

Get started with Efficient Documents Management System

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Chapter 1. Objective

This document has for main objective to provide you the minimum required information to start working with the product. The full details of the product options is explained in the manuals of the product. This document is a baseline recommendation to start learning the system, but is NOT in any manner the ONLY way to setup your document management system.

Caution

This is an install from scratch procedure, not an update from previous version. Data from previous version will not be imported, and will be destroyed in the case you select same database as in the previous instance. We have included an UPGRADE section in this document, follow this if you have already a system running our eDMS.

Warning

FREE OF CHARGE - NO warranty: we are not responsible for any damage to your computer(s) or any loose of data occurred while performing system installation and execution.

Chapter 2. Procedure

For licensing terms please read license* files (located in the same directory than this file)

This install file concerns following module:

- NO-SOD Framework 2.0.2
- Efficient Documents Management System 1.0.4
- Electronic Check Point 1.0.4
- Tasks Management System (Developers sample) 1.0.1
- Twentee (Game) 1.0.1

Pre-requisites: PHP 4.2.0 / MySQL 3.23.49 / Apache 1.3.24/ GD 2.x - PHP must be configured with gettext support enabled Previous versions will not work and will not be supported by our team.

Chapter 3. Upgrading from a previous version

Important

upgrading from any previous version than 1.0.3 to 1.0.4 is not supported and will result into problems and lost of data.

- To upgrade your installation, backup your system (database and htdocs), then uncompress the upgrade package within you eDMS directory (e.g. htdocs/EZE). This will overwrite some existing files.
- Open a client browser and hit the following url : http://your_nosod_server/EZE/EZEUpgrade.php (if you open the client browser from the computer on which you are installing the system, use <http://localhost/EZE/EZEUpgrade.php>) and follow the instructions on screen.

Remove EZEinstall* and EZEUpgrade* files from your EZE directory, in order to avoid a user starts the installation and kill your existing database content.

Chapter 4. Installing eDMS 1.0.4 from Korigan Package 1.0.4

STEP 1

You need ZLIB module installed and configured (for windows platform, check that php_zlib.dll is loaded / uncommented in your php.ini)

Check the following settings in your PHP configuration file (php.ini):

- register_globals : Off
- session.use_trans_sid : 0
- session.gc_maxlifetime : 1440 (this means sessions will time out after 15 minutes of inactivity between client and server - nothing to do with screen time out).
- magic_quotes_gpc : On ; magic quotes for incoming GET/POST/Cookie data
- magic_quotes_runtime : Off ; magic quotes for runtime-generated data, e.g. data from SQL, from exec(), etc.
- magic_quotes_sybase : Off ; Use Sybase-style magic quotes
- extension=php_gettext ;(Put this line for Win32, or compile PHP with gettext enabled for *NIX).
- extension=php_gd2.dll ; (Put this line for Win32, or compile PHP with GD enabled for *NIX).

Set your file size limit (16Mb max). 8MB is the default we advise (php.ini):

- post_max_size = 8M
- mysql.max_allowed_packet = 8M

Set your mySql daemon able to receive the file size limit: check arguments starting your mySql daemon and add :

```
--set-variable=max_allowed_packet=8M
```

STEP 2

Move the unpacked files under your preferred web server location (eg /usr/local/apache/htdocs/ or c:/apache/htdocs/)

Feel free to rename the TOP directory called by default 'EZE'. Installation instructions bellow are based on EZE directory name, adapt it to which one you choosed.

NOTE to Winzip users: make sure you extract empty directories as well. If not, create yourself the directories:

- logs
- include/dbparameters

- debug

IMPORTANT: Make sure the http process (running PHP on your server) has WRITE access in the following locations:

- logs
- include/dbparameters
- debug
- include/ccl/1.0.3

STEP 3

Open a client browser and hit the following url : http://your_nosod_server/EZE/EZEinstall.php (if you open the client browser from the computer on which you are installing the system, use <http://localhost/EZE/EZEinstall.php>)

At the system check, provide your mysql host name, with a valid mysql username and password. Click on START SYSTEM CHECK button. Just after the title, verify your versions against the recommended version.

Fill in all required information:

Table 4.1.

DATA	FIELD	DESCRIPTION	EXAMPLE
USER			
	username	This is default user-name that the installer will create for you. You need it to login to the system when no other users are created. It's an administrator user defined by default.	administrator
	password	Minimum 6 characters password required to login to the system with the default username (see above).	mypassword
PARAMETERS			
	system id	System id means the label identifying your system (as a unique system name, or number...). Note that you can use the server name, or the QA system reference for regulated industries. That reference is displayed on the system information screen, and is provided in the emails sent to the system administrator when activ-	SYS783

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DATA	FIELD	DESCRIPTION	EXAMPLE
		ated.	
	administrator's information	Provide name, description, phone number and email address of the username created by default (see above). Information shown on the info page (from the logon screen)	
	SMTP hostname	The system uses SMTP parameters to communicate by email with users and system administrator. Contact your IT support if you don't know about this. This parameter is only used during SMTP communication for the HELO handshaking. The SMTP host ip is used to initiate the communication and is more important.	re-lay.yourInternetServiceProvider.com
	SMTP host ip address	The system uses SMTP parameters to communicate by email with users and system administrator. Contact your IT support if you don't know about this. Note that the ipaddress may be defined as same as the smtp hostname, if your dns are correctly configured.	10.100.10.2 or re-lay.yourInternetServiceProvider.com
	Path for files upload	Provide the path to your root web server directory. From there, the 'tempupload' sub directory is used to store temporary files between upload and database commit. Note that for win32, use 3 chars '\' for one.	C:\\\\apache\\\\htdocs\\\\EZE / usr/local/apache/htdocs/EZE
SYSTEM DB			
		System database is used to store user information, security links, source code, and any module sharable system data.NB: system db information, edms db information and audit trail db information may be all the same.	
	Host	Provide here the name of the server where	localhost

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DATA	FIELD	DESCRIPTION	EXAMPLE
		your system mySQL server has been installed.	
	Name	The name of the system database that the installer script will create for you.	nsdsys
	username / password	The username and password the installer script will use to communicate with mySQL in order to be able to create the database.	username: root / password: mydbpass , or let empty (no password)
EDMS DB			
		EDMS database is used to store data related to the documents management system, such the documents themselves, the documents status, workflow, etc. NB: system db information, edms db information and audit trail db information may be all the same.	
	Host	Provide here the name of the server where your system mySQL server has been installed.	localhost
	Name	The name of the application(edms) database that the installer script will create for you.	edmsdb
	username/password	The username and password the installer script will use to communicate with mySQL in order to be able to create the database.	username: root / password: mydbpass , or let empty (no password)
AUDIT TRAIL DB			
		The audit trail db contains every trace of any action performed with the system. (summary : who did what from where, and when ?) NB: system db information, edms db information and audit trail db information may be all the same.	
	Host	Provide here the name of the server where your system mySQL server has been installed.	localhost

DATA	FIELD	DESCRIPTION	EXAMPLE
	Name	The name of the audit trail database that the installer script will create for you.	nsdtrail
	username/password	The username and password the installer script will use to communicate with mySQL in order to be able to create the database.	username: root / password: mydbpass , or let empty (no password)

At the end of the installer script execution, enter in the ECP module (This is the maintenance module to create users and manage security stuffs) , using the default username and password you gave in the installer script execution, and extend your account expiration date.

If you omit to extend your account expiration date, you will not be able to login with your default account (created by the installer script) after one day. To extend, select you username in ECP module, and change the end date for this user. Logoff from the module.

STEP 4

Edit the file fly.php :

- Modify \$largefiledir variable value by the physical file system path where documents will be stored (eg : /myfolder/ or c:/myfolder/). Always end the value with a final '/'.
- Modify \$nsdmailing (1 means system will send mails and use the smtp parameters you provided during the installation) and \$nsdsqtrace (1 means system will create SQL logs) if needed.

Edit the file include/ncl/2.0.2/nsddms.inc:

- Adjust your password expiry: \$passwordexpiry=45; = 45 days
- Adjust your screen time out: \$timeoutcfr=60; = 60 seconds of inactivity

Edit the file include/ncl/lang.inc:

- Adjust your default language: \$defaultlang="en"; // If you want to use another language, you need to install the korigan language pack for the language of your choice.

STEP 5

Login in to ECP module (hit the url http://your_nosod_server/EZE/fly.php)

Create your profiles and groups (do not forget System/Public groups associations):

From ECP's user management interface, select option to manage groups of EZE module (EZE is the NO-SOD code for the edms module).

You must be aware the eDMS module is delivered with three system groups:

- EZE: only people attached to this group are able to login to the module.
- DOCEZE: people attached to this group are able to CREATE NEW documents.

- ADMEZE: people attached to this group are able to manage the edms locations, the document types, etc.

In order to attach people into the delivered system groups, you will have to create PUBLIC groups. It's not possible to associate directly a user profile to a system group, you must create public groups (in which you put selected usernames), and you attach the created public group to the system group.

user -> public group -> system group

When you enter in the 'Manage groups of module' section of ECP, use the first fields of the user interface to create three public groups in to you will associate the existing system groups. Keep the drop down 'Public Groups' on the 'NEW' option selected, and provide the public group name and description you want to create. If you have no idea of the names (generally, department names are used, representing the community of users it target to contain) provide the same group names than the system groups (EZE, DOCEZE and ADMEZE).

When the three public groups are created, associate the system groups as follow (for each system group you created):

- Select a public group (from the drop down, after the 'NEW' option)
- Select the system group you want to associate from the 'Existing system group' list. Click on the ADD button. You should see the system group name you added moving from the list 'Existing system group' to the list 'Associated system groups'.
- Select the users you want to attach into your public public, by clicking on usernames you want from the 'Existing users' list. Click on add button for each user. You should see the user names you added moving from the list 'Existing users' to the list 'Associated users'.

Note

Remember: do the associations (with system groups and users) for EACH public group you created. Non associated public groups will be available only for documents authorities.

Provide now your signature data as system administrator (your password, and reasons). Click on SAVE button to record permanently performed actions and data into the system.

Important

You will need to create ADDITIONAL public groups, before going further with the edms. By sample, each stored document of special rights the document owner must affect during document creation. These right are RWXD, standing for Read, Write, eXecute and Delete. Each right is represented by a public group. The documents validation flow requires also public groups, such at least a group for the edition, one for the control and another one for the validation.

So here comes a list of public groups we suggest to create as minimal for test environment:

- Edition
- Control
- Validation

Associate your selected usernames to these public groups, and DO NOT attach these public groups to SYSTEM GROUPS.

If you want to provide login access to ECP, Twentee or TMS module:

Select for each module the module name from the module dropdown. Create a public group into which you add users. Associate the public group with the module system group.

Tip

Summary of the minimal actions required in the ECP module

- Create public groups EZE, DOCEZE and ADMEZE. Attach SYSTEM groups to the corresponding public groups, and link corresponding usernames to the public groups you created.
- Create public groups Edition, Control and Validation. Link corresponding usernames to the public groups you created.
- Save your work.

STEP 6

Secure your database access parameters by htpasswd (cf Apache documentation) for the folder include/dbparameters

Remove EZEinstall* and EZEupgrade* files from your EZE directory, in order to avoid a user starts the installation and crap your data.

Then, you should begin to configure your edms:

Before managing any document through the system, some steps should be performed (remember it's minimum required):

- login to the edms module (with a user profile being part of the public groups associated with the system groups EZE and ADMEZE)
- click on locations, provide your signature
- create folders and file cabinets you want to see in the public tree
- click on the edms logo and select maintenance
- Create properties according your needs. We suggest for test purpose:
 - CTL
 - edition= the public group you created for edition,
 - control = the public group you created for control,
 - validation = /
 - VAL
 - edition= the public group you created for edition,
 - control = the public group you created for control,
 - validation = the public group your created for validation

- Create required document type for your needs
- Create required information field for your needs (these are extra attributes you may choose for your documents)
- Do not forget to commit your changes: signature at the bottom of the screen.

That's all

STEP 7

Congratulations, you have successfully installed your NO-SOD Framework with the Efficient Documents Management System.

If you need assistance, a HELP forum is available at http://sourceforge.net/forum/forum.php?forum_id=190538 where you can browse questions and submit new ones.

Subscribe also to the no-sod-info mailing list via <http://lists.sourceforge.net/lists/listinfo/no-sod-info> to get latest information about our products (no spam).

Before submitting bugs, browse http://sourceforge.net/tracker/?group_id=56867&atid=482106 to get known bugs and submit only new ones (thanks).

Please submit technical questions via the help forum at http://sourceforge.net/forum/forum.php?forum_id=190538

Developers are welcome to <http://www.no-sod.net>

For any other information: <http://www.no-sod.org>

Do not forget: YOUR SUPPORT IS VITAL FOR US !