



# **FileSurf / Hummingbird DM Installation and Configuration Manual**

**Prepared: March 2005  
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*MDY Advanced Technologies, Inc.*

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Welcome to the installation and configuration guide for FileSurf – Hummingbird DM integration from MDY. The FileSurf-Hummingbird DM integration facilitates the sharing of data between FileSurf and Hummingbird's DM document management product. Please read the entire document before proceeding with the installation.

# 1 Design

## 1.1 Supported Products

The MDY integration of FileSurf and Hummingbird's DM supports the following products only:

- FileSurf 7.5 service release 3
- Hummingbird DM Server 5.1.0.5
- Hummingbird DM 5.1.0.5

## 2 Prerequisites

- The following should be installed and working prior to installing the integration:

### **Hummingbird DM Server**

Microsoft Windows

Fusion Service

### **FileSurf Server**

Microsoft Windows

FileSurf COM Server

Hummingbird DM Extensions

Windows Explorer DM Extension

### **Client**

Microsoft Windows

Hummingbird DM client

FileSurf client

The above products have their own requirements which might coincide or differ from the integration's. Please refer to the individual software for specific requirements.

- FileSurf Admin account is a Hummingbird DM user with administrative privileges plus the ability to delete versions. Details on adding the FileSurf Admin account can be found in the installation section
- Metadata synchronization requires two DM groups, FILESURF\_USERS and FILESURF\_SUPERUSERS. If metadata synchronization is not to be used, they are not necessary. Metadata synchronization will create these groups if it finds that they do not exist. If not using Metadata synchronization, the users will need to be added manually. FileSurf checks FILESURF\_USERS to see if integration is available to user.
- FileSurf and Hummingbird users and groups synchronized.
- The Hummingbird initialization file, PCDOCS.INI, should be in the FileSurf\bin directory of the FileSurf server. This is required for the indexer.
- Hummingbird DM must be set up to use Windows Integrated Authentication. Please see appendix for instructions.
- Any Hummingbird DM fields that you wish to map to FileSurf must be included on both the GROUP\_DEF and DEF\_PROF profiles.
- The settings for "Allow To Check-In Other's Documents" should be set to "NO" at the System Level, and "Default" for all other groups except for DOCS\_SUPERVISORS. Only this group should be set to YES. This prevents users from checking in documents that have been checked out by the "Declare" process. Please note that DOCS\_SUPERVISORS will still be able to check in these documents.
- For indexer to be able to access DM5 documents in DM5 repository, FileSurf Administrator account needs 'Read' access to it.

## 3 Manual Installation

### 3.1 Summary of Tasks

The following table lists the steps of the installation as well as which programs are required and on which systems:

#	Task	Server / Workstation	Program(s) Used
1	Add integration fields to DM database	<i>Can be run from any system with MS SQL installed and ability to access database server</i>	Microsoft Query Analyzer or Enterprise Manager
2	Add FileSurf Administrator user	DM Server	Hummingbird DM

	to DM database		Library Maintenance
3	Add category structure to Hummingbird DM Database <i>Corporate hierarchies only</i>	DM Server	Hummingbird DM Designer
4	Register Hummingbird DM database as a FileSurf Repository	FileSurf COM Server	MDY FileSurf Server Administrator
5	Configure synchronization tools	FileSurf COM Server	MDY FileSurf Server Administrator
6	Add Hummingbird DM repository to indexing service	FileSurf Web server	MDY FileSurf Web Administrator
7	Install integration and folder manager	User workstation	FileSurf Client Setup

## 3.2 On the Database Server

### Task 1: Add the fields FileSurf uses for storage to the VERSIONS table of the Hummingbird DM database

#### *Microsoft Query Analyzer or Microsoft Enterprise Manager*

This can be done through a script entered in Microsoft Query Analyzer or through the interface of Enterprise Manager's table design mode.

#### Open **Query Analyzer**

Log on as database owner (sa)

Select the Hummingbird DM database from the drop-down on the toolbar

Copy the following text into the command area:

```
ALTER TABLE DOCSADM.VERSIONS ADD
    [FS_CONT_ID] int NULL ,
    [FS_DATABASE] varchar(30) NULL ,
    [FS_FILE_ID] int NULL ,
    [FS_MATTER_ID] int NULL ,
    [FS_CATEGORY_ID] int NULL ,
    [FS_STATUS] varchar(1) NULL
```

Press F5 to execute the query

-- or --

## Open **Enterprise Manager**

On the left pane, drill down to the *Tables* node under the name of the Hummingbird DM database, logging on as database owner (sa) if necessary.

On the right pane, right-click the VERSION table and select *Design Table* from the menu.

Enter the following for each field:

<b>Name</b>	<b>Type</b>	<b>Allow NULL</b>
FS_CONT_ID	int	YES
FS_DATABASE	varchar(30)	YES
FS_FILE_ID	int	YES
FS_MATTER_ID	int	YES
FS_CATEGORY_ID	int	YES
FS_STATUS	varchar(1)	YES

## **Task 2: Create FileSurf Admin user**

### ***Hummingbird DM Library Maintenance***

Open Hummingbird DM library Maintenance if not already open. By default, it can be opened by selecting *Programs->Hummingbird->DM 5.1->Library Maintenance* from the Start Menu. Select *People* on left plane and select *New* from Edit menu

The People dialog box will open

Enter the following information for the user FileSurf Admin

*Short Name:* <FileSurf Administrator account name>

*Network ID:* < The network ID of FileSurf Administrator >

*Primary Group:* DOCS\_SUPERVISORS

*Full Name:* <FileSurf Administrator display name>

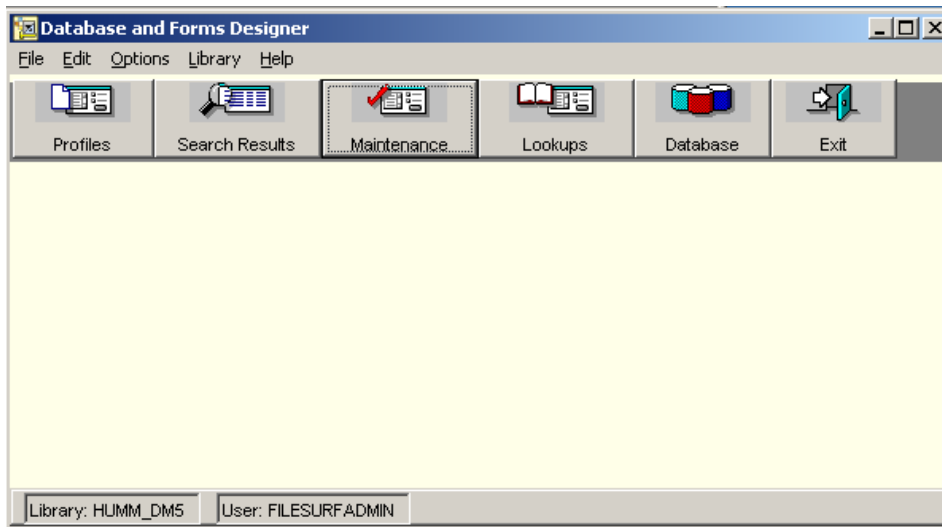
Click *OK*

***Important:*** *DOCS\_SUPERVISORS must be allowed delete versions and to checkout other users' documents*

### **Task 3: Add category structure to Hummingbird DM Database**

#### ***Hummingbird DM Designer***

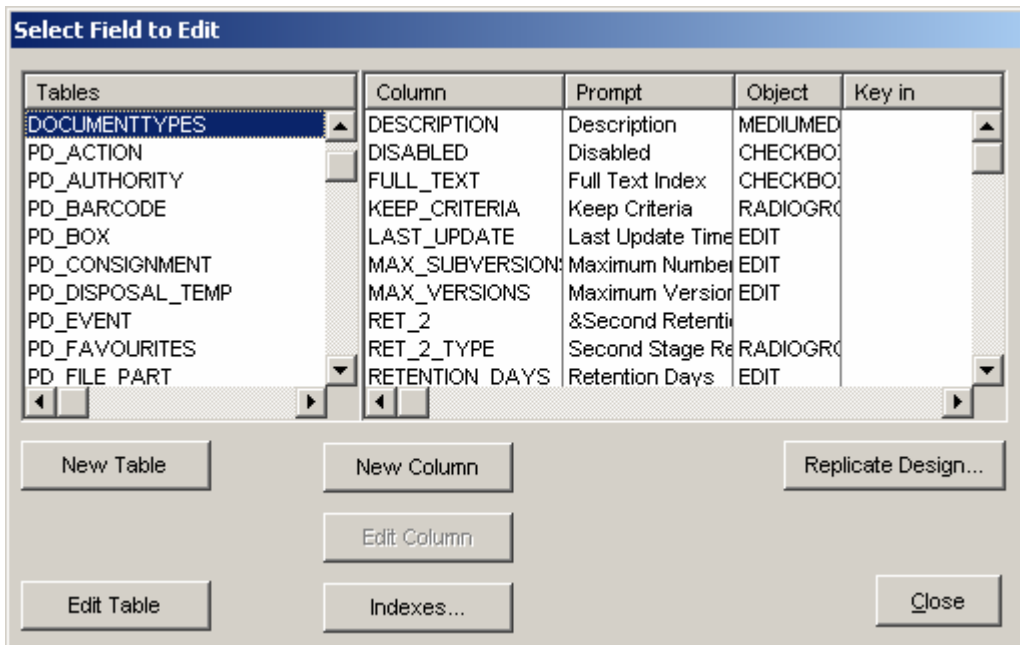
If the FileSurf database uses a corporate (category) hierarchy and if category is going to be mapped, then the next step is to create a table in Hummingbird DM where code and title can be synched to FileSurf's f\_category table. Open DM Designer by selecting *Programs->Hummingbird->DM 5.1->DM Designer* from the Start Menu.



Before doing anything else, make sure you are working with the correct library by checking the library name in the status bar. The working library can be changed by clicking on *Library* menu.

## A: Create table

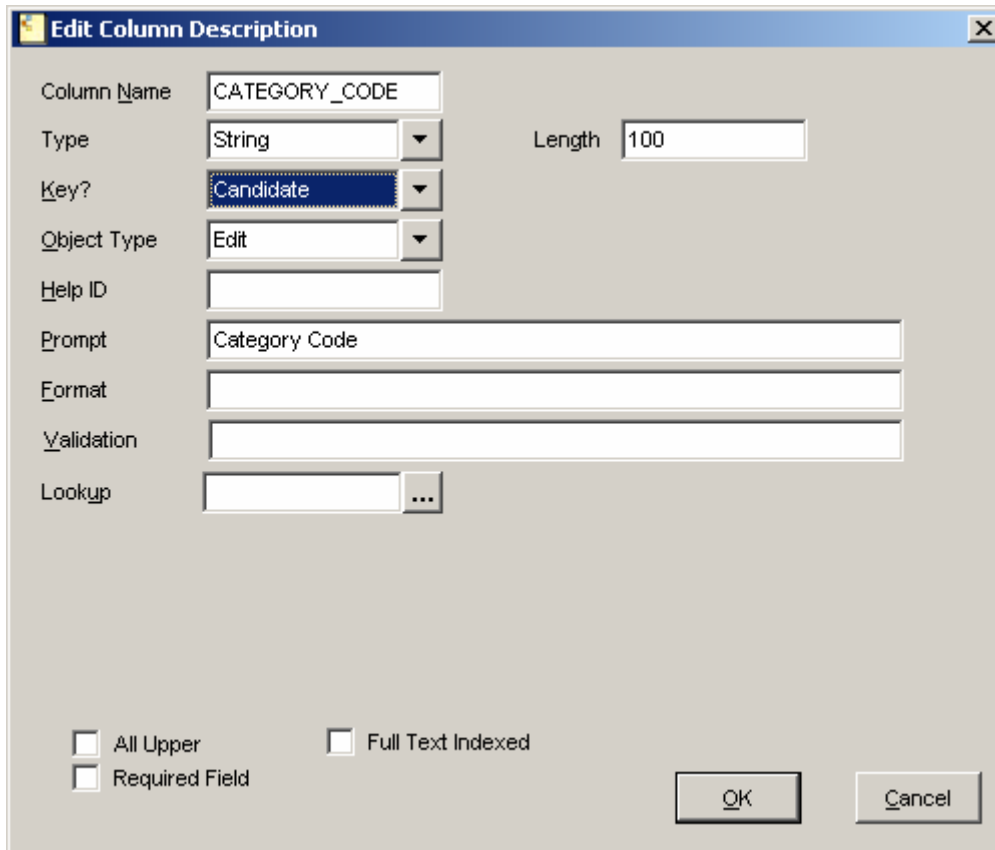
Click on *Database* button in toolbar to bring up the fields editor:





Click on *New Table* button to bring up *Table Definition* dialog. Enter "CATEGORY" for name and description then click *OK*.

Click on *New Column* to add category code field. **Important: Do not enter a column name that already being used – even in another table.** Enter "CATEGORY\_CODE" for *Column Name*, "100" for *Length*, and "Category Code" for *Prompt*. Select "Candidate" for *Key?*. Here is the form with the values entered:



**Edit Column Description**

Column Name: CATEGORY\_CODE

Type: String Length: 100

Key?: Candidate

Object Type: Edit

Help ID:

Prompt: Category Code

Format:

Validation:

Lookup:

☐ All Upper ☐ Full Text Indexed ☐ Required Field

OK Cancel

Click *OK*.

Click on *New Column* again to add category description field. Enter "CATEGORY\_DESC" for *Column Name*, "1000" for *Length*, and "Category Description" for *Prompt*. Here is the form with the values entered:

**Edit Column Description**

Column Name: CATEGORY\_DESC

Type: String Length: 1000

Key?: No

Object Type: Edit

Help ID:

Prompt: Category Description

Format:

Validation:

Lookup: ...

☐ All Upper ☐ Full Text Indexed ☐ Required Field

OK Cancel

Click *OK*. *Lookup* will be populated with 'CATEGORY' before the dialog closes. Click *Save Table* on fields editor to save changes.

**Designer**

**Question:**

Create a new lookup called CATEGORY?

Yes No

Click *Yes*

Category Code	Category Description

Filter:

Description:

Click *OK*.

**Designer**

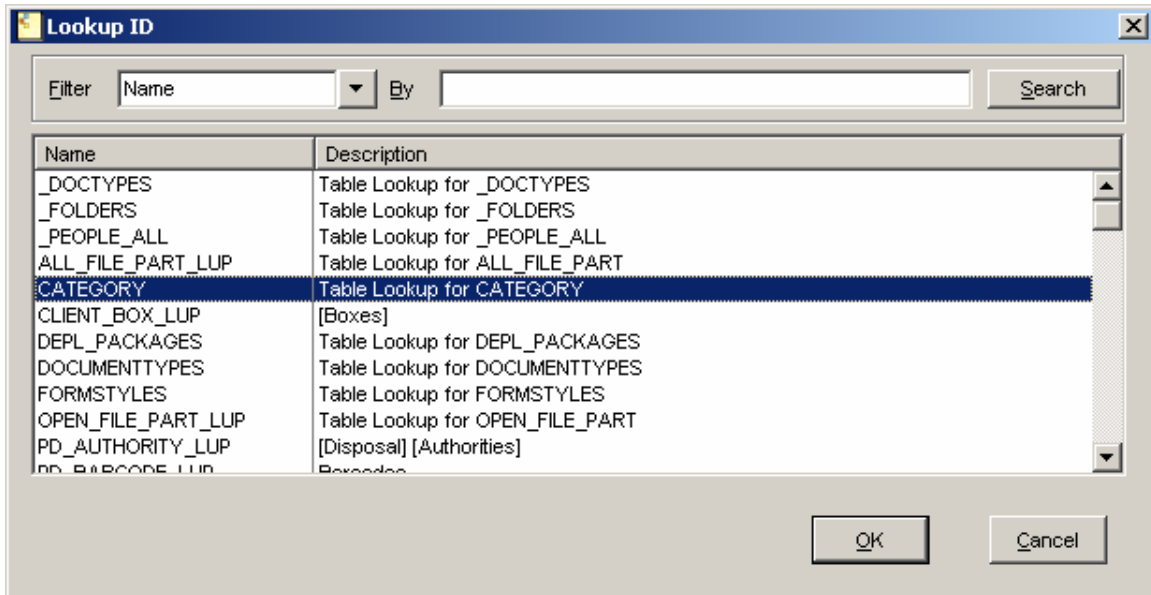
**Question:**

Do you want a link from the PROFILE table to the CATEGORY table?

Click *Yes*. Click Close on *Select fields to edit* dialog.

## B: Create lookup

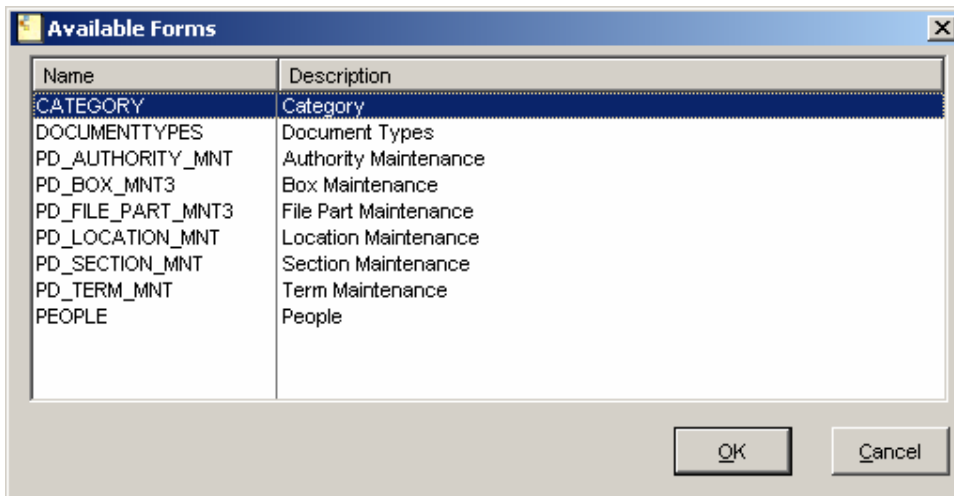
Click on *Lookups* button in toolbar to bring up Lookups ID editor.



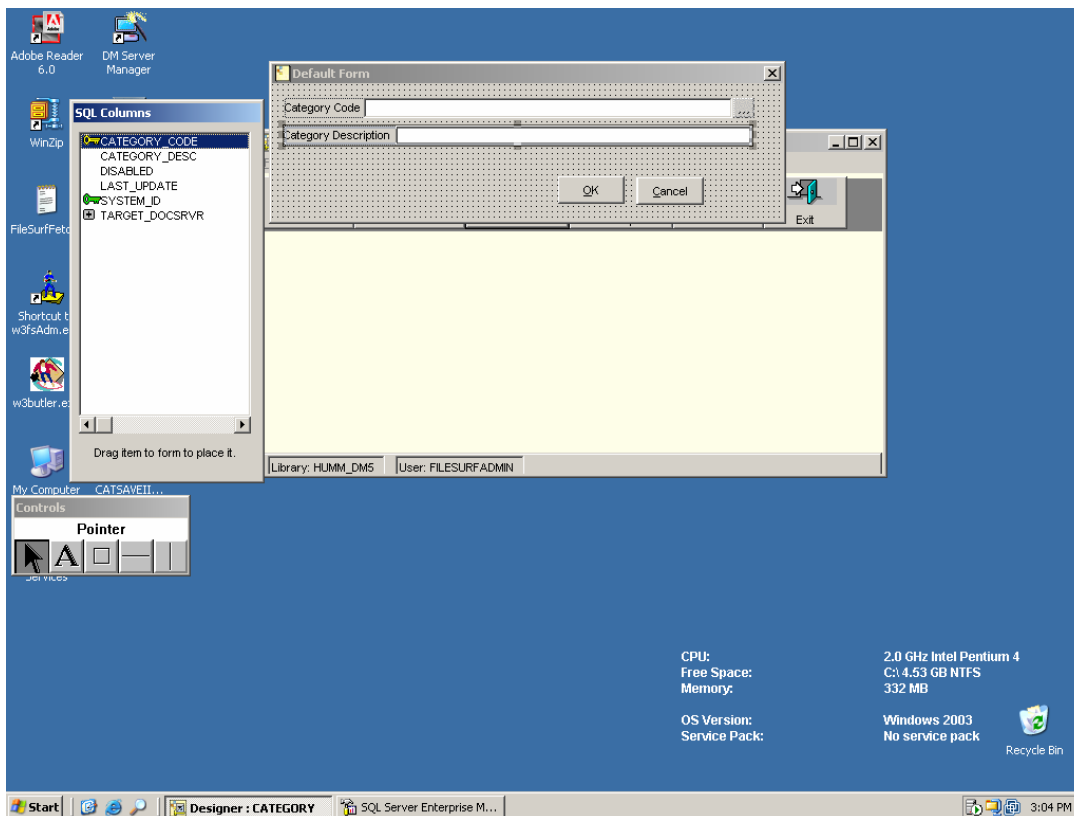
Select *CATEGORY* and click *OK*. Take the default values and click *OK*.

### C: Create form

Click on *Maintenance* button in toolbar to bring up the *Available Forms* dialog:



Select *CATEGORY* and click *OK*. This will bring up a blank form and a list of fields. Drag *CATEGORY\_CODE* and then drag *CATEGORY\_DESC* from the list of fields to the blank form and arrange as below (or however you like):

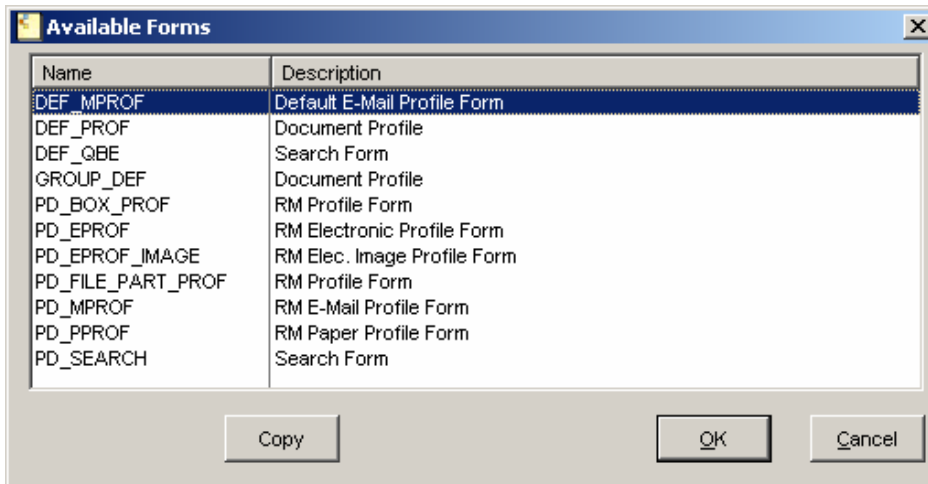


Close the form by clicking on the close button on the caption bar. Click Yes on the dialog that asks "*Do you want to save changes?*". The following dialog will prompt you for a description and language code:

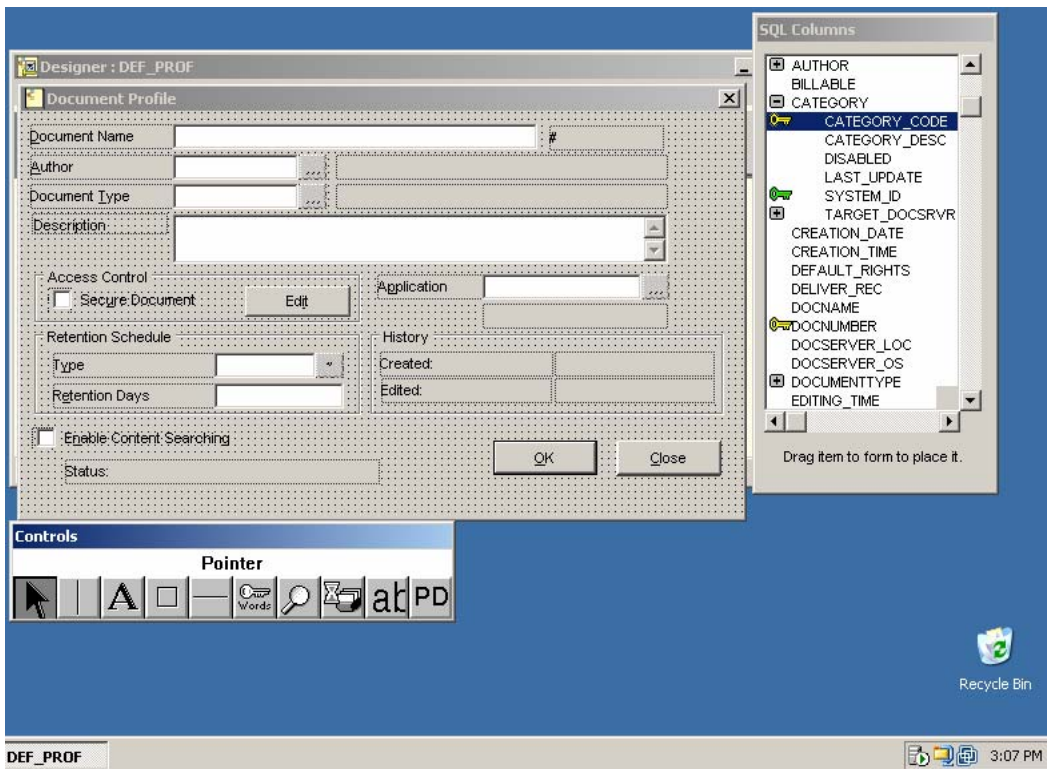
Enter "Category" for *Description* and click *OK*.

## D: Add Category Fields to Standard Form(s)

Click on *Profiles* button in toolbar to bring up the *Available Forms* dialog:



Select *DEF\_PROF* (Document Profile) and click *OK*. This will bring up the profile in designer mode:



This profile form allows fields to be added, deleted, or moved. First make room for the category fields by dragging the edge of the dialog to make it bigger and/or rearranging fields on the dialog. Expand the *CATEGORY* entry in *SQL Columns* and drag the *CATEGORY\_CODE* and *CATEGORY\_DESC* fields from the *SQL columns* list to the *Document Profile* and arrange in a

way similar to Author or Document Type. CATEGORY\_CODE will be editable and with a lookup button while CATEGORY\_DESC will be read-only. For help with form design, consult your Hummingbird DM documentation.

Repeat the process with GROUP\_DEF (Default Profile for groups) and DEF\_QBE (Search Form).

## **E: Restart Server**

For above changes to take effect, the server must be restarted. Open DM Server and under the *Server State* tab, click the *Stop* button. When server status read stopped, click on *Start* button.

## **F: Populate Categories**

Using FileSurf's category lookup, enter the values full code and name values to the corresponding fields created in Hummingbird DM database. Open Library Maintenance and select CATEGORY on the left pane.

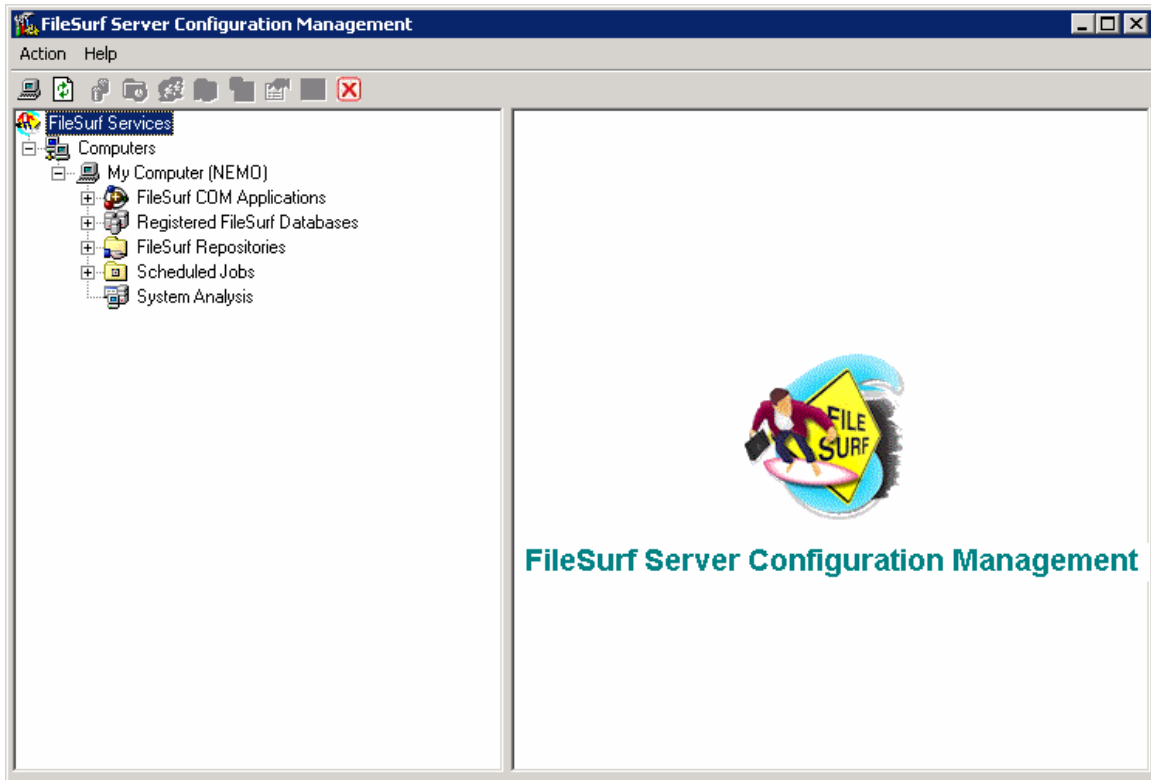
For each category to be added:

- Select File->New or click on New icon to get New Category dialog box.
- Enter the full code from FileSurf category into *Category Code*
- Enter title from FileSurf category to *Category Description*
- Click *OK*.

## **Task 4: Register Hummingbird DM database as a Repository**

### ***MDY FileSurf Server Administrator***

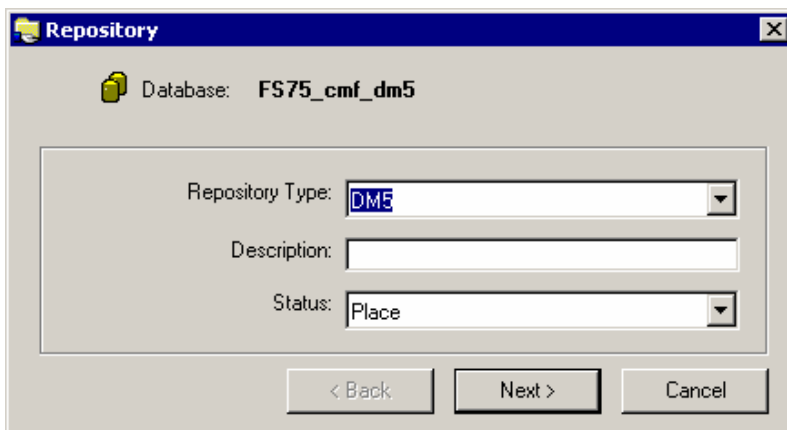
Open FileSurf Server Administrator by selecting *Programs->FileSurf->FileSurf Server Configuration* from Start Menu



Expand *FileSurf Repositories* Node on left pane

Right-click the FileSurf database alias underneath and select *Add New Repository* from the menu

This will open the Repository dialog



Enter the following data about the repository:

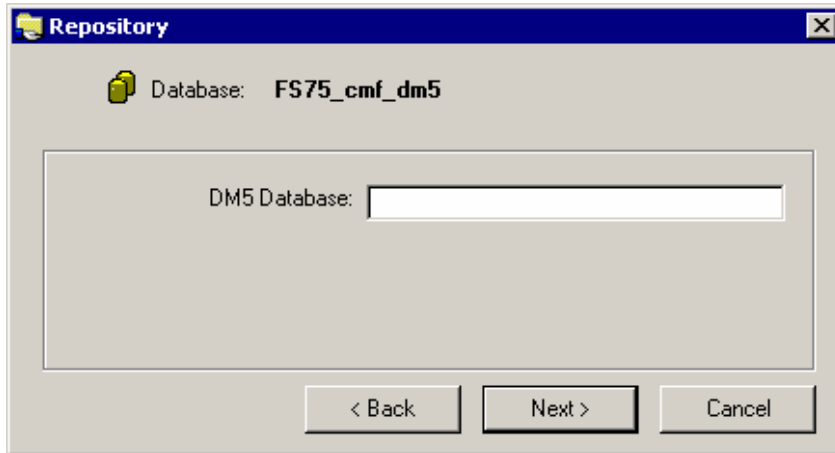
*Repository Type:* Select **DM 5** from the drop-down list



*Description:* description should include DM library name e.g. **DM library "DocsFusion"**

*Status:* Select **Place** from drop-down list

Click *Next >*

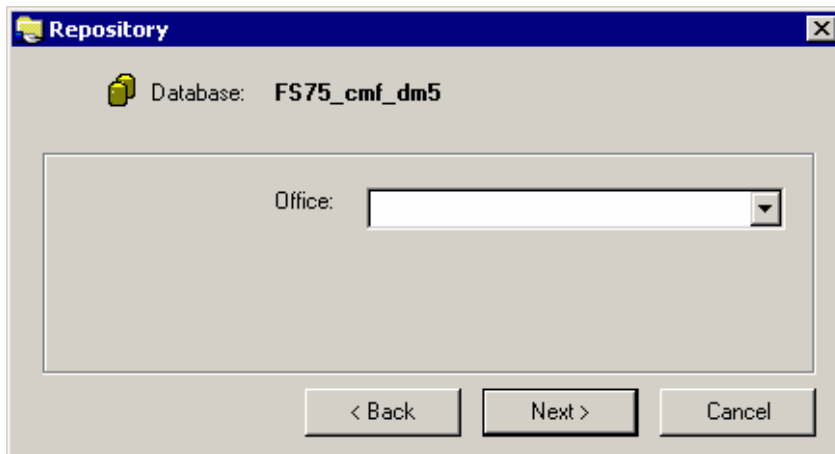


The screenshot shows a window titled "Repository" with a blue header bar. Below the header, there is a label "Database: FS75\_cmf\_dm5" next to a folder icon. The main area of the window contains a label "DM5 Database:" followed by a text input field. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

Enter the following data about the repository:

DM5 Database : < Hummingbird DM library name >

Click *Next >*

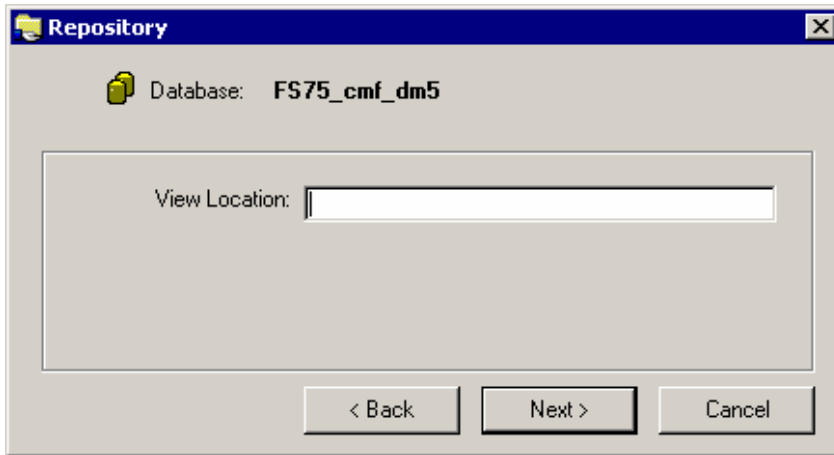


The screenshot shows the same "Repository" window. The main area now contains a label "Office:" followed by a dropdown menu. At the bottom, the same three buttons are present: "< Back", "Next >", and "Cancel".

Enter the following data about the repository:

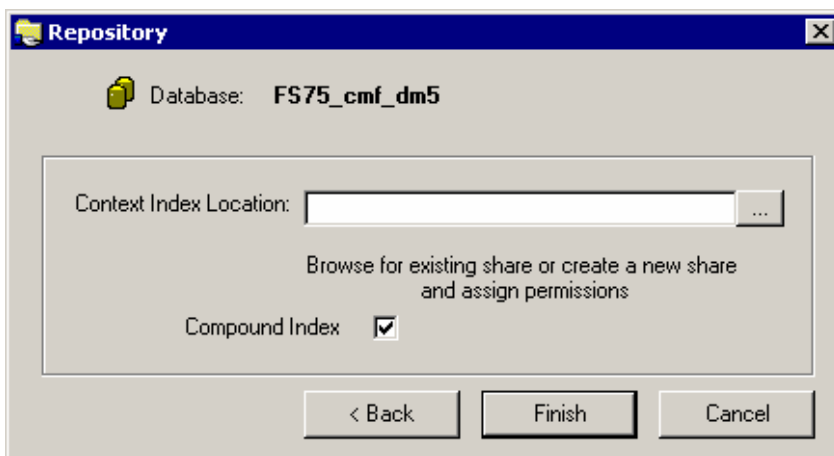
*Office:* < office location of DM database >

Click *Next >*



*View Location:* Do not enter any data.

Click *Next >*

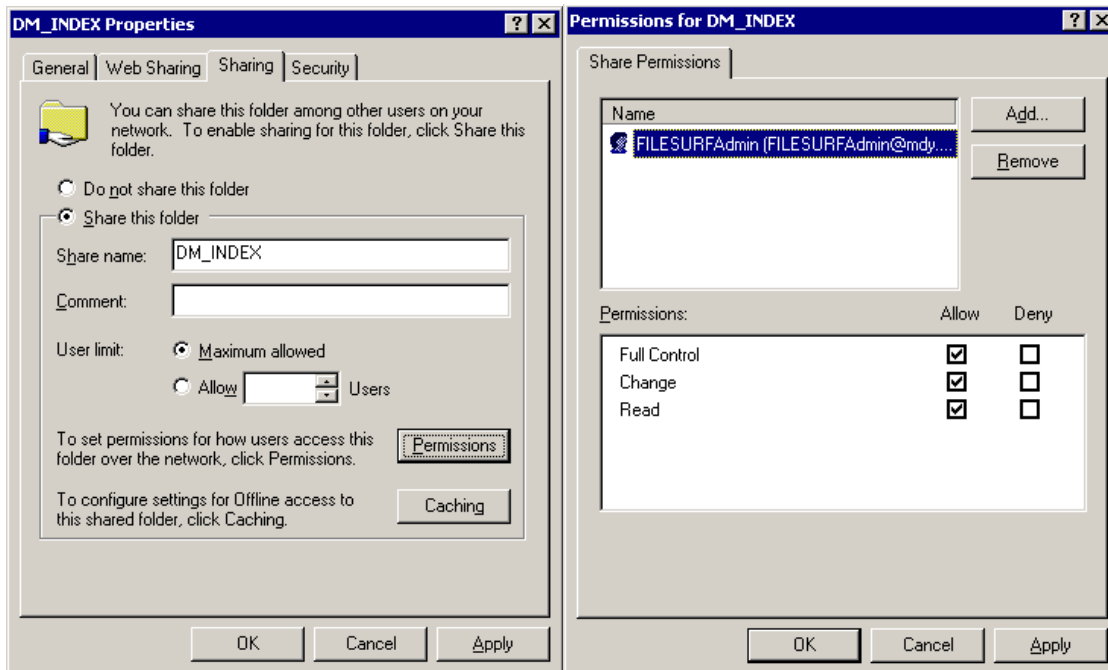


Enter the following data about the repository:

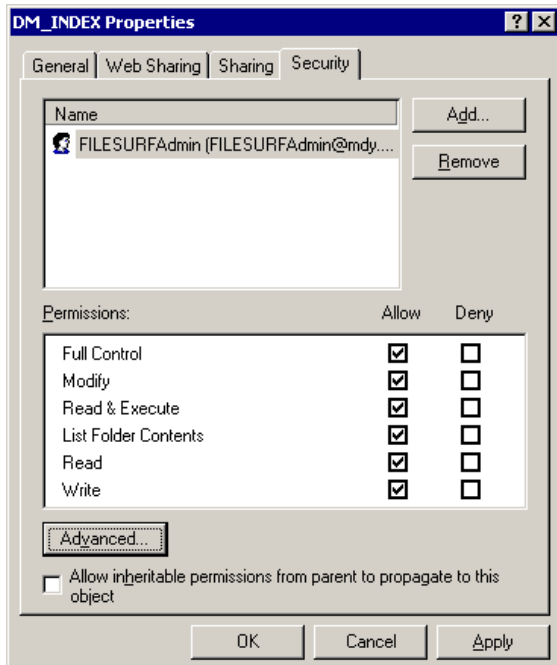
*Content Index Location:* The location of the FileSurf's content index for the Hummingbird DM database. If not yet configured, this will be done during **Task 6**. For now, let's create this location and designate it a network share.

Create a new folder in Windows Explorer - right-click the folder and select *Properties...* from the menu. Both directory security and share permissions must be configured to allow access to FileSurf Administrator account only.

For the share, click on the *Sharing* tab and click *Share this folder*. Click Permissions and configure as seen in the figure on the right.



Click *OK*. For directory security, click the *Security* tab and configure as seen in the figure below:



Include those users that need access to content search, universal search and grant read-only access.

Click OK and return to the repository dialog to enter the share name into *Content Index Location*.

Click *Finish*.

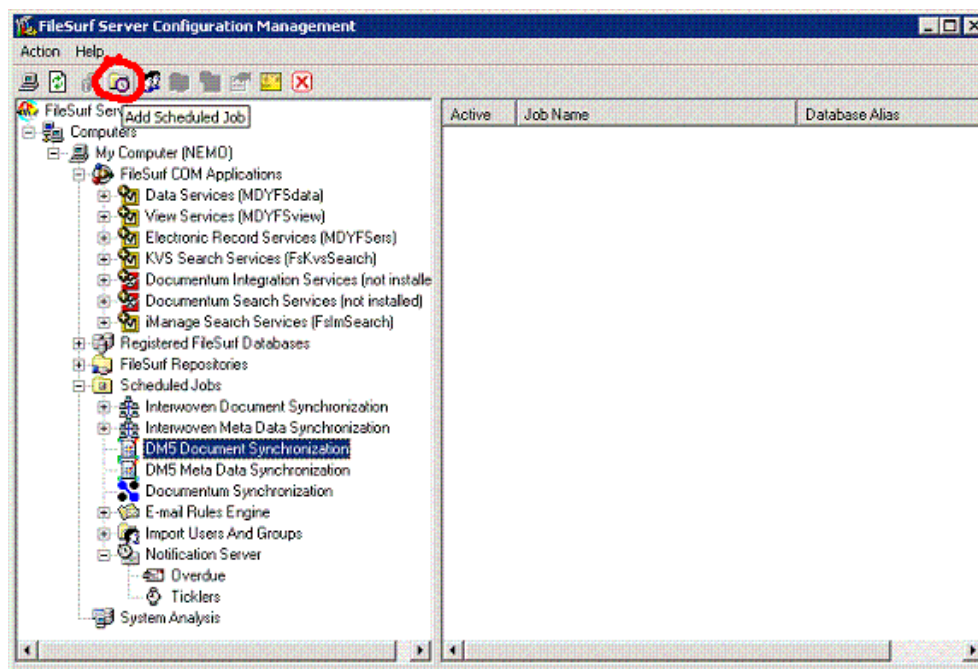
## Task 5: Install Synchronization Tools

### *MDY FileSurf Server Administrator*

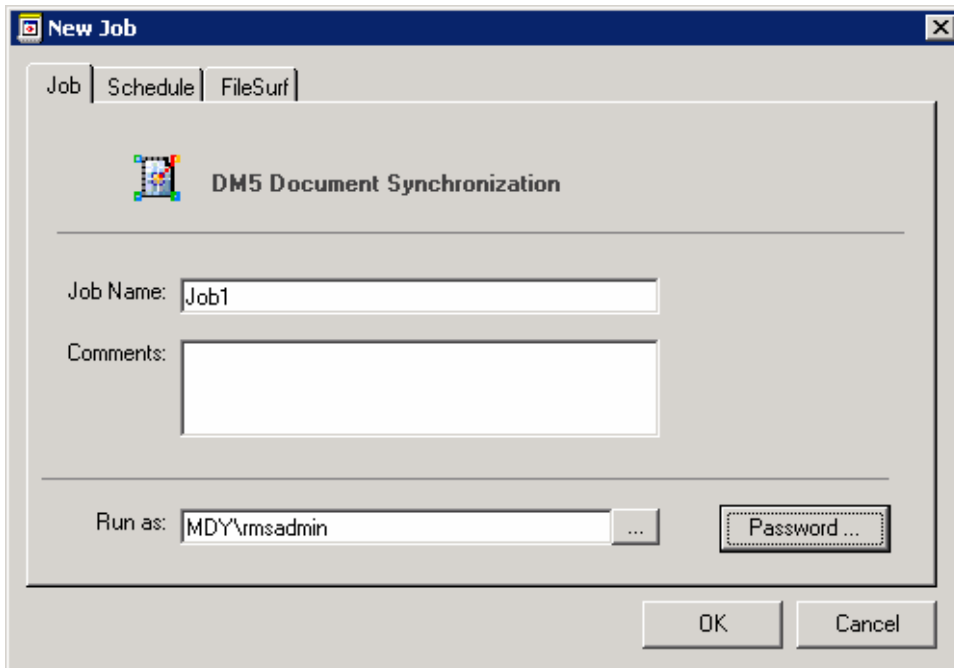
The two synchronization utilities keep data in FileSurf and Hummingbird DM consistent. The *DM5 Document Synchronization* tool synchronizes security and mapped fields of documents, while the *DM5 Metadata Synchronization* tool synchronizes groups. When groups are synchronized, the integration processes are more efficient.

### Configuring DM5 Document Synchronization

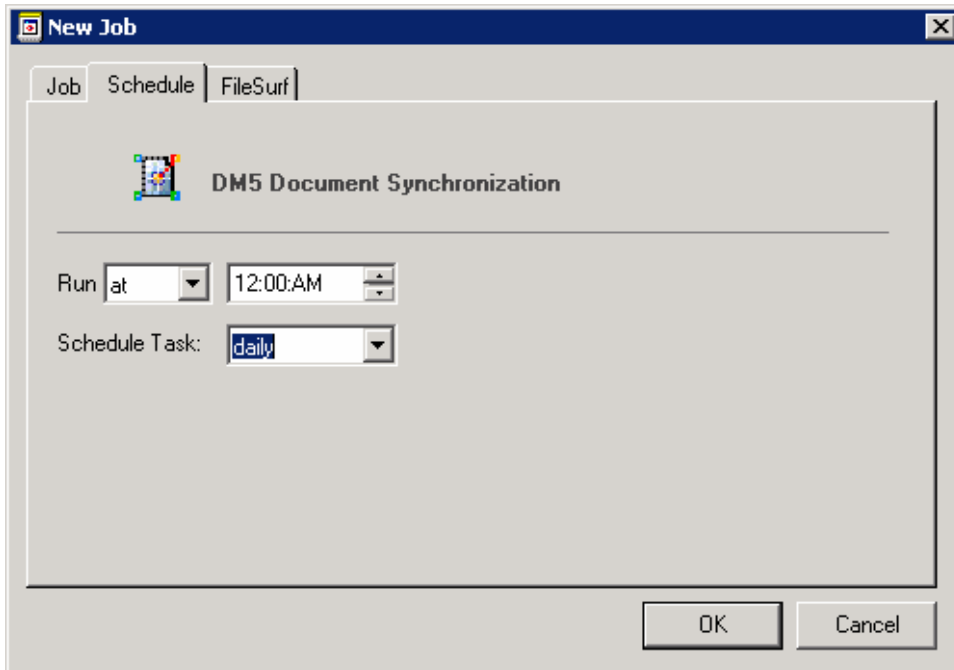
1. From the MDY FileSurf Server Administrator main form, expand *Scheduled Jobs*
2. Select *DM5 Document Synchronization* on the left pane



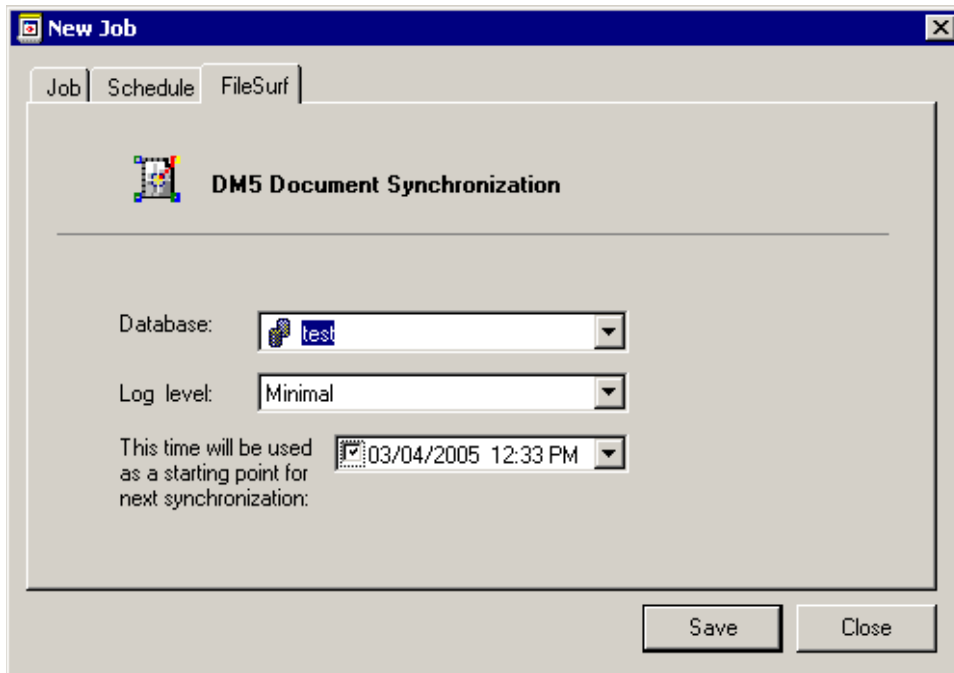
3. Click on the button with Folder and clock icon (circled in red above) from toolbar –or– right-click and select *Add job* from the menu. The new job dialog opens...



4. Enter a unique name for the new job in *Job Name* box.
5. Enter or select FileSurf Administrator account for *Run as*
6. Click on *Password...* button to set the password for the FileSurf Administrator account
7. Click on the *Schedule* tab.
8. Select *at* from the *Run* dropdown and select a time convenient for users.



9. Click the *FileSurf* tab



10. Select the FileSurf database from the *Database* dropdown

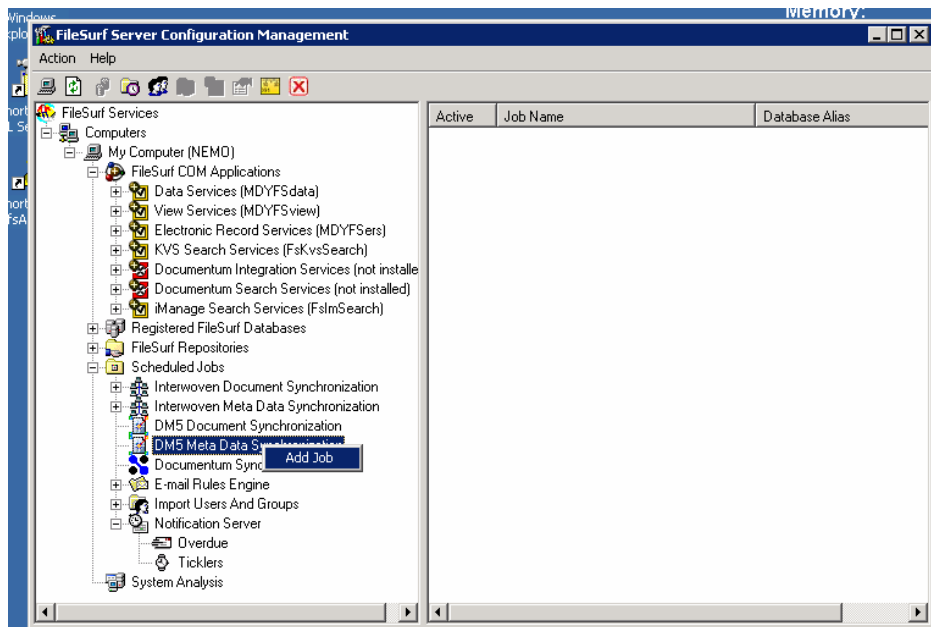
11. Select a Log level: *Errors Only*, *Minimal*, *Detailed*, or *Extreme*. Unless troubleshooting, always use *Errors Only* or *Minimal*.

12. To use starting time displayed, leave the checkbox next to the date/time checked. If filing documents starting today, use change the displayed date to yesterday's date. If the checkbox is cleared, synchronization will use 1/1/1900 as a start date.

13. Click *Save*, then *Close*.

### Configuring DM5 Metadata Synchronization

14. Select *DM5 Meta Data Synchronization* on the left pane of the Server Administrator's main form



15. Click the button with folder and clock icon on the toolbar –or- right-click and select *Add Job* from the menu

16. Repeat steps 4-13 as outlined for document synchronization above. Skip step 12 since Metadata synchronization does not use last date.

### Testing

After installing the synchronization utilities, test them by doing the following:

## 3.3 On the FileSurf Web Server

### Task 6: Add Hummingbird DM Repository to Indexing Service via FileSurf Web Administrator

*MDY FileSurf Web Administrator*

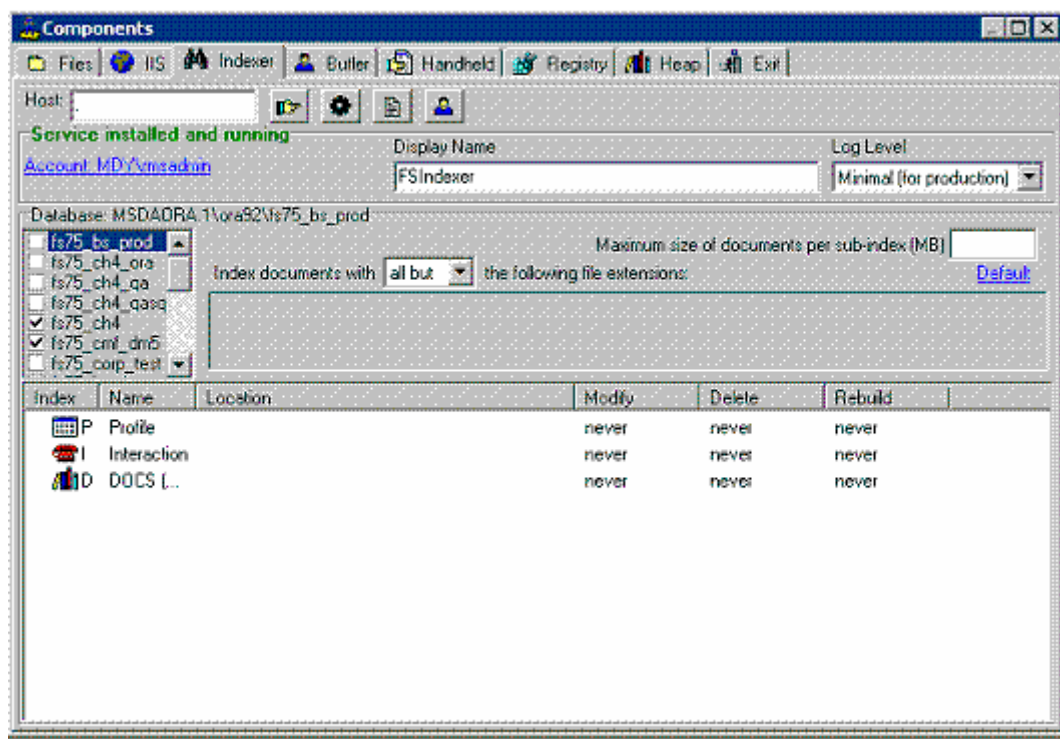
**Important: For indexer to be able to access DM5 documents in DM5 repository, FileSurf Administrator account needs 'Read' access to it.**

Open the w3FsAdm.exe program located at C:\Inetpub\FileSurf

Select Components on the left pane, this will open the components dialog box

Click on the *Indexer* tab

Click on the *Connect To Server* button (the pointing hand icon)



Select the FileSurf database that contains the Hummingbird DM repository added in **Task 4**.

Check the box next to it if not checked already - a list of repositories will be displayed

Right-click on the Hummingbird DM repository added in **Task 4** and select *Indexable* from the menu - there will now be an LED icon displayed for the repository under the *Index* column

Right-click on the Hummingbird DM repository added in **Task 4** and select *Concurrent* from the menu - the LED icon displayed for the repository under the *Index* column will now appear to be lit.

Assign a directory location to write the index to. This location should be designated as a network share. To assign an index to a location: right-click on the repository and select *Location* from the menu. This will open a dialog to enter the location, use the network share format and click *OK*.



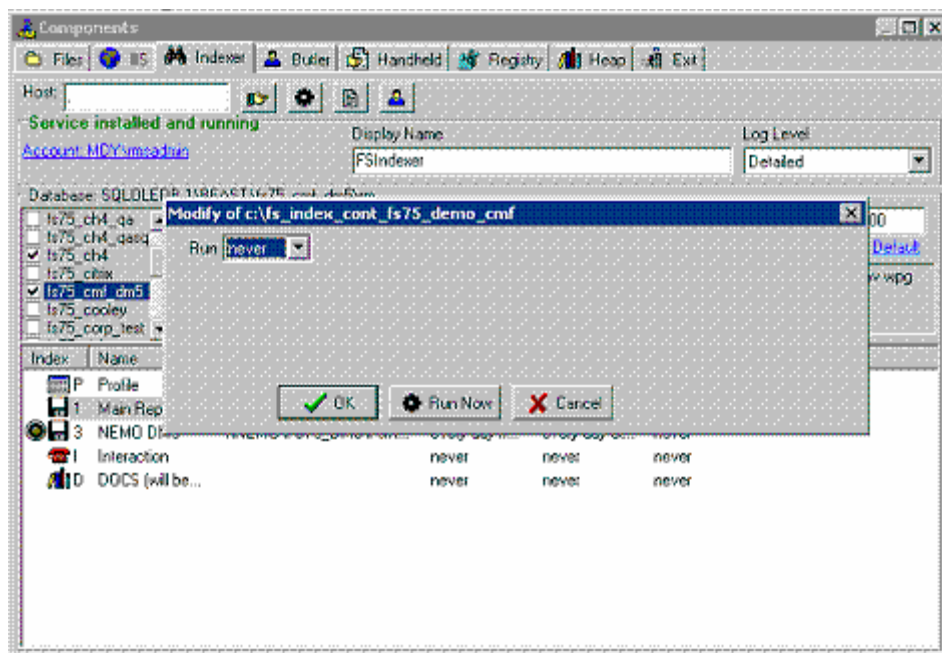
Assign an amount of disk space to set aside for the index in the *Maximum size of documents per sub-index (MB)* text box. The value *2000* will set aside 2 gigabytes, for example. This amount should not exceed *8000*.

If there are documents with certain file extensions that should not be indexed, click on *Default* (in blue). The box above the repository list will be populated with a default list of file extensions that will not be included in the index. Click on the box to edit the list.

Force indexer to build index: Right-click on the DM 5 repository in the list and select *Schedule->Rebuild* from the menu. An almost empty dialog box opens.

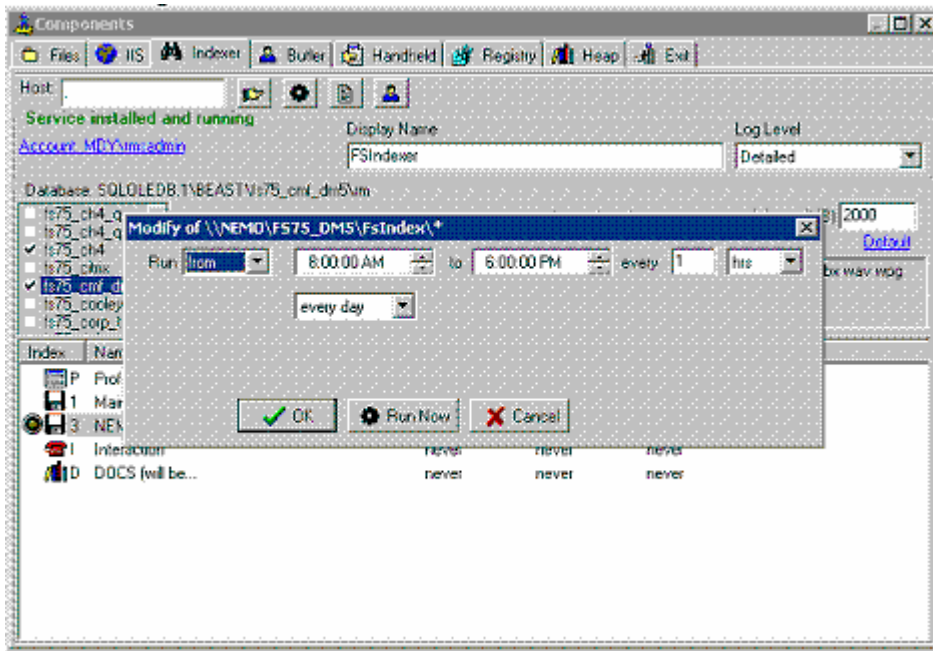
Click on the *Run Now* button

Schedule indexer to modify index: Right-click on the DM 5 repository in the list and select *Schedule->Modify* from the menu. The following dialog opens:



Select *from* from the dropdown and more fields are added to the dialog

Change the fields to read from 8:00:00 AM to 6:00:00 PM every 1 hour every day. It should look like the following:

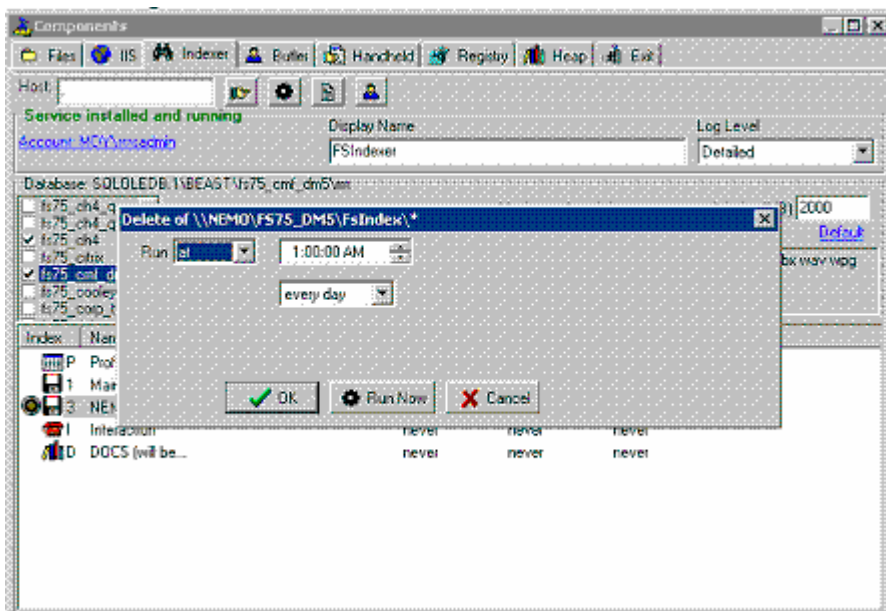


Click *OK*

Schedule indexer to delete index: Right-click on the DM 5 repository in the list and select *Schedule->Delete* from the menu. The same almost empty dialog box opens.

Select *at* from the dropdown and more fields are added to the dialog

Change the fields to read at 1:00:00 AM every day. It should look like the following:



Click *OK*

## 3.4 On the client

### Task 7: Install Integration and Folder Manager

#### *FileSurf Client Installation*

1. Start the FileSurf Client Setup program
2. When prompted, enter the license information for DM 5 integration. You can find it in the LIC section of the fsi.ini file. Use the serial number for the PowerDocs integration:

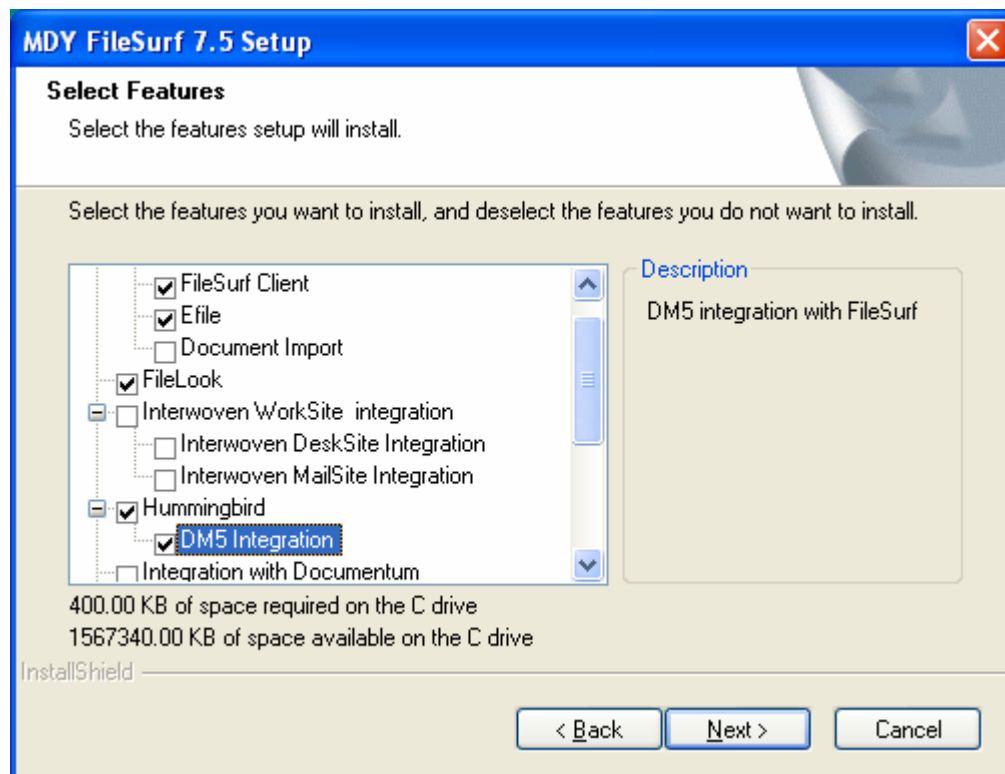
[LIC]

.

.

PowerDocs=XXXXXXXXXXXXXXXX

3. The installation program will detect that Hummingbird DM is installed on the client. On the *Select Features* dialog, make sure that *DM5 Integration* under *Hummingbird* is checked:



4. Click *Next>* and proceed with the setup program.

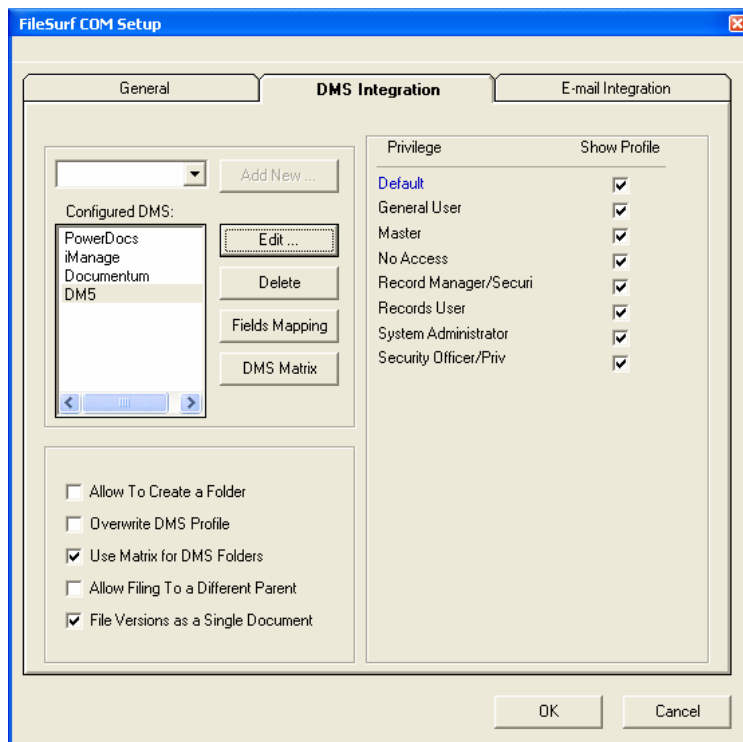
## 4 Configuration

Integration configuration is carried out in the FileSurf Administrator within the desktop client. Open FileSurf, by selecting *Programs->FileSurf->FileSurf7* from the Start menu

Select *System->Administrator* from the main menu. **Note:** the user logged in must have administrative privilege in FileSurf to see this menu option.

Expand *Configuration* in the left pane and select *Documents*. There are two buttons on the right pane, *FSCom Setup* and *Refresh FSCom*

Click on the *FSCom Setup* button, the FileSurf COM Setup dialog opens:



Click on the *DMS Integration* tab

Select *DM5* from the *Configured DMS* list by clicking on it. If *DM5* does not appear on the *Configured DMS* list as it does above, then it must be added by selecting it from the dropdown just above the list and clicking on the *Add New...* button. When you click on the button, a dialog will prompt you for the

Library name, user account credentials, and database user account credentials. Enter the following:

*Library:* Hummingbird DM library name

*Account:* FileSurf Administrator account network login

*Password:* FileSurf Administrator account network password

*Database/Account and Database/Password:* enter a database account that has at least rights to read from the Hummingbird DM database – *DOCSADM* is recommended

When everything is filled out, click the *Save* button.

## **Show Profile**

On the right side of the *DMS Integration* tab, you can configure which privilege groups can see the FileSurf profile before declaring a Hummingbird DM document as a record. A checked box indicates that the profile will be shown to users who have the corresponding privilege. An unchecked box indicates that the profile will be shown to users with the corresponding privilege only when necessary. The profile will be shown if there are required fields in the profile that are not autopopulated.

## **Allow Create Folder**

In certain situations, the integration will actually create a FileSurf folder of a certain type for a specified Hummingbird document when this option is checked:

- The type of the Hummingbird DM document being profiled must be associated (via DMS matrix – see section 4.2) to one and only one FileSurf document type
- The integration does not find an eligible FileSurf folder of the configured type in the destination location

## **Overwrite DMS Profile**

With this option checked, whenever filing a new version of an existing FileSurf document, the profile of the previous version will overwrite any mapped values from the Hummingbird DM profile. When not checked, the user has the option to overwrite or keep the profile values from the Hummingbird DM document.

## **Use Matrix for DMS Folders**

When not checked, the user can file a Hummingbird DM document into a folder of any type. When checked, the user can only file the Hummingbird

DM document into folders whose types have been associated with the document type of the Hummingbird DM document being filed. See section 4.2 for more information.

### **Allow Filing to a Different Parent**

When checked, a user can choose any FileSurf matter / category to be the parent of a Hummingbird DM document when filing it to FileSurf; otherwise, the user must choose a location under the current matter / category in the Hummingbird DM profile.

### **File Versions as a Single Document**

When checked, a document with multiple versions is always filed as a single FileSurf document. Each version in the Hummingbird DM document is saved as different version of that document. When not checked, the user can choose to file each version of a Hummingbird DM document as a version of a single FileSurf document or as separate FileSurf documents.

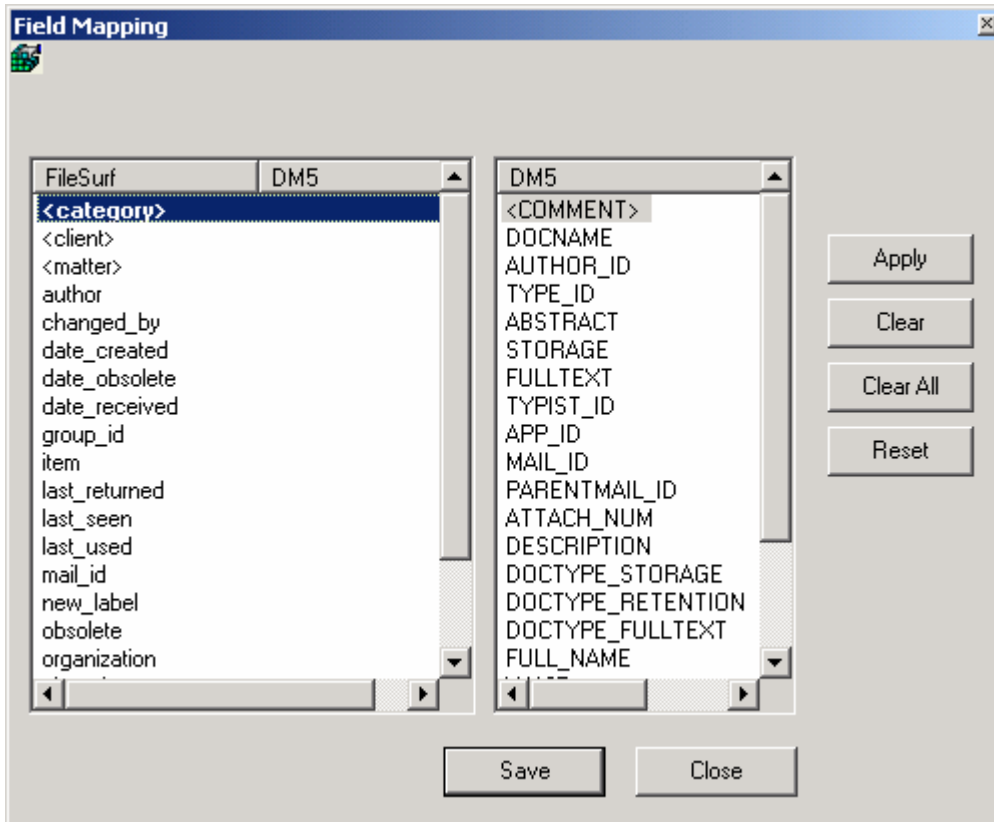
## **4.1 Fields Mapping**

### **4.1.1 Introduction**

When a document is declared as a record, certain attributes are automatically captured and copied to the FileSurf profile. This happens according to the mapping between Hummingbird DM and FileSurf profile attributes configured and stored in FileSurf. The mapping is configured via the Fields Mapping dialog in the FileSurf Administrator.

### **4.1.2 Mapping Fields Between FileSurf & Hummingbird DM**

From the *DMS Integration* tab of the *FileSurf COM Setup* dialog, click on *Fields Mapping* button to open the Fields Mapping dialog.



There are two lists on the Fields Mapping dialog. The *mapped fields list* (on the left) shows the current mapping while the *DM fields list* (on the right) lists available Hummingbird DM Fields. The fields in this list vary depending upon which item is selected in the mapped fields list. <COMMENTS> comes from the VERSIONS table and so is bracketed. The rest of the fields in the *DM fields list* come from the PROFILE table included in the GROUP\_DEF profile in Hummingbird DM.

To map a DM field to the FileSurf field selected in the mapped fields list, highlight the desired DM field and click the *Apply* button (or double-click the DM field). If a field is already mapped, the field just selected will replace the field previously mapped.

To remove a mapping, click the *Clear* button.

To remove all mappings, click the *Clear All* button

**Important:** To save the changes made, click *Save* before closing the dialog.

Close the *FileSurf COM Setup* dialog by clicking *OK*

Click the *Refresh FSCOM* button to update the changes immediately.

It is also necessary to restart the Hummingbird DM and FileSurf clients to see the changes.

Keep in mind that some fields which can be mapped, will not work correctly. This is true for those Hummingbird DM fields in the profile that are defined as tables and thus depend on valid codes for their values. For instance, when mapping FileSurf author to Hummingbird DM author, AUTHOR \_FULLNAME from FileSurf will not work unless the codes for PEOPLE in DM use full names. Map FileSurf's AUTHOR\_ID if codes in DM's PEOPLE table are network names.

## 4.2 Matrix

### 4.2.1 Introduction

The Matrix is used for mapping Hummingbird DM document types to FileSurf folder types. When you map *doctype* to *foldertype* in the DMS matrix, you are allowing documents of *doctype* to be filed into folders of *foldertype*. Via mapping, you can limit which document types can be filed to a particular folder type. You can also specify a one-to-one relationship - a single document type for a particular FileSurf folder type. In a one-to-one relationship, whenever a document of such a type is being profiled, FileSurf can automatically determine to which folder to place that document. If no folder of this type exists for this parent, the integration can create a folder of this type. This is all accomplished by using the DMS Matrix configuration dialog in the FileSurf administrator.

### 4.2.2 Using DMS matrix to connect folders and document types

Click the *DMS Matrix* button from the FileSurf COM Setup screen. The following dialog will open:



**DMS Matrix**

Database:  View: ☒ Matrix ☐ List

Document Type Starts with:

Found 4 document types.

	DEFAULT	FOLDER	MEMO	RM
ARP		✓		
CMEMO			✓	
COM				✓
CORR				
EMAIL				
FLDR				
GEN				
MEMO				
MISC				
RED				
REG				

If the matrix does not appear in the dialog, click the *Retrieve* button. FileSurf file types appear along the left side of the matrix while Hummingbird DM document types appear along the top. A cell (like in a spreadsheet) is located at the intersection of each document type and file type. Each cell can be mouse-clicked to toggle between a checked state and an unchecked state. Additionally each document type can be mouse-clicked to toggle all cells in that row and folder type can be mouse-clicked to toggle all cells in the column. A cell that is checked means that the document type listed above the cell will be allowed to be filed in the file type listed to the left of the cell. A cell that is not checked means that the document type listed above the cell will not be allowed to be filed in the file type listed to the left of the cell.

In the dialog above, DM documents of the type RM can be filed in folders of type COM, however they cannot be filed folders of any other type. Also, documents of type of RM are automatically assigned to the COM folder when profiled.

If there are many document types, the matrix can be difficult to work with. FileSurf can list those document types whose names start a certain way. In

the *Document types start with* text box (next to *Retrieve* button), enter how the desired document types should start and click *Retrieve*.

As an alternative, you can work with types in list view. To switch to list view, click on the *List* radio button. Before switching views, click *Save* if you want to save anything that might have been changed. Any data already retrieved, as well as all changes will be cleared when switching to either view. You might need to retrieve the matrix data again after switching.

The screenshot shows the 'DMS Matrix' dialog box. At the top, there is a 'Database' dropdown set to 'HUMM\_DM5'. Below it is a 'Document Type Starts with:' text box followed by a 'Retrieve' button. To the right, there is a 'View' section with two radio buttons: 'Matrix' (selected) and 'List'. Below this, it says 'Found 4 document types.' and then a table with three columns: 'Allowed', 'Document Type', and 'File Type'.

Allowed	Document Type	File Type
<input type="checkbox"/>	DEFAULT	ARP
<input type="checkbox"/>	DEFAULT	CMEMO
<input type="checkbox"/>	DEFAULT	COM
<input type="checkbox"/>	DEFAULT	CORR
<input type="checkbox"/>	DEFAULT	EMAIL
<input type="checkbox"/>	DEFAULT	FLDR
<input type="checkbox"/>	DEFAULT	GEN
<input type="checkbox"/>	DEFAULT	MEMO
<input type="checkbox"/>	DEFAULT	MISC
<input type="checkbox"/>	DEFAULT	RED
<input type="checkbox"/>	DEFAULT	REG
<input checked="" type="checkbox"/>	FOLDER	ARP
<input type="checkbox"/>	FOLDER	CMEMO
<input type="checkbox"/>	FOLDER	COM
<input type="checkbox"/>	FOLDER	CORR
<input type="checkbox"/>	FOLDER	EMAIL
<input type="checkbox"/>	FOLDER	FLDR
<input type="checkbox"/>	FOLDER	GEN
<input type="checkbox"/>	FOLDER	MEMO
<input type="checkbox"/>	FOLDER	MISC
<input type="checkbox"/>	FOLDER	RED

At the bottom of the dialog, there are buttons for 'Select All', 'Select None', 'Invert Selection', 'Save', and 'Close'.

The *Document Type* column refers to the Hummingbird DM document type; the *File Type* column refers to the FileSurf folder type; the *Allowed* column is populated with checkboxes which signifies whether the documents of the corresponding document type can be filed to folders of the corresponding file type. To populate the list, click the *Retrieve* button and the list should be populated with Hummingbird document types and FileSurf folder types.

**Important:** To save the changes made, click *Save* before closing the dialog.

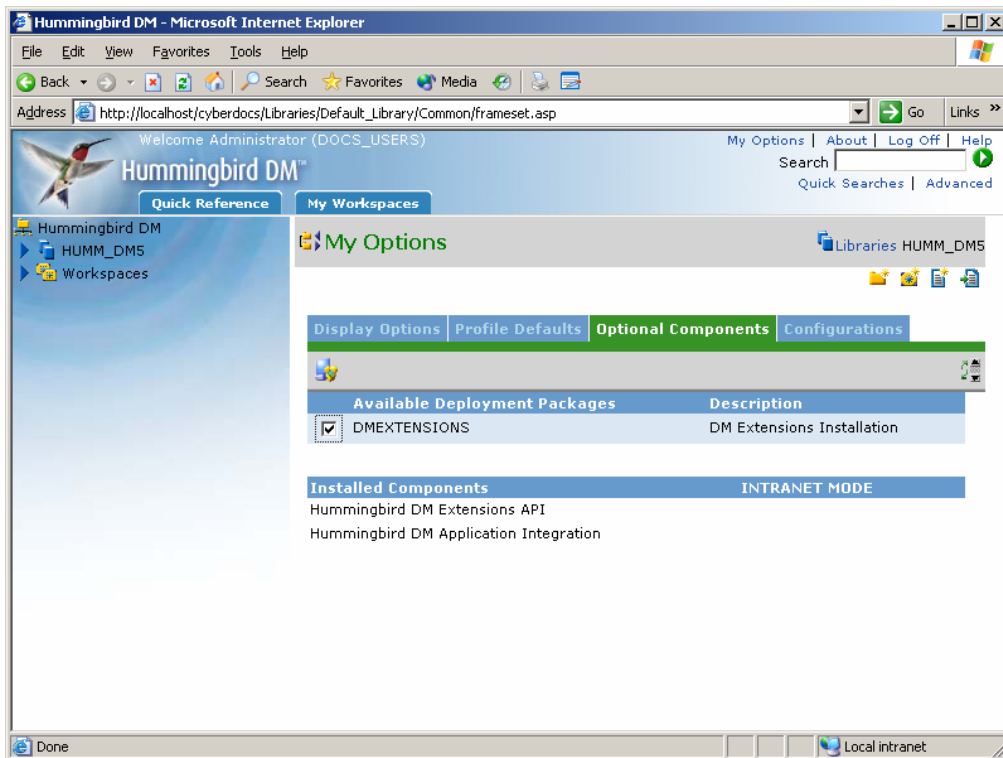
Close the *FileSurf COM Setup* dialog by clicking *OK*

Click the *Refresh FSCom* button to update the changes immediately.

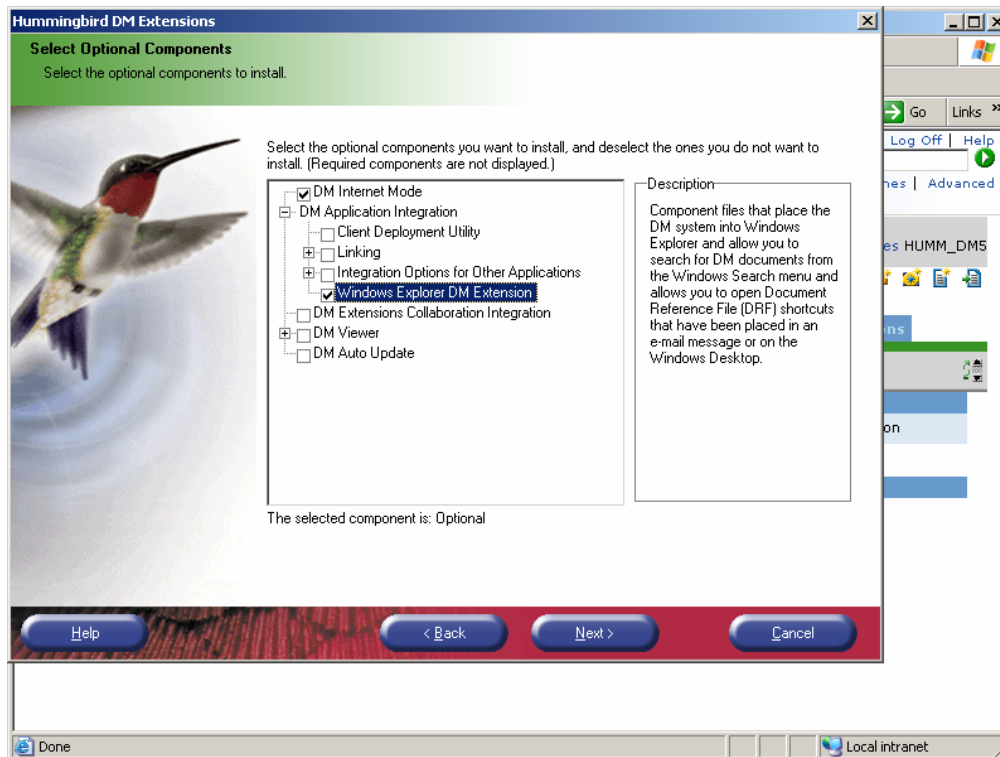
It is also necessary to restart the Hummingbird DM and FileSurf clients to see the changes.

## Appendix A: Installing DM Extensions on FileSurf Server

1. Open Internet Explorer on the machine hosting FileSurf server
2. Go to CyberDOCS, <http://<FusionServer>/cyberdocs>
3. Log in when prompted
4. Click on *My Options* near the top-right corner of the web page
5. Click on *Optional Components* tab
6. Make sure DMEXTENSIONS is checked and click the unmarked install button. It is the left-most button on the gray toolbar just above *Available Deployment Packages*



7. Allow installer to run and make the following selections on the *Select Optional Components* dialog:

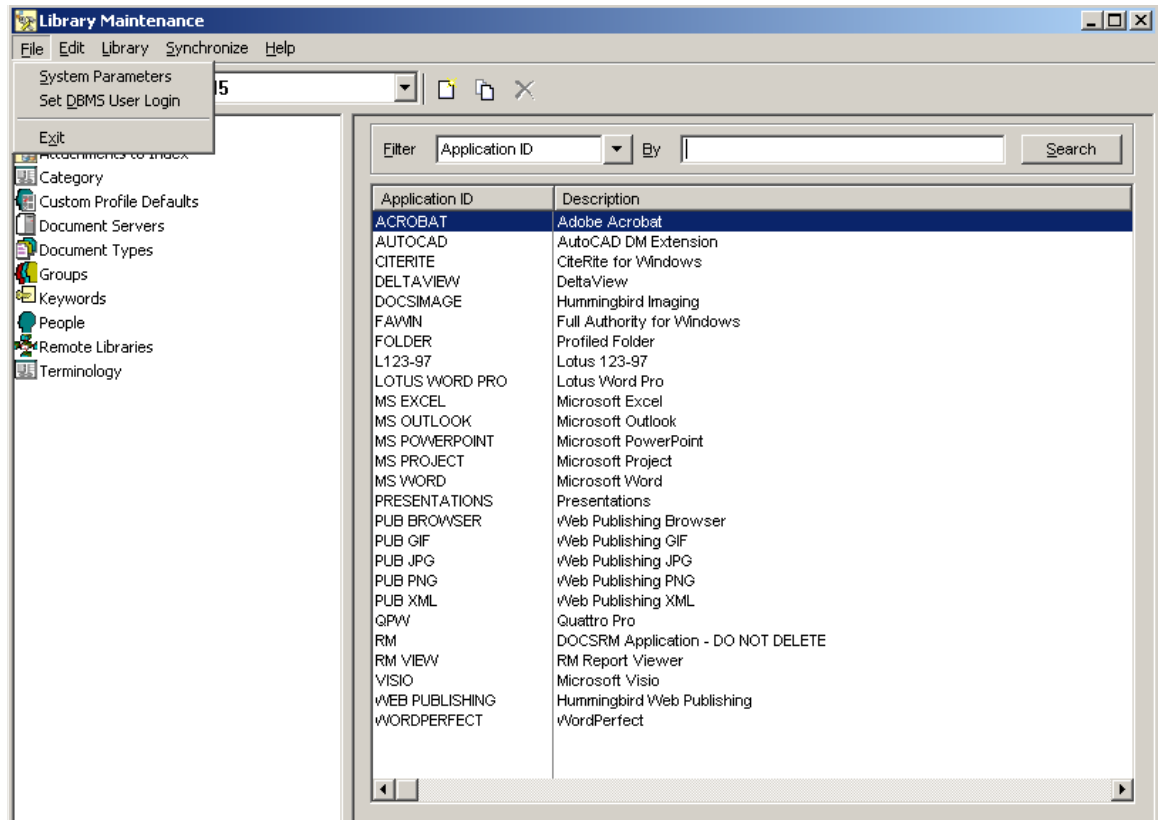


7. Click next and proceed with the installation.

## Appendix B: Windows Integrated Authentication in Hummingbird DM

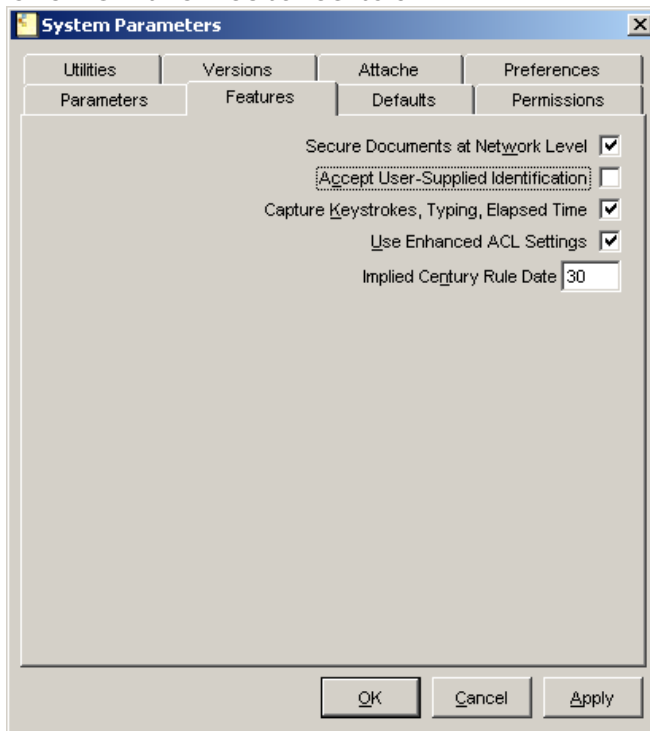
MDY requires that Hummingbird DM server be set up to use Integrated Authentication for the DM/FileSurf integration to work correctly. Here is how to do it:

1. Open DM Library Maintenance: *Start->Hummingbird->DM Server->Library Maintenance*
2. Make sure the correct library is selected in the Library Maintenance toolbar, then, select *File->System Parameters* from the main menu.

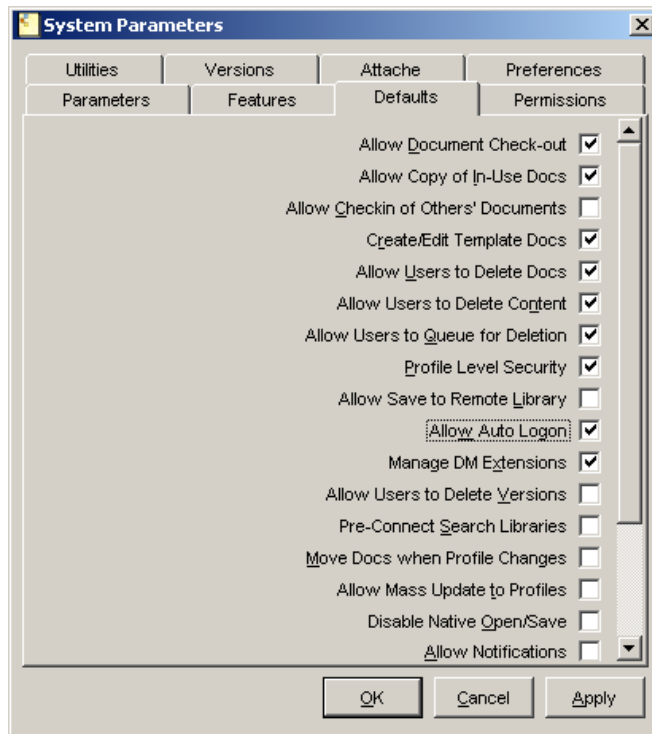


The *System Parameters* dialog opens.

- Click on the *Features* tab:

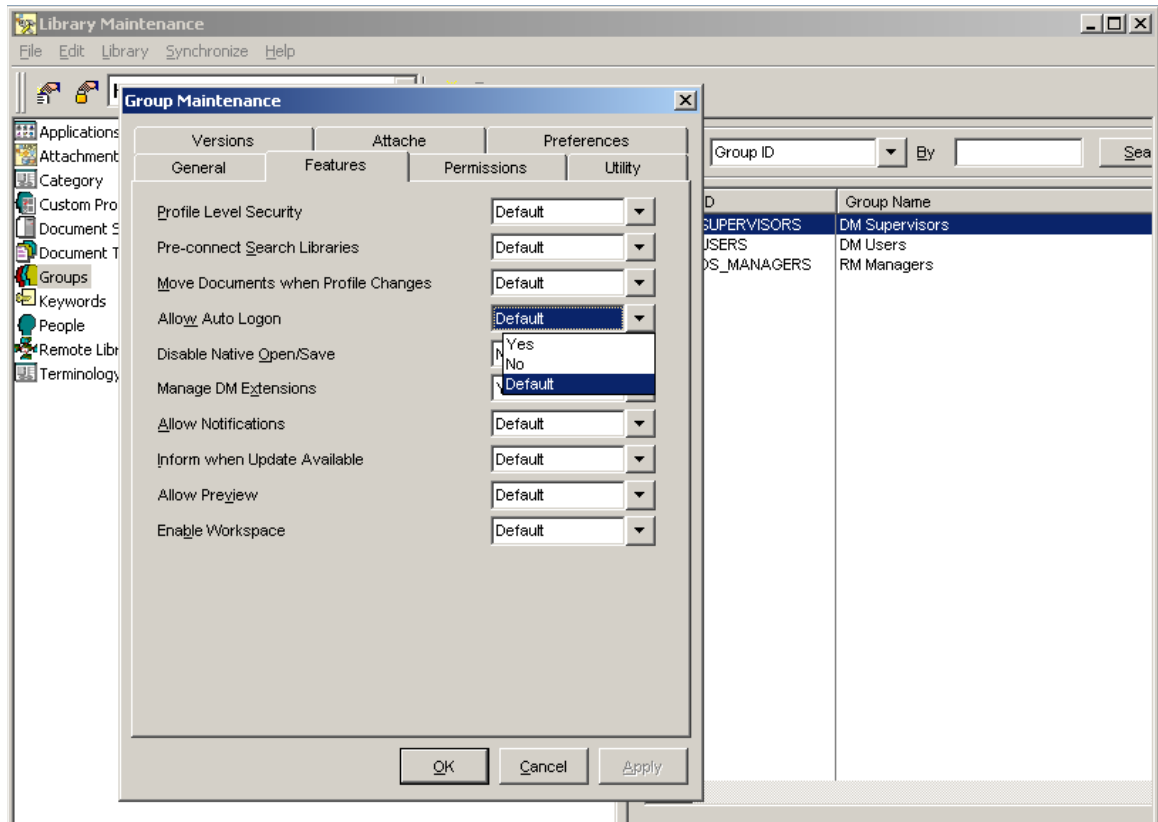


Make sure that the checkbox for *Accept User-Supplied Identification* is not checked. Click on *Defaults* tab:



Make sure *Allow Auto Logon* is checked. Click *Apply* or *OK* to save any changes made.

Also, make sure that all groups either allow Auto logon or accept the global default that you just set. Highlight groups on the left pane of Library Maintenance, double-click a group's entry on the right pane to bring up its properties dialog, and then go to the Features tab:



Click *OK* or *Apply* to save the changes.

## Appendix C: Adding fields to the Hummingbird DM Profile

Adding fields (especially lookups) to the Hummingbird DM profile can be a long and error-prone process. Be deliberate and careful while adding fields to a profile. If you make a mistake - do not delete anything. This section is meant as reference, not as a tutorial. Please see the Hummingbird documentation for more information about this process.

It must first be determined what kind of field is to be added to the profile. Is it a string, date, or lookup to another table? If it is a lookup, follow the process as explained in Task 3:

1. Add the table and fields to the database.
2. Make sure the lookup was created when table was saved

3. Design the form for data of this table
4. Add the field to profiles being used by integrations
5. Restart server
6. Populate data in Library Maintenance

If it is not a lookup, then the field only needs to be added to the profile (table and form).

1. Add field to the Profile table in DM Designer.

The screenshot shows the 'Edit Column Description' dialog box in DM Designer. The dialog has a 'Tables' list on the left with 'PROFILE' selected. The main area contains the following fields and options:

Tables	Column	Prompt	Object	Key in
PD_TERM	PD_VITAL	Vital Record	Edit	
PD_TERM_REL	PD_VREVIEW_DATE	Vital Record Rev	Edit	
PD_THES_SEC				
PD_TREE_REL				
PD_USER_VAL				
PROFILE				
SETTINGS				

Buttons: New Table, Edit Table

Field Details:

- Column Name: FS\_PLEA\_DATE
- Type: Date
- Key?: No
- Object Type: Edit
- Help ID:
- Prompt: FileSurf Plea Date
- Format:
- Validation:
- Lookup:

Options:

- ☐ All Upper
- ☐ Full Text Indexed
- ☐ Required Field

Buttons: OK, Cancel

2. Add field to the Profile using the forms designer.



