

DocuBrain® TechDoc SharePoint WebParts Installation Guide



A DocuBrain® Product

<http://docubrain.com/>

By Prevo Technologies, Inc.

<http://www.prevo.com/>



Table of Contents

Assumptions.....	1
Install the TechDoc WebParts for SharePoint 2007	2
Install the TechDoc WebParts for SharePoint 2010	2
Install the TechDoc WebParts for SharePoint 2013	3
Using TechDoc WebParts.....	3
TechDoc Folder Share WebPart	4

Assumptions

This guide provides instructions on how to install TechDoc SharePoint WebParts. TechDoc SharePoint WebParts may work on other versions of SharePoint, but it has only been tested with SharePoint 2007, SharePoint 2010, and SharePoint 2013.

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

Install the TechDoc WebParts for SharePoint 2007

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc WebParts 8 Installer "TechDocWebParts8MOSS2007.exe".
- You will be presented with the TechDoc WebParts 8 Welcome dialog, click Next to continue.
- You will be presented with the 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 WebParts and click Install to continue.
- You will be presented with the Completing the TechDoc WebParts 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 "TechDocWebParts8MOSS2007.html" in the installation directory. Follow the instructions to install the WebParts on SharePoint.

Install the TechDoc WebParts for SharePoint 2010

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc WebParts 8 Installer "TechDocWebParts8MOSS2010.exe".
- You will be presented with the TechDoc WebParts 8 Welcome dialog, click Next to continue.
- You will be presented with the 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 WebParts and click Install to continue.
- You will be presented with the Completing the TechDoc WebParts 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 "TechDocWebParts8MOSS2010.html" in the installation directory. Follow the instructions to install the WebParts on SharePoint.

Install the TechDoc WebParts for SharePoint 2013

- Log into the server where SharePoint has been installed.
- Locate and run the TechDoc WebParts 8 Installer "TechDocWebParts8MOSS2013.exe".
- You will be presented with the TechDoc WebParts 8 Welcome dialog, click Next to continue.
- You will be presented with the 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 WebParts and click Install to continue.
- You will be presented with the Completing the TechDoc WebParts 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 "TechDocWebParts8MOSS2013.html" in the installation directory. Follow the instructions to install the WebParts on SharePoint.

Using TechDoc WebParts

- TechDoc WebParts function just as any other WebParts in SharePoint. WebParts can be displayed on almost any page in SharePoint.
- The normal method of adding a WebPart to a given page is to navigate to the page where the WebPart is to be displayed.
- Once on the target page, click the "Site Actions" menu in the upper right hand corner of the screen and select "Edit Page". Note this must be a page that you own or have privileges to in order to modify it.
- You should now be looking at the target page in the page editor. Navigate to the location on the page where you wish to display a WebPart and click "Add a Web Part" in that zone.

- On the Add Web Parts dialog, select the Web Part to add and click the Add button. Currently the only TechDoc Web Part is the TechDoc Folder Share WebPart. This WebPart is located in the Miscellaneous section under All Web Parts.

TechDoc Folder Share WebPart

- The TechDoc Folder WebPart will display a folder share located in TechDoc where the WebPart is added in SharePoint. To set the folder share to display, simply click the edit button on the WebParts and select Modify Shared Web Part.
- Once the WebPart settings are loaded and displayed at the right, scroll down to the "Folder Share" settings section and expand it.
- Select the protocol in which SharePoint should communicate with TechDoc. The HTTPS protocol is highly recommended and often mandatory with most TechDoc system as it is secure. The HTTP protocol is not secure and not recommended for use.
- Enter the IP address or host name of the machine where the TechDoc folder share exists. For instance, for a folder share running on TDTEST, you would enter tdtest.ksc.nasa.gov
- Enter the name of the folder share to display and click OK.
- The settings dialog should now disappear and the added TechDoc Folder Share WebPart should now be displaying the specified folder share.