Installation Guide

NOVELL®

For WINDOWS

USING ENVOY

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SoftSolutions®

DOCUMENT MANAGEMENT SOFTWARE **V 4.1**

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Introduction

Welcome to SoftSolutions® for Windows, the advanced document management software for local and wide area networks (LANs and WANs) from Novell, Inc.

This *Installation Guide* will assist in getting SoftSolutions loaded onto your system. If you are a first-time user of SoftSolutions, you will also need to read and understand the concepts in the "Setup Issues" and "Setup Procedures" sections of the *Administrator's Guide* to tailor SoftSolutions to your particular needs.

About This Manual

In addition to the Introduction which discusses the several sources of help and the procedures for obtaining upgrades and updates, the *Installation Guide* includes several different installation procedures for the SoftSolutions core programs:

- First Time Installation
- Upgrade Installation from SoftSolutions 3.1
- Upgrade Installation from SoftSolutions 3.0
- Upgrade Installation from SoftSolutions 2.0
- Update Installation
- Data Only Installation
- Removing Previously-Installed SoftSolutions Integrations

Based on whether you are a new or current user and whether you currently have any version of SoftSolutions installed, only *one* of these procedures will apply to you. You will also have the option of doing an "Express" or "Custom" installation.

Other installation procedures include:

- Document Desktop Installation
- ODBC Workstation Installation
- Remote Document Server Installation
- SoftSolutions Workstation Installation

The following pages describe the above procedures and other sections in the *Installation Guide*.

"**First Time Installation**" *p. 7*

This should be read by those who are *not current* users of SoftSolutions and are installing SoftSolutions for the *first time*.

"**Upgrade Installation (from SoftSolutions 3.1)**" *p. 11*

This should be read by those who are *currently using* SoftSolutions *3.1* and are *upgrading to* SoftSolutions 4.1 for Windows.

"**Upgrade Installation (from SoftSolutions 3.0)**" *p. 15*

This should be read by those who are *currently using* SoftSolutions *3.0* and are *upgrading to* SoftSolutions 4.1 for Windows.

"**Upgrade Installation (from SoftSolutions 2.0)**" *p. 23*

This should be read by those who are *currently using* SoftSolutions *2.0 Advanced* or *Global* and are *upgrading to* SoftSolutions 4.1 for Windows.

"**Update Installation**" *p. 31*

This should be read by those who are *currently using* SoftSolutions 4.1 for Windows and are installing a SoftSolutions 4.1 for Windows update, which may be available periodically.

"**Data Only Installation**" *p. 33*

This should be read by those who are *currently using* SoftSolutions 4.1 for Windows and are either:

- *initializing* an existing SoftSolutions 4.1 data directory, or
- installing the SoftSolutions 4.1 data files *to a new location*.

Most SoftSolutions users will never need to refer to this section.

"**Removing Previously-Installed SoftSolutions Integrations**" *p. 35*

This should be read by those who wish to *delete* a SoftSolutions integration. Most SoftSolutions users will never need to refer to this section.

Two methods are available for installing SoftSolutions for Windows. The *Installation Guide* also documents these methods:

- Express Installation
- Custom Installation

"**Express Installation**" *p. 39*

This gives the quick and easy steps of performing an Express Installation. Using this method, many decisions are already made for the administrator.

"**Custom Installation**" *p. 51*

This gives the installation procedures for the experienced SoftSolutions user in performing a Custom Installation. Using the Custom Installation, the administrator can determine what portions of SoftSolutions (datasets, programs, utilities, integrations) are to be installed and the directory structure to be used.

"**Document Desktop Installation**" *p. 69*

Document Desktop is an optional user interface for SoftSolutions. This section describes how to install it after SoftSolutions has been installed.

"**ODBC Workstation Installation**" *p. 73*

For those users who will be using ODBC, this section describes how to do a workstation installation of ODBC. The program files for ODBC are automatically installed when SoftSolutions is installed.

Lastly, the *Installation Guide* contains three appendices:

- Foreign Language Sorting Method Charts
- SoftSolutions Program Files
- ODBC Files

"**Remote Document Server Installation**" *p. 79*

Remote Document Server is an optional user interface for SoftSolutions. This section describes how to install the RDS server it after SoftSolutions has been installed.

"**SoftSolutions Workstation Installation**" *p. 83*

Each time the SoftSolutions programs or integration files are updated, a Workstation Installation must be performed on each workstation running SoftSolutions. The *Installation Guide* contains the steps necessary for performing this procedure.

"**Foreign Language Sorting Method Charts**" *p. A-1*

This appendix lists the four language groups (Germanic, Romance, Nordic, and Hungarian) for SoftSolutions sorting routines.

This appendix lists the files installed by SoftSolutions and files which are modified by SoftSolutions.

This appendix lists the files installed for ODBC.

General Installation Notes

Integrations

During installation of SoftSolutions for Windows, you will also be asked to indicate which *integrations* you wish to install. Therefore, before running the installation program, you may wish to refer to the Integrations section in the *User's Guide* for additional information.

Additional SoftSolutions Utilities

During installation of SoftSolutions for Windows, you will also be asked if you wish to install any of the utilities. These utilities provide additional functionality for operations that may affect the SoftSolutions data files. Before running the installation program, you may wish to refer to the Utilities section in the *Administrator's Guide* for additional information.

HardWare & System Requirements

SoftSolutions for Windows is designed to run on any machine set up to run *Microsoft Windows 3.1* or higher in standard or enhanced mode. SoftSolutions will run on a 386SX PC with 4.0MB of RAM. But, Novell recommends at minimum a 486 PC with 8MB of RAM. Additional RAM may be required, depending on the number of applications opened simultaneously in Windows. Windows requires at least an EGA monitor. SoftSolutions is network- and application-*independent*. Server Enhancement Modules (SEMs) are available for various network operating systems.

Express vs. Custom Installation

The Express Installation will install SoftSolutions, making default decisions, so the installation is quick and easy. Unlink a Custom Installation, the Express Installation does *not* update the SOFTSOL.CTX strings file, if necessary.

"**Custom Installation**" *p. 51*

The Custom Installation is for the experienced SoftSolutions user who wants to determine what portions of SoftSolutions (dataset, programs, utilities, integrations) are to be installed and the directory structure to be used. If selected, the SOFTSOL.CTX strings file is updated with any changes to the Custom Prompts and EZLaunches.

The following table lists the differences between the Express and Custom installation options.

Feature	Express Installation	Custom Installation
Installs New Program Files	Automatically	If selected
Installs New Dataset	Automatically	If selected
Installs Utilities	Automatically	If selected
Installs Integrations	All that are selected	All that are selected
Updates the SOFTSOL.CTX strings file	No	Yes
Used for First-Time Installation	Recommended	Yes
Used for 3.1, 3.0 or 2.0 Upgrade Installation	Yes	Recommended
Used for Update Installation	No	Yes
Used for Data Only Installation	No	Yes
Used for Removing Installed SoftSolutions Integrations	No	No
Can determine the location of the SoftSolutions programs and data directories	No. Only the parent directory of the programs and data directories may be specified.	Yes

Standalone PC Installation and Missing OAMs

If an installation is performed on a standalone PC, OAMLAUNC, OAMPREVI and OAMEND will *not* be installed in the OAM setup. If you copy the dataset to the network, your /NOVMAP switch will not work because the OAMs were not activated.

Manually add these three OAMs (OAMLAUNC, OAMPREVI, OAMEND) in the OBJECT ACCESS MODULES window *(see "Object Access Modules" in the Administrator's Guide).*

First Time Installation

This section contains the following information on a *first time* installation of SoftSolutions 4.1 for Windows:

- Operations preformed by the installation program
- Things needed before installing SoftSolutions for Windows
- SoftSolutions for Windows installation procedures

Operations Performed by the Installation Program

1. Copies the SoftSolutions program files from the CD or diskettes to the specified SoftSolutions programs directory.

2. Initializes a new dataset in the specified data directory.

3. Installs all integration files in the SoftSolutions INT directory, a subdirectory of the SoftSolutions programs directory, and adds application codes for the installed integrations in the new SoftSolutions dataset.

4. Installs all utilities in the SoftSolutions \UTIL directory, a subdirectory of the SoftSolutions programs directory.

5. Installs all DLLs used by SoftSolutions in the SoftSolutions SYSTEM directory, a subdirectory of the SoftSolutions programs directory.

A minimum of 13.5MB of free hard disk space is required to *initially* install SoftSolutions. An additional 1.5MB of hard disk space is required in the Windows SYSTEM directory.

Before Installing SoftSolutions 4.1 for Windows

Before installing SoftSolutions 4.1 for Windows the *first time*, the following are needed:

- Operational hardware (*e.g.,* an individual PC *or* a file server on a functioning network).

- *Microsoft Windows 3.0* or above.

- SoftSolutions for Windows installation CD or diskettes.

- The SoftSolutions Server Enhancement Module diskettes, if purchased for a specific network implementation.

- Your company's name, up to 30 characters, to whom the SoftSolutions Serial Numbers are registered.

- The SoftSolutions Serial Number(s) from the Registration Card. Each server license has its own Serial Number.

- A Dataset ID of up to 8 characters for each dataset. An ID is assigned to a dataset during the installation steps

> **NOTE**
> A "dataset" is a collection of SoftSolutions Profiles, setup records, and SpeedSearch™ indices. The Dataset ID distinguishes the different datasets that SoftSolutions accesses. Therefore, when more than one dataset is to be located on a single file server, such as in example #3 below, each dataset must be assigned a *unique* Dataset ID. Some examples:
>
> 1) If SoftSolutions datasets are to be installed on *two* file servers, one might be assigned the Dataset ID of "FS1" and the other "FS2."
>
> 2) If a corporation has offices in Los Angeles, Chicago and New York, and a file server resides at each location, the datasets might be named "LA," "CHI," and "NY."
>
> 3) If the scenario in #2 above also includes two additional datasets in Los Angeles and one additional dataset in New York, the corporation's datasets might be named "LA1," "LA2," "LA3," "CHI," "NY1," and "NY2."

Installation Procedures _____

There are two installation procedures, *one* of which you will use. Select the installation
procedure according to the following criteria:

"**Express Installation**" *(Recommended) p. 39*

> The Express Installation will install SoftSolutions, making default decisions,
> so the installation is quick and easy.

"**Custom Installation**" *p. 51*

> The Custom installation is for the experienced SoftSolutions user who wants
> to determine what portions of SoftSolutions (dataset, programs, utilities,
> integrations) are to be installed and the directory structure to be used.

Continue with the First Time Installation using instructions on the indicated pages for
either the Express or Custom Installation. A Workstation Installation must then be
performed on each workstation. *(See "SoftSolutions Workstation Installation" on page
83 for instructions on performing this installation.)*

Upgrade Installation
(from SoftSolutions 3.1)

This section contains the following information on upgrading from SoftSolutions 3.1 to SoftSolutions 4.1 for Windows:

- New SoftSolutions for Windows options and windows
- Operations preformed by the installation program
- SoftSolutions for Windows installation procedures
- SoftSolutions 4.1 data and word conversion procedures

New SoftSolutions for Windows Options and Windows _____

The following major changes and additions have been made between SoftSolutions 3.1 for Windows and SoftSolutions 4.1 for Windows:

- "Compound Document" has been changed to "Related Document." As a consequence, C**o**mpound in the **F**ile menu and in many of the dialog boxes has been changed to **R**elated Documents. The Unlink option in the SoftSolutions 3.0 COMPOUND dialog box has been changed to Unrelate in the SoftSolutions 4.1 RELATED DOCUMENTS dialog box.

- **R**etrieve in the **F**ile menu and in many of the dialog boxes has been changed to **O**pen. The default option in the dialog boxes is now Open rather than Profile.

- A new option, Task **M**anager, has been added to the Se**t**up menu. This accesses the new Setup window, TASK MANAGER, used for creating and maintaining tasks to be performed by a dedicated workstation at specified times or intervals. By default, only members of the SYSM screen access group will be given access to this window when initially converting to SoftSolutions 4.1 for Windows.

- A new option, Customize **R**esults List, has been added to the Pre**f**erences menu. This accesses the new dialog box, CUSTOMIZE RESULTS LISTS, used to define which of the available Profile fields should be displayed in the SEARCH RESULTS, WORKLIST, and RELATED DOCUMENTS dialog boxes. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- A new option, **G**eneral Options, has been added to the Pre**f**erences menu. This accesses the new dialog box, GENERAL OPTIONS, used to define the 〔Enter〕 key functionality and to indicate whether confirmation messages should be displayed in SoftSolutions. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- The Index Verification utility has been enhanced to verify and rebuild words and user-defined fields in the full text of documents. This is useful when a search on a specific word in the text returns inaccurate results.

Operations Performed by the Installation Program _____

1. Copies the SoftSolutions program files from the CD or diskettes to the specified SoftSolutions programs directory.

2. Compares the SoftSolutions 3.1 SOFTSOL.CTX strings file with the 4.1 SOFTSOL.CTX strings file. Any changes to the custom prompts or the EZLaunches in the 3.1 strings file are automatically made to the 4.1 strings file. The remainder of the differences between the 3.1 and 4.1 strings files are recorded in the log file, SOFTSOL.LOG.

3. Initializes a new dataset in the specified data directory.

4. Installs all integration files in the SoftSolutions INT directory, a subdirectory of the SoftSolutions programs directory, and adds application codes for the installed integrations in the new SoftSolutions dataset.

5. Installs all utilities in the SoftSolutions \UTIL directory, a subdirectory of the SoftSolutions programs directory.

6. Installs all DLLs used by SoftSolutions in the SoftSolutions SYSTEM directory, a subdirectory of the SoftSolutions programs directory.

Installation Procedures

SoftSolutions 3.1 must have been previously installed to use this Upgrade Installation. When the Upgrade Installation is complete, run the conversion program *(see page 13)*.

There are two installation procedures, *one* of which you will use. Select the installation procedure according to the following criteria:

"**Express Installation**" *p. 39*

> The Express Installation will install SoftSolutions, making default decisions, so the installation is quick and easy. The SOFTSOL.CTX strings file is *not* updated, however.

"**Custom Installation**" *(Recommended) p. 51*

> The Custom installation is for the experienced SoftSolutions user who wants to determine what portions of SoftSolutions (dataset, programs, utilities, integrations) are to be installed and the directory structure to be used. The SOFTSOL.CTX strings file is updated.

Continue with the Upgrade Installation using instructions on the indicated pages for either the Express or Custom Installation. Please observe any notes applicable to the Upgrade Installation (from SoftSolutions 3.1). A Workstation Installation must then be performed on each workstation. *(See "SoftSolutions Workstation Installation" on page 83 for instructions on performing this installation.)*

Conversion Procedures

Upon completion of the installation procedures, perform the following conversion to SoftSolutions 4.1 using the DOS-based CONVERSION program:

1. Make a current and complete backup of the SoftSolutions 3.1 data directory.

2. At the SoftSolutions programs directory, type SSCV41.

   - The CONVERSION window is displayed.

3. Highlight **Convert from SoftSolutions 3.1** and press 〔Enter〕.

   - The SOFTSOLUTIONS CONVERSION 3.1 -> 4.1 window is displayed.

4. Enter the **3.1 Dataset Directory**.

5. Enter the **3.1 Dataset ID** assigned to the dataset. Conversion will begin immediately.

    - The 3.1 to 4.1 conversion process simply adds a few files to the 3.1 data directory (JOBS.* and STORE.*).

    - The SoftSolutions 3.1 data is not moved. The 3.1 data directory becomes the 4.1 data directory. Once the process is completed, the users will perceive no changes in how SoftSolutions is used and operates.

    Press {Esc} at any time to cancel the conversion process. The SoftSolutions 3.1 data files are not affected by interrupting the Conversion program with {Esc}.

6. Upon completion of the process, a message is displayed indicating the conversion is completed. If any errors were encountered, this is indicated as well. Press any key to exit the CONVERSION window.

    - Errors are written to the file, CVERR.LOG, found in the STATUS subdirectory of the new 4.1 data directory.

Upgrade Installation
(from SoftSolutions 3.0)

This section contains the following information on upgrading from SoftSolutions 3.0 to SoftSolutions 4.1 for Windows:

- New SoftSolutions for Windows options and windows
- Operations performed by the installation program
- SoftSolutions for Windows installation procedures
- SoftSolutions 4.1 data and word conversion procedures

New SoftSolutions for Windows Options and Windows

The following major changes and additions have been made between SoftSolutions 3.0 for Windows and SoftSolutions 4.1 for Windows:

- "Compound Document" and "Compound" has been changed to "Related Documents." As a consequence, C**o**mpound in the **F**ile menu and in many of the dialog boxes has been changed to **R**elated Documents. The Unlink option in the SoftSolutions 3.0 for Windows COMPOUND dialog box has been changed to Unrelate in the SoftSolutions 4.1 for Windows RELATED DOCUMENTS dialog box.

- **R**etrieve in the **F**ile menu and in many of the dialog boxes has been changed to **O**pen. The default option in the dialog boxes is now Open rather than Profile.

- A new option, Task **M**anager, has been added to the Se**t**up menu. This accesses the new Setup window, TASK MANAGER, used for creating and maintaining tasks to be performed by a dedicated workstation at specified times or intervals. By default, only members of the SYSM screen access group will be given access to this window when initially converting to SoftSolutions 4.1 for Windows.

- A new option, Customize **R**esults List, has been added to the Pre**f**erences menu. This accesses the new dialog box, CUSTOMIZE RESULTS LISTS, used to define which of the available Profile fields should be displayed in the SEARCH RESULTS, WORKLIST, and RELATED DOCUMENTS dialog boxes. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- A new option, **G**eneral Options, has been added to the Pre**f**erences menu. This accesses the new dialog box, GENERAL OPTIONS, used to define the 〔Enter〕 key functionality and to indicate whether confirmation messages should be displayed in SoftSolutions. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- The Index Verification utility has been enhanced to verify and rebuild words and user-defined fields in the full text of documents. This is useful when a search on a specific word in the text returns inaccurate results.

Operations Performed by the Installation Program

1. Copies the SoftSolutions program files from the CD or diskettes to the specified SoftSolutions programs directory.

2. Compares the SoftSolutions 3.0 SOFTSOL.CTX strings files with the 4.1 SOFTSOL.CTX strings files. Any changes to the custom prompts or the EZLaunches in the 3.0 strings file are automatically made to the 4.1 strings file. The remainder of the differences between the 3.0 and 4.1 strings files are recorded in the log file, SOFTSOL.LOG.

3. Initializes a new dataset in the specified data directory.

4. Installs all integration files in the SoftSolutions INT directory, a subdirectory of the SoftSolutions programs directory, and adds application codes for the installed integrations in the new SoftSolutions dataset.

5. Installs all utilities in the SoftSolutions \UTIL directory, a subdirectory of the SoftSolutions programs directory.

6. Installs all DLLs used by SoftSolutions in the SoftSolutions SYSTEM directory, a subdirectory of the SoftSolutions programs directory.

Installation Procedures _____

SoftSolutions 3.0 must have been previously installed to use this Upgrade Installation. When the Upgrade Installation is complete, run the conversion program *(see page 18).*

> **NOTE**
> If you have made changes to your strings file that you wish not to lose, do a "Custom Installation," then be sure to select the "Convert Strings" option. The "Express Installation" automatically *replaces* the current strings file with the new 4.x version.

There are two installation procedures, *one* of which you will use. Select the installation procedure according to the following criteria:

"**Express Installation**" *p. 39*

The Express Installation will install SoftSolutions, making default decisions, so the installation is quick and easy. The SOFTSOL.CTX strings file is *not* updated, however.

"**Custom Installation**" *(Recommended) p. 51*

The Custom installation is for the experienced SoftSolutions user who wants to determine what portions of SoftSolutions (dataset, programs, utilities, integrations) are to be installed and the directory structure to be used. The SOFTSOL.CTX strings file is updated.

Continue with the Upgrade Installation using instructions on the indicated pages for either the Express or Custom Installation. Please observe any notes applicable to the Upgrade Installation (from SoftSolutions 3.0). A Workstation Installation must then be performed on each workstation. *(See "SoftSolutions Workstation Installation" on page 83 for instructions on performing this installation.)*

Conversion Procedures _____

Upon completion of the installation procedures, perform the following conversion to SoftSolutions 4.1 using the DOS-based CONVERSION program:

> **NOTE**
> Before performing the conversion, make sure there is sufficient disk space for both the 3.0 data directory and the 4.1 data directory. The 4.1 dataset is approximately the 1.25 the size of the 3.0 data directory.

1. Make a current and complete backup of the SoftSolutions 3.0 data directory.

2. At the SoftSolutions programs directory, type SSCV41.
    - The CONVERSION window is displayed.

3. Highlight **Convert from SoftSolutions 3.0** and press ⟨Enter⟩.
    - The SOFTSOLUTIONS CONVERSION 3.0 -> 4.1 window is displayed.

4. Enter the **3.0 Programs Directory** *(not your new 4.1 programs directory—the 3.0 directory should have been preserved during either the Express or Custom installation—see pages 49 and 64).*

5. Enter the **3.0 Dataset Directory**.

6. Enter the **3.0 Dataset ID** assigned to the dataset.

7. Enter the **4.1 Dataset Directory** to which the new data files were installed during the 4.1 installation.
    - This location must be different than the location of the SoftSolutions 3.0 data files. If the same data directory is used, a Confirm message box will be displayed asking if the contents of the directory is to be overwritten. **Y**es destroys the old dataset. **N**o cancels the current operation.

8. In **Modify character set**, enter **Y**es or **N**o to indicate whether the CONVERSION program should convert the existing data from ASCII to ANSI.

- Of the first 128 characters, the printable characters have the same values in ANSI and ASCII. Only the international characters have different values. In SoftSolutions 3.0 **for Windows**, however, these international characters are already stored in ANSI. Therefore:

    1) **If** the current 3.0 dataset contains international characters **and** SoftSolutions 3.0 for Windows **has not** been used to access the dataset, **Y**es should be entered.

    2) **If** the current 3.0 dataset contains only English characters **or** the SoftSolutions 3.0 for Windows **has been** used to access the dataset, **N**o should be entered.

    Once converted, any international characters entered in the new 4.1 dataset will automatically be stored in ANSI, independent of your entry in this field.

9. Enter the **Sorting Method**, indicating how the data should be sorted. Valid entries include ASCII, Germanic, Romance, Nordic, and Hungarian.

> **NOTE**
> Sorting method charts for the Germanic, Romance, Nordic, and Hungarian languages are contained in the appendix.

- If only US English characters are used and international characters are never used, choose ASCII. If US English characters as well as some international characters are being used, Germanic is recommended.

- During conversion, a file named SORT.LST will be created automatically in the SoftSolutions programs directory. This file simply contains a number indicating the sorting method being used. These numbers and their corresponding sorting method are as follows:

        0 - ASCII
        1 - Germanic (default)
        2 - Romance
        3 - Nordic
        4 - Hungarian

If you wish to change the sorting method after the installation has been performed, use any editor to change the number in the file. A Normal Reconstruction must be performed on all data files.

10. The conversion process begins. The file being copied or converted is displayed. Also, the number of records converted is displayed.

    • The SoftSolutions 3.0 data is maintained and the data is placed in the appropriate SoftSolutions 4.1 fields. Once the process is completed, the users will perceive no changes in how SoftSolutions is used and operates.

    Press ⟨Esc⟩ at any time to cancel the conversion process. The SoftSolutions 3.0 data files are not affected by interrupting the Conversion program with ⟨Esc⟩.

11. Upon completion of the process, a message is displayed indicating the conversion is completed. If any errors were encountered, this is indicated as well. Press any key to exit the CONVERSION window.

    • Errors are written to the file, CVERR.LOG, found in the STATUS subdirectory of the new 4.1 data directory.

12. The SoftSolutions Text Conversion Utility (TXTCV.EXE) may need to be run. The Text Conversion Utility converts the specified *.TXT or *.LST files from the DOS character set to the ANSI (ISO 8859-1) character set or vice versa.

    • This utility should be run for each **non**-ANSI text file if **any** of the listed conditions is desired. (The file may already be in ANSI format if a Windows-based text editor was used to modify the file. If a DOS-based editor was used, the text file should be converted.)

    a) International characters are used in the strings file and these characters are to be displayed in the SoftSolutions windows and in the Help. In order for SoftSolutions to display international characters, the strings files (*.TXT files) must be modified to contain the desired characters.
    b) International characters must be available for searching. These characters must be added to the ICHAR.LST so that they will be indexed.
    c) International characters need to be added to the Stop List (STOP.LST).

If the Text Conversion Utility is needed, run this utility using the syntax:

```
TXTCV format input_ le [output  le]
```

where:

- *format* is the character set *to* which you are converting (OSCS for native [character set used by DOS] or SSCS for ANSI [ISO 8859-1]). TXTCV automatically determines the *present* character set of the file being converted.
- *input_file* is the file being converted; and,
- *[output_file]* is an optional filename for the newly converted file. If no output file is specified, the output will be written to the *input_file*.

For example, assume international characters are used in SOFTSOL.TXT. This strings file is using the ASCII character set. The international characters contained in this file are to be displayed in the SoftSolutions windows and in the Help. To convert the file to ANSI and overwrite the existing file, TXTCV must be run using the following command line:

```
TXTCV SSCS SOFTSOL.TXT
```

Once TXTCV is run on the necessary strings files, COMPSTR must be run to convert the *.TXT file(s) to the corresponding *.CTX file(s).

- Once a strings file is converted to ANSI, an ANSI text editor (*e.g.,* Windows Notepad) should be used to edit the strings file. If a DOS-based text editor (*e.g.,* DOS EDIT.EXE) is to be used, the strings file must be converted to ASCII using TXTCV before editing the file.

Upgrade Installation
(from SoftSolutions 2.0)

This section contains the following information on upgrading from SoftSolutions 2.0 to SoftSolutions 4.1 for Windows:

- New SoftSolutions for Windows options and windows
- Operations performed by the installation program
- SoftSolutions for Windows installation procedures
- SoftSolutions 4.1 data and word conversion procedures

New SoftSolutions for Windows Options and Windows

The following major changes and additions have been made between SoftSolutions 3.0 for Windows and SoftSolutions 4.1 for Windows:

- "Compound Document" has been changed to "Related Document." As a consequence, C**o**mpound in the **F**ile menu and in many of the dialog boxes has been changed to **R**elated Documents. The Unlink option in the SoftSolutions 3.0 COMPOUND dialog box has been changed to Unrelate in the SoftSolutions 4.1 RELATED DOCUMENTS dialog box.

- **R**etrieve in the **F**ile menu and in many of the dialog boxes has been changed to **O**pen. The default option in the dialog boxes is now Open rather than Profile.

- A new option, Task **M**anager, has been added to the Se**t**up menu. This accesses the new Setup window, TASK MANAGER, used for creating and maintaining tasks to be performed by a dedicated workstation at specified times or intervals. By default, only members of the SYSM screen access group will be given access to this window when initially converting to SoftSolutions 4.1 for Windows.

- A new option, Customize **R**esults List, has been added to the Pre**f**erences menu. This accesses the new dialog box, CUSTOMIZE RESULTS LISTS, used to define which of the available Profile fields should be displayed in the SEARCH RESULTS, WORKLIST, and RELATED DOCUMENTS dialog boxes. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- A new option, **G**eneral Options, has been added to the Pre**f**erences menu. This accesses the new dialog box, GENERAL OPTIONS, used to define the ⟨Enter⟩ key functionality and to indicate whether confirmation messages should be displayed in SoftSolutions. By default, only members of the SYSM screen access group will be given access to this dialog box when initially converting to SoftSolutions 4.1 for Windows.

- The Index Verification utility has been enhanced to verify and rebuild words and user-defined fields in the full text of documents. This is useful when a search on a specific word in the text returns inaccurate results.

Operations Performed by the Installation Program

1. Copies the SoftSolutions program files from the CD or diskettes to the specified SoftSolutions programs directory.

2. Initializes a new dataset in the specified data directory.

3. Installs all integration files in the SoftSolutions INT directory, a subdirectory of the SoftSolutions programs directory, and adds application codes for the installed integrations in the new SoftSolutions dataset.

4. Installs all utilities in the SoftSolutions \UTIL directory, a subdirectory of the SoftSolutions programs directory.

5. Installs all DLLs used by SoftSolutions in the SoftSolutions SYSTEM directory, a subdirectory of the SoftSolutions programs directory.

Installation Procedures

SoftSolutions 2.0 must have been previously installed to use this Upgrade Installation. When the Upgrade Installation is complete, run the conversion program *(see page 25).*

There are two installation procedures, *one* of which you will use. Select the installation procedure according to the following criteria:

"**Express Installation**" *p. 39*

The Express Installation will install SoftSolutions, making default decisions, so the installation is quick and easy.

"**Custom Installation**" *(Recommended) p. 51*

> The Custom installation is for the experienced SoftSolutions user who wants to determine what portions of SoftSolutions (dataset, programs, utilities, integrations) are to be installed and the directory structure to be used.

Continue with the Upgrade Installation using instructions on the indicated pages for either the Express or Custom installation. Please observe any notes applicable to the Upgrade Installation (from SoftSolutions 2.0). A Workstation Installation must then be performed on each workstation. *(See "SoftSolutions Workstation Installation" on page 83 for instructions on performing this installation.)*

Conversion Procedures

Upon completion of the installation procedures, perform the following conversion to SoftSolutions 4.1 using the DOS-based CONVERSION program:

> **NOTE**
> Before performing the conversion, make sure there is sufficient disk space for both the 2.0 data directory and the 4.1 data directory. The 4.1 dataset is approximately 1.5 to 2.0 times the current size of the 2.0 data directory.

1. Make a current and complete backup of the SoftSolutions 2.0 data directory.

2. At the SoftSolutions programs directory, type SSCV41.
   - The CONVERSION window is displayed.

3. Highlight **Convert from SoftSolutions 2.0** and press 〔Enter〕.
   - The SOFTSOLUTIONS CONVERSION 2.0 -> 4.1 window is displayed.

4. Enter the **2.0 Dataset Directory**.

5. Enter the **2.0 Dataset ID** assigned to the dataset.

6. Enter the **4.1 Dataset Directory** to which the new data files were installed during the 4.1 installation.
   - This location must be different than the location of the SoftSolutions 2.0 data files.

7. In **Modify character set**, enter **Y**es or **N**o to indicate whether the CONVERSION program should convert the existing data from ASCII to ANSI.

   - Of the first 128 characters, the printable characters have the same values in ANSI and ASCII. Only the international characters have different values. Therefore:

     a) **If** the current 2.0 dataset contains international characters, **Y**es should be entered.

     b) **If** the current 2.0 dataset contains only English characters, **N**o should be entered.

   Once converted, any international characters entered in the new 4.1 dataset will automatically be stored in ANSI, independent of your entry in this field.

8. Enter the **Sorting Method**, indicating how the data should be sorted. Valid entries include ASCII, Germanic, Romance, Nordic, and Hungarian.

   > **NOTE**
   > Sorting method charts for the Germanic, Romance, Nordic, and Hungarian languages are contained in the appendix.

   - If only US English characters are used and international characters are never used, choose ASCII. If US English characters as well as some international characters are being used, Germanic is recommended.

   - During conversion, a file named SORT.LST will be created automatically in the SoftSolutions programs directory. This file simply contains a number indicating the sorting method being used. These numbers and their corresponding sorting method are as follows:

         0 - ASCII
         1 - Germanic (default)
         2 - Romance
         3 - Nordic
         4 - Hungarian

   If you wish to change the sorting method after the installation has been performed, use any editor to change the number in the file. A Normal Reconstruction must be performed on all data files.

9. In **Create Related Documents**, enter **Y**es or **N**o to indicate whether versions of a document having a different application than the most recent version should be added as related documents.

    > **NOTE**
    > In SoftSolutions 2.0, versions of the same document can have different applications. In SoftSolutions 4.1, versions of the same document must be associated with the same application. In order for related documents of different applications to be linked in 4.1, they are added as related documents.

    - If **N**o is entered, all versions of a document are converted to a single application—the application assigned to the most recent version. The document may not be retrievable through SoftSolutions if the document cannot be converted from its native application to the current application.

    - If **Y**es is entered, a Profile is created for the version based on the information contained in the Profile and the version record. The new Profile is related to the Profile of the most recent version.

10. In the **Default Screen Definition**, enter WINDEF to use the Windows default screen definition.

11. The conversion process begins. The file being copied or converted is displayed. Also, the number of records converted is displayed.

    - The SoftSolutions 2.0 data is maintained and the data is placed in the appropriate SoftSolutions 4.1 fields. Once the process is completed, the users will perceive no changes in how SoftSolutions is used and operates.

    Press [Esc] at any time to cancel the conversion process. The SoftSolutions 2.0 data files are not affected by interrupting the Conversion program with [Esc].

12. Upon completion of the process, a message is displayed indicating the conversion is completed. If any errors were encountered, this is indicated as well. Press any key to exit the CONVERSION window.

    - Errors are written to the file, CVERR.LOG, found in the STATUS subdirectory of the new 4.1 data directory.

13. Make a current and complete backup of the SoftSolutions 4.1 data directory.

14. Run the DOS-based Word Conversion utility on the 4.1 dataset by performing the following:

> **NOTE**
>
> In SoftSolutions 2.0, any apostrophe located in the middle of a word is indexed. For example, the word "can't" is indexed as *one* word. A search can be performed on the word "can't." But, since SoftSolutions 3.0, the apostrophe is considered a word separator and is *not* indexed. For example, the word "can't" is now indexed as two words—"can" and "t." A search for "can't" is really searching for the word "can" and the word "t." The Word Conversion utility simply removes the contractions converted from the SoftSolutions 2.0 index and re-indexes these as two words.
>
> The Word Conversion utility should be run at night or on a weekend because this process may take several hours to complete, and once started, *cannot* be interrupted.

a. At the SoftSolutions programs directory (*e.g.,* F:\SOFTSOL\PROG), type "WORDCONV."

> **NOTE**
>
> If the DATAPATH file does not exist in the SoftSolutions programs directory, or a different dataset than the one referred to in the DATAPATH is to be converted, use the /DATA= switch.

b. Upon accessing the WORD CONVERSION window, press [Enter] to begin conversion.

c. Upon completion of the process, "`Word conversion successfully completed.  Press any key to continue.`" is displayed. Press any key to exit the WORD CONVERSION window and return to the operating system.

> **NOTE**
>
> Due to a DOS-memory limitation, the Word Conversion process may not be able to complete the entire process. Once this limitation has been reached, the Word Conversion utility will indicate that it was not able to complete the processing. The Word Conversion utility must be restarted to continue the conversion process.

15. Make a complete backup of the newly updated SoftSolutions 4.1 data directory.

16. Run the INDEX VERIFICATION utility to index Profile information that could not be searched in SoftSolutions 2.0, but is searchable in SoftSolutions 4.1:

    a. Start the INDEX VERIFICATION utility using the /VERIFY switch in the icon's command line.

    b. Enter "Rebuild Field(s)" in the **Type** field.

    c. Enter "Application," "Date Created," "Date Opened," "Doc Security," "Home Dataset," and "In Use" in the **Fields** field.

    d. Choose **Y**es to begin the verification, or **N**o to exit the VERIFICATION utility.

        •   Upon starting the verification process, the SoftSolutions VERIFY window is displayed and indicates the number of records read.

        •   An indication is made as to the Document Number and Record Number currently being verified; however, this window is updated every 10 records.

        •   Searches on specified fields will return incomplete results until the process is completed.

    e. Once Verification is complete, "`Veri cation complete.  Press any key to continue.`" is displayed. Press any key to exit.

17. The SoftSolutions Text Conversion Utility (TXTCV.EXE) may need to be run. The Text Conversion Utility converts the specified *.TXT or *.LST files from the DOS character set to the ANSI (ISO 8859-1) character set or vice versa.

    This utility should be run for each **non**-ANSI text file if **any** of the listed conditions is desired. (The file may already be in ANSI format if a Windows-based text editor was used to modify the file. If a DOS-based editor was used, the text file should be converted.)

    a. International characters are used in the strings file and these characters are to be displayed in the SoftSolutions windows and in the Help. In order for SoftSolutions to display international characters, the strings files (*.TXT files) must be modified to contain the desired characters.

b. International characters must be available for searching. These characters must be added to the ICHAR.LST so that they will be indexed.

c. International characters need to be added to the Stop List (STOP.LST).

If the Text Conversion Utility is needed, run this utility using the syntax:

```
TXTCV format input_ le [output  le]
```

where:

- *format* is the character set *to* which you are converting (OSCS for native [character set used by DOS] or SSCS for ANSI [ISO 8859-1]). TXTCV automatically determines the *present* character set of the file being converted.
- *input_file* is the file being converted; and,
- *[output_file]* is an optional filename for the newly converted file. If no output file is specified, the output will be written to the *input_file*.

For example, assume international characters are used in SOFTSOL.TXT. This strings file is using the ASCII character set. The international characters contained in this file are to be displayed in the SoftSolutions windows and in the Help. To convert the file to ANSI and overwrite the existing file, TXTCV must be run using the following command line:

```
TXTCV SSCS SOFTSOL.TXT
```

Once TXTCV is run on the necessary strings files, COMPSTR must be run to convert the *.TXT file(s) to the corresponding *.CTX file(s).

- Once a strings file is converted to ANSI, an ANSI text editor (*e.g.,* Windows Notepad) should be used to edit the strings file. If a DOS-based text editor (*e.g.,* DOS EDIT.EXE) is to be used, the strings file must be converted to ASCII using TXTCV before editing the file.

Update Installation

This section contains the following information on an update installation of SoftSolutions for Windows:

- Operations preformed by the installation program
- SoftSolutions for Windows update installation procedure

Operations Performed by the Installation Program

1. Updates the SoftSolutions programs directory.

2. Compares the *current* SoftSolutions 4.x SOFTSOL.CTX strings file with the *new* 4.1 SOFTSOL.CTX strings file. Any changes made by the user in the current strings file are automatically made to the new 4.1 strings file. Any changes in the new strings file are maintained. The differences between the strings files are recorded in the log file, SOFTSOL.LOG, in the SoftSolutions programs directory.

3. Updates selected integration files in the SoftSolutions INT directory, a subdirectory of the SoftSolutions programs directory, and adds any new application codes for newly-installed integrations in the SoftSolutions dataset.

4. Updates selected utilities in the SoftSolutions \UTIL directory, a subdirectory of the SoftSolutions programs directory.

5. Updates the DLLs in the SoftSolutions SYSTEM directory, a subdirectory of the SoftSolutions programs directory.

If you are currently using SoftSolutions 4.x and are installing a SoftSolutions 4.1 update, follow the installation instructions in this section. Also, read the Integrations section in the *User's Guide* to determine which modules to install.

> **NOTE**
> A dataset conversion is *not* necessary when updating from SoftSolutions 4.0 *or* 4.0a to SoftSolutions 4.1.

Installation Procedures

Use the "**Custom Installation**" option (*see page 51*).

Please observe any notes applicable to the Update Installation. A Workstation Installation must then be performed on each workstation. *(See "SoftSolutions Workstation Installation" on page 83 for instructions on performing this installation.)*

Data Only Installation

This section contains the SoftSolutions for Windows installation procedures for *data files* only. The installation program simply creates a new dataset in the specified directory or initializes an existing dataset. Most SoftSolutions users will never need to refer to this section.

Use the "**Custom Installation**" option (*see page 51*).

Please observe any notes applicable to the Data Only Installation.