- Administrator's Guide

Enterprise Organizer is a robust, yet simple, application for organizing computer files. It provides file organization, document scanning, a PDF editor, a PDF print driver, a built-in search engine, and an integration with the *save/open* functions of most programs to make it easy to bring any kind of file into Enterprise Organizer.

Cabinet Overview

There are two interface options for organizing files: a regular *Explorer* interface, or an *electronic file cabinet* interface. The latter has many advantages over a regular Explorer interface: faster access to files, more intuitive organization, and consistency to name a few. The electronic file cabinets are really just an alternative layout. Files are still stored in regular Windows folders, not a database. In fact, an electronic file cabinet really just "overlays" regular Windows folders, as described in The Cabinet Structure.

Enterprise Organizer does not use a database. There are a number of benefits to this model:

- Existing data can immediately be accessed through Enterprise Organizer without any conversion
- Your data is not locked into a propriety format or database
- You have finite control over access permissions through the NTFS and Windows Share permissions you are already used to
- There is no server-side software to run
- Enterprise Organizer has minimal impact on the overall system

Creating a Cabinet

Creating a cabinet is as simple as creating a pointer to an existing folder structure and giving it a name. If the folder doesn't exist yet, Enterprise

Organizer will create it. A new tab will show up in the interface. Clicking that tab opens the location in Enterprise Organizer. See Cabinet Basics for more information.

Note that you can be very creative in setting up cabinets. Since cabinets are simply pointers to a location in the Windows filesystem, any location can be a cabinet, whether it is on a shared network path, a SAMBA share, a private local path, a RAM drive, a CD-ROM drive, or even a USB drive or digital camera. This makes it especially easy to set up a shared cabinet on a file server.

Network Cabinets

Cabinets are very easy to share on a network. Since a cabinet is really just a regular Windows folder, Windows handles the sharing just like any other shared folder on the network.

Shared Settings

Enterprise Organizer has a built-in sharing feature that makes it easy to share a number of settings on the network, including cabinet definitions, folder templates, and naming options. All of the shared settings can be administered from a central location, and changes propagate to all of the machines automatically.

The basis of the sharing feature is a *Shared Settings* folder on the network. This is a folder which holds settings files that all of the machines will share. Shared settings are uploaded into this folder, and then downloaded onto each machine.

The sharing feature is detailed in Sharing Basics.

There is also an *Admin Tool* to help you manage your shared items and set policies for your users. See Administer Shared Settings for more information.

Deployment Using Shared Settings

NOTE: Following is a description for deploying Enterprise Organizer across a network using the built-in sharing feature. If the options described aren't available, you aren't on a high enough edition of Enterprise Organizer.

Deploying Enterprise Organizer on a network is a three-step task:

1. Set up the network
2. Create a model Enterprise Organizer configuration
3. Install Enterprise Organizer with the model configuration on client machines

Set Up the Network

Your first decision is what machine(s) will host data. These machines will be operating as file servers, so you should consider whether they have the necessary resources to handle the number of users that will be connecting to them. You can opt for a peer-to-peer arrangement, a pure client-server arrangement, or a mixture of the two.

Prepare the file tree. If you have existing data that will be used to populate the cabinet, you should clean up the file tree so that it will accomodate the layout required for Enterprise Organizer. See The Cabinet Structure for further information.

Set up shares. Once the path where the cabinet will reside exists, you will need to set up a Windows network share for the path. In setting up the share, give consideration to any permissions you wish to establish. Enterprise Organizer inherits Windows NTFS and/or Share permissions. If you wish to limit access to a cabinet or specific drawers or folders in the cabinet, set up these permissions within Windows.

Map drives on client machines. On each client machine that will connect to the

network share, map a network drive that will reconnect at each logon. You are *strongly* encouraged to use consistent drive mappings across the network. Consider this a requirement.

Create a Model Enterprise Organizer Configuration

If you haven't aleady done so, install Enterprise Organizer on the machine where you'll be administering settings. Then go to the *Tools* button > *Administer Shared Settings*. This will open the *Administer Shared Settings* dialog. This is where you'll set up the configuration you want to push out to the other machines.

Create a Shared Settings Folder. The first thing you need to do is create a *Shared Settings Folder*. Pick a network location where shared settings should be stored. Every user should have at least *read* permissions for this folder.

Create File Cabinets. Now go to the *Cabinets* section on the left and follow the instructions Cabinet Basics to create shared cabinets. In creating the cabinets, you can opt to enable auto-indexing for full-text searching and to disallow file and folder deletions from within the cabinet interface. See Disallowing Deletions.

Set Up Other Options. Now set up any other settings you want to share, like *Folder Templates*, *Naming Options*, etc.

Disable Features. If there are any features you want to disable, you can do that under the *Policy* section.

Create an Install File. Now go to the *Advanced* tab > *Install File* where you'll create an *FCInstall.ini* file. This is a configuration file which the installer can use to automatically configure Enterprise Organizer during installation. Go to the *Install File* section on the left, enter the parameters, then post the file to the network. Finally, place a copy of the Enterprise Organizer installer in the same directory. It's important that the installer and the *FCInstall.ini* file be in the

same place.

Install Enterprise Organizer on Client Machines

The final step is to install Enterprise Organizer on the other workstations. On each workstation, browse out to the directory where you put the installer and the *FCInstall.ini* file and run the installer. This will install Enterprise Organizer and automatically configure it to access the shared settings.

Alternatively, you can manually install Enterprise Organizer on each workstation, then point it to the shared settings. See <u>Set Up the Other Machines</u> for more information.

Updating Shared Settings

If you need to update the shared settings, just go to the *Tools* button > *Administer Shared Settings* and make the changes there. You may need to restart Enterprise Organizer on the workstations for the changes to take effect.

Other Considerations

Protecting Cabinet Contents

Enterprise Organizer has the ability to prevent users from deleting cabinet contents within the main Enterprise Organizer interface. For more information on this feature see <u>Disallowing Deletions</u>. Note, however, that it cannot prevent users from deleting files in *Explorer Mode* or through outside programs or shells. Advanced access control should be handled through Windows permissions.

Full-Text Search

You can enable or disable full-text searching on a cabinet-by-cabinet basis. Normally each machine on the network maintains its own indexes. It is

possible to share a common index across the network. When you create the default configuration as described above, go to the Enterprise Organizer *Settings* button > *Indexes* option and set the *Root Path for Search Indexes* to a shared network folder. When you deploy this configuration, all client machines will use the same set of indexes. See Sharing Search Indexes for more information.

IMPORTANT: If you share indexes on the network, only *one* machine should do the indexing. Auto-indexing should be disabled for all other machines.

See Search Basics and Indexes and Indexing.

Automatic Backups

It is imperative that you back up all of your critical data on a daily basis and that you maintain an off-site copy of your data.

Integration

Enterprise Organizer can integrate with other applications. See Integration Options for more information.