

Oracle® Documaker Desktop

Desktop Installation Guide

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Preface

Oracle Documaker Desktop is the market-leading policy issuance solution for managing general agents (MGAs), excess and surplus (E&S), and specialty insurance carriers in North America. It is an adaptive enterprise document automation solution that provides efficient, cost-effective policy creation, presentment, printing archival, retrieval, and web-enabling capabilities.

Oracle Documaker Desktop can help you dramatically improve the time required to write new business while handling more volume with existing staff. Oracle Documaker Desktop can be easily integrated with third-party and home-grown legacy systems, including accounting, agency management, and rating systems. With access to a library of pre-approved industry content, such as ISO and ACORD forms, it further accelerates new business.

Oracle Documaker Desktop's intuitive, easy-to-use design tools empower your business users to create documents throughout the insurance value chain, reducing their reliance on IT staff. It handles production of user-defined transactions, such as new policies, quotes, endorsements, cancellations, renewals, personalized correspondence, and other customer communications. It also supports creation of package policies, including multiple lines of business per policy with master declaration and sub declaration pages. Using it, you can efficiently manage policy issuance through work-in-progress (WIP); workflow, assignment, and routing; speed policy creation and accuracy with WYSIWYG form-based data entry; and much more.

AUDIENCE

This document is designed for system supervisors and is intended to help you install and set up these Oracle Documaker Desktop components:

- Oracle Documaker Desktop
- PPS Reporting Tool

DOCUMENTATION ACCESSIBILITY

Accessibility of Links to External Web Sites in Documentation

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RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- Documaker Desktop User Guide
- Documaker Desktop Administration Guide
- Output Management Guide
- Using the PPS Reporting Tool

CONVENTIONS

The following text conventions are used in this document:

| Convention | Description |
|------------------------|---|
| bold | Indicates information you enter. |
| <i>italic</i> | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| <code>monospace</code> | Monospace type indicates commands, URLs, code in examples, and text that appears on the screen. |

Chapter 1

Introduction

This manual provides instructions for installing Oracle Documaker Desktop on computers running Windows.

For information on system requirements, see the [Oracle Documaker System Requirements Guide](#).

Chapter 2

Installing the System

This chapter provides instructions for installing Oracle Documaker Desktop on computers running Windows.

Note For information on installing the PPS Reporting Tool, see *Installing the PPS Reporting Tool* on page 20.

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

In this chapter you will find information on...

- *System Overview* on page 9
- *Downloading the Software* on page 10
- *Installing the System* on page 12
- *Downloading the Documentation* on page 18
- *Downloading Patches* on page 19

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

SYSTEM OVERVIEW

Documaker Desktop 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 Desktop lets you enter that information and print complete, collated form sets on 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 Desktop 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 Desktop 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.

USING THE ORACLE SOFTWARE DELIVERY CLOUD

Oracle applications are available for download from the [Oracle Software Delivery Cloud](#) website. The process includes:

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

Note To download the latest patches for the Oracle software you have already installed, visit the My Oracle Support site at this web address:

<https://support.oracle.com>

To download the latest documentation, visit the Oracle Technology Network (OTN) website at this web address:

<http://www.oracle.com/technetwork/>

Before you begin

The Oracle Software Delivery Cloud site lets you download versions of Oracle applications. Files on the Oracle Software Delivery Cloud are available in ZIP format. Once you download the files you need, extract the files in the ZIP file to proceed with the software installation.

Note You can download the corresponding product documentation from the Oracle Technology Network (OTN) site:

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

You will need Acrobat Reader or a similar program to view the PDF documentation. You can download Acrobat Reader at Adobe's site (www.adobe.com).

Follow these instructions to download Oracle applications:

1. First, go to the Oracle Software Delivery Cloud website:

<https://edelivery.oracle.com>

2. Sign in with your Oracle account. If you do not have an Oracle account, you can register for an account [here](#).
3. Review and accept the Terms and Restrictions.
4. Select Oracle Applications from the Product Pack list or you can search the Product.
5. Once you have selected the desired program, select the desired platform.

6. The selected products are then listed. To remove them, click the X (cross) which is adjacent to the product.
7. Once you have selected the desired product and platform, click Continue to proceed.
8. License agreement is displayed. Once you are ready to proceed, check the checkbox, then click Continue.
9. Installations are displayed. To individually download files click on the filename, to download all files click on the Download All button.
10. The Oracle Software Delivery Cloud prompts you to open or save the zipped file and then starts the download.

While you can save the file on any machine you choose, we recommend you save the file onto the machine where you plan to run it. You must unzip the file on the platform for which it was intended. The length of time it takes to download an application depends on the size of the download, your connection speed, and the amount of traffic on the site.

11. Click Sign Out when you finish downloading the files you need.

INSTALLING THE SYSTEM

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

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, unzip the file you downloaded, then double click on the following program:

ODSE12.6.00.YYYYW32.exe (where YYYY represents the build number)

The installation wizard starts.

2. Follow the instructions that appear on your screen to install the software. The installation creates folders and icons on your Start\Programs menu.

After you install the system, restart your computer so the various system settings can take affect. If you install the software on a network, you will need to set up icons and a program group for each user. Refer to your operating system's documentation for information on how to do this.

Downloading Sample Resources

Oracle provides sample resources you can download and use to validate your installation. The system expects these resources or your company specific resources to be available when you first start the system. Sample resources are available for download on Oracle Technology Network (<http://www.oracle.com/technetwork/index.html>) and are not intended for use in production.

Follow these steps to download the resources from Oracle Technology Network:

1. Go to Insurance page on the Oracle Technology Network
<http://www.oracle.com/technetwork/documentation/insurance-097481.html#Documaker> and search for the sample resources
2. Download the sample resources
3. 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) 1.7 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_(<i>version, patch number and build number</i>).exe | Contains the sample resources for use with Documaker Desktop and Documaker Studio. |

2. Double click on the SAMPCO_(*version, patch number and build number*).exe file to install the SAMPCO resources into your \mstrres directory. Typically, this will be the c:\fap\mstrres 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

A shortcut for Systems Icons is automatically created as a part of Studio installation. Refer to *Customizing the system icon* on page 15 to modify the *Start In*.

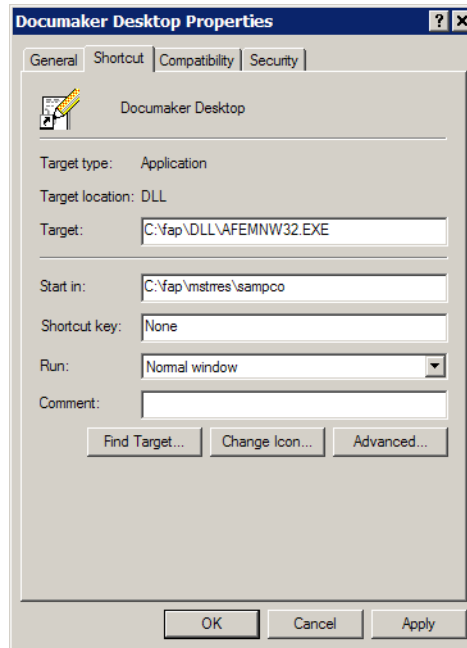
Follow the steps below in case the *create shortcut* option was left unchecked.

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:



Documaker Desktop opens.

See the [Documaker Desktop Administration Guide](#) for more information on setting up additional users. This guide also contains information on INI options you can set to display a Logon window or to automatically log users on.

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 INI files (FSISYS.INI and FSIUSER.INI) are located in the FAP\DLL directory. The settings of the INI files located in the FAP\DLL directory will not be affected.
- The INI files in the FAP\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 directories:
 - Allow users to specify Documaker Desktop functions
 - Determine how Documaker Desktop 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 Documaker documentation at the Oracle Technology Network (OTN) website. The process includes:

- Going to the applicable page on the OTN site
- Searching for the documentation you want to download
- Downloading that documentation

To download Oracle Documaker documentation, go to this page on OTN:

<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>

Appendix A

Installing the PPS Reporting Tool

This appendix discusses how to install the PPS Reporting Tool. You can use this tool to select and retrieve information stored in your PPS archives.

This chapter includes information on these topics:

- *Requirements* on page 21
- *Installation* on page 23
 - *Installing the Required Dependencies* on page 23
 - *Starting the Installation* on page 24

REQUIREMENTS

The following software and hardware components are a minimum of what you need to run the PPS Reporting Tool. Newer versions of these software packages and/or a more powerful system can improve performance. In addition, you will find information on setting up Windows user accounts.

Software requirements

To use the PPS Reporting Tool, you should have these software systems:

- Any version of Documaker Desktop.
- A PDF file viewer to view FAP files as PDF files.
- Microsoft Windows*
- Microsoft .NET Framework 3.5. For more information, go to this web site:
<http://www.microsoft.com/downloads/en/details.aspx?FamilyId=333325fd-ae52-4e35-b531-508d977d32a6>
- Microsoft Core XML Services (MSXML6.0).
- Microsoft Internet Explorer 7.0 or higher (Not required to be your default internet browser).
- Microsoft Windows Installer 3.1. This is required for Microsoft Core XML Services (MSXML6.0).
- Microsoft Access (from Microsoft Office 2000 or higher).
- Microsoft Excel is recommended and is required for the Lloyds Bordereau Report Example (from Microsoft Office 2000 or higher).

* The PPS Reporting Tool is to be installed on Windows Desktop or Workstation and not on a Windows Server.

Hardware requirements

To run the PPS Reporting Tool, your computer must meet or exceed this hardware requirements:

| | |
|-------------------------|--|
| Processor | 800 MHz |
| Memory | 256 MB |
| Hard drive space | 330 MB (280 MB*, 50 MB PPS Reporting Tool) |
| Display | 1024 x 768 High Color |

User account requirements

The Windows user accounts you set up must have these privileges:

- Computer Registry Read & Write access privileges

- Hard Disk Read & Write access privileges

Contact your System Administrator if you have questions about these privileges.

INSTALLATION

Before you install the PPS Reporting Tool, make sure you...

- Log in as the Administrator or as a user with Administrative rights.
- Close all other programs before you start the installation process.
- Have Internet access. This may be required to install Microsoft .NET Framework.

After you finish, perform a Windows Update to make sure you have all of the latest security patches for the Microsoft products installed.

Download Oracle PPS Reporting tool from the Oracle Software Delivery Cloud site and follow these steps to install the PPS Reporting Tool. For more information, see *Downloading the Software* on page 10.

Installing the Required Dependencies

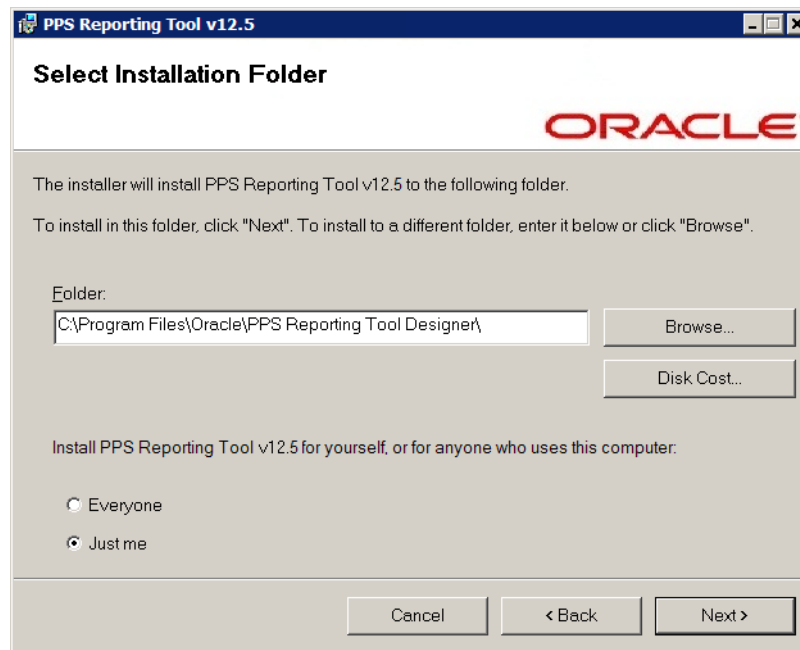
The Oracle PPS Reporting tool installation automatically searches for and installs (with your permission) the required software packages, except Microsoft Access and Microsoft Excel (see *Software requirements* on page 21 for more information). If you cancel any of the required dependencies, the installation ends and is incomplete.

Note You should uninstall any prior versions of the PPS Reporting Tool *before* you install a new version.

Starting the Installation

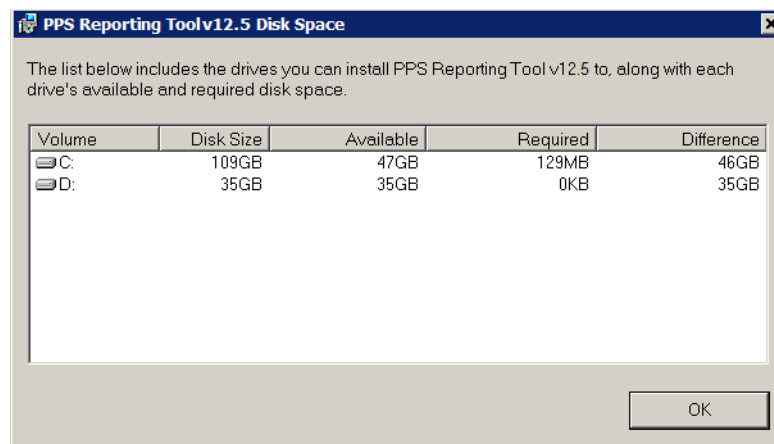
After the dependencies are checked, the installation for the PPS Reporting Tool starts. Follow these steps:

1. On the Welcome screen, click Next. The Select Installation Folder window appears:



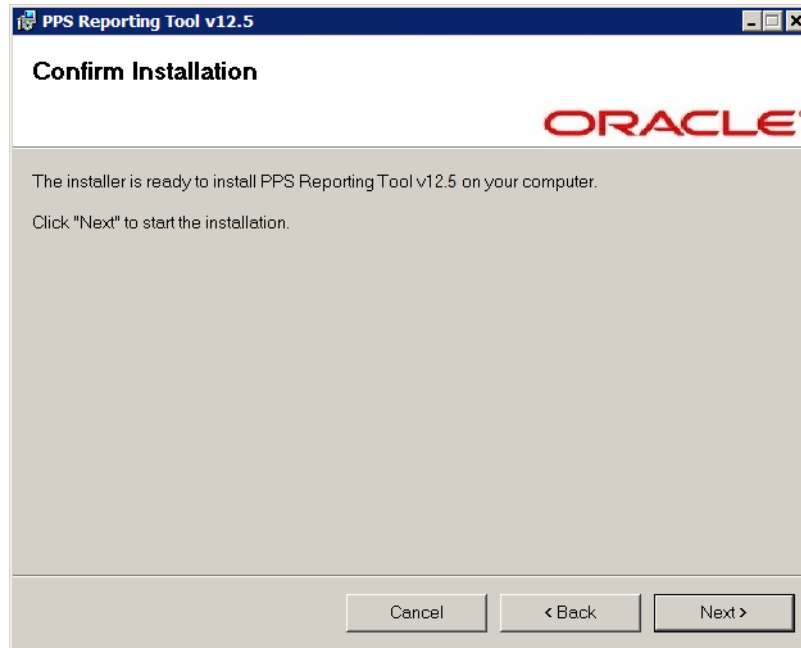
2. You can change the default installation drive, folder, and who can access the application from here or click Next to accept the defaults and continue.

If you need to choose a different drive, click the Disk Cost button to see which drives are available and how much space is required and available to you.

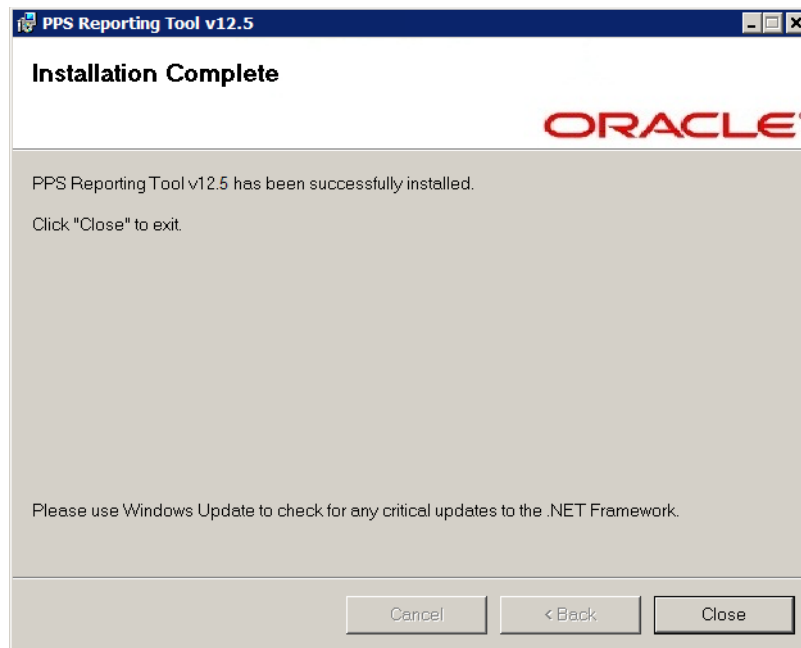


Click Ok to exit the Disk Space window and return to the installation.

3. Click Next. The Confirm Installation window appears.



4. Click Next again to confirm your selections and start the installation. When the installation is complete, you see the following window:



5. Click Close.

Appendix B

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