

Adding a New Drive to DMS

Configuration

Multiple DMS services can be used in LawMaster but only one can be set as a default. following configuration of the new DMS:

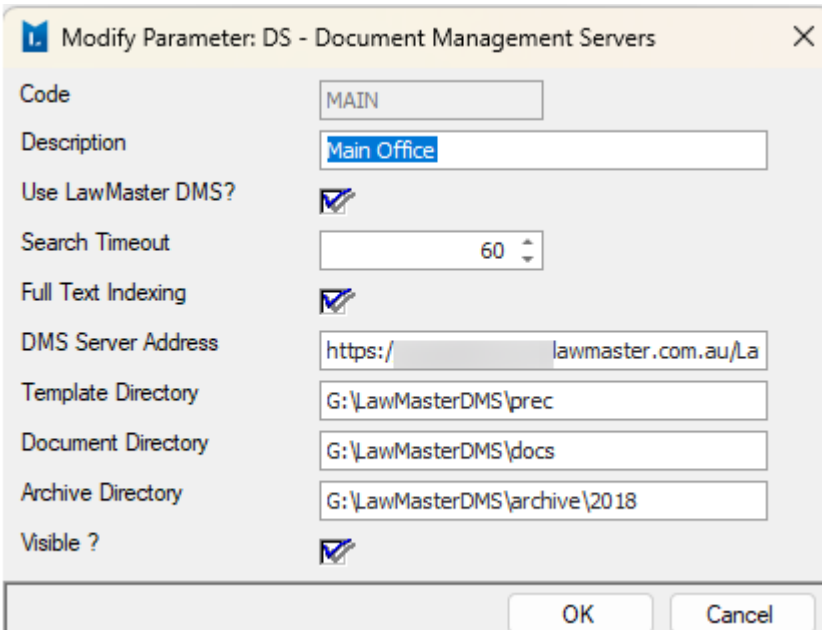
- New Folio records will be created against the new default DMS but all references to the old DMS will still be valid for existing Folios.
- Operations such as creating a new version of a folio will use the DMS of the original folio record for the new version not the default DMS.
- If files are to be transferred to the new DMS we recommend you contact LawMaster Support to assist.

You should follow the steps in the order detailed below to minimise issues.

Create DS Parameter in LawMaster

Parameters > Set Parameters > DS > context menu > Add

Field	Details
Code	New DMS information eg MAINK
Description	Main Office K Drive
Use LawMaster DMS	Tick
Search Timeout	Leave as 60
Full Text Indexing	Tick
DMS Server Address	Enter DMS Server Address
Template Directory	Enter location of Templates. It is recommended that all the DMS Template Directories point to the same drive and directory location.
Document Directory	Enter location where documents will be saved
Archive Directory	Enter location of archived documents
Visible	Tick



Modify Parameter: DS - Document Management Servers

Code: MAIN

Description: Main Office

Use LawMaster DMS?:

Search Timeout: 60

Full Text Indexing:

DMS Server Address: https://lawmaster.com.au/La

Template Directory: G:\LawMasterDMS\prec

Document Directory: G:\LawMasterDMS\docs

Archive Directory: G:\LawMasterDMS\archive\2018

Visible?:

OK Cancel

Setup DMS on Server

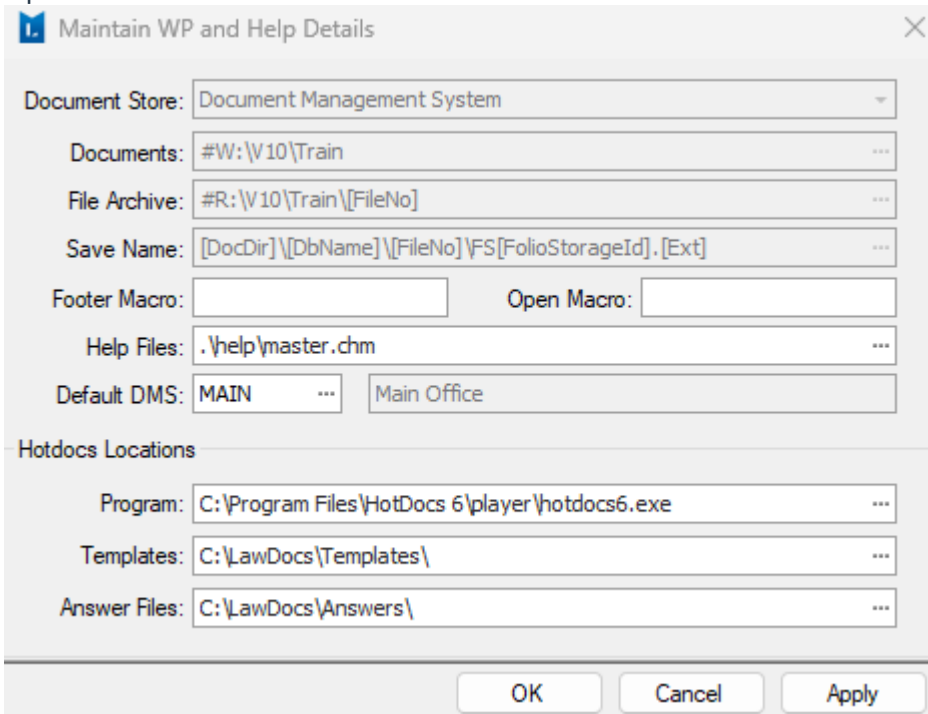
In LawMaster WebAdmin create a new DMS Service on the Server including Security and Permissions.

1. Create the new DMS instance using LawMaster WebAdmin.
 - a. You must ensure that the DMS Code remains consistent in the DMS Web Service "ServerCode" field, the final part of the DMS Web Service Name (eg "LawMasterDMS.Production.MAIN"), the Code used in the DS Parameter and the selection for Default DMS.
2. Setup the IIS AppPool "Modify" permissions to new Docs and Archive folder and to existing Prec folder on Drive as follows:
 - a. On the DMS Server paste the new DMS URL into the browser:
 - i. Login as Proadm
 - ii. Click on Admin
 - iii. Click on Folder Permission Check
 - iv. Copy the three lines which start with `icacls.exe`
 - b. Open a DOS Command Prompt Run as Administrator:
 - i. Paste the three lines into the Command Prompt window.
 - ii. Ensure all three finish with "Successfully processed 1 files;*"

Change Default DMS in LawMaster

Parameters > Set Parameters > WP, Mail, Help & Printing > Processing Options

Update Default DMS field to new DS Parameter.



Maintain WP and Help Details

Document Store: Document Management System

Documents: #W:\V10\Train

File Archive: #R:\V10\Train\[FileNo]

Save Name: [DocDir]\[DbName]\[FileNo]\FS[FolioStorageId].[Ext]

Footer Macro: Open Macro:

Help Files: .\help\master.chm

Default DMS: MAIN Main Office

Hotdocs Locations

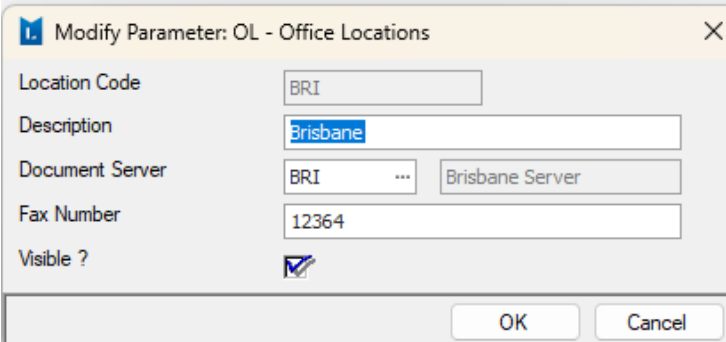
Program: C:\Program Files\HotDocs 6\player\hotdocs6.exe

Templates: C:\LawDocs\Templates\

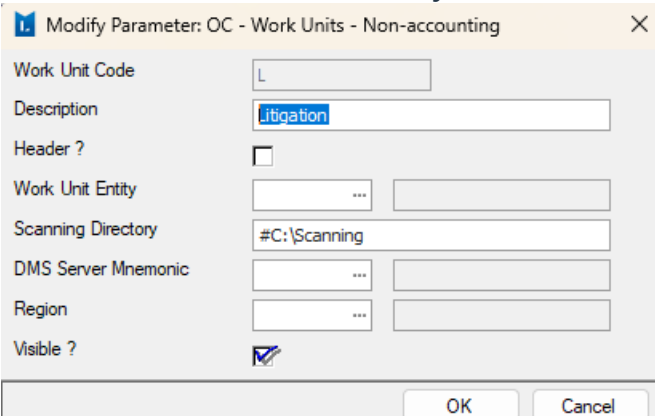
Answer Files: C:\LawDocs\Answers\

OK Cancel Apply

Check OL Parameter and modify if Document Server field set

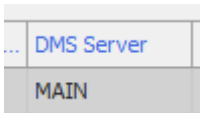


Check OC Parameter and modify if DMS Server Mnemonic set



Check DMS Settings are Correct

1. Log out of the database.
2. Log back into the database.
3. Add new Folio to LawMaster (eg Drag and Drop to test matter). Check that new Folio has been stored against the new DMS by checking the 'DMS Server' field in the Matter Folios window.



...	DMS Server	:
	MAIN	

4. Merge Template to ensure Document Templates are still accessible.
5. Check IDX Parameter to ensure new folios are being Indexed if Elasticsearch is enabled.

6. Check Folio that was added prior to change in DMS can be accessed by selecting Edit.

Created: 12th November, 2024 Kristina Fenwick

Modified: 19th November 2024 Kent Moyle