mirror Service".
- On the TechDoc SharePoint Mirror Settings page complete the following:
 - Enter the host URL for the TechDoc Document Manager as described.
 - Enter the username and password for TechDoc Document Manager user account created in the previous section.

- Click the "Synchronize" button. This step may take several minutes depending on the number of documents that are in SharePoint.
 - After the synchronization is completed, click the "OK" button.

- This completes the configuration of the SharePoint settings for mirroring. Within a few minutes, you should start to see SharePoint documents appearing in the TechDoc Document Manager in the cabinet you chose in the TechDoc Configuration section.

SharePoint 2010 Configuration

- Using an Administrator account, log into the Central Administration and click the "Manage services on server" link under System Settings.
- On the "Services on Server" screen, click the "TechDoc SharePoint Mirror Service" link.
- On the TechDoc SharePoint Mirror Settings page complete the following:
 - Enter the host URL for the TechDoc Document Manager as described.
 - Enter the username and password for TechDoc Document Manager user account created in the previous section.
 - Click the "Synchronize" button. This step may take several minutes depending on the number of documents that are in SharePoint.
 - After the synchronization is completed, click the "OK" button.

- This completes the configuration of the SharePoint settings for mirroring. Within a few minutes, you should start to see SharePoint documents appearing in the TechDoc Document Manager in the cabinet you chose in the TechDoc Configuration section.

SharePoint 2013 Configuration

- Using an Administrator account, log into the Central Administration and click the "Manage services on server" link under System Settings.
- On the "Services on Server" screen, click the "TechDoc SharePoint Mirror Service" link.
- On the TechDoc SharePoint Mirror Settings page complete the following:
 - Enter the host URL for the TechDoc Document Manager as described.
 - Enter the username and password for TechDoc Document Manager user account created in the previous section.
 - Click the "Synchronize" button. This step may take several minutes depending on the number of documents that are in SharePoint.

- After the synchronization is completed, click the "OK" button.

- This completes the configuration of the SharePoint settings for mirroring. Within a few minutes, you should start to see SharePoint documents appearing in the TechDoc Document Manager in the cabinet you chose in the TechDoc Configuration section.