



## System Requirements

### Operating System

Nintex SmartLibrary must be installed on Microsoft Windows Server 2003.

### Browser Client

Microsoft Internet Explorer 5.01 although Microsoft Internet Explorer 6 or greater is recommended for Workflow Designing and Advanced Administration features.

### Software

Nintex SmartLibrary requires that the following software is installed and correctly configured:

- Microsoft Windows SharePoint Services or Microsoft SharePoint Portal Server 2003
- Microsoft .NET Framework 1.1, Service Pack 1.

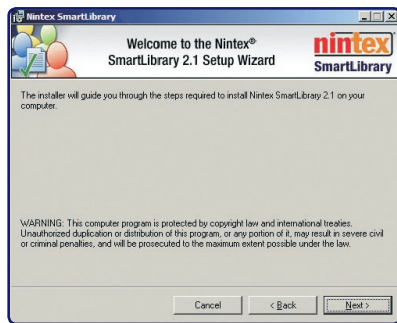
## Installation procedure

SmartLibrary is installed by running the SmartLibrary installer package on your server running Windows SharePoint Services. In the case of multiple servers or a web farm configuration, SmartLibrary will need to be installed on each Web Farm Server.

When installing SmartLibrary, you will need to configure a Service Account for SmartLibrary with Administrative access to SharePoint. This account should be created prior to installing SmartLibrary and should be configured to not expire the password. If using a Web Farm configuration, this account should be a Windows Domain account from either the NT Domain or Active Directory. The installer will prompt for this account during installation.

### Run the SmartLibrary installer

1. Login to the SharePoint Server using an account with administrative privileges. Launch the SmartLibrary Installer and select **'Next'**.

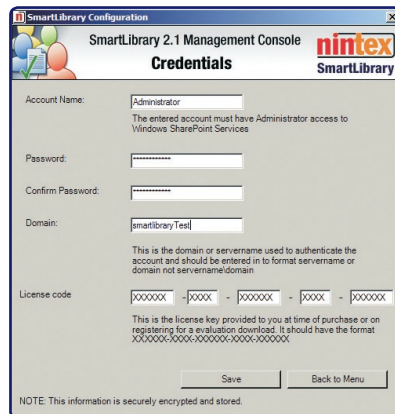


2. Read the License Agreement. Select either **'I Agree'** or **'I Do Not Agree'**: The installation process will be cancelled if you do not agree.

3. The installer will then ask if you want to restart IIS automatically or manually. Nintex recommends leaving this option set as 'Automatic'.

4. The **'Confirm Installation Screen'** will now be displayed: click **'Next'** and the installer will begin copying files.

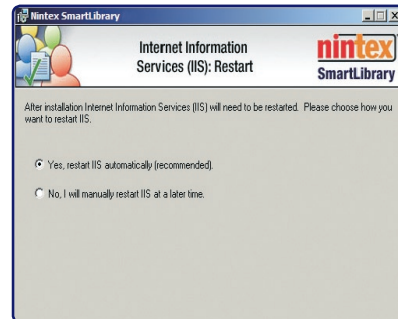
5. Once all the files are copied, you will be prompted for the details of the SmartLibrary Service account that will be used by SmartLibrary. Enter the credentials for that account, the registration key and click **'Save and Close'**. If you are using a Local User Account instead of a Domain Account, enter the Server Name as the Domain Name.



6. Once the Service Account credentials are successfully verified, you will be prompted to automatically restart IIS. If IIS is not restarted

at this point in the installation, you will need to restart IIS manually before SmartLibrary functionality will be enabled.

7. The **'Installation Complete'** screen will be displayed: click **'Close'**.



### Now enable SharePoint Events for document libraries

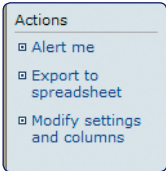
By default, SharePoint does not enable events for document libraries. Follow the steps below to enable events for document libraries. Events are enabled on a per virtual server basis. Therefore, when you enable events, you enable them for all sites created on the specified virtual server.

8. On the server with Smart Library installed, click **'Start'**, point to **'Administrative Tools'**, and then click **'SharePoint Central Administration'**.
9. In the **'Virtual Server Configuration'** section, click **'Configure virtual server settings'**.
10. On the **'Virtual server list'**, click the virtual server that you want to enable.
11. On the Virtual Server Settings page, in the **'Virtual Server Management'** section, click **'Virtual server general settings'**.
12. On the **'Virtual Server General Settings'** page, in the **'Event Handlers'** section, in the **'Event handlers are'** box, select **'On'**, and then click **'OK'**.
13. Installation and configuration of SmartLibrary is now complete.



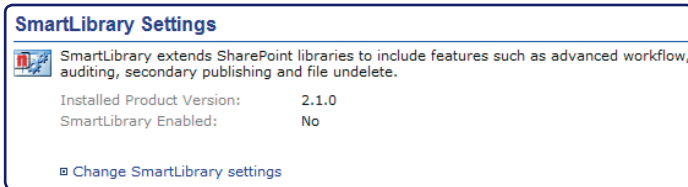
## Enabling SmartLibrary functionality in a new or existing document library

1. To add SmartLibrary functionality to a new or existing Windows SharePoint Services library, simply navigate to the required Document, Form or Image library.

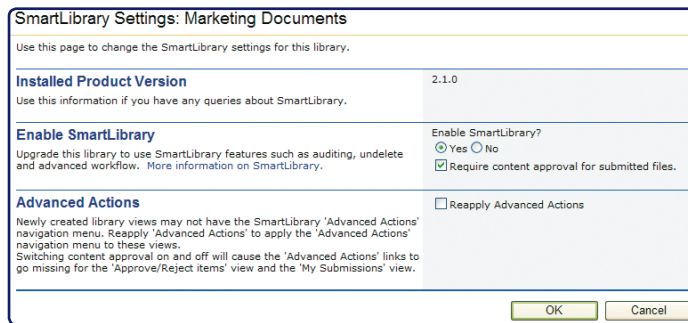


2. Click the 'Modify Settings and Columns' link under 'Actions' in the left hand menu.

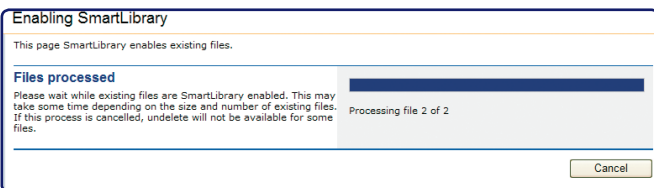
3. At the bottom of the 'Customize' page that is displayed, click 'Change SmartLibrary settings' under the 'SmartLibrary Settings' heading.



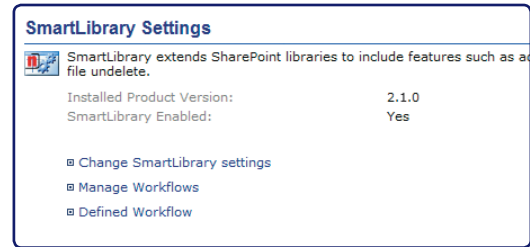
4. The 'SmartLibrary Settings' page is displayed. Set 'Enable SmartLibrary' to 'Yes' and click 'OK' to enable the Undelete and Audit Log functionality. If you wish to use SmartLibrary's Document Workflow functionality then also check the box next to "Require content approval for submitted files". If you are enabling SmartLibrary functions in a Document Library that already has customized views, select the "Reapply Advanced Actions" box.



5. If the Document Library being SmartLibrary-enabled already contains documents, a progress box will appear. The progress box indicates that the documents are being prepared to enable the 'Undelete' and Audit Log feature.



6. SmartLibrary will now return to the 'Customize' page. To confirm that SmartLibrary is enabled, scroll down to the 'SmartLibrary Settings' section. 'SmartLibrary Enabled' should be set to 'Yes' and there should be links related to Workflow (if 'Content Approval' was required).



That's it! All SmartLibrary functionality is now enabled! To further verify this, return to your document library and in the navigation area at the left of the page you should now see the options 'View Audit Log', 'Manage Deleted Items' and 'View Workflow'.

## Additional notes - Hard Disk space

Those responsible for installing SmartLibrary should be aware of the requirements for extra disk space related to SmartLibrary's Undelete functionality. Hard disk space will increase by twice the current size of every document library that is upgraded - a document library containing 9MB worth of documents would therefore be increased to 18MB.

Site administrators should ensure that there is sufficient disk space to handle the increased load requirements.

Furthermore, if an administrator has set a quota limit on a document library, the quota will need to be amended to take into account the increased storage size needed by the document undelete functionality.