

**Oracle® Documaker Desktop**

**Documaker Desktop  
Installation Guide**

version 11.5

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## **Chapter 1**

### **Introduction**

This guide provides instructions for installing Oracle Documaker Desktop on computers running 32-bit versions of Windows, such as Windows XP and Windows Vista.

A summary of the system requirements follows. Note that the system requirements information covers both Oracle Documaker Desktop and Oracle Documaker as these systems are often implemented together.

## SYSTEM REQUIREMENTS

### Operating systems

The following Oracle Documaker and Oracle Documaker Desktop applications run on a variety of operating systems and hardware platforms. Make sure you have these components before you install the following applications.

The following applications run on a variety of operating systems, principally Windows 32-bit operating systems such as Windows 2000, Windows 2003, Windows Vista, and Windows XP, UNIX/Linux 32-bit operating systems such as AIX, Solaris, and Linux x86, and z/OS (OS/390). This table shows the various product offerings and the operating systems under which they run.

**NOTE:** To store a Documaker version 11.x resource library in Documanager, you must have Documanager version 6.3 SR 2 or version 6.4 SR 1 or higher.

	Windows+	z/OS	AIX	Linux	Solaris
<b>Documaker</b>					
Docucreate	Yes	No	No	No	No
Documaker Studio	Yes	No	No	No	No
Docupresentation	Yes	No	Yes	Yes	Yes
iDocumaker ++	Yes	No	Yes	Yes	Yes
iPPS +++	Yes	No	No	No	No
EWPS ++	Yes	No	Yes	Yes	Yes
Documanager	Yes	No	No	Yes	No
GenTrn	Yes	Yes	Yes	Yes	Yes
GenData	Yes	Yes	Yes	Yes	Yes
GenPrint	Yes	Yes	Yes	Yes	Yes
GenWIP	Yes	Yes	Yes	Yes	Yes
GenArc	Yes	Yes	Yes	Yes	Yes
<b>Documaker Desktop</b>					
Documaker Workstation	Yes	No	No	No	No

+ Includes Windows 2000, Windows 2003, Windows XP, Windows Vista, Windows 2000 Server, and Windows 2003 Server. Be sure to have the latest service packs installed.

++ Runs under any operating system that supports the Java Virtual Machine.

+++ Runs under Microsoft Windows 2000 Server and Windows 2003 Server.

	Windows+	z/OS	AIX	Linux	Solaris
<b>Printers**</b>					
AFP	Yes	Yes	Yes	Yes	Yes
GDI	Yes	No	No	No	No
HTML	Yes	No	Yes	Yes	Yes
Metacode	Yes	Yes	Yes	Yes	Yes
PCL	Yes	No	Yes	Yes	Yes
PCL 6*	Yes	No	Yes	Yes	Yes
PDF	Yes	Yes	Yes	Yes	Yes
PostScript	Yes	Yes	Yes	Yes	Yes
RTF	Yes	No	Yes	Yes	Yes
VIPP	Yes	Yes	Yes	Yes	Yes
XML**	Yes	Yes	Yes	Yes	Yes

+ Includes Windows 2000, Windows 2003, Windows XP, Windows Vista, Windows 2000 Server, and Windows 2003 Server.

\* You must have PCL 6 or higher for Unicode support on PCL-compatible printers. PCL 6 support became available in version 10.2.

\*\* Printer support depends on licensing. For example, PDF and HTML are licensed separately for the PPS market and PDF is licensed separately for the z/OS market.

## Networks

The system does not use any specific network calls and is expected to work on any network compatible with Microsoft programs.

**NOTE:** The network file server you use with Documaker Studio or Documaker Desktop must be a 100% Windows network compatible. Some UNIX systems that offer NFS support are not 100% Windows compatible and some UNIX systems do not honor Windows file locking calls and may not be suitable for use as a file server in a true multi-user environment.

## DOCUMAKER AND DOCUMAKER DESKTOP REQUIREMENTS

Your computer must have certain software and hardware components to run the programs that comprise the Documaker and Documaker Desktop systems. Depending on your software license, operating environment, and your processing needs, these requirements vary.

The following tables outline the minimum hardware we use to test Documaker and Documaker Desktop and are included for informational reasons only. You should run the system on a computer configured appropriately for the version of Windows you use and with the processing power to meet your needs

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**NOTE:** For more specific information on the GenArc program and the additional archive and retrieval capabilities available, refer to the [Documaker Administration Guide](#).

Should your company have special needs, contact your sales representative and keep in mind that, by using upload and download programs, additional functionality is available.

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### On Windows

Documaker and Documaker Desktop run on Windows. This table outlines the minimum hardware we use to test the system on a single user Windows XP workstation.

For Windows XP	Our minimum test configuration is
CPU	Intel® Core™ 2 CPU.2.13GHz
Memory*	1.99GB RAM
Hard disk**	148GB
Printer	HP-compatible printers supporting PCL5
Printer memory***	8mb RAM

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

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This table outlines the minimum hardware we use to test the system on a single user Windows Vista workstation.

For Windows Vista	Our minimum test configuration is
CPU	Intel® Core™ 2 CPU.1.86GHz
Memory*	1022MB RAM
Hard disk**	75GB

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

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Printer	HP-compatible printers supporting PCL5
Printer memory***	8mb RAM

\* Additional memory improves system performance.

\*\* Depends on the volume of data you must process

\*\*\* Additional memory may be required if printing complicated graphics or using a lot of fonts.

## On z/OS (OS/390)

The DAP and Oracle Documaker products run on the following versions/releases of IBM's operating systems:

- OS/390 version 1.1 to version 2.10
- z/OS version 1.6 and higher

**NOTE:** Following OS/390 version 2.10, new versions were named z/OS. Documaker runs on OS/390 and z/OS. In this manual, OS/390 and z/OS are referred to as *z/OS* unless otherwise noted.

No product upgrades are required and no incompatibility problems have been reported when running Documaker on any of these operating system releases.

	Requirements
Hard disk	150mb
Printer	Any printer which supports IBM AFP, Xerox Metacode, or Adobe PostScript
Runtime library	IBM Language Environment for OS/390 version 2.10 or higher
Compiler	(Only necessary if adding custom code to the system) IBM C/C++ Compiler for OS/390 version 2.10 or higher

**NOTE:** Regardless of the type of computer you run the system on, to print charts on Xerox Metacode printers, you must have a GVG card. To print charts on IBM AFP printers, you must have a GOCA card.

The amount of hard disk space you will need depends mainly on the volume of data you must process. Keep in mind too, that the C/C++ compiler is only required if you plan to write your own custom rules and recompile the source modules provided in the Software Developer's Kit (SDK).

## On UNIX Systems

Oracle Documaker products run on the following UNIX systems.

For all UNIX systems, you can use any printer that supports IBM AFP, PCL, PostScript level 2, or Xerox Metacode. For HP printers, you need at least 8mb of memory, more if you are printing complicated graphics or using a lot of fonts. The amount of hard disk space you need depends on the volume of data you process. Keep in mind too, that a compiler is only required if you plan to recompile the system, such as if you customize the source code or use a runtime library other than the one shown for your operating system.

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**NOTE:** For any UNIX installation, first make sure you have the uudecode, uncompress, and awk utilities installed.

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### On AIX systems

	Requirements
Operating system	AIX version 5.2 or higher
Model*	pSeries - Power RISC
Compiler	(Only necessary if adding custom code to the system) IBM Visual Age C/C+ version 6 IBM C/C++ Enterprise Edition for AIX v7
Runtime library	C Set ++ Runtime for AIX 5.0 or higher

	Tested on
Model*	pSeries p650
CPU	6 x 1.45GHz Power4+ processors
Memory*	12GB
Hard disk**	Two 36.4GB 10,000RPM Ultra3 SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

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## On Linux systems

	Requirements
Operating system	GNU/Linux distributions RedHat Enterprise Linux (RHEL) version 5.1 or higher SuSE Linux Enterprise Server (SLES) version 9.3 or higher
Model	Intel/AMD based systems
Compiler	(Only necessary if you are adding custom code to the system) GNU C/C++ compiler: gcc-3.3.5-5 v3.3.5 or higher, gcc-c++-3.3.5-5 v3.3.5 or higher
Runtime library	libgcc-3.3.5-5 v3.3.5 or higher or compatibility module libstdc++-3.3.5-5 v3.3.5 or higher or compatibility module
Additional requirements	<ul style="list-style-type: none"> <li>– The installer requires the sharutil package for the uudecode applet.</li> <li>– RedHat Enterprise Linux version 5.1 or higher needs these compatibility modules for the C++ runtimes: <ul style="list-style-type: none"> <li>compat-libstdc++-33</li> <li>compat-libstdc++-296 (required for the current ORA native DBHandler for Oracle 10g in Documaker)</li> </ul> </li> <li>– Any other utilized third-party software required packages, such as Oracle, DB2, MySQL, and so on.</li> </ul>

	Tested on
CPU*	Pentium 4, 1.80 GHz
Operating system	RedHat Enterprise Linux (RHEL) version 5.1 VMWare guest SuSE Linux Enterprise Server (SLES) version 9.4 VMWare guest
Memory*	768MB
Hard disk**	75GB

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

On Solaris systems

	Requirements
Operating system	Sun Solaris 9/SunOS 5.9 (SPARC based) or higher
Model*	UltraSPARC based
Compiler	(Only necessary if adding custom code to the system) Sun ONE Studio 8
Runtime library	Core Solaris 9

	Tested on
Model*	Sun Fire v240 Server
Operating system	Solaris v9 SPARC
CPU	2 x 1.28GHz UltraSPARC IIIi Cu
Memory*	2GB
Hard disk**	Four 36GB SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

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## DOCUPRESENTMENT REQUIREMENTS

Your computer must have certain software and hardware components to run Docupresentation. Depending on your software license and operating environment, these requirements vary.

### Docupresentation Client

For a Docupresentation client, you must have a personal computer equipped with the following:

- Microsoft Internet Explorer version 6.0 or later for Windows 2000 or Windows XP or higher
- Adobe ® Acrobat Reader version 7.0 or higher

### Docupresentation Server

You can run Docupresentation on the following operating systems:

- Windows
- AIX
- Linux
- Solaris

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**NOTE:** For Docupresentation Client and Server, you must have Java 1.5 or higher.

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These tables provide more detailed information on our minimum platform requirements for testing Docupresentation implementations.

#### On Windows systems

	Tested on
Operating system*	Windows XP
CPU	Intel® Core™ 2 CPU.2.13GHz
Memory	2 GB
Hard disk (RTE)	80 GB
Hard disk (MRL)**	80 GB

\* Also tested on Windows 2000 Server and Windows 2003 Server.

\*\* Additional space required for your customized forms

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On AIX systems

	Requirements
Operating system	AIX version 5.2 or higher
Model*	pSeries - Power RISC
Compiler	(Only necessary if adding custom code to the system) IBM Visual Age C/C+ version 6 IBM C/C++ Enterprise Edition for AIX v7
Runtime library	C Set ++ Runtime for AIX 5.0 or higher

	Tested on
Model*	pSeries p650
CPU	6 x 1.45GHz Power4+ processors
Memory*	12GB
Hard disk**	Two 36.4GB 10,000RPM Ultra3 SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.  
\*\* Additional space required for your customized forms

On Solaris systems

	Requirements
Operating system	Sun Solaris 9/SunOS 5.9 (SPARC based) or higher
Model*	UltraSPARC based
Compiler	(Only necessary if adding custom code to the system) Sun ONE Studio 8
Runtime library	Core Solaris 9

	Tested on
Model*	Sun Fire v240 Server
Operating system	Solaris v9 SPARC
CPU	2 x 1.28GHz UltraSPARC IIIi Cu
Memory*	2GB
Hard disk**	Four 36GB SCSI drives

\*Additional memory and a faster CPU is not required, but will improve performance.  
\*\* Additional space required for your customized forms

## On Linux systems

	Requirements
Operating system	GNU/Linux distributions RedHat Enterprise Linux (RHEL) version 5.1 or higher SuSE Linux Enterprise Server (SLES) version 9.3 or higher
Model	Intel/AMD based systems
Compiler	(Only necessary if you are adding custom code to the system) GNU C/C++ compiler: gcc-3.3.5-5 v3.3.5 or higher, gcc-c++-3.3.5-5 v3.3.5 or higher
Runtime library	libgcc-3.3.5-5 v3.3.5 or higher or compatibility module libstdc++-3.3.5-5 v3.3.5 or higher or compatibility module
Additional requirements	<ul style="list-style-type: none"> <li>– The installer requires the sharutil package for the uudecode applet.</li> <li>– RedHat Enterprise Linux version 5.1 or higher needs these compatibility modules for the C++ runtimes:     compat-libstdc++-33     compat-libstdc++-296 (required or the current ORA native DBHandler for Oracle 10g in Documaker)</li> <li>– Any other utilized third-party software required packages, such as Oracle, DB2, MySQL, and so on.</li> </ul>

	Tested on
Model*	Dell PWS450
Operating system	RedHat Enterprise Linux (RHEL) v5.1 VMWare guest SuSE Linux Enterprise Server (SLES) v9.4 VMWare guest
CPU	2 x 2.40GHz Xeon processors
Memory*	3GB
Hard disk**	70GB SCSI drive

\*Additional memory and a faster CPU is not required, but will improve performance.

\*\* Additional space required for your customized forms

## Web Server

This table outlines the web server requirements for each operating system:

Operating system	Web server
Windows	2000 Server or 2003 Server (or higher), such as Microsoft Internet Information Server 4.0 (or higher).
AIX	Web server for AIX 5.2, such as IBM's HTTP Server for AIX version 1.3.3.1 or higher with the Java Runtime Environment and/or JDK for AIX, version 1.4.0 or higher.
Linux	Web server for Linux, such as Apache 1.3.12 or higher or IBM HTTP Server 1.3.9 or higher.
Solaris	Web server for Sun Solaris 7 or higher on SPARC, such as Java Web Server 2.0 or Apache 1.3.9 with the Java Runtime Environment and/or JDK for Solaris, version JRE 1.4.0 or higher. IBM HTTP Server 1.3.9 or higher can also be used.

---

**NOTE:** We test DocuPresentment version 2.2 and iDocumaker version 3.2 implementations on WebSphere Application Server (WAS) version 6.1.x and Tomcat 6.x Application Server.

---

## IDOCUMAKER REQUIREMENTS

Your computer must have certain software and hardware components to run iDocumaker. This table outlines those requirements:

### Basic requirements

	Requirements
Operating system	Windows XP, Windows 2003 Server, Linux, AIX, and Sun Solaris
Java Runtime Environment (JRE)	version 1.5 or higher
Physical memory/JVM heap memory*	2 GB RAM/512 MB
Hard disk**	100 MB free
Other components	Keyboard and mouse or compatible pointing device
Monitor	Color SVGA monitor

\* Additional memory will improve system performance.

\*\* The amount of hard disk space you will need depends mainly on the volume of data you must process.

### Client requirements

In addition to the basic requirements, each client should have the following:

- WIP Edit plug-in, version 11.3, patch 05 or higher
- Microsoft Windows XP Professional or later
- Adobe Acrobat Reader 7.0 or higher
- Microsoft Internet Explorer 7.0 or higher with these Internet security options enabled:
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls safe for scripting
  - Allow cookies that are stored on your computer
  - Allow per-session cookies (not stored)
  - Active scripting

### Server requirements

In addition to the basic and client requirements, the computer you will use as a server should be configured with the following:

- Apache Tomcat or IBM WebSphere MQ
- A database such as Oracle version 8i or higher, Microsoft SQL 2000 or higher, IBM DB2 version 8.1 or higher, Sun MySQL version 4.3 or higher, or other JDBC version 2.0-supported databases
- Application servers that support the J2EE 1.4 specification. We test on Tomcat version 5.5 and WebSphere MQ version 6.1.

Application server requirements

In addition to the basic requirements, for the application server, you should have:

- Windows Server (Tomcat plug-in), Tomcat version 5.5 or higher, or WebSphere MQ (formerly MQSeries) version 6.1
- One of these message buses:
  - WebSphere MQ
  - JMS
  - ActiveMQ
  - MSMQ
  - HTTP
- A database such as Oracle version 8i or higher, Microsoft SQL Server 2000 or higher, IBM DB2 version 8.1 or higher, Sun MySQL version 4.3 or higher, or other JDBC version 2.0-supported databases
- Docuement version 10.2 (IDS version 1.8) or higher

---

**NOTE:** We test iDocumaker version 3.2 implementations on WebSphere Application Server (WAS) version 6.1.x and Tomcat 6.x Application Server.

---

Using the right Java environment

This table shows various application servers we have tested with and the Java version you should use with those web servers and with iDocumaker.

For	Use
Tomcat 5.5 (or higher)	Tomcat using Java 1.5 (iDocumaker using the Servlet Specification 2.4 or higher)
WebSphere Application Server 6.1.x	WebSphere Application Server using Java 1.5 (iDocumaker using the J2EE standard 1.4)

Additional recommendations

We also recommend these additional products for your iDocumaker implementation:

Product	Description
Documaker	Use for rules publishing.



## iPPS REQUIREMENTS

Your computer must have certain software and hardware components to run iPPS. This table outlines those requirements:

### Basic requirements

	Requirements
CPU	Pentium III or higher
Operating systems	Windows 2000, Windows XP, or Windows 2003 Server
Memory*	256MB RAM
Hard disk**	400 MB free
Other components	Keyboard and mouse or compatible pointing device
Monitor	Color SVGA monitor

\* Additional memory, while not required, will improve system performance.

\*\* The amount of hard disk space you will need depends mainly on the volume of data you must process.

### Client requirements

In addition to the basic requirements, each client should have the following:

- WIP Edit plug-in, version 11.3, patch 05 or higher
- Windows 2000 Professional or XP Professional or later
- Adobe Acrobat Reader 7.0 or higher
- Microsoft Internet Explorer 6.0 or higher with these Internet security options enabled:
  - Run ActiveX controls and plug-ins
  - Script ActiveX controls safe for scripting
  - Allow cookies that are stored on your computer
  - Allow per-session cookies (not stored)
  - Active Scripting

### Server requirements

In addition to the basic and client requirements, the computer you will use as a server should be configured with the following:

- Internet Information Services (IIS) with World Wide Web Server and File Transfer Protocol (FTP) Server
- A database such as Microsoft Access (Access 97 or higher), xBase, or SQL
- Visual Basic runtimes
- Microsoft XML Core Services 4.0 SP2 (msxml4) for iPPS 3.11 and below
- Microsoft XML Core Services 6.0 (msxml6) for iPPS 3.12 and higher
- ADO 2.6 or later
- A static IP address

- Web server For the web server, you should have:
- Minimum Pentium III with 512MB of RAM
  - Windows 2003 Server
  - Component Services or Microsoft Transaction Server
  - Microsoft Visual Basic 6 Runtimes (included/installed with iPPS version 3.1 or higher)
  - Microsoft Active Data Objects 2.6 or higher (included/installed with iPPS version 3.1 or higher)
  - IBM WebSphere MQ (formerly MQSeries) or Microsoft Message Queue client
  - ODBC-compliant database (Oracle, SQL Server, or DB2 recommended for production)
  - Microsoft's XML parser:
    - MSXML 4.0 sp2 for iPPS version 3.11 and below
    - MSXML 6.0 for iPPS version 3.12 and higher
  - DocuPresentment version 10.2 (IDS version 1.8) or higher

Additional recommendations

We also recommend these additional products for your iPPS implementation:

Product	Description
Documaker	Use for rules publishing.

## EWPS REQUIREMENTS

The EWPS Java web application deployment supports Java Runtime Environment (JRE) version 1.5 or higher. For best results, use JRE version 1.6. This table shows you the version of Java you need for each supported platform:

For this platform	You need this version of Java
Microsoft Windows (x86-32 and x86-64)	
XP (SP 2) Server 2003 (SP2)	Sun Java 5 or higher
Linux (x86-32 and x86-64) 32- and 64-bit kernels	
SuSE Linux Enterprise Server (SLES) version 9.4 or higher RedHat Enterprise Linux (RHEL) version 5.1 or higher	Sun Java 5 or higher or IBM Java 5 or higher
Sun Solaris (SPARC) 32-and 64-bit kernels	
Solaris 9/SunOS 5.9 or higher)	Sun Java 5 or higher
IBM AIX 5L pSeries (RISC) 32- and 64-bit kernels	
version 5.2 TL 5200-09	IBM Java 5 or higher
version 5.3 TL 5300-07	IBM Java 6 or higher

### Web application server

Whether running on Windows, Linux, Solaris, or AIX, you can use either of the following Java Web Application Servers:

- IBM WebSphere AS, version 6.1 or higher
- Tomcat version 5.5 or higher

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**NOTE:** We test with both WebSphere and Tomcat. Other Java application servers should also work.

---

An EWPS Java web application deployment requires the following version of Docupresentment to process web services requests:

- Docupresentment version 2.2, patch 04 or higher

Message bus systems EWPS communicates to Docupresentation using a message bus provider such as JMS, WebSphere MQ, or MSMQ. This table shows the possible message bus systems. Tested systems are indicated with a single asterisk (\*).

For this platform	You can use one of these message busses
Microsoft Windows (x86-32 and x86-64) <ul style="list-style-type: none"> <li>– XP (SP 2)</li> <li>– Server 2003 (SP2)</li> </ul>	HTTP/SOAP(*) (**) MSMQ(*) IBM WebSphere MQ <sub>3</sub> version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
Linux (x86-32 and x86-64) **** <ul style="list-style-type: none"> <li>– SuSE Linux Enterprise Server (SLES) version 9.4 or higher</li> <li>– RedHat Enterprise Linux (RHEL) version 5.1 or higher</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ <sub>3</sub> version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
Sun Solaris (SPARC) <ul style="list-style-type: none"> <li>– Solaris 9/SunOS 5.9 or higher</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ <sub>3</sub> version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers
IBM AIX 5L pSeries (RISC) 32-bit and 64-bit <ul style="list-style-type: none"> <li>– version 5.2 TL 5200-09</li> <li>– version 5.3 TL 5300-07</li> </ul>	HTTP/SOAP(*) (**) IBM WebSphere MQ <sub>3</sub> version 5.3 or higher (*) ActiveMQ JMS (*) (***) Other JMS providers

(\*) Tested providers

(\*\*) This provider has not been tested under heavy concurrency and load.

(\*\*\*) At the time of publication, we noticed problems with the ActiveMQ JMS during heavy load testing, We expect Apache to address these issues in the future. Contact Apache for more information.

(\*\*\*\*) Other Linux distributions should work at kernel v2.6.11.4-21 or higher but have not been tested.

---

Docupresentment, JRE, and Documaker versions This table shows, for each supported and tested platform, the version of Docupresentment, the corresponding Java Runtime Environment (JRE) for Docupresentment, and the version of Documaker necessary to support EWPS.

For this platform	Docupresentment	JRE	Documaker
Microsoft Windows (x86-32 and x86-64) <ul style="list-style-type: none"> <li>– XP (SP 2)</li> <li>– Vista (SP 1)</li> <li>– Server 2003 (SP2)</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6	Version 11.3, patch 05 or higher
Linux (x86-32 and x86-64)**** <ul style="list-style-type: none"> <li>– SuSE Linux Enterprise Server (SLES) version 9.4 or higher</li> <li>– RedHat Enterprise Linux (RHEL) version 5.1 or higher</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6  IBM JRE v1.5** IBM JRE v1.6***	Version 11.3, patch 05 or higher
Sun Solaris (SPARC) <ul style="list-style-type: none"> <li>– Solaris 9/SunOS 5.9 or higher</li> </ul>	Version 2.2, patch 04* or higher	Sun JRE v1.5** Sun JRE v1.6	Version 11.3, patch 05 or higher
IBM AIX 5L pSeries (RISC) 32-bit and 64-bit <ul style="list-style-type: none"> <li>– version 5.2 TL 5200-09</li> <li>– version 5.3 TL 5300-07</li> </ul>	Version 2.2, patch 04* or higher	IBM JRE v1.5** IBM JRE v1.6***	Version 11.3, patch 05 or higher

\* A Docupresentment Windows installation includes a bundled Sun J2SE JRE version 1.6 which is used by default by the Docupresentment server.

\*\* Running the Docupresentment web services interface under JRE version 1.5 requires JAXB 2. See [Downloading JAXB on page 20](#) for more information.

\*\*\* IBM's J2SE JRE version 1.6 is only supported in Docupresentment version 2.2, patch 05 or higher and Documaker Shared Objects version 11.3, patch 06 or higher.

\*\*\*\* Other Linux distributions should work at kernel version 2.6.11.4-21 or higher but have not been tested.

---

**NOTE:** To find the latest version of Documaker, Docupresentment, iDocumaker, iPPS, or EWPS, log onto the following web site:

<https://support.oracle.com>

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**Downloading JAXB** JAXB provides a way to map XML and Java code and extend applications with XML and Web Services technologies. You must install and implement JAXB 2 to run the Docupresentment web services interface under JRE version 1.5.

Follow these steps to download the latest version of JAXB:

- 1** Go to the JAXB web site:  
<https://jaxb.dev.java.net/>
- 2** Click Download Now for the latest version of JAXB.
- 3** On the new page, click the Download the Binary link and save the ZIP file to your local machine.
- 4** Unzip the downloaded ZIP file into directories. There will be a \jaxb-ri directory with a \lib subdirectory.
- 5** From the \lib subdirectory, copy the jaxb-api.jar and jaxb-impl.jar files to the \lib directory of your Docupresentment installation.

## DOCUMANAGE REQUIREMENTS

The hardware and software described here only includes what is required by the Documange applications. These hardware recommendations are cumulative. Running multiple software applications on a single system requires that the system support the sum of all of the hardware recommended by all of the software vendors. For example, if each of two software applications require 50MB of free disk space and 256MB of available memory, then the required hardware should have 100MB of free disk space and 512MB of available memory.

For server products, the required minimum amount of hardware varies depending on the client load it supports, including the type and size of documents being processed. For instance, rendering Metacode documents with a 24-bit color depth on the server requires more server memory for fewer workstation connections.

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**NOTE:** These recommendations are not intended as guidelines for high-volume production systems. They are for installing and running a workgroup with fewer than ten users, and they assume that the systems are not running other applications. Larger systems should be set up while working with Consulting Services. The number of users, the amount of data, along with usage profiles and their impact on system operation should be considered.

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### Workstation and Administrative Applications

The Workstation and Administrative Applications can run on Microsoft Windows operating systems with Intel-compatible hardware.

Normally, the Workstation component is installed on end-user workstations by itself. You can, however, install the Workstation and Services applications on the same machine to test an installation and to perform trouble shooting.

#### On Windows systems

	Requirements
Operating systems*	Windows 2000 Professional (NT5) or XP Professional Be sure to install all available service packs. No additional software is required. All support libraries are installed or updated by the Documange installers.
CPU	Intel-compatible; 256-MHz or faster Pentium III-or-better processor required; 512-MHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended
Memory	128MB available RAM or more recommended (64MB minimum supported; may limit performance and some features)

\* Windows XP Professional does not support Workstation scanning functions until Documange release 6.4.

Requirements	
Hard Disk	40MB of available hard-disk space required for installation (disk usage will vary based on configuration)
Monitor	Recommend 19" monitor or better at 1024 x 768 resolution or better for viewing and working with documents using Workstation software
Networking	Network adapter for the type of network to which you want to connect, and access to an appropriate network

\* Windows XP Professional does not support Workstation scanning functions until Documanager release 6.4.

---

## Server and Router Applications

The Server and Router Applications can run on Microsoft Windows, Linux, AIX, and Solaris operating systems and Intel-compatible hardware.

### On Windows systems

Requirements	
Operating systems	Windows 2000 Professional (NT5), XP Professional Be sure to install all available service packs. No additional software is required. All support libraries are installed or updated by the Documanager installers.
CPU	Intel-compatible; 512-MHz or faster Pentium III-or-better processor required; 1-GHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended; multi-processor systems are fully supported by a multi-threaded server
Memory	Router: 50MB available RAM or more. Server: 38 MB available RAM or more (256MB minimum supported; this may limit performance and the availability of some features)
Hard disk*	Router: 80MB of available hard-disk space is required for installation Server: 100MB of available hard-disk space is required for installation
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for all document storage.
Networking	Network adapter appropriate for the type of network to which you want to connect, and access to an appropriate network

\* Disk usage will vary based on configuration.

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## On Linux systems

Requirements	
Operating systems	<p>Red Hat Advanced Enterprise Server, versions 2.1, 3 and 4. All current fixes are required for each kernel release. The latest Linux kernel build announcements are available at:</p> <p><a href="http://www.spinics.net/lists/announce-kernel/">http://www.spinics.net/lists/announce-kernel/</a></p> <p>No additional software is required. Free DCE/RPC for Linux is supplied in the libdcerpc.so.0.0.1 file packaged with your installation. It incorporates modifications that allow Documanage to run with the latest versions of Linux. ODBC and DCE libraries are included in your installation.</p>
CPU	Intel-compatible only; 512-MHz or faster Pentium Pro-or-better processor required; 1-GHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended
Memory	<p>Router: 50MB available RAM or more recommended</p> <p>Server: 384MB available RAM or more recommended (128MB minimum supported; may limit performance and some features)</p>
Hard disk*	<p>Router: 80MB of available hard-disk space required for installation</p> <p>Server: 100MB of available hard-disk space required for installation</p>
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for document storage.
Networking	Network adapter appropriate for the type of network to which you want to connect, and access to an appropriate network

\* Disk usage will vary based on configuration.

On AIX systems

Requirements	
Operating systems	<p>AIX 4.3 or later (for pSeries processors). We recommend that you install all available fixes.</p> <p>Encryption Support: /usr/lib/libcrypt.a (Encryption library)</p> <p>POSIX Thread Support (see <a href="http://www-306.ibm.com/software/awdtools/caix/">http://www-306.ibm.com/software/awdtools/caix/</a>)</p> <ul style="list-style-type: none"> <li>- libpthreads.a (POSIX thread library)</li> <li>- libpthreads_compat.a (POSIX thread additional compatibility layer)</li> </ul> <p>Note: Both libraries are included in the bos.rte.libpthreads fileset, which is installed by default.</p> <p>IBM DCE/RPC for AIX (see <a href="http://www-306.ibm.com/software/network/dce/">http://www-306.ibm.com/software/network/dce/</a> )</p> <ul style="list-style-type: none"> <li>- libdce.a (IBM DCE main library)</li> <li>- libdcephthreads.a (IBM DCE support library)</li> <li>- libdcelibc_r.a (IBM DCE support library)</li> </ul>
CPU	IBM pSeries supporting required AIX versions
Memory	<p>Router: 50MB available RAM or more recommended</p> <p>Server: 384MB available RAM or more recommended (128MB minimum supported; may limit performance)</p>
Hard disk*	<p>Router: 80MB of available hard-disk space required for installation</p> <p>Server: 100MB of available hard-disk space required for installation</p>
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required to store documents.
Networking	Network adapter for the type of network to which you want to connect, and access to an appropriate network

\* Disk usage will vary based on configuration.

On Solaris Systems

Requirements	
Operating systems	<p>The Documanage Server and Router run on SunOS 5.7 (Solaris 7) or later. We recommend that you install all available fixes. For recent announcements, see:</p> <p><a href="http://www.spinics.net/lists/announce-kernel/">http://www.spinics.net/lists/announce-kernel/</a></p> <p>IBM DCE/RPC for Solaris; not compatible with Sun's ONC/RPC (see <a href="http://www-306.ibm.com/software/network/dce/">http://www-306.ibm.com/software/network/dce/</a> )</p>
CPU	Sun SPARC Server platform only, supporting required SunOS versions.
Memory	<p>Router: 50MB available RAM or more recommended</p> <p>Server: 384MB available RAM or more recommended (128MB minimum supported; may limit performance)</p>

\* Disk usage will vary based on configuration.

	Requirements
Hard disk*	Router: 80MB of available hard-disk space required for installation Server: 100MB of available hard-disk space required for installation
Peripheral	Additional peripheral storage (hard disk or other mass storage or networked storage) is required for document storage.
Networking	Network adapter for the type of network to which you want to connect, and access to an appropriate network

\* Disk usage will vary based on configuration.

---

## Databases Supported

The Documanage Server supports several database management systems, including Oracle, Microsoft Sybase Adaptive Server, DB2, and Adaptive Server Anywhere.

Database/version	Driver/version
Oracle 9i, 10g	Latest Oracle drivers (ODBC version 9.00.01.08 or later)
MSSQL Server 2000	Microsoft Data Access Components (MDAC) 2.8
DB2 7.2, 8.2	IBM DB2 Connect 7.2 or 8.2
Sybase Adaptive Server 12.5	Sybase Adaptive Server Enterprise (ASE) ODBC driver 4.20.00.67 or later
MySQL 4.1	Latest MySQL drivers

## Document Retention Management Requirements

Optional Nearstor Network Attached Storage (NAS) with Snaplock compliance from Network Appliance, Inc., securely stores documents that Documanage has under Retention Management. Nearstor NAS is currently available with capacities between one terabyte and 96 terabytes.

## Third-Party Storage Solutions

Documanage interfaces to third-party storage systems, which augment Documanage's enforcement of retention policies and provide other managed storage-system benefits. Contact your sales representative for the latest listing of storage system versions which have been certified for use with Documanage. Documanage interfaces to the storage systems listed here at this time:

Vendor	Product	Supported Versions*
Network Appliance, Inc.	NearStor/SnapLock	Data ONTAP 7.1 or newer
EMC, Inc.	Centera	3.0.1 or newer with Compliance (Governance) Edition or CE Plus

\* Oracle Insurance applications support newer product versions only if they are backward compatible with the versions listed here.

Plug-in modules interface these storage systems to the Documanage Server. These modules have been developed by Oracle Insurance, which is solely responsible for their performance.

## Chapter 2

# Installing the System

This chapter contains information to help get you started downloading the software, installing the software, and downloading patches. For information on system requirements, see [System Requirements on page 2](#).

In this chapter you will find information on...

- [System Overview on page 28](#)
- [Downloading the Software on page 29](#)
- [Installing the System on page 30](#)
- [Testing Your Installation on page 35](#)
- [Re-installing the System on page 36](#)
- [Downloading the Documentation on page 37](#)
- [Downloading Patches on page 38](#)

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**NOTE:** For information on how to set up, maintain, and customize Oracle Documaker Desktop, see the [Documaker Workstation Administration Guide](#). This guide is a reference tool for system supervisors.

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## SYSTEM OVERVIEW

Documaker Workstation is the workstation-based form set entry and publishing piece of the Documaker system. Documaker is a total form set automation system which enables forms-intensive industries such as insurance, finance, utilities, and government to automate enterprise-wide forms and forms processing.

You collect the information you need for your form sets from various sources including manually entered data, system default data, archived data, and data extracted from external application systems. Documaker Workstation lets you enter that information and print complete, collated form sets on laser printers.

The system's unique data import and export feature enhances the data entry process. The system lets you import data files that automatically fill or propagate the data onto a form's fields. Exporting lets you extract data from Documaker Workstation for use in other applications or for import back into the system.

The system's user interface makes data entry and forms processing easy for non-technical users. You enter basic information and Documaker Workstation displays a list of applicable forms. You then select specific form sets in which to enter data.

## DOWNLOADING THE SOFTWARE

Once you make sure your computer has the correct hardware and software, you can download and install Oracle Documaker Desktop.

Oracle Insurance applications are available for download at the Oracle Software Delivery Cloud web site. The process includes:

- Logging in and agreeing to the terms and restrictions
- Searching for the applications you want to download
- Downloading those applications

Go to the Oracle Software Delivery Cloud web site to download Oracle Insurance applications:

<https://edelivery.oracle.com>

## INSTALLING THE SYSTEM

Once you finish downloading the software, follow these steps to install the Oracle Documaker Desktop on a personal computer running Windows.

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**NOTE:** Re-installation *does not* overwrite your INI files.

If you install the system into an existing directory, the current library setup is retained. If you install the system into a new directory, you must set up all of your libraries—just as you would for a new customer.

If you need to uninstall Oracle Documaker Desktop, use Control Panel's Add or Remove Programs option.

---

Before you begin

Keep in mind...

- Be sure to log onto your computer as an *Administrator* and make sure you have full directory access permissions to the c:\windows\profiles\all users folder, as well as to the registry.
- When using NTFS drive formats, the logon name must be assigned all privileges and permissions to the Windows operating system folder and all sub-folders within, as well as to make changes to the Windows registry.

### Installation

Follow these steps to install the system:

- 1** From the directory into which you downloaded the media pack, double click on the following program:

```
CD1-7spDocumakerStudioFullSystemW32(version and patch number).exe
```

The installation wizard starts.

- 2** Follow the instructions that appear on your screen to install the software.

After you install the system, restart your computer so the various system settings can take affect. Then, continue with the tasks in the topic [Downloading Sample Resources on page 31](#).



## Downloading Sample Resources

The My Oracle Support site includes sample resources you can download and use with your installation. The system expects these resources to be available when you first start the system. You can find these resources at this web site:

<https://support.oracle.com>

The process involves these tasks:

- Going to the My Oracle Support site (requires registration)
- Searching for the sample resources
- Downloading those sample resources

To download the SAMPCO sample resources for Documaker Desktop, follow these steps:

- 1 Go to the My Oracle Support web site, log in, and click the Patches & Updates tab.
- 2 Click the Product or Family (Advanced) button and search for Oracle Documaker version 11.5 patches (not Oracle Documaker Desktop).

The site returns a list of available patches.

- 3 Click the Download button for the Documaker sample master resource libraries (MRLs).

Patch Name	Description	Release	Platform (Lang)	Classification	Product/Family
<input checked="" type="checkbox"/> 13909568	DOCUMAKER SAMPLE MRLS 11.5 P04 (Patchset)	11.5	Microsoft Wi...	General	Oracle Documaker

1 Patch Selected    Read Me    Add to Plan    Download

- 4 Save the file to a local directory, then follow the steps in the next topic to install the sample resources.

---

**NOTE:** To use the sample resources, you must have installed the Java Runtime Environment (JRE) 1.6 or higher.

---

### Installing the sample resources

Follow these steps to install the sample resources:

- 1 Unzip the sample resources you downloaded. This will place the following files on your computer:

File	Description
readme.html	Provides information about the contents of your download.
amergen.zip	Contains sample resources for use with iPPS.
dms1.zip	Contains sample resources for use with Documaker Studio and Documaker Server.
SAMPCO_115p04b704.exe	Contains the sample resources for use with Documaker Desktop and Documaker Studio.

- 2 Double click on the SAMPCO\_115p04b704.exe file to install the SAMPCO resources. into your \mstres directory. Typically, this will be the c:\fap\mstres directory.

---

**NOTE:** If you later want to remove the SAMPCO sample resources, simply delete the directory in which the resources are installed.

---

Continue with the tasks in the topic, [Setting Up System Icons](#)

### Setting Up System Icons

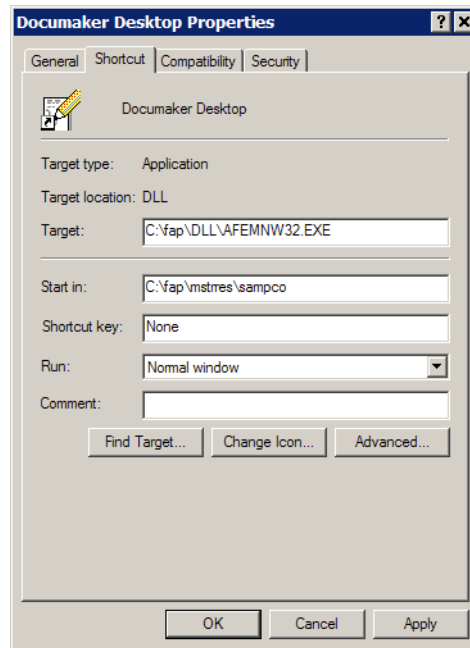
Follow these steps to set up shortcuts on your desktop which you can use to quickly start the system:

- 1 Right-click on your desktop.
- 2 Choose New, Shortcut. The Create Shortcut window appears.
- 3 Click Browse to locate the afemnw32.exe program. Typically, you will find this program in the c:\fap\dll directory. Then click Ok.
- 4 Click Next. The Select a Title for the Program window appears. Enter a name, such as *Documaker Desktop*, and click Finish.

#### Customizing the System Icon

Follow these steps to customize the system icon you created to open the SAMPCO resources you installed.

- 1 Right click on the system icon you created and select Properties. The Properties window appears:



- 2 Change the Start In directory to point to the location of the installed SAMPCO MRL. Typically this will be the c:\fap\mstres\sampco directory.

By starting the system in the \sampco directory, the system will use the FSIUSER.INI file in that directory. This INI file includes SAMPCO-specific settings and printer configurations for PCL, GDI, and PDF printers.

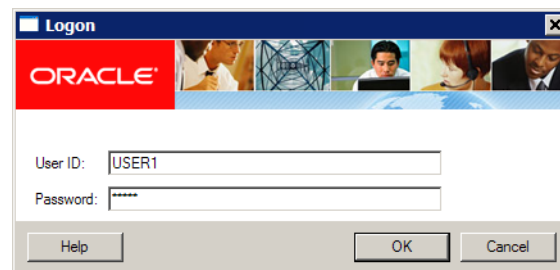
Now you are ready to start your system.

## Starting the System

To start the system, double-click the system icon you created and customized:



The Logon window appears:



Enter your user ID and password, then click Ok.

The system comes with several pre-installed user ID/password combinations you can use, such as USER1/USER1. See the [Documaker Workstation Administration Guide](#) for more information on setting up additional users.

## TESTING YOUR INSTALLATION

The [Documaker Workstation User Guide](#) includes a short tutorial that shows you how to perform basic tasks in the system and lets you make sure your system was installed correctly. These tasks are based on a scenario that includes

- Creating a new insurance policy
- Adding information to that policy
- Saving the policy to work-in-progress (WIP)
- Updating the policy
- Completing the policy
- Renewing the policy

---

**NOTE:** These tasks use the SAMPCO resources you installed earlier. See [Downloading Sample Resources on page 31](#) for more information.

---

The tasks also include printing the policy. Your system is set up to use a PCL printer at LPT1 by default. If you want to use a different type of printer or target a different device, you will need to modify the system's INI settings. The default INI settings are shown here:

```
< Printer >
  PrtType      = PCL
< Printers >
  PrtType      = PCL
< PrtType:PCL >
  Device       = LPT1
  DownloadFonts = Yes, Enabled
  Module       = PCLOS2
  PrintFunc    = PCLPrint
  SendOverlays = No, Enabled
```

These settings are stored in the FSIUSER.INI file, which resides in the \dll directory where you installed the system. Typically, this is the \fap\dll directory.

For more information on setting up printers, see the [Documaker Workstation Administration Guide](#).

## RE-INSTALLING THE SYSTEM

If at any time in the future, you need to re-install the system, keep the following points in mind:

- If you re-install the software to the same drive and sub-directory, the PATH statement in your AUTOEXEC.BAT file will not be affected.
- If you re-install the software to a different drive or sub-directory, the new path statements will append to any previous settings in the AUTOEXEC.BAT file.

This makes the system use path statements from the previous installation, and ignore the new path statements. If you want the system to use the new path statements, you must delete the old path statements in the AUTOEXEC.BAT file.

- System and user INI files (FSISYS.INI and FSIUSER.INI) are located in the FAP\DLL directory and the SAMPCO directory. The settings of the INI files located in the \DLL directory will not be affected; however, the files in the SAMPCO directory will be overwritten if you install new sample resources into that directory.

The INI files in the \DLL directory:

- Specify default values and other defined parameters
- Provide system flexibility
- Store system default settings
- Allow a user ID to be reset

The INI files in the SAMPCO directory:

- Allow users to specify Documaker Workstation functions
- Determine how Documaker Workstation uses the library resources

FSISYS.INI - Controls information related to the entire system, such as systems settings and program function calls.

FSIUSER.INI - Controls settings which vary between resource libraries, such as sorting options, archival mode, and import and export ability.

## DOWNLOADING THE DOCUMENTATION

You can download the latest Oracle Insurance documentation at the Oracle Technology Network (OTN) web site. The process includes:

- Going to the Oracle Insurance Documentation page on the OTN site
- Searching for the application documentation you want to download
- Downloading that documentation

To download Oracle Insurance application documentation, go to the Oracle Insurance Documentation page:

<http://www.oracle.com/technetwork/documentation/insurance-097481.html>

## DOWNLOADING PATCHES

You can download the latest Oracle software patches at the My Oracle Support web site. The process includes:

- Going to the My Oracle Support site (requires registration)
- Searching for the patches you want to download
- Downloading those patches

To download Oracle software patches, go to the My Oracle Support web site:

<https://support.oracle.com>



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