

HotDocs Workspace Setup Guide

System Requirements

Minimum Hardware Requirements

- 2 or more processors (2 GHz or faster)
Single processor machines can work well for development and lower load production environments
- 1GB RAM (2GB recommended)
- SCSI or comparable storage subsystem

Software Minimum Requirements

Server Operating Systems

- Microsoft Windows Server (2008, 2008r2, 2012, or 2012r2)

Additional Server Software

- HotDocs Server 11, with the HDServerFiles Virtual directory or a HotDocs Cloud Services subscription
- Microsoft .Net Framework 4.0
- Microsoft Internet Information Services (IIS) 7 or later¹
You must ensure that the following IIS features are installed (enabled) or you may experience errors when using Workspace:
 - Common HTTP features: Static Content, HTTP Redirection
 - Application Development: ASP.NET, .NET Extensibility
 - Security: Basic Authentication, Request Filtering
 - Management Tools: IIS Management Console, IIS Management Scripts and Tools
- Microsoft SQL Server² 2008 to 2014 with Mixed Mode Authentication enabled
- Windows feature ASP.NET 4.5 enabled
With Microsoft Windows Server 2012 you need to manually enable ASP.NET 3.5 and 4.5, as well as .NET Extensibility 3.5 and 4.5.

Development

To expand the functionality of HotDocs Workspace, your system must also have the following software installed:

- Microsoft Visual Studio (2008 or later) with C# libraries installed
- Asp.Net MVC (4.5)

1. IIS version 7 requires IIS 6 compatibility tools installed via the add remove windows features.
2. This includes any version, including SQL Server Express. Please review capacities for specific versions before deploying to a production environment as express supports a limited database size.

Web Browsers

To access Workspace, users must have a compatible web browser installed.

	Internet Explorer	Firefox	Safari	Chrome
Version	Version 8 and later	Version 2 and later	Version 3 and later	Version 5 and later
JavaScript	Yes	Yes	Yes	Yes
Silverlight	Yes	Yes	Yes	Yes

Workspace Setup

Installing

To install HotDocs Workspace, launch the Setup executable provided by your software vendor. On the destination folder page, you can customize the installation directory to which Workspace shall install. Please be aware that network service account is given permission to some of the directories within this installation directory. Click **Next**.

On the database server screen you must select a server instance to install the database. You must also provide an account that has access to this database (either a windows user account, or an SQL server account). If you use an SQL server account you will need to select **Server authentication using the Login ID and password below** and enter your sa password. You may also define a database name. If the database already exists, the installer will use this database, leaving data intact. Click **Next**.

Finally, on the web server details, you can customize the Application name and Application pool for Workspace. This will affect how users browse to the web application. You can also use the Advanced settings to choose your port number and site number. Click **Next** and then **Install** on the following screen.

Click on **Finish** to accept and begin installing.

Logging In

You must log in to use Workspace. When the installation is finished, browse to Workspace web application (with default settings `http://localhost/Workspace`). You must then log in to Workspace with the administrator account. The details are:

Username: *Admin*
Password: *password*

You should change the password on this administrators account as soon as you log in, at the upper right hand corner of the window click **Change Password**. Now you can begin to add new users and groups.

Creating a user

1. In the Navigation bar, click the link for **Users**.
2. Click **Create User** link near the top of the page. This opens the User Details page.
3. Enter the details as necessary, selecting Admin rights if appropriate.
4. Click **Save**.

Upload a template

1. In the Navigation bar, click **Templates**.
2. Click **Download Configuration** and open the downloaded file. This file configures HotDocs Developer to allow uploads to your Workspace site.
3. Open HotDocs Developer. Select one or more templates in your HotDocs Library and right-click.
4. Select **Upload**, then select **HotDocs Workspace**.
5. At the HotDocs Upload window, click **Upload**.
6. Enter your Administrator Login details for Workspace. Click **Log In**.
7. You can edit the template title and enter a description. You can also choose which groups have access to this template. If you are replacing an existing template click **Replace**.
8. When you have finished, click **Upload**.
9. Once the template has uploaded, click **Close**.

Creating a group

1. In the Navigation bar, click **Groups**.
2. Click **Create Group**.
3. Enter a Title and Description for the group.
4. Optionally, you can change the name used to refer to work items. Enter the new name and its plural form under Work Item Name and Work Item Plural.
5. Under the Templates heading, check the templates you want to add to the group.
6. Under the Users heading, check the users you want to add to the group.
7. Click **Save**.

Creating a work item

Once you have created a group with templates and have a user account with access to that group, you can begin to work with Workspace.

To create a new work item:

1. In the Navigation bar, click **Home**.
2. Make sure you have selected the correct group from the drop-down list then click **Create Work Item** (This may have a different name depending on how you set up the group).
3. Click on a template to add it to your new work Item.
4. A HotDocs Interview appears. Navigate through the interview until you have completed it.
5. Once you have finished and Workspace has processed the answer, the Work Items Details page appears, where you can view and modify the work item.
6. Please refer to the Workspace help file for more specific features within Workspace.