Docu-Proof
Enterprise
Text Inspection
Installation Guide

GLOBAL VISION
To find out how your company can benefit from Global Vision's solutions, contact us at:
info@globalvisioninc.com  www.globalvisioninc.com
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<tr>
<th>REV. NO.</th>
<th>CHANGES</th>
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<tr>
<td>002</td>
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<td>• Added Email Relay Settings functionality</td>
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<td>• Added support for local or remote installation of the Microsoft SQL Server and Oracle databases</td>
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<td>• Added a step for specifying the Product Key.</td>
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<td>• Added steps for specifying the Database Service Name when installing Synergy Server.</td>
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<td>• Added steps for Updating the Office Live add-in (if required).</td>
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<td>• Removed support for Windows XP, Windows Server 2003, MS Word 2003 and Oracle 9i.</td>
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<td>• Updated Synergy Server hard disk space to 250 MB</td>
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<td>• Added MICROSOFT SQL SERVER 2008/2012 Installation section</td>
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1.0 INTRODUCTION

**DOCU-PROOF ENTERPRISE** is a full-featured text comparison application which will highlight missing, added, modified, moved text and font differences between the Original and Revision documents. Various file types such as Microsoft® Word, Microsoft® Excel, PDF, XML, HTML, RTF, and TXT formats, are supported.

**Synergy Admin** is a user management/ authentication and application configuration tool. The Synergy Admin is LDAP aware and may have users added from one if chosen. Synergy Server runs as a service and the Synergy Admin is the GUI interface to access the Synergy Server.

This document covers the installation procedures required to install Docu-Proof Enterprise, Synergy Admin and Synergy Server using the Global Vision Unified Installer. It also covers the installation of MySQL, Microsoft SQL Server (MS SQL) and ORACLE databases and the procedures required for database migration.

The following topics are covered in this document:

- Hardware and Software Minimum Requirements
- System Architecture
- Installation Prerequisites
- Installation Procedures
- Activating the Docu-Proof Enterprise Application.
- Starting Synergy Server Services
- Installing MS SQL and Oracle Databases
- Database Migration
2.0 HARDWARE AND SOFTWARE MINIMUM REQUIREMENTS

Please ensure that all computers meet the MINIMUM REQUIREMENTS.
For additional information contact the Global Vision Inc. support team at support@globalvisioninc.com or 1-800-501-0511.

**HARDWARE MINIMUM REQUIREMENTS**

<table>
<thead>
<tr>
<th>SOFTWARE</th>
<th>PROCESSOR</th>
<th>MEMORY</th>
<th>HARD DISK SPACE</th>
<th>DATABASE SPACE</th>
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</thead>
<tbody>
<tr>
<td>SYNERGY ADMIN</td>
<td>32 bit or 64 bit</td>
<td>2.0 GB RAM</td>
<td>200 MB</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>2.0 GHZ DUAL CORE</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYNERGY SERVER</td>
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<td>4.0 GB RAM</td>
<td>250 MB</td>
<td>20 GB</td>
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<td></td>
<td>2.0 GHZ DUAL CORE</td>
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<td>50 GB recommended</td>
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<td>DOCU-PROOF ENTERPRISE</td>
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<td>4.0 GB RAM</td>
<td>20.0 GB</td>
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<td></td>
<td>2.0 GHZ DUAL CORE</td>
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**SOFTWARE MINIMUM REQUIREMENTS**

<table>
<thead>
<tr>
<th>SOFTWARE</th>
<th>OPERATING SYSTEMS</th>
<th>DATABASE</th>
<th>OTHER SOFTWARE</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYNERGY ADMIN</td>
<td>WINDOWS 7</td>
<td>N/A</td>
<td>Microsoft .NET Framework 4.0 Microsoft C++ 2010 x86 Redistributable</td>
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<tr>
<td></td>
<td>WINDOWS SERVER 2008 R2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYNERGY SERVER</td>
<td>WINDOWS 7</td>
<td>MySQL v. 5.5</td>
<td>Microsoft .NET Framework 4.0 Microsoft C++ 2010 x86 Redistributable</td>
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<td>MS SQL SERVER 2008/ 2012 ORACLE 11g</td>
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<td>DOCU-PROOF ENTERPRISE</td>
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<td></td>
<td>WINDOWS SERVER 2008 R2</td>
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</table>
3.0 SYSTEM ARCHITECTURE

The application may be installed on one workstation or on multiple workstations with the licensing service installed on a server. Alternatively, the application may be installed on a Citrix Server, Terminal Services Server or Web Server to allow multiple users to access the software from one location. The Synergy Server (Global Vision Synergy Server Service) is installed as a Windows Service on a Windows platform. The server will start automatically when Windows starts.

3.1 DEPLOYMENT OPTIONS

3.1.1 WORKSTATION

The Synergy Server, Admin, Docu-Proof Enterprise and MySQL Database, are installed on one computer.
3.1.2 CLIENT/SERVER

Schema 1

The Synergy Server and Database are installed on one computer. Docu-Proof Enterprise and Synergy Admin are installed on different computers connecting to the server.
Schema 2

Synergy Server is installed on one computer; the Database is installed on another computer; DocuProof Enterprise and Synergy Admin are installed on different computers connecting to the server.
Schema 3

Docu-Proof Complete is installed on one computer (with Windows terminal Services or Citrix Server) and clients are using Remote desktop or Web browser.
Schema 4

Synergy Server + Docu-Proof Enterprise + Synergy Admin are installed on one computer and the Database is installed on another computer. Clients are using Remote desktop or Web browser.

Note: Configuration only supports Oracle and MS SQL. Remote access to MySQL is not supported.
3.2 AUTHENTICATION

There are two methods of authentication:

- **LDAP**: The username, password, and password settings are maintained by the Windows Server O/S Active directory (Windows Server 2008 and later).
- **Local**: The username, password, and password settings are maintained by the Synergy Server. Authentication is performed by the Synergy Server using only the users stored in its database.

3.3 DATABASES

The Synergy Server supports the followings databases:

- **MySQL**: v5.0, v5.5 (Included with the installer).
- **MS SQL**: 2008/2012 (Not included with the installer).
- **ORACLE**: 11g (Not included with the installer).

3.4 APPLICATION COMPONENTS

The system requires the following three components to be installed:

- **Synergy Server**: A Windows service which allows for Docu-Proof Enterprise and Synergy Admin database connectivity.
- **Synergy Admin**: Used for user maintenance, global settings configuration, event logging and license management.
- **Docu-Proof Enterprise**: The text comparator.
4.0 PREREQUISITES

This section describes the prerequisite requirements and settings for the installation.

4.1 WINDOWS 7 SETTINGS

1. Select **Never notify** in User Account Control Settings window before running the installation and click **OK**.
4.2 MICROSOFT PRODUCT UPDATES (Optional)

It is recommended that Windows and other Microsoft products are kept up-to-date. To ensure Windows automatically checks for updates:

1. Navigate to Control Panel → Windows Update → Change Settings.
2. Ensure the Microsoft Update checkbox is checked. If not, check it.
3. Click OK.
4. In the Windows Update window, click Check for Updates to install any recent updates.
4.3 FONT SETTINGS

Prior to running the installation, ensure the <Hide fonts based on language settings> option is unchecked in Font Settings as follows:

1. To access Font Settings go to Start → Control Panel → Fonts.
2. Click on Font Settings.
3. Uncheck Hide fonts based on language settings option (if necessary).
4. Click OK.
4.4 XML/HTML SETTINGS FOR INTERNET EXPLORER

This option needs to be set in Internet Explorer for XML/HTML files to display properly on a network drive.

In the Internet Explorer, enable the settings as follows:

1. Tools → Internet options → Security → Local intranet → Custom level → Miscellaneous → Access data sources across domains → Enable
2. Click OK.
4.5 NETWORK CONNECTIONS

The following information is required to be entered during the installation to connect to different networks:

**Synergy Server:**

a) **Domain Name:** The identification that defines a realm of administrative control on the Network.

b) **Host Name:** The technical name of the system

c) **User Port ID:** Communication port used for the client application (i.e. Docu-Proof Enterprise).

d) **Admin Port ID:** Communication port for the Synergy Server.

**LDAP:**

a) **Domain Name:** The identification that defines a realm of administrative control on the Network.

b) **Host Name:** The technical name of the system, where the LDAP Server is installed.

c) **User List Location:** Directory path of the location where the network users are stored.

d) **LDAP Port ID:** Communication port for the LDAP server.

Additional details are provided in the Synergy Network Settings Section.

**NOTE:** All ports must be available and not blocked by the firewall.
5.0 INSTALLATION PROCEDURES

**IMPORTANT**: It is necessary to uninstall all three applications i.e. Synergy Server, Synergy Admin and Docu-Proof Enterprise prior to installing a new version. Refer to Section 8.0 Uninstall Procedure.

The following sections provide the steps required to install the Synergy Server, Synergy Admin and Docu-Proof Enterprise components. The three components may be installed together or separately as described below.

5.1 UNIFIED INSTALLATION

1. The installer must always be executed by an Admin User. Right-click on the Global Vision Unified Installer icon and choose Run as administrator. The Docu-Proof Enterprise splash screen displays briefly.

2. **Welcome to the Global Vision Unified Installer Setup Wizard** screen appears. Click Next >.
3. The **Choose Components** screen appears. The Synergy Server, Synergy Admin and Docu-Proof Enterprise components are checked by default.
   - If installing all of the components, click **Install** and go to Section 5.2 Synergy Server Installation.
   - If installing only Synergy Server, uncheck Synergy Admin and Docu-Proof Enterprise, click **Install** and go to Section 5.2 Synergy Server Installation.
   - If installing only Synergy Admin, uncheck Synergy Server and Docu-Proof Enterprise, click **Install** and go to Section 5.3 Synergy Admin Installation.
   - If installing only Docu-Proof Enterprise, uncheck Synergy Server and Synergy Admin, click **Install** and go to Section 5.4 Docu-Proof Enterprise Installation.

5.2 SYNERGY SERVER INSTALLATION

1. The Synergy Server Installation screen appears.
The Synergy Server Installation is divided into three sections:

- Section 5.2.1 New Database Installation.
- Section 5.2.2 Retain Existing Database.
- Section 5.2.3 Upgrading from MySQL 5.0 to MySQL 5.5.

5.2.1 NEW DATABASE INSTALLATION

1. Welcome to the Synergy Server Setup Wizard screen appears. Click Next >.

2. License Agreement screen appears. Review the license terms. If you accept the license agreement, click I Agree. If you do not accept, click Cancel to stop the installation and contact Global Vision Inc.
3. **Synergy Server Settings** screen appears. **MySQL** is selected as the default database type.

   - If MySQL is the required database, it will be installed as a local installation during the Global Vision Unified Installation process. Click **Next** and go to step 4.

   - If MySQL is not the required database, select Microsoft SQL Server or Oracle. The **Local** or **Remote Synergy Database Location** options are enabled. Select the database location, click **Next** and go to step 5.
4. The **Synergy Server Settings** screen appears with MySQL Database Installer options. Select **MySQL Version 5.5 (Recommended)** and click **Next**.

![Synergy Server Setup](image)

5. **Choose Components** screen appears. The Synergy Server has three components: Synergy Server, MySQL Server and Synergy Server Database Setup.

   - If MySQL is the database type, the **Complete** components option is checked and all three components will be installed.
   - If MS SQL or Oracle is the database type, the **Synergy Server** component is checked and will be the only component installed.
   - Click **Next >**.

![Choose Components](image)
6. **Synergy Server Network Settings** screen appears.

- If local authentication is required, check **Do not use LDAP**, click **Next** and go to step 7.

- If **LDAP** authentication is required, enter the following information in the text fields and click **Next**:
  
  **Domain Name**: The name of a domain component (DC) where the Directory service is installed. **NOTE**: Additional domains may be added after installation as described in the Synergy Administration User Guide.

  **Host Name**: The network name of the machine where the LDAP Server is installed.

  **User List Location**: The User List Location is the directory path where the domain user account information is located. It is also referred to as an Organizational Unit (OU). **NOTE**: Additional OUs may be added after installation as described in the Synergy Administration User Guide.

  The User List Location must be entered using the format XX.YY.ZZ where:

  - **XX** = Top Level OU
  - **YY** = Next Level OU
  - **ZZ** = Last level OU (optional)

  To determine the name of the User List Location directory path, the Administrator is advised to use a directory browser such as Softerra LDAP Browser.
(www.Softerra.com). The following is an example of how to determine the User List Location within Global Vision’s directory structure using Softerra LDAP Browser.

− The Root of the domain component (DC) is highlighted in blue. In this example, the root is GLOBALVISION01 and is where the Directory service is installed.
− Navigate through the directory structure until the OU with all the required user names (CN) is reached. In the above example, OU = MyBusiness → OU = Quality Assurance has a list of user names: CN=qa test1, CN=qa test 1, etc. If this was the location of the required User List, the path MyBusiness.Quality Assurance would be entered in the Synergy Server Network Settings User List Location text box.

**LDAP Port ID:** Communication port for the LDAP server (default = 389).

**Synergy Network Settings:**

- **User Port ID:** Communication port used for Docu-Proof Enterprise.
- **Admin Port ID:** Communication port used for Synergy Admin.
7. **Synergy Server Email Settings** screen appears. This screen refers to the Synergy Server Email Settings required to send email notifications from within Synergy Admin and Docu-Proof Enterprise. Choose one of the following Email settings:

- Select **Do not use Email Relay** to have Microsoft Outlook send emails (if needed) and click **Next**.

- Use **Email Relay SMTP** (**Simple Mail Transfer Protocol**) to have emails sent by the Exchange Server. To use SMTP, enter the following information and click **Next**.
  - **Domain Name**: The domain name of the machine where the e-mail exchange server software is located.
  - **Host Name**: The computer name of the machine where the email exchange server software is located.
  - **Port ID**: The default port value for SMTP (this value defaults to 25 - the standard SMTP port).
8. **Choose Install Location** screen appears. Choose the folder to install Synergy Server and click **Next >**.

![Choose Install Location](image)

9. The **Synergy Server DB Credentials** screen appears.

![Synergy Server DB Credentials](image)

- If MySQL is the database:
  i. Enter **docuproof2** for the **DSN (Data Source Name)**.
  ii. Enter **root** for the database administrator **User Name**.
  iii. Contact the Global Vision Inc. support team to obtain the **Password**.

- If MS SQL or Oracle is the database:
  i. Enter the **DSN** (e.g. `docuproof2`) for the ODBC (Open Database Connectivity) data source setup, as described in Section 9.2 MS SQL Server ODBC Setup.
  ii. **User Name/Password**: If using SQL Server authentication to connect to the database instance, enter the credentials of a user that already exists in the
database. (E.g. user name = root, password = abc123). If using Windows authentication to connect to the database instance, enter the credentials of a user currently logged into Windows. (e.g. user name = j_smith, password = xxx).

- Enter the port number for the database and the Service Name. The recommended Service Name for the databases are:

<table>
<thead>
<tr>
<th>Database</th>
<th>Service Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>MySQL 5.5</td>
<td>MySQL55</td>
</tr>
<tr>
<td>Microsoft SQL Server</td>
<td>MSSQLSERVER</td>
</tr>
<tr>
<td>Oracle 11g</td>
<td>OracleServiceDCP2</td>
</tr>
</tbody>
</table>

10. Click Next.

- If MySQL is the database type, go to Section 5.2.1.1 MYSQL Database Configuration.

- If MS SQL or Oracle is the database type, go to Section 5.2.1.2 MS SQL/Oracle Database Configuration.
5.2.1.1 MYSQL DATABASE CONFIGURATION

1. A Synergy Server Setup warning screen appears (MySQL Database Only). Click **OK**.

![Synergy Server Setup](image1)

2. The MySQL Server 5.5 Windows configuration progress window displays.

![MySQL Server 5.5](image2)

3. **Welcome to the MySQL Server Instance Configuration Wizard** screen appears. Click **Next >**.

![MySQL Server Instance Configuration Wizard](image3)
4. **MySQL Server Instance Configuration** screen appears. Select **Standard Configuration** and click **Next >**.

5. **MySQL Server Instance Configuration** screen appears.
   - Ensure “**Install As Windows Service**” and “**Include Bin Directory in Windows PATH**” are both checked. **NOTE: BOTH OPTIONS MUST BE CHECKED.**
   - Enter the Service Name **MySQL55**
   - Click **Next >**.
6. **MySQL Server Instance Configuration** screen appears.
   - Ensure “Modify Security Settings” is checked.
   - Enter root password as entered previously in the Synergy Server DB Credentials. **NOTE:** ENSURE ROOT PASSWORD IS THE SAME AS ROOT PASSWORD ENTERED PREVIOUSLY.
   - Click Next >.

7. **MySQL Server Instance Configuration** screen appears. Click Execute.
8. Click **Finish**.

![MySQL Server Instance Configuration Wizard]

Processing configuration...

- Prepare configuration
- Write configuration file (C:\Program Files (x86)\MySQL\MySQL Server 5.5\my.ini)
- Start service
- Apply security settings

Configuration file created.
Windows service MySQL55 installed.
Service started successfully.
Security settings applied.
Press [Finish] to close the Wizard.

9. Installation Complete screen appears. Click **Next >**.

![Synergy Server Setup]

Installation Complete
Setup was completed successfully.

Completed service installation and start.

Created uninstaller: C:\Program Files (x86)\Global Vision\Synergy Server\uninstall.exe
Completed
Execute: "C:\Program Files (x86)\Global Vision\Synergy Server\giveSynergyServiceu....
Execute: "C:\Program Files (x86)\Global Vision\Synergy Server\giveSynergyServiceu....
Completed service installation and start.
10. **Synergy Server Default Administrator Credentials** screen appears.

   - Enter the User Name, Password and E-mail address to create a default administrator.
   - Click **Next**.

   **NOTE:** The user name is limited to 5-20 characters and the password is limited to 8-20 characters. A valid email address should be entered.

11. A message appears: “**Default Administrator created successfully.**” Click **OK**.

13. If Synergy Admin is to be installed, Global Vision Unified Installer Setup Wizard continues to install and automatically launches the **Synergy Admin Setup Wizard**. To continue with the Synergy Admin installation, go to Section 5.3 Synergy Admin Installation. Otherwise if DocuProof Enterprise is to be installed, go to Section 5.4 Docu-Proof Enterprise Installation.
5.2.1.2 MS SQL/ORACLE DATABASE CONFIGURATION

1. Click **Next** to proceed to **Installation Complete** screen.

2. **Synergy Server Default Administrator Credentials** screen appears.
   - Enter the User Name, Password and E-mail address to create a default administrator.
   - Click **Next**.

   **NOTE:** The user name is limited to 5-20 characters and the password is limited to 8-20 characters. A valid email address must be entered.

3. A message appears: "**Default Administrator created successfully.**" Click OK.

5. If Synergy Admin is to be installed, Global Vision Unified Installer Setup Wizard continues to install and automatically launches the Synergy Admin Setup Wizard. To continue with the Synergy Admin installation, go to Section 5.3 Synergy Admin Installation. Otherwise if only DocuProof Enterprise is to be installed, go to Section 5.4 Docu-Proof Enterprise Installation.

NOTE:

If **MS SQL** is to be used for the database, then once the Docu-Proof Enterprise components have been installed, go to Section 9.0 MS SQL Server 2008/2012 Installation and ensure that: a) the MS SQL Server 2008/2012 software has been installed; b) the required tables have been created; c) the MS SQL Server ODBC connection has been setup.

If **Oracle** is to be used for the database, then once the Docu-Proof Enterprise components have been installed, go to Section 10.0 Oracle Installation and ensure that: a) the Oracle software has been installed; b) the Oracle Database Instance has been configured so that it contains a tablespace for all the schemas as well as a tablespace user that has access to this tablespace; c) the Oracle ODBC connection has been set up.
5.2.2 RETAIN EXISTING DATABASE

1. **Welcome to the Synergy Server Setup Wizard** screen appears. Click **Next >**.

   ![Synergy Server Setup Wizard](image1)

   **Welcome to the Synergy Server Setup Wizard**

   This wizard will guide you through the installation of Synergy Server.

   It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to restart your computer.

   Click Next to continue.

   [http://www.globalvisioninc.com](http://www.globalvisioninc.com)

2. **License Agreement** screen appears. Review the license terms.

   ![License Agreement](image2)

   **License Agreement**

   Please review the license terms before installing Synergy Server.

   Press Page Down to see the rest of the agreement.

   **Global Vision Software License Agreement**

   *Global Vision owns all intellectual property in the supplied Software. *Global Vision permits the use of the Software only in accordance with the terms of this Agreement.*

   If you accept the terms of the agreement, click **I Agree** to continue. You must accept the agreement to install Synergy Server.
• If you accept the license agreement, click I Agree.

• If you do not accept, Cancel the installation and contact Global Vision.

3. **Synergy Server Settings** screen appears. MySQL is selected as the default database type.
   - If MySQL is the required database type, it will be installed as part of the Global Vision Unified Installation process, limited to a local installation. Click Next and go to step 4.
   - If Microsoft SQL Server (MS SQL) or Oracle is selected as the required database type, the Local or Remote Synergy Database Location options are enabled. Select the correct database location, click Next and go to step 5.

![Synergy Server Settings](image)

4. The **Synergy Server Settings** screen appears with MySQL Database Installer options. Select MySQL Version 5.5 (Recommended) and click Next.
5. **Choose Components** screen appears. The Synergy Server has three components: Synergy Server, MySQL Server and Synergy Server Database Setup. If MySQL is the database type, the Complete option is checked and all three components will be installed. If MS SQL Server or Oracle is the database type, only the Synergy Server component is checked. Click **Next >**.

![Synergy Server Setup](image)

6. **Synergy Server Network Settings** screen appears.

   ![Synergy Server Network Settings](image)

   - If local authentication is required, check **Do not use LDAP**, click **Next** and go to step 7.
• If LDAP authentication is required, enter the following information in the text fields and click Next:

**Domain Name:** The name of a domain component (DC) where the Directory service is installed. **NOTE:** Additional domains may be added after installation as described in the Synergy Administration User Guide.

**Host Name:** The network name of the machine where the LDAP Server is installed.

**User List Location:** The User List Location is the directory path where the domain user account information is located. It is also referred to as an Organizational Unit (OU). **NOTE:** Additional OUs may be added after installation as described in the Synergy Administration User Guide.

The User List Location must be entered using the format XX.YY.ZZ where:

- XX = Top Level OU
- YY = Next Level OU
- ZZ = Last level OU (optional)

To determine the name of the User List Location directory path, the Administrator is advised to use a directory browser such as Softerra LDAP Browser ([www.Softerra.com](http://www.Softerra.com)). The following is an example of how to determine the User List Location within Global Vision’s directory structure using Softerra LDAP Browser.

- The Root of the domain component (DC) is highlighted in blue. In this example, the root is GLOBALVISION01 and is where the Directory service is installed.
Navigate through the directory structure until the OU with all the required user names (CN) is reached. In the above example, OU = MyBusiness → OU = Quality Assurance has a list of user names: CN=qa test1, CN=qa test 1, etc. If this was the location of the required User List, the path **MyBusiness.Quality Assurance** would be entered in the **Synergy Server Network Settings User List Location** text box.

**LDAP Port ID:** Communication port for the LDAP server (default = 389).

**Synergy Network Settings:**
- **User Port ID:** Communication port used for Docu-Proof Enterprise.
- **Admin Port ID:** Communication port used for Synergy Admin.

7. **Synergy Server Email Settings** screen appears. This screen refers to the Synergy Server Email Settings required to send email notifications from within Synergy Admin and Docu-Proof Enterprise. Choose one of the following Email settings:

   - **Select Do not use Email Relay** to have Microsoft Outlook send emails (if needed) and click **Next**.
   - **Use Email Relay SMTP** *(Simple Mail Transfer Protocol)* to have emails sent by the Exchange Server. To use SMTP, enter the following information and click **Next**.
     - **Domain Name:** The domain name of the machine where the e-mail exchange server software is located.
     - **Host Name:** The computer name of the machine where the email exchange server software is located.
     - **Port ID:** The default port value for SMTP (this value defaults to 25 - the standard SMTP port).
8. **Choose Install Location** screen appears. Choose the folder to install Synergy Server and click Next >.

![Choose Install Location](image)

9. The **Synergy Server DB Credentials** screen appears.

![Synergy Server DB Credentials](image)

- Enter the Data Source Name (DSN), the administrator user name and password for the database instance.
- Enter the port number for the database and the Service Name. The recommended **Service names** for the supported databases are:

<table>
<thead>
<tr>
<th>Database</th>
<th>Service Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>MySQL 5.5</td>
<td>MySQL55</td>
</tr>
<tr>
<td>Microsoft SQL Server</td>
<td>MSSQLSERVER</td>
</tr>
<tr>
<td>Oracle 11g</td>
<td>OracleServiceDCP2</td>
</tr>
</tbody>
</table>
10. Click **Next**. A **Synergy Server Setup** warning screen appears (MySQL Database Only). Click **Yes** if you want to clear the data from the database. Click **No** to retain the data.

![Synergy Server Setup Warning Screen]

11. **Installation Complete** screen appears. Click **Next >**.
12. **Synergy Server Default Administrator Credentials** screen appears (For MS SQL and Oracle Databases Only). Enter the User Name, password and email address to create a default administrator. Click **Next**.

****NOTE: The user name is limited to 5-20 characters and the password is limited to 8-20 characters. A valid email address should be entered****.

![Synergy Server Default Administrator Credentials](image)

13. **Completing the Synergy Server Setup Wizard** screen appears. Click **Finish**.

![Completing the Synergy Server Setup Wizard](image)

**NOTE:** Continue with the Synergy Admin Installation described in Section 5.3 Synergy Admin Installation.
5.2.3 UPGRADING FROM MYSQL 5.0 TO MYSQL 5.5

Upgrading to MySQL 5.5 is a 3-step process. It includes:

- Back up the current MySQL 5.0 database and uninstall MySQL 5.0
- Continue running the Synergy Server Installer
- Restore the MySQL 5.0 database backup into the new MySQL 5.5 Instance.

STEP 1: Backup the current MySQL 5.0 database and uninstall MySQL 5.0

1. Minimize the Welcome to the Synergy Server Setup Wizard screen.

2. From the Start menu, enter cmd.exe in the Search textbox.

3. Press Enter on your keyboard to access Windows Command Prompt.

4. Enter the following directory to access the mysqldump utility:

Example:

```
C:\Users\gve> cd\nC:\>cd Program Files (x86)\MySQL\MySQL Server 5.0\bin
```

To create the dump, run the mysqldump.exe program using the following arguments:

```
```

Example:

```
C:\>cd Program Files (x86)\MySQL\MySQL Server 5.0\bin>
Mysqldump.exe –e –uroot –pabc123 –hlocalhost Docu-Proof2 > C:\Docu-Proof2.sql
```
5. Press **Enter**

6. Enter **exit** to close Command Prompt.

7. The dump file will be saved in .sql format in the specified location. In this case, it will be stored in the C:\ directory.

8. Navigate to Programs and Features in Control Panel, select MySQL Server 5.0 and click **Uninstall**.
9. Navigate to the MySQL folder in Window Explorer, Computer → OS (C:) → Program Files (x86).

10. Delete the MySQL folder.

11. The MySQL 5.0 uninstall is complete.
STEP 2: Continue running the Synergy Server Installer.

1. Restore the **Welcome to the Synergy Server Setup Wizard** screen.

   Click **Next >**.

2. **License Agreement** screen appears. Review the license terms.

   - If you accept the license agreement, click **I Agree**.
   - If you do not accept, cancel the installation and contact Global Vision.
3. **Synergy Server Settings** screen appears. MySQL is selected as the default database type.

   - If MySQL is the required database type, it will be installed as part of the Global Vision Unified Installation process, limited to a local installation. Click **Next** and go to step 4.

   - If Microsoft SQL Server or Oracle is selected as the required database type, the **Local** or **Remote Synergy Database Location** options are enabled. Select the correct database location, click **Next** and go to step 5.

4. The **Synergy Server Settings** screen appears with MySQL Database Installer options. Select **MySQL Version 5.5 (Recommended)** and click **Next**.
5. **Choose Components** screen appears. The Synergy Server has three components: Synergy Server, MySQL Server and Synergy Server Database Setup. If MySQL is the database type, the **Complete** option is checked and all three components will be installed. If Microsoft SQL Server or Oracle is the database type, only the Synergy Server component is checked. Click **Next >**.

6. **Synergy Server Network Settings** screen appears.
• If local authentication is required, check **Do not use LDAP**, click **Next** and go to step 7.

• If LDAP authentication is required, enter the following information in the text fields and click **Next**:

  **Domain Name**: The name of a domain component (DC) where the Directory service is installed. **NOTE**: Additional domains may be added after installation as described in the Synergy Administration User Guide.

  **Host Name**: The network name of the machine where the LDAP Server is installed.

  **User List Location**: The User List Location is the directory path where the domain user account information is located. It is also referred to as an Organizational Unit (OU).

  **NOTE**: Additional OUs may be added after installation as described in the Synergy Administration User Guide.

  The User List Location must be entered using the format XX.YY.ZZ where:

  - XX = Top Level OU
  - YY = Next Level OU
  - ZZ = Last level OU (optional)

  To determine the name of the User List Location directory path, the Administrator is advised to use a directory browser such as Softerra LDAP Browser ([www.Softerra.com](http://www.Softerra.com)). The following is an example of how to determine the User List Location within Global Vision's directory structure using Softerra LDAP Browser.
− The Root of the domain component (DC) is highlighted in blue. In this example, the root is GLOBALVISION01 and is where the Directory service is installed.
− Navigate through the directory structure until the OU with all the required user names (CN) is reached. In the above example, OU = MyBusiness → OU = Quality Assurance has a list of user names: CN=qa test1, CN=qa test 1, etc. If this was the location of the required User List, the path **MyBusiness.Quality Assurance** would be entered in the **Synergy Server Network Settings User List Location** text box.

**LDAP Port ID:** Communication port for the LDAP server (default = 389).

**Synergy Network Settings:**

- **User Port ID:** Communication port used for Docu-Proof Enterprise.
- **Admin Port ID:** Communication port used for Synergy Admin.

7. **Synergy Server Email Settings** screen appears. This screen refers to the Synergy Server Email Settings required to send email notifications from within Synergy Admin and Docu-Proof Enterprise. Choose one of the following Email settings:

- Select **Do not use Email Relay** to have Microsoft Outlook send emails (if needed) and click **Next**.

- Use Email Relay SMTP (**Simple Mail Transfer Protocol**) to have emails sent by the Exchange Server. To use SMTP, enter the following information and click **Next**.

  − **Domain Name:** The domain name of the machine where the e-mail exchange server software is located.
  − **Host Name:** The computer name of the machine where the email exchange server software is located.
  − **Port ID:** The default port value for SMTP (this value defaults to 25 - the standard SMTP port).
8. **Choose Install Location** screen appears. Choose the folder to install Synergy Server and click **Next >**.

9. The **Synergy Server DB Credentials** screen appears.
Enter the Data Source Name (DSN), the administrator user name and password for the database instance that was backed up in STEP 1 above.

Service is displayed as MySQL55 by default.

Enter the port number for the database and the Service Name. Click Next.

10. A Synergy Server Setup message appears. Take note of the Service Name. Click OK.

   NOTE: Specify this exact service name in the MySQL Server Instance Configuration Wizard. Failure to do this will result in the Global Vision Synergy Service not starting.

11. A prompt message appears that The MySQL RDBMS V5.5 (32 bit) will be installed on your system. Click OK.

12. The installation continues with the configuration of MySQL Server 5.5.
13. **Welcome to the MySQL Server Instance Configuration Wizard** screen appears.
   
   Click **Next >**.

14. **MySQL Server Instance Configuration** screen appears.

   Select **Standard Configuration** and click **Next >**.
15. **MySQL Server Instance Configuration** screen appears.

Ensure "Install As Windows Service" and "Include Bin Directory in windows PATH" are both checked.

*******NOTE: BOTH OPTIONS MUST BE CHECKED************

Verify the Service Name as per the Synergy Server Setup Warning message.

Click **Next >**.

16. **MySQL Server Instance Configuration** screen appears.
Ensure “Modify Security Settings” is checked. Enter root password as entered in an earlier step. Click Next >.

****NOTE: ENSURE ROOT PASSWORD IS THE SAME AS ROOT PASSWORD ENTERED PREVIOUSLY****.

17. **MySQL Server Instance Configuration** screen appears.

Click Execute.

18. Click Finish.
19. **Installation Complete** screen appears.
   Click **Next >**.

20. **Synergy Server Default Administrator Credentials** screen appears.
    Enter the User Name, password and email address to create a default administrator. Click **Next**.
****NOTE: The user name is limited to 5-20 characters and the password is limited to 8-20 characters. A valid email address must be entered****.

21. A prompt message appears that the Default Administrator created successfully.

Click OK.

**** NOTE: This new Default Administrator will override the Default Administrator that exists in the database backup from STEP 1. ****

22. Completing the Synergy Server Setup Wizard screen appears.

Minimize the Completing the Synergy Server Setup Wizard screen.

STEP 3: Restore the MySQL 5.0 database backup into the new MySQL 5.5 Instance.

1. From the Start menu, enter cmd.exe in the Search textbox.
2. Press **Enter** on your keyboard to access **Windows Command Prompt**.

3. In Command Prompt, enter **cd\**

4. Enter the following directory to access the MySQL utility:
   - Example:
     
     C:\Users\gve> cd\ 
     C:\>cd Program Files (x86)\MySQL\MySQL Server 5.5\bin

5. To restore the database backup, run the mysql.exe program using the following arguments:

   ```
   ```

   Example:
   
   C:\>cd Program Files (x86)\MySQL\MySQL Server 5.5\bin>
   mysql –uroot –pabc123 –hlocalhost Docu-Proof < C:\Docu-Proof2.sql
6. Press Enter.
7. Type `exit` to close Command Prompt.
9. The previous database will be restored within the new MySQL 5.5 database.

**NOTE:** The Serial Number is not restored with this process. In order to activate Docu-Proof Enterprise, the steps in section 6.0 Activating Docu-Proof Enterprise must be performed.

10. Restore the **Completing the Synergy Server Setup Wizard** screen.

11. Click **Finish >**

**NOTE:** CONTINUE with the Synergy Admin Installation. Refer to Section 5.3 – **SYNERGY Admin Installation**.
5.3 SYNERGY ADMIN INSTALLATION

1. Welcome to the Synergy Admin Setup Wizard screen appears. Click Next >.

2. License Agreement screen appears. Review the license terms.

   - If you accept the license agreement, click I Agree.
   - If you do not accept, cancel the installation and contact Global Vision.
3. **Synergy Server Identification** screen appears.

This screen refers to the authentication settings required. Ensure the values of Domain Name, Host Name and Admin Port are the same as specified in Section 5.2 Synergy Server Installation.

**Use Localhost:** If checked, the Synergy Admin application will be installed on the same computer as the Synergy Server. Typically used when a single computer hosts both the server and the client.

Click **Next**.

4. **Email Delivery Mode Selection** screen appears.

If Email Relay Settings were entered during Synergy Server Setup, select the **Synergy Server Email Relay** option. Otherwise select the **Default Email Client** option.

Click **Next**.
5. **Choose Install Location** screen appears. Choose the folder in which to install Synergy Admin. Click **Next >**.
6. **Choose Users** screen appears. Choose the users for Synergy Admin.

   ![Choose Users Screen]

   Click **Next >**.

7. **Choose Start Menu Folder** screen appears. Choose a start menu folder for the Synergy Admin shortcuts.

   ![Choose Start Menu Folder Screen]

   Click **Install**.
8. **Installing** screen appears.

9. **Installation Complete** screen appears.

   Click **Next >**.
10. **Completing the Synergy Admin Setup Wizard** screen appears.

![Completing the Synergy Admin Setup Wizard](image)

Click **Finish**.

11. If Docu-Proof Enterprise is being installed, installation continues and automatically launches the Docu-Proof Enterprise Setup. Go to Section 5.4 Docu-Proof Enterprise Installation.

![Global Vision Unified Installer Setup](image)
5.4  **DOCU-PROOF ENTERPRISE INSTALLATION**

1. **Welcome to the Docu-Proof Enterprise Setup Wizard** screen appears. 

   ![Welcome to the Docu-Proof Enterprise Setup Wizard](image)

   Click **Next >**.

2. **License Agreement** screen appears. Review the license terms.

   ![License Agreement](image)

   - If you accept the license agreement, click **I Agree**.
   - If you do not accept, cancel the installation and contact Global Vision.
3. **Product Key** screen appears. This screen refers to the Product Key required to access DocuProof Enterprise. This Product Key should be labeled on the installer CD-ROM. Contact Global Vision Support if unable to locate a product key.

![](image1.png)

- Enter the **Product Key**.
- Click **Next >**.

4. **Synergy Server Identification** screen appears. This screen refers to the Synergy Server identification parameters required by the Docu-Proof application to be able to connect to the Synergy Server. Ensure the values of Domain Name, Host Name and User Port ID are the same as the values entered in the **Synergy Server Network Settings** screen during Synergy Server installation.

![](image2.png)
**Domain Name:** The identification that defines a realm of administrative control on the Network.

**Host Name:** The computer name where the Synergy Server is installed.

**Use Localhost:** If checked, the Docu-Proof Enterprise client application will be installed on the same computer as the Synergy Server. This is typically used when a single computer hosts both the server and the client.

**User Port ID:** Communication port used for the client application (i.e. Docu-Proof Enterprise). Click Next.

5. **Email Delivery Mode Selection** screen appears. If Email Relay Settings were entered during Synergy Server Setup, select the **Synergy Server Email Relay** option. Otherwise select the **Default Email Client** option. Click Next.

![Email Delivery Mode Selection](image)
6. **Choose Install Location** screen appears. Choose the folder in which to install Docu-Proof Enterprise. Click **Next >**.

7. **Choose Users** screen appears. Choose the users for Docu-Proof Enterprise. Click **Next >**.
8. **Choose Start Menu Folder** screen appears. Choose a Start menu folder for the Docu-Proof Enterprise shortcuts.

Click Next>.

![Choose Start Menu Folder](image)

9. **Docu-Proof Enterprise Spelling-Optional** screen appears.

This screen allows for the specification of the location of the User Dictionary used by the optional Spelling module.

![Docu-Proof Enterprise Spelling-Optional](image)

Perform one of the following three actions:
• **Not Applicable:** If checked, the Spelling functionality is not enabled. All the other fields are disabled.

• **Spelling User Dictionary Location:** The User Dictionary may be placed on the local computer or on a shared network.

  **Network Location:** Path for the User Dictionary. If entered, the Use local User Dictionary option is disabled.

  **NOTE:** The complete path must be specified. For example: 
  "<machine-name>\SharedFolder1\SharedFolder2\...\SharedFoldern". Logical drives are supported.

• **Use Local User Dictionary:** If checked, the Network Location field is disabled.

  Click **Next**.

10. **Installing** screen appears
11. **Installation Complete** screen appears. Click Next >.

12. **Completing the Docu-Proof Enterprise Setup Wizard** screen appears. Click Finish.
13. **Installation Complete** screen appears.
   
   Click Next >.

14. **Completing the Global Vision Unified Installer Setup Wizard** screen appears.
   
   Click Finish.
6.0 ACTIVATING DOCU-PROOF ENTERPRISE

To activate the Docu-Proof Enterprise application, Global Vision must provide the serial number in a license file format. The serial number must be updated in the Synergy Admin. The hardware ID is required to obtain the license file.

1. Launch Synergy Admin application from the Programs → Global Vision → Synergy Admin → Synergy Admin or double click on the Synergy Admin icon on the desktop.

2. In the Synergy Admin Login Screen:
   - Enter Username and password specified in the installation.
   - Click Login.

3. To obtain the Hardware ID for the license file, go to Help → About.

4. Send the Hardware ID to Global Vision by email to activation@globalvisioninc.com. Please provide the hardware id (and the Product key if available) in the subject line.

5. Global Vision will supply the license file required to activate the Docu-Proof Enterprise application. Place the license file in a desired location.
6. Select **Tools → Update Serial Number**.

7. In the License file dialog:
   - Select Serial Number (.lic) file supplied by Global Vision.
   - Click **Open**.
     The Serial number, License Type, Count, Mode and Spell Checking option is displayed in the Global Settings and Information panel.

8. Create a new Regular user or set the default Administrator as a Regular User.

9. Launch Docu-Proof Enterprise application from the **Programs → Global Vision → Docu-Proof Enterprise** or double click the Docu-Proof Enterprise icon on the Desktop.

10. In the Docu-Proof Enterprise Login Screen:
    - Enter Username and password (created above in step 8).
    - Click Login.
    - Change new password (if prompted).

11. Click **OK**. The main Docu-Proof Enterprise screen appears.
7.0 STARTING THE GLOBAL VISION SYNERGY SERVER SERVICE

The following steps are required to start the **Global Vision Synergy Server Service** if it is stopped.

1. Access Control Panel.
2. Double click on Administrative Tools.
3. Double click on Services.
5. Right click and select Start.
8.0 UNINSTALL PROCEDURE

The following section outlines the steps required to perform a complete uninstall of:

- Synergy Server
- Synergy Admin
- Docu-Proof Enterprise
- Easy PDF

NOTE:

- ADMIN rights are required to perform the uninstall procedure.
- All applications should be closed before starting to uninstall.
- For Docu-Proof Enterprise Uninstall, refer to Section 8.1.
- For Synergy Admin Uninstall, refer to Section 8.2.
- For Synergy Server Uninstall, refer to Section 8.3.
- For Easy Pdf Uninstall, refer to Section 8.4.
8.1 **DOCU-PROOF ENTERPRISE UNINSTALL**

1. Launch Control Panel and click on **Uninstall a Program**.

2. Click on Docu-Proof Enterprise and click on **Uninstall**.
3. Click on **Uninstall** to start Uninstall of Docu-Proof Enterprise.

4. Once the uninstall is complete, click on **Close**. The Docu-Proof Enterprise has now been uninstalled from the system.
8.2 SYNERGY ADMIN UNINSTALL

1. Launch Control Panel and click on **Uninstall a Program**.

2. Click on Synergy Admin and click on **Uninstall**.
3. Click on **Uninstall** to start the Uninstall of Synergy Admin.

![Uninstall Synergy Admin](image1)

4. Once the uninstall is complete, click on **Close**. The Synergy Admin has now been uninstalled from the system.

![Uninstallation Complete](image2)
8.3 SYNERGY SERVER UNINSTALL

1. Launch Control Panel and click on **Uninstall a program**.

2. Click on Synergy Server and click **Uninstall**.

![Uninstall Control Panel](image1.png)

![Uninstall Synergy Server](image2.png)
3. **Click on Uninstall** to start the Uninstall of Synergy Server.

![Synergy Server Uninstall dialog box](image1)

4. Once the uninstall is complete, **click on Close**. The Synergy Server has now been uninstalled from the system.

![Synergy Server Uninstall dialog box](image2)
5. Delete the Synergy Registry Entries. Perform the following steps:
   - From the start menu, enter `REGEDIT.exe`
   - Press **Enter** on your keyboard to access the **Registry Editor**.
     - In the Registry Editor, go to the location `HKEY_LOCAL_MACHINE\SYSTEM\ControlSet001\services`
     - Delete the folder **Synergy** (if it exists).
     - In the Registry Editor, go to the location `HKEY_LOCAL_MACHINE\SYSTEM\ControlSet002\services`
     - Delete the folder **Synergy** (if it exists).
     - In the Registry Editor, go to the location `HKEY_LOCAL_MACHINE\SYSTEM\ControlSet\services`
     - Delete the folder **Synergy** (if it exists).
     - Reboot the Computer.
8.4 EASY PDF UNINSTALL

1. Launch Control Panel and click on **Uninstall a program**.

![Image of Control Panel with Uninstall highlighted](image1.png)

2. Click on Easy PDF and click **Uninstall**.

![Image of Control Panel list with Easy PDF highlighted](image2.png)
3. Click on **Yes** to start the uninstall of EasyPDF.

![Programs and Features dialog box with Yes button circled](image1)

4. The EasyPDF will now be removed from the System.

![Uninstall EasyPDF dialog box](image2)
5. Delete the EasyPDF Registry Entries. Perform the following steps:
   - From the start menu, enter **REGEDIT.exe**
   - Press **Enter** on your keyboard to access the **Registry Editor**.

   ![Screenshot of Registry Editor](image.png)

   - In the Registry Editor, go to the location `HKEY_CURRENT_USER\Software\`
   - Delete the folder **BCL Technologies**.
   - In the Registry Editor, go to the location `HKEY_LOCAL_MACHINE\Software\`
   - Delete the folder **BCL Technologies**.
   - In the Registry Editor, go to the location `HKEY_LOCAL_MACHINE\Software\Wow6432Node\`
   - Delete the folder **BCL Technologies**.
   - In the Registry Editor, go to the location `HKEY_USERS\DEFAULT\Software\`
   - Delete the folder **BCL Technologies**.
   - Reboot the Computer.
9.0 **MS SQL SERVER 2008/2012 INSTALLATION**

It is necessary to install the MS SQL Server 2008/2012 software, create the database and tables and setup the MS SQL Server ODBC connection so that the Synergy Server can communicate with the database.

9.1 **DATABASE AND TABLES CREATION**

The following steps are required to create a database and tables:


2. The **Connect to Server** window appears. Enter the Server name and click **Connect**. Ensure **Server type** is **Database Engine** and **Authentication** is **Windows Authentication**.

   **NOTE:** Server name is the machine name of the computer, where SQL Server is installed.

   **NOTE:** If using SQL Server authentication, enter existing user name and password.
3. Microsoft SQL Server Management Studio opens. Right Click on the **Databases node** in the Object Explorer panel and click the **New Database...** option.

![Microsoft SQL Server Management Studio](image)

4. Name this newly created database (e.g. docuproof2) and click **OK**.

5. Right click on the database in the Object Explorer panel and click the **New Query** option to execute a query. A Script editor window opens.

6. Access the Synergy Server folder (e.g. C:\ Program Files\Global Vision\Synergy Server) in the directory that was selected during installation.

7. Open the Synergy SQL Script.sql file with Notepad.

8. Copy the contents of the file into the Script editor window.

9. Click **Execute**.

10. Close the script editor window.

**Note:** Do not save changes if save changes prompt message appears.
11. The following tables will be created in the (e.g. docuproof2) database. Exit the MS SQL Server Management Studio after the creation of the tables.
9.2 MS SQL SERVER ODBC SETUP

NOTE: Docu-Proof Enterprise is a 32-bit application and hence requires the 32-bit ODBC wizard to setup an ODBC connection. If you try to create an ODBC connection in a 64-bit Operating System, it will use the 64-bit ODBC wizard and hence your ODBC setup will not be successful. In order to create an ODBC connection using the 32-bit wizard, navigate to C:\Windows\SysWOW64\odbcad32.exe and launch this wizard.

The following steps are required to create an ODBC setup:

1. Open the Control Panel.
2. Double click on the Administrative Tools option.
3. Double click on the **Data Sources (ODBC)** option.

4. The **ODBC Data Source Administrator** screen appears. Select the System DSN and click **Add**.
5. The **Create New Data Source** screen appears. Select **SQL Server** and click **Finish**.

![Create New Data Source](image)

6. **Create a New Data Source to SQL Server** screen appears. In **What name do you want to use to refer to the data source? Name**, enter the ODBC data source name (DSN) that was entered in the Synergy Server DB Credentials window when installing Synergy Server (e.g. docuproof2). Type the Server name or select it from the drop down menu. Click **Next >**.

**NOTE:** Server is the machine where MS SQL Server is installed.
7. **Create a New Data Source to SQL Server** screen appears. Select the appropriate authentication. Click **Next >**.

![Create a New Data Source to SQL Server](image)

8. **Create a New Data Source to SQL Server** screen appears. Check the **Change the default database to** option and select the previously created database (e.g. docuproof2). Click **Next >**.

![Create a New Data Source to SQL Server](image)
9. **Create a New Data Source to SQL Server** screen appears. Click **Finish**.

10. **ODBC Microsoft SQL Server Setup** screen appears. Click **Test Data Source**...to check the connection with database.
11. **SQL Server ODBC Data Source Test** screen appears. It indicates whether the connection has been established or not. Click **OK** twice.

**NOTE:** Check to ensure that the tests have completed successfully. If not, contact Global Vision Support.

12. In the **System DSN** tab, on the **ODBC Data Source Administrator** dialog, ensure that docuproof2 is listed in the System Data Sources list box. Click **OK**.

13. Reboot the system to start the Synergy Service. To activate the client application, refer to the Section 6.0 Activating Docu-Proof Enterprise.
9.3 MS SQL SERVER 2008/ 2012 – REMOTE ACCESS

The following tasks are necessary to enable remote connection to SQL Server 2008:

- Start SQL Server Browser service.
- Change Server Authentication to SQL Server and Windows Authentication.
- Create a new user with SQL Server Authentication.
- Configure ODBC on Client application.

START SQL SERVER BROWSER SERVICE

1. Go to SQL Server Configuration Manager. Click Start -> Programs -> Microsoft SQL Server 2008 -> Configuration Tools -> SQL Server Configuration Manager.

2. Select SQL Server Services on the left window. If already running, skip to the section on Enable TCP/IP. Otherwise, continue with the following steps to configure and start the service.
3. Double-click on SQL Server Browser for the Properties window. Set the account to start SQL Server Browser Service. Set to Local Service account.

4. On the SQL Server Browser Properties, move to Service tab and change Start Mode to Automatic so that the service will start automatically when the computer starts. Click OK.

5. On the SQL Server Configuration Manager, right-click on SQL Server Bowser on the right window and select Start to start the service.
### SQL Server Configuration Manager

<table>
<thead>
<tr>
<th>Name</th>
<th>State</th>
<th>Start Mode</th>
<th>Log On As</th>
<th>Process ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server Integration Services 2016</td>
<td>Running</td>
<td>Automatic</td>
<td>NT AUTHORITY...</td>
<td>1526</td>
</tr>
<tr>
<td>SQL Full-text Indexes LauncherSqlServer</td>
<td>Running</td>
<td>Automatic</td>
<td>NT AUTHORITY...</td>
<td>1612</td>
</tr>
<tr>
<td>SQL Server (MSSQLSERVER)</td>
<td>Running</td>
<td>Automatic</td>
<td>NT AUTHORITY...</td>
<td>1712</td>
</tr>
<tr>
<td>SQL Server Analysis Services (MSSQL...</td>
<td>Running</td>
<td>Automatic</td>
<td>NT AUTHORITY...</td>
<td>1728</td>
</tr>
<tr>
<td>SQL Server Reporting Services (MSSQL...</td>
<td>Running</td>
<td>Automatic</td>
<td>NT AUTHORITY...</td>
<td>1856</td>
</tr>
</tbody>
</table>

### SQL Server Configuration Manager Options
- Start
- Stop
- Pause
- Stop
- Restart
- Properties
- Help
ENABLE TCP/IP PROTOCOL

1. Expand **SQL Server Network Configuration** -> **Protocols for SQL**. Note: TCP/IP protocol status is disabled.
2. Right-click on TCP/IP and select Enable to enable the protocol.

NOTE: A warning message displays indicating that the HSQLH Service must be restarted to apply changes.
3. Select SQL Server Services. Select SQL Server on the right window. Click **Restart**. The SQL Server service will restart.
CHANGE SERVER AUTHENTICATION TO SQL SERVER AND WINDOWS AUTHENTICATION

1. Open Microsoft SQL Server Management Studio and connect to SQL Server 2008.
2. Right-click on the SQL Server Instance and select Properties.

**NOTE:** A warning message displays indicating that the HSQLH Service must be restarted to apply changes.
4. Right-click on the SQL Server Instance and select **Restart**.
CREATE USER WITH SQL SERVER AUTHENTICATION

It is required to create a new user with SQL Server authentication for a remote SQL Server connection.

**Note:** Windows Authentication cannot be used when connecting to a remote SQL Server instance.

Creating a user with SQL Server Authentication is a two-step process:

1. Create **New Login**.
   - Launch the **Microsoft SQL Server Management Studio**.
   - In the Object Explorer panel, go to **Security > Login**.
   - Right click on the Login tab and select **New Login**…

![Image of SQL Server Management Studio](image-url)
- Enter the user name that will be used to access the database.
- Select **SQL Server authentication**.
- Enter and confirm the associated password for this account.
- Check **Enforce password policy**.
- Select `<docuproof2>` as Default database.
- Click **OK** to finish creating a New Login.
2. Create **New User**.

- In the Object Explorer panel, go to **Databases > docuproof2 > Security > Users**.
- Right click **<Users>** and select **<New User...>**.
• <Database User – New> window appears.

• Enter a Login name from the list of names or name entered earlier for the server.

• Check db_owner in both dialog boxes.

**NOTE:** The same user name and password may be used for all the databases. The username and password MUST be added for each database.
ODBC SETUP (CLIENT MACHINE)

NOTE: Docu-Proof Enterprise is a 32-bit application and therefore requires the 32-bit ODBC wizard to setup an ODBC connection. The steps below are used with the 32-bit ODBC wizard. If installing on a 64-Bit Operating System, navigate to `C:\Windows\SysWOW64\odbcad32.exe` to access this ODBC wizard.

The following steps are required to setup an ODBC connection:

1. On a 32-Bit Operating System:
   - From the Start Menu, select Control panel.
   - Click on Administrative Tools.
   - Locate Data Sources (ODBC); double-click to launch the ODBC Wizard.
2. On a 64-Bit Operating System:
   - In Windows Explorer, navigate to C:\Windows\SysWOW64
   - Locate odbcad32.exe; double-click to launch the ODBC wizard.

3. The ODBC Data Source Administrator screen appears. Click Add.

4. Create New Data Source screen appears. Select SQL Server and Click Finish.
5. **Create a New Data Source to SQL Server** screen appears. Insert the **ODBC data source name** *(docuproof2)* and select the **Server** *(Computer name)*, where the SQL Server is installed from the drop down menu. Click **Next >**.

**NOTE:** ODBC data source name must be the same name that was entered as DSN (Data Source Name) in the Synergy Server DB Credentials specified in section 5.2.1 New Database Installation.
6. **Create a New Data Source to SQL Server** screen appears. Select SQL Server authentication and enter login name and corresponding password created in the step 4. Click **Next >**.

![Microsoft SQL Server DSN Configuration](image1.png)

7. **Create a New Data Source to SQL Server** screen appears. Check the **Change the default database to** option and select `docuproof2` database. Click **Next >**.

![Microsoft SQL Server DSN Configuration](image2.png)
8. **Create a New Data Source to SQL Server** screen appears. Click Finish.

![Microsoft SQL Server DSN Configuration](image1)

9. **ODBC Microsoft SQL Server Setup** screen appears. Click **Test Data Source...** to check the connection with database.

![ODBC Microsoft SQL Server Setup](image2)
10.0  ORACLE INSTALLATION

It is necessary to install the Oracle software, create the database and tables in Oracle, setup the Oracle ODBC connection, and modify the Synergy server DependOnService registry value (if needed) so that the Synergy Server can communicate with the database.

**NOTE:** It is required that an Oracle database instance is already installed, a **tablespace**, which will contain all the schemas, and a **tablespace user**, which allows the access to the tablespace, is already created prior to creating the tables below (Refer to your Database Administrator for information about the Oracle database instance and tablespace).

**NOTE:** The screenshots and examples below are for Oracle 11g. The same or similar steps are applicable to other versions of Oracle.

10.1  DATABASE TABLES CREATION

The following steps are required to create the database tables:

**NOTE:** As a demonstration example, the Database Instance name used is DCP2, the tablespace name used is DCP2, and the tablespace user used is (username: DCP2 password: XXXXX).

1. Connect to **11g Oracle Database**, from **Start Menu ➔ Program Files ➔ Oracle ➔ OraDb11g_home1 ➔ Database Control ➔ DCP2**. The Login page to **Oracle Enterprise Manager 11g** appears.

   **NOTE:** The browser may prompt that the website is not a trusted site on many occasions. Simply ignore this message and continue.

2. Enter the required Oracle database access information for the **tablespace** (e.g. DCP2):
o User Name: match the user name entered in the Synergy Server DB Credentials Form when installing Synergy Server.

o Password: match the password entered in Synergy Server DB Credentials Form when installing Synergy Server.

o Connect As: **Normal**

3. Click **Login**.
4. On the home page of the Database Control, click on the **SQL Worksheet** link in the **Related Links** section.

**NOTE:** The browser may prompt that the website is not a trusted site on many occasions. Simply ignore this message and continue.

5. **SQL Worksheet** is displayed. Uncheck the default option Allow Only SELECT statements in the SQL Worksheet.

**NOTE:** Using this SQL Worksheet, the tables for the tablespace (e.g. **DCP2**) will be created, and the default variables will be inserted (Including the variables for the default Administrator).
6. Access the Synergy Server folder (C:\Program Files\Global Vision\Synergy Server) or the directory that was selected during installation).

7. Open the Synergy SQL Script.sql file with Notepad.

8. Copy the contents of the SQL Script file into the SQL Commands area in the SQL Worksheet window.

9. Separate each statement from the next one with a new blank line.

10. 10 statements must be executed. The highlighted statement determines which one will be executed.
11. Execute the First Statement:

- Highlight the SQL statement “create table GVE_AUDIT(AuditID int not null primary key, UserId int DEFAULT 0, TS_Date varchar(15), TS_Time varchar(15), Event varchar(50), Val varchar(255), data varchar(3000));”
- Click **Execute** button.
- Ensure that the confirmation message “The SQL has been executed successfully” is displayed in the **Results** section.
12. Execute the Second Statement:

- Highlight the SQL statement “create table GVE_USERS(UserID int not null IDENTITY primary key, UserName varchar(30), RealName varchar(50), Password varchar(20), Admin int default 0, AccExpiryDate varchar(15), PwdExpiryDate varchar(15), Active int default 1, CreatedDate varchar(15), Email varchar(50), LoggedIn int default 0, Client int default 1, IsPasswordTemporary int default 0, DirectoryAuthentication int default 0, ModifyDictionary int default 0, Domain varchar(50));”

- Click Execute button.

- Ensure that the confirmation message “The SQL has been executed successfully” is displayed in the Results section.
13. Execute the Third Statement:

- Highlight the SQL statement "create table GVE_SERIAL_NUMBER (AppId int primary key, SerialNumber varchar (60), Gandalf varchar (15), Frodo int);"

- Click *Execute* button.

- Ensure that the confirmation message “The SQL has been executed successfully” is displayed in the *Results* section.
14. Execute the Fourth Statement:

- Highlight the SQL statement “create table GVE_SETTINGS (AUTH_Min_Pwd.Len int default 8, AUTH_Max_Pwd.Len int default 12, AUTH_Complex_Pwd int default 1, AUTH_Pwd_Retention int default 3, AUTH_Pwd_Exp_Days int default 0, DCP_Force_Commenting int default 0, DCP_No_Pwd_Attempts int default 3, DCP_Min_Inactive_Lockout int DEFAULT 10, DCP_Min_Inactive_Logout int, DCP_Comments varchar (255), DCP_UseComments int, DCP_UseLevels int, DCP_Levels varchar (160), DCP_Acct_Expiry int);”.

- Click Execute.

- Ensure that the confirmation message “The SQL has been executed successfully” is displayed in the Results section.
15. Execute the Fifth Statement:
   - Highlight the SQL statement "create sequence audit_seq start with 1 increment by 1 nomaxvalue;"
   - Click Execute button.
   - Ensure that the confirmation message “The SQL has been executed successfully” is displayed in the Results section.
16. Execute the Sixth Statement:

- Highlight the SQL statement "create sequence users_seq start with 1 increment by 1 nomaxvalue;".
- Click **Execute** button.
- Ensure that the confirmation message ‘The SQL has been executed successfully’ is displayed in the **Results** section.
17. The Seventh and Eighth statements are SQL Trigger Statements. SQL Triggers Statements are created differently than above.

- From Database Control home page, go to Schema page.
- In the Schema page, click link Triggers under the Programs column.

- In the Triggers page, click Create button to start a 3 step process.

- For the Seventh Statement: “create or replace trigger audit_trigger before insert on GVE_AUDIT for each row begin select audit_seq.nextval into :new.AuditID from dual; end;”,

- In the first page of trigger creation (General page), enter the following:
  - Name text field: AUDIT_TRIGGER.
  - Schema text field: tablespace name used (e.g. DCP2).
  - [Replace If Exists]: checkbox is checked.
  - Trigger Body text area: begin select audit_seq.nextval into :new.AuditID from dual; end;
Click the Event Link.

In the second page of trigger creation (Event page), enter the following:

- Trigger On drop menu: Table.
- Table (Schema.Table) text field: (tablespace name used e.g. DCP2).GVE_AUDIT.
- Fire Trigger radio button: Before.
- Event option: Insert checkbox.
• Click the **Advanced** Link.

• In the third page of trigger creation (**Advanced page**), enter the following:
  
  - **Trigger for each row**: checkbox is checked.
  - **Old as**: Old.
  - **New as**: New.
  - **Condition text area**: empty.

• Click **OK** button on the top right corner to save the Audit Trigger.

• Continue to the triggers page where a confirmation message is displayed indicating that the **AUDIT TRIGGER** has been created successfully.
• From this page, continue with the creation of the second SQL Trigger Statement.
• Click Create.
• For the Eighth Statement: “create or replace trigger user_trigger before insert on GVE_USERS for each row begin select users_seq.nextval into: new.UserID from dual; end;”.
• In the first page of trigger creation (General page), enter the following:
  – Name text field: USER_TRIGGER.
  – Schema text field: tablespace name used (e.g. DCP2).
  – [Replace If Exists]: checkbox is checked.
  – Trigger Body text area: begin select users_seq.nextval into: new.UserID from dual; end;”.

![Database Control](https://example.com/dbe.png)
• Click the Event Link.
• In the second page of trigger creation (Event page), enter the following:
  – Trigger On drop menu: Table.
  – Table (Schema.Table) text field: (tablespace name used e.g. DCP2).GVE_USERS.
  – Fire Trigger radio button: Before.
  – Event option: Insert checkbox.

• Click the Advanced Link.
• In the third page of trigger creation (Advanced page), enter the following:
  – Trigger for each row: checkbox is checked.
  – Old as: Old.
  – New as: New.
  – Condition text area: empty.
• Click OK button on the top right corner to save the User Trigger.

• Continue to the triggers page where a confirmation message is displayed indicating that the USER TRIGGER has been created successfully.

• Go back to the SQL Worksheet to continue with the rest of the SQL Statements.

• Go to the SQL Commands area in the SQL Worksheet:

18. Execute the Ninth Statement:
   - Highlight the SQL statement: “insert into GVE_SETTINGS Values (8, 20, 1, 3, 30, 0, 3, 60, 30, 'No Comment', 0, 0, 'No Level', 30);”
   - Click Auto Commit checkbox.
   - Click Execute button.
   - Ensure that the confirmation message “1 rows have been inserted and committed” is displayed in the Results section.
19. Execute the Tenth Statement:

- Highlight the SQL statement: 
  ```sql
  insert into GVE_USERS(UserName, RealName, Password, Admin, AccExpiryDate, PwdExpiryDate, Active, CreatedDate, Email, LoggedIn, Client, IsPasswordTemporary, DirectoryAuthentication, ModifyDictionary) values ('admin', 'Default Administrator', 'gve12345', 1, 'Never', 'Never', 1, 'mm/dd/yyyy', 'admin@company.com', 0, 0, 0, 0, 1);
  ```
- Click **Auto Commit** checkbox.
- Click **Execute** button.
- Ensure that the confirmation message “1 rows have been inserted and committed” is displayed in the **Results** section.
• Close the **SQL Worksheet** window.

• Log out from the **Oracle Enterprise Manager** (DCP2).
10.2 ORACLE ODBC SETUP

NOTE: Docu-Proof Enterprise is a 32-bit application and hence requires the 32-bit ODBC wizard to setup an ODBC connection. If you try to create one in a 64-bit Operating System, it will use the 64-bit ODBC wizard and hence your ODBC setup will not be successful. In order to create an ODBC connection using the 32-bit wizard, navigate to C:\Windows\SysWOW64\odbcad32.exe and launch this wizard.

The following steps are required to create an ODBC setup:

- Open the Control Panel.
- Double click on the Administrative Tools option.
14. Double click on the **Data Sources (ODBC)** option.

- The **ODBC Data Source Administrator** screen appears. Select the **System DSN** and Click **Add**.
• The Create New data Source screen appears. Select **Oracle in the OraDB11g_home1** as driver and click **Finish**.

• In the Oracle ODBC Driver Configuration, enter the following:
  
  **Note**: Parameters must match the ones entered in Synergy Server DB Credentials Form during Synergy Server installation.

  • **Data Source Name**: Same name as entered for the **tablespace name** (e.g. DCP2).
  
  • **TNS Service Name**: select from the drop down list the **service name of the database**
  
  • **Instance name** (e.g. DCP2).
  
  • **User ID**: Same as entered for the **tablespace user name** (e.g. DCP2)
• Click **Test Connection button** to test the connection with the database.

![Oracle ODBC Driver Connect](image)

• Enter the password for the valid **tablespace user** (e.g. XXXXX) allowed to access the database.
• Click **OK**.
• The following confirmation window is displayed if successful:
  
  **Note**: If connection not successful, contact Global Vision Support.

![Testing Connection](image)

• Continue to the **Oracle ODBC Driver Configuration** window, and click **OK**.
• In the **System DSN** property page of the **ODBC Data Source Administrator** dialog box, ensure that the entered DSN (e.g. DCP2) is listed in the System Data Sources list box.
• Click **OK** to exit the **ODBC Data Source Administrator**.
• The Oracle database setup is now complete.
• Reboot the system to start the Synergy Service. To activate the client application, refer to Section 6.0 Activating Docu-Proof Enterprise.

NOTE:
The Synergy Server DependOnService registry value should be changed only if the database is sitting on the same server where the Synergy Client and Server are installed. The application will search for this service if it is not present. If this value has to be modified (refer to Section 10.3 Registry Value Modification (Synergy Server DependOnService), then do not Reboot at this stage.
10.3 REGISTRY VALUE MODIFICATION (Synergy Server DependOnService)

If the Oracle 11g TNS Service Name used has a name that is different from the specified example DCP2, continue with the following steps:

- Start Menu → Select Run program.
- Run window opens.
- Type regedit and click OK.

- The Registry Editor window opens.
- Go to HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\Synergy\DependOnService.
• Right click On DependOnService. Select Modify.

• Edit Multi-String window opens.

• In the Value data text area, modify the existing data: "OracleServiceDCP2" by replacing DCP2 with the actual Oracle 11g Database Instance name used. The Value data will be "OracleServiceXXXXX" where "XXXXX" is the actual database instance name.

• Click OK.

• Edit Multi String window closes.

• Close Registry Editor Window.

• Reboot the system to start the Synergy Service. To activate the client application, refer to the main installation guide (Activating Docu-Proof Enterprise).
11.0 DATABASE MIGRATION

11.1 DOCU-PROOF ENTERPRISE V1.3.0 to V2.0.0

Changes were made to the SYNERGY Version 2.0.0 database structure to accommodate changes to 21 CFR Part 11 for the User Dictionary and to ensure that users change their password.

This section provides the SQL statements that need to be executed on customer installations prior and equal to Docu-Proof Enterprise V1.3.0 in order to preserve the customer’s previous data in the database (audit trail, user list, settings) and ensure compatibility with Docu-Proof Enterprise V2.0.0.

Note: Upon installation, the Admin should not re-initialize the database data so that the existing database remains.

The scripts below are to be run after the installation. The users will be required to change their passwords.

The default database, MySQL, is used to demonstrate the execution of the SQL statements.

1. SQL statements

   **STEP 1**
   Start the MySQL command-line client.

   **STEP 2**
   Enter the password for the root user. This is typically “abc123” or “ABC123” by default.
STEP 3
Once logged in, select the correct database to use by executing the following statement:

```
USE DOCUPROOF2
```

STEP 4
A new column needs to be added to the user table to specify whether a user has access to modify the user dictionary list. The default value of this field will be set to “1” in order to ensure consistent behavior with previous versions of DOCU-PROOF ENTERPRISE, where all users had access to add words to the user dictionary. To add the column, execute the following statement:

**MYSQL and Oracle:**
```
ALTER TABLE gve_users ADD ModifyDictionary int Default '1';
```

**MS SQL:**
```
ALTER TABLE gve_users ADD ModifyDictionary int;
```
```
UPDATE gve_users SET ModifyDictionary = '1'
```
STEP 5
To ensure that users change their password, execute the following statement to ask the user to modify their password:

**NOTE:** This step is NOT required for Directory users who will not modify their passwords.

**MYSQL:**
UPDATE gve_users SET IsPasswordTemporary = '1';

**MS SQL and Oracle:**
UPDATE gve_users SET IsPasswordTemporary = '1'
UPDATE gve_users SET IsPasswordTemporary = '0' where DirectoryAuthentication = '1'

---

**STEP 6**
Log in to SYNERGY and you will be asked to change your password as follows:
11.2  DOCU-PROOF ENTERPRISE V2.0.0 to V3.1.0

Changes were made to the SYNERGY Version 3.1.0 database structure to accommodate the domain field. This section provides the SQL statement that must be executed on customer installations equal to Docu-Proof Enterprise V 2.0.0 in order to preserve the customer's previous data in the database (audit trail, user list, settings) and to ensure compatibility with Docu-Proof Enterprise V 3.1.0.

Note: Upon installation, the Admin should not re-initialize the database data so that the existing database remains.
The scripts below are to be run after the installation.

The default database, MySQL, is used to demonstrate the execution of the SQL statements.

1. SQL statement

   STEP 1
   Start the MySQL command-line client.

   STEP 2
   Enter the password for the root user. This is typically "abc123" or "ABC123" by default.
STEP 3
Once logged in, select the correct database to use by executing the following statement:

USE DOCUPROOF2

STEP 4
A new domain column needs to be added to the user table.

To add the column, execute the following statement:

**MYSQL:** ALTER TABLE gve_users ADD `Domain` varchar(50);

**Oracle:** ALTER TABLE GVE_USERS ADD Domain varchar(50);

**MS SQL:** ALTER TABLE gve_users ADD Domain varchar(50);