

BitByBitCreation

DMS

Installation Guide

Quick Start · Version 1.0

Self-hosted document management

Install the application on your own server, create an administrator account, and configure document management, permissions, and optional local AI.

This guide covers the standard installation using the supplied ZIP package. Server configuration may vary by hosting provider.

1. Before You Begin

BitByBitCreation DMS is supplied as a ZIP archive containing the Laravel application and its project files. Extract the complete package on your server; do not upload only the public directory.

Server requirements

- PHP: version 8.3.0 or later.
- Database: MySQL-compatible database, with a database and user prepared for the application.
- Web server: Apache, Nginx, or an equivalent correctly configured hosting environment.
- PHP extensions: OpenSSL, PDO, Mbstring, Tokenizer, XML, Ctype, JSON, Fileinfo, and Zlib.
- Server binaries: **pdftoppm** and **tesseract**, required for PDF processing/OCR features checked by the installer.
- Write permissions: the application must be able to write to **storage** and **bootstrap/cache**.

Hosting note

Your hosting provider may need to enable PHP extensions, install system binaries, or configure the web root. These settings are not always available in a hosting control panel.

Prepare the following

- The ZIP package downloaded from your purchase.
- The target directory and domain/subdomain for the application.
- Database host, port, database name, username, and password.
- Mail server details, if you want the application to send email.

2. Upload the Application

Step 1 — Upload and extract

Upload the supplied ZIP archive to your server and extract it into the directory where you want the DMS application to live. Keep the complete Laravel project structure intact, including **app**, **bootstrap**, **config**, **public**, **storage**, and **vendor**.

Step 2 — Configure the web root

Important security requirement

Configure your domain or virtual host so its document root points to the application's public directory. Do not expose the complete Laravel project directory to the internet.

For example, if the project is extracted to **/srv/www/dms**, the web root should point to **/srv/www/dms/public**. This is an example path only; use the actual directory on your server.

The ZIP contains the complete application. The public folder is only the web-facing entry point; it is not the whole application.

Step 3 — Check write permissions

Ensure the PHP/web-server user can write to **storage** and **bootstrap/cache**. Avoid granting unrestricted write access to the entire project. The installer checks these requirements.

Step 4 — Open the installer

Open your application URL in a browser and append **/installer**.

```
https://your-domain.com/installer
```

For a local development environment, the URL might look like this:

```
http://localhost:8081/installer
```

Replace the example with your actual domain or local URL.

3. Complete the Installation Wizard

The installer contains four steps. Complete each step in order and follow any messages shown on the page.

Step 1 — Requirements

The installer checks the PHP version, required extensions, server binaries, and directory write permissions. Continue when all required checks pass. If an item fails, correct the server configuration and run the check again.

Step 2 — Database

Enter the connection details for the MySQL database prepared for this installation:

- Host: your database hostname (for example, **mysql** in a Docker network).
- Port: usually **3306**.
- Database name: the database created for the DMS.
- Username and password: the database credentials.

The database must exist, and its user must have the permissions needed to create and update tables. In Docker, **localhost** may refer to the PHP container itself rather than the database container.

Step 3 — Environment

Enter the application's basic settings:

- App Name: the name used to identify the application.
- App URL: the full base URL, including the correct scheme such as **https://** for a secured public site.
- Mail Host and Port: your outgoing mail server details.
- Mail Username and Password: credentials if required by your provider.
- Sender Email: the address used as the sender.

Use the mail settings supplied by your email provider. Incorrect settings may prevent email delivery.

3. Complete the Installation Wizard (continued)

Step 4 — Admin account

Create the administrator account by entering your name, email address, password, and password confirmation. Store the credentials securely.

Select the application language. Available languages are German, English, French, Spanish, Portuguese (Brazil), Italian, Dutch, Polish, Indonesian, and Turkish.

You can choose whether to install sample data. Enable this option to explore example content, or leave it disabled to start with an empty workspace.

Select Complete Installation and wait for the installer to finish.

Installation complete

Open the application at its base URL without **/installer**, then sign in with the administrator account you created.

4. First Login and User Access

Open your application URL, for example:

`https://your-domain.com`

Sign in with the administrator email address and password created during installation.

User registration

Users can register from the application's main page. New registrations must be approved by an administrator before those users can access the application. Review registrations and approve only users who should have access.

Initial administrator checklist

- Review user access and permissions.
- Set up categories, tags, and metadata as needed.
- Review encryption settings before storing sensitive documents.
- Configure AI or other optional services only if you intend to use them.
- Confirm that your backup process covers the database, documents, and required configuration.

5. Optional Features and Settings

OCR and PDF processing

The installer checks for **tesseract** and **pdftoppm**. These tools must be installed and available to the application where PHP runs. In containerized deployments, installing a tool on the host alone may not make it available inside the PHP container.

Local AI with Ollama

To connect Ollama, sign in as an administrator and open Settings → AI. Enter the server hostname or IP address and the port used by the Ollama service. Save the settings and test the connection using the options provided by the application. Configure a supported model suited to your hardware and document-processing needs.

The Ollama endpoint must be reachable from the DMS server. An address that works from your desktop may not work from a Docker container or remote server. Do not expose Ollama publicly without appropriate network controls.

Privacy and local AI

When Ollama runs on infrastructure you control and the DMS connects directly to it, AI processing can remain within that environment. Verify the actual network and service configuration before making privacy claims.

Document encryption

Document encryption is optional and can be enabled or disabled under Settings → Encryption. Review the available options and decide whether encryption is appropriate before adding sensitive documents.

Protect your APP_KEY

The Laravel **APP_KEY** is used to decrypt data encrypted with that key. If the key is changed or lost, documents encrypted with the original key may no longer be decryptable. Store the key securely and include the required configuration in your protected backup and recovery plan.

Other administrator settings

- Categories: manage document categories.
- Tags: manage classification tags.
- Metadata: manage additional document information.
- Access: manage user access and permissions.
- License: review license settings.
- Services: review other available services.

6. Troubleshooting

The installer reports a missing requirement

Check which item failed. Confirm the PHP version and extensions, install missing system binaries, or correct permissions for **storage** and **bootstrap/cache**. Contact your hosting provider if you cannot change the server environment.

The application cannot connect to the database

Verify the host, port, database name, username, and password. Confirm that the database is running and the database user has the required permissions. In Docker, use the database service hostname reachable from the PHP container where appropriate.

A permissions error appears

Check ownership and write permissions for **storage** and **bootstrap/cache**. Grant only the permissions needed by the application rather than making the whole project writable by everyone.

OCR does not work

Confirm that **tesseract** and **pdftoppm** are installed and available to the PHP process. If the DMS runs in Docker, check inside the relevant application container.

AI results are poor or incomplete

Verify the Ollama address, port, service availability, and selected model. Model quality and hardware limitations can affect extraction results. Try a supported model suited to the documents you process.

Encrypted documents cannot be opened

A changed or missing **APP_KEY** may prevent decryption. Do not generate a new key as a troubleshooting step. If available, restore the original key and matching configuration from a secure backup. Without the correct key, recovery may not be possible.

7. Reset the Installation

Destructive operation — read before proceeding

The reset runs a fresh database migration operation (**migrate:fresh**) that drops existing database tables before recreating them. Existing records may be permanently lost. Back up your database, APP_KEY, documents, and required configuration before continuing.

Use this procedure only when you intentionally want to start the installation again. It is not a routine update procedure.

Step 1 — Create the reset marker

The reset marker does not exist in a fresh installation. Using FTP or your hosting provider's file manager, create an empty file named **RESET** at this exact path:

```
storage/installer/RESET
```

The filename must be exactly **RESET**, without an additional extension such as **.txt**.

Step 2 — Open the reset URL

```
https://your-domain.com/installer/reset
```

For a local installation, the URL may look like this:

```
http://localhost:8081/installer/reset
```

Step 3 — Confirm the reset

The application should ask you to confirm that existing data will be deleted and redirect you to the installer. Read the warning carefully. Continue only if you intend to reset the installation and have made the necessary backups.

After the reset is confirmed, the reset marker is removed and the installer can be run again from the beginning. Complete all four installer steps to set up the application again.

Docker example

From the project directory, create the marker using the PHP service name configured in your Docker Compose file. In this example, the service is named **php**:

```
docker compose exec php touch storage/installer/RESET
```

Then open **/installer/reset** in your browser and follow the confirmation step. If your PHP service has a different name, replace **php** with the correct service name.

8. Security and Maintenance

- Use HTTPS for public installations.
- Keep PHP, the operating system, and server software updated.
- Point the web server document root to the application's **public** directory only.
- Keep database credentials and the Laravel **APP_KEY** private.
- Back up the database, uploaded documents, and required configuration regularly.
- Test that backups can actually be restored.
- Restrict filesystem permissions to what the application needs.
- Do not expose database administration tools or Ollama endpoints unnecessarily.

Before storing important documents

Confirm that login and user approval work as expected, review access permissions, decide whether encryption should be enabled, and verify your backup and recovery procedure.

BitByBitCreation DMS

Self-hosted document management under your control.

This guide describes the standard installation workflow. Exact server configuration may vary depending on your hosting provider, web server, and deployment environment.