

RECORDLINK4PaperWorks

INSTALLATION NOTES

Thank you for purchasing RECORDLINK4PaperWorks. This application links eCopy PaperWorks with the SIMS Document Management Server. Here are some instructions to get you started. Further information and downloads are available from www.cohesionsoftware.co.uk.

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OVERVIEW

RECORDLINK4PaperWorks consists of two elements. First, PAPERWORKS *manager* which is installed on the SIMS Server. This element must be registered on-line with your Product Key, after which it governs the availability of licences to the second element, the PAPERWORKS *connector*. This is installed on end-user PCs that are networked to the same SIMS server. The PAPERWORKS *connector* is the functional software that allows the end users to integrate eCopy PaperWorks with SIMS.

FINDING YOUR PRODUCT KEY

IMPORTANT: Your Product Key will be emailed to the address provided to your reseller at the time of purchase and copied to the technical contact at your school (The Product Key is provided in the format DT-123456-123456). You will need the key to activate you RECORDLINK products.

SHORT INSTRUCTIONS

To get started with RECORDLINK4PaperWorks you will need to follow some instructions which are listed in detail below this summary. In general RECORDLINK4PaperWorks consists of PAPERWORKS *manager* that is installed on the SIMS server and the PAPERWORKS *connector* for installation on networked PCs and laptops. The mManager needs to be activated. Downloads and updates are free of charge to licensed users.

1. **Register** your details on www.cohesionsoftware.co.uk/register.aspx . This will give you access to download and activate your software.
2. **Sign in** using the email address that you used during the registration process with your chosen password.

3. **Download PAPERWORKS *manager*** from www.cohesionsoftware.co.uk/download.aspx and install it on your SIMS server.
4. **Activate the PAPERWORKS *manager*** on www.cohesionsoftware.co.uk/activate.aspx . For this you will need the Product Key shown above and the Hardware Key taken from your installed PAPERWORKS *manager* .
5. **Download the PAPERWORKS *connector*** from www.cohesionsoftware.co.uk/download.aspx and install it on the SIMS client PCs on which you wish to use the software.

You are then ready to go with user tips available at <http://www.cohesionsoftware.co.uk/faqs.aspx> and a discussion forum for end users at <http://www.cohesionsoftware.co.uk/forum> .

DETAILED INSTRUCTIONS

1. REGISTER

You need to register your details to sign-in and then download and activate your software. We need your details to keep you up to date with new releases that keep you in step with changes in SIMS. Anyone can register and we recommend end users at your school be encouraged to do so. We will not pass on any details to third parties and will not bombard anybody with unwanted information. To register, fill in the form at www.cohesionsoftware.co.uk/register.aspx.

2. SIGN IN

You need to sign-in before you can download and activate your software for the first time. Simply enter your details at <http://www.cohesionsoftware.co.uk/signin.aspx> using the email address that you supplied during registration and your chosen password.

3. DOWNLOAD & INSTALL PAPERWORKS *manager*

Download the PAPERWORKS *manager* from www.cohesionsoftware.co.uk/download.aspx . Click the link;



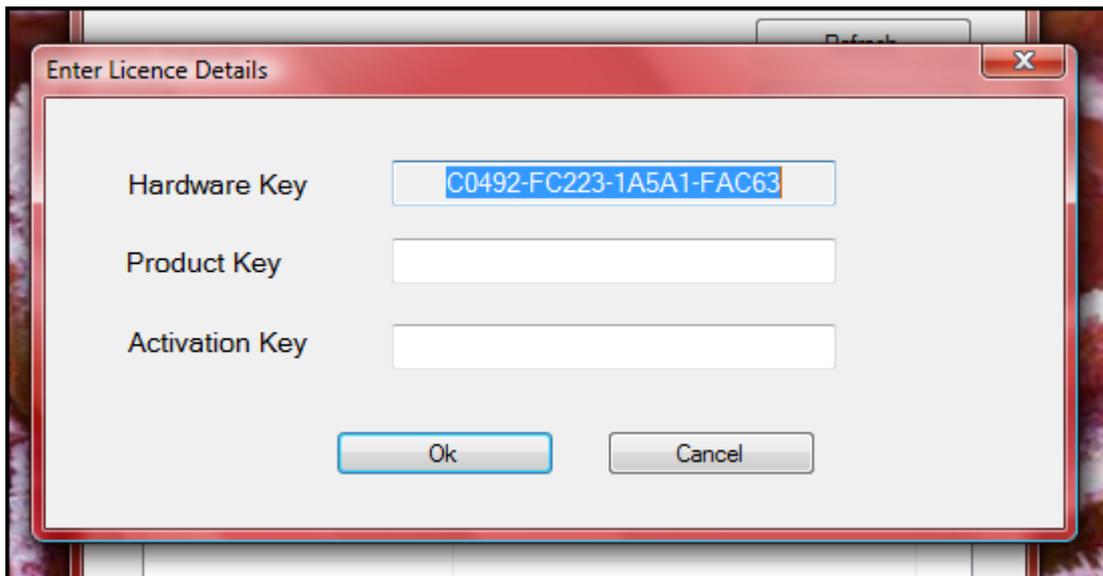
In the following pop-up you can choose to Run the installer or Save it to a location to run it later.

This application *must* be installed on the SIMS server. Local administrator privileges are required. Please contact your SIMS support team or your network manager if you are unsure.

4. ACTIVATE

You will need to enter the Hardware Key taken from the installed PAPERWORKS *manager* and the Product Key taken from your original email from Cohesion. This will give you an Activation Key to paste into the eCopy Desktop Manager that will activate it.

To find the Hardware Key open the eCopy Desktop Manager then select 'Configure' which will open the activation screen;



- Copy the Hardware Key and go to www.cohesionsoftware.co.uk/activate.aspx .
 - Paste in the Hardware Key in the field marked Hardware Key.
 - Copy the Product Key from your email and paste it into the website field marked Product Key.
 - Paste the same Product Key into the Manager field marked Product Key.
 - On the website select Activate. This will return an Activation Key.
 - Copy the Activation Key and paste it into the Manager.
 - Select OK to activate.
5. DOWNLOAD & INSTALL the PAPERWORKS *connector*
- You can install the PAPERWORKS *connector* on as many SIMS client PCs as you wish. However the maximum number of active seats will be restricted by the PAPERWORKS *manager* according to the number of concurrent seats you have purchased with your licence.

The PAPERWORKS *connector* is available for download from www.cohesionsoftware.co.uk/download.aspx . Local administrator privileges are required. Click the link;



In the following pop-up you can choose to Run the installer or Save it to a location to run it later.

To install on the PC you are using hit Run. If you are prompted, allow the software to run if you have authorisation to do so on your network.

To install on other PCs select Save and browse to your chosen location. You will need to transfer the saved file to the other PCs or install with group policy.

You will be taken through a wizard that is self explanatory. During this process you can choose to change the folder for installation. We recommend that you do not change this folder unless you are sure of what you are doing.

If you do not have the correct permissions or authority you will need to contact your network administrator. The PAPERWORKS *connector* will not function before the Manager is installed and activated and SIMS must be loaded on the PC for the PAPERWORKS *connector* to function.

GENERAL NOTES

SYSTEM REQUIREMENTS

You will require the following system elements before installing the PAPERWORKS *connector*:

- SIMS November 2007 Release or newer.
- eCopy PaperWorks
- SIMS workstation components
- 32 bit Windows operating system

INSTALLING UPDATES

You can freely download the latest versions of the PAPERWORKS *connector* at any time. **IMPORTANT: Before you install a new version it is necessary to remove the previous version using ADD & REMOVE PROGRAMS, or PROGRAMS & FEATURES if you are using Vista.**

FAQs

For updated user notes please visit www.cohesionsoftware.co.uk/faqs.aspx. As common themes emerge from the discussion board they are posted here and shared with all registered users who have opted to receive email notifications.

DISCUSSION FORUM

Please use the discussion board at www.cohesionsoftware.co.uk/forum to poll other users and share your experiences. We hope to see real world examples and share new thinking to stop the wheel being re-invented too often.

There are three specific areas regarding RECORDLINK, eCopy (which uses similar workflows for PDF handling), and a more general forum for Paperless Working.