

Oracle® Insurance IStream

IStream Document Manager Guide for New Installations

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Chapter 1

Overview

Welcome to the IStream Document Manager Guide for New Installations. This guide describes how to install and configure IStream Document Manager.

Important: This guide is for advanced users such as system administrators.

This chapter gives an overview of the installation process and describes:

- *Document Conventions* on page 8
- *The Installation Process* on page 9
- *IStream Document Manager Features* on page 10
- *IStream Document Manager Documentation* on page 16
- *Contacting Oracle for Help* on page 18

Note: Please read this chapter completely before beginning your installation.

Document Conventions

Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

Other Document Conventions

- Microsoft Window names, buttons, tabs and other screen elements are in bold, for example: Click **Next**.
- paths, URLs and code samples are in the Courier font, for example:
`C:\Windows`
- values that you need to enter or specify are indicated in the italicized Courier font, for example, *server_name*
- values that are optional are indicated with square brackets, for example [reserved]

The Installation Process

The IStream Document Manager installation process allows you to select a number of components (called *features*) to install. (*IStream Document Manager* refers to the entire family of IStream features.)

IStream Assembler is a subset of IStream Document Manager. It is for integration with existing customer or third-party systems, and contains no DMS.

The installation path for all IStream Document Manager components is:

C:\Program Files\Whitehill Technologies\IStream

All .EXE and .DLL files are in this location.

IStream Document Manager Features

This section describes the various IStream Document Manager components (called **features**) that you can install.

IStream Document Manager Features

The table on the next page contains the complete list of IStream Document Manager features. These features are displayed in the **Select Features** screen when you run the setup application. You can install these features on more than one computer.

Please note:

- There are two types of features that you can select: **main** features and **subfeatures**. To display a subfeature, click the plus sign (+) next to the main feature to expand it.
- When you select a subfeature, the higher level feature is automatically selected.
- When you select certain subfeatures, other subfeatures may automatically be selected. If you later clear the subfeature that you had selected, the dependant subfeature that was automatically selected will remain selected.

For example, if you select the **Author** subfeature (under **Workstation**), the **Assembler UI** and the Add-in features are automatically selected, and is displayed with a dark gray selected check box. You cannot clear any of these selected checkboxes, because these features are dependant upon **Author**. If you clear the **Author** feature, the other features remain selected. At this point, you can clear the other check boxes

- For the specific software requirements and version numbers, see the *IStream Document Manager Release Notes*.

Main Feature	Subfeatures
<p>ISTream Document Manager Integration Incorporates the IStream functionality (including Object Types) within the document management system (DMS). It is the IStream module for the Livelink Enterprise Server, and is therefore the main server for an IStream Document Manager installation.</p> <p>For more information, see <i>ISTream Document Manager and Livelink Integration</i> on page 12.</p>	<ul style="list-style-type: none"> • ISTream Document Manager Modules Base provides the base components required by IStream Document Manager Modules. IStream Document Manager enhances the base document management system (DMS) to provide IStream functionality. You need to install IStream Document Manager Modules separately. For details, please refer to <i>Installing IStream Document Manager</i> on page 27 • ISTream Servlet (includes Tomcat) provides the connection between IStream Document Manager and the Assembly Server, and allows users to generate, regenerate and compile model documents
<p>Assembly Server</p> <ul style="list-style-type: none"> • a server used to assemble and generate model documents • includes the features required for remote generation 	<ul style="list-style-type: none"> • Assembly Service is the document generation engine that assembles complex documents based on model documents. Includes InfoConnector. • Proxy is a server required for rendering PDF files
<p>Workstation Includes the Author and Assembler user interfaces subfeatures. These subfeatures allows users to create and generate model documents and include the following components:</p> <ul style="list-style-type: none"> • IStream Assembler • IStream Visualizer (Charts and Graphs) • IStream InfoSources • IStream InfoConnector • standalone generator • the plug-ins required for the authoring of model documents 	<ul style="list-style-type: none"> • Author provides an authoring environment that uses Microsoft Word for editing and managing model documents. Model documents rules and functions are evaluated during generation to produce complex contracts, policies and correspondence. • The Assembler UI enables local assembly of documents from Author. Assembler creates complex documents based on model documents. • The Author Add-In for Microsoft Word enables you to edit and generate documents directly from Microsoft Word. If selected, the Assembler Add-in is automatically selected. • The Assembler Add-in for Microsoft Word enables you to generate model documents directly from Microsoft Word. <p>Note: If you select Author and Assembler UI and all Add-ins are automatically selected.</p> <ul style="list-style-type: none"> • Promoter is a utility which contains both promote and convert functions. <i>Promoting</i> allows you to easily copy documents between your many different physical environments. <i>Converting</i> allows you to upgrade your documents into the current IStream format

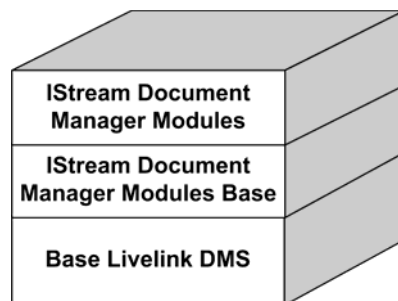
Main Feature	Subfeatures
<p>Customizer</p> <ul style="list-style-type: none"> allows users to create documents that are tailored (or <i>customized</i>) for a specific customer's needs manages the tailored wording so that it continues to be applied to the document as benefits change and renewals occur 	None
<p>SDK</p> <ul style="list-style-type: none"> the Software Development Kit (or Toolkit) allows users to integrate IStream Document Manager with custom applications using application program interfaces (APIs) if selected, the required IStream Document Manager components, SDK samples and documentation are automatically installed 	None
<p>Core</p> <ul style="list-style-type: none"> provides the basic IStream Document Manager functionality including the support of InfoSources and document generation 	None

IStream Document Manager and Livelink Integration

The DMS portion of IStream Document Manager allows users to manage documents and versions and helps users establish workflow processes.

You do not install the DMS portion of IStream Document Manager directly. Instead, you install the following components, one on top of the other, in this order:

- **Livelink** – a third-party base DMS from OpenText
- **IStream Document Manager Module Base** – integrates the IStream Document Manager Modules with Livelink
- **IStream Document Manager Modules** – provide the actual IStream Document Manager functionality



Note: All references in this document to *Livelink* refer to the DMS in *IStream Document Manager*.

IStream Publisher

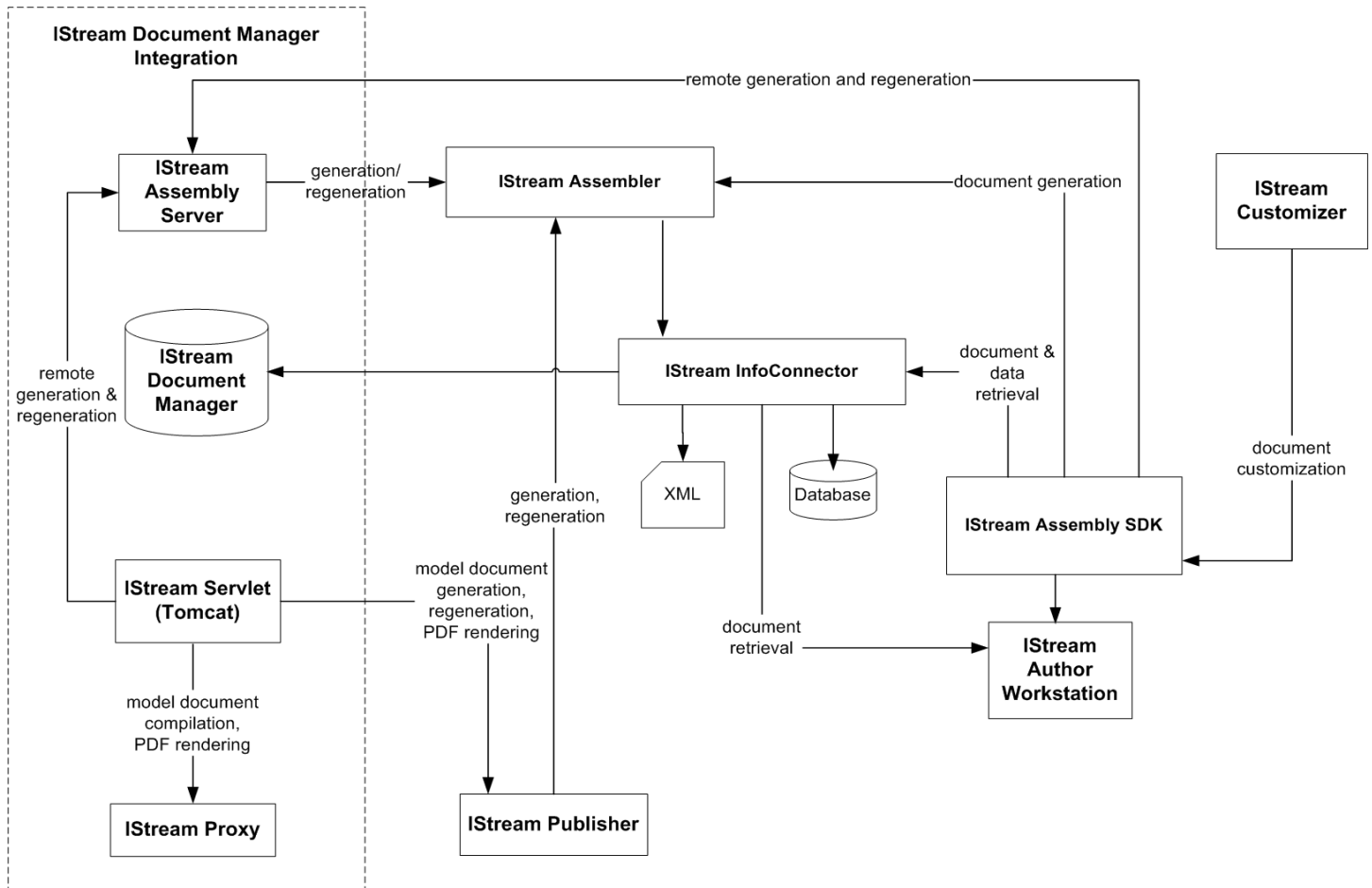
In addition to these features, IStream Document Manager can also work with IStream Publisher. IStream Publisher is an application where pre-defined or customized services are used to retrieve, assemble, render, deliver and store documents.

For more information about IStream Publisher, see the IStream Publisher documentation.

Overview Diagram of Features

The following diagram gives a high-level overview of IStream Document Manager's features.

The larger, bolded items represent features that can be assigned to a workstation or server during installation. These correspond to the features in the *IStream Document Manager Features* on page 10. The smaller, non-bolded items represent features that may be installed as part of the system's role.



Note: This diagram does *not* indicate the specific applications you should install on each system. Some systems may be able to contain more than one feature. For further information, please contact *Customer Support*.

Microsoft Word 2007 Document Format

By default, Microsoft Word 2007 will save to its new document format (*.docx, *.docm, *.dotm). This new Word format is **not** supported in any IStream Document Manager application. Therefore, you need to complete one of the following steps:

- under **Word Options**, change the default format that files are saved in to **Word 97-2003**
- change the file format to **Word 97-2003** when saving a specific file

IStream Document Manager Documentation

IStream Document Manager includes the following documents and online help files. If you need a copy of any of these documents, please contact your system or product administrator.

General Documentation

- The *IStream Document Manager Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.
- The *IStream Document Manager ReadMe* file describes the contents of the installation CD.
- The *IStream Document Manager Glossary* contains definitions of commonly used IStream terms.

User Guides and Online Help

- The *IStream Assembler Online Help* describes how to generate documents from sections and model documents.
- The *IStream Assembler Add-in for Microsoft Word Online Help* describes how to perform certain IStream Assembler functions directly within Microsoft Word.
- The *IStream Author User Guide* describes how to create, edit, and test sections or model documents.
- The *IStream Author Add-in for Microsoft Word Online Help* describes how to perform certain IStream Author functions directly within Microsoft Word.
- The *IStream Customizer User Guide* describes how to modify the content of generated documents so that the changes will be applied during subsequent document generations.
- The *IStream Document Manager DMS Guide for IStream and Model Documents* describes how to edit and work with IStream sections and model documents using the DMS user interface.
- The *DMS Plug-in for Author Online Help* describes how to access DMS functionality in IStream Author.
- The *IStream InfoConnector Online Help* describes how to set up and configure IStream InfoSources.

Advanced Guides

- The *IStream Document Manager Guide for New Installations* explains how to complete a new installation of IStream Document Manager. It includes system requirements and detailed installation and configuration information.

- The *IStream Document Manager Message Reference Guide* contains lists of error, log and SDK messages from the various IStream components. It is for technical users who need additional information about the various IStream messages they receive.
- The *IStream Document Manager Technical Guide* is for system administrators and technical support staff who configure IStream Document Manager and set up links between it and their company's database. This guide is also for those who set up and maintain security groups and operators in the system, and who install, optimize, maintain and troubleshoot IStream Document Manager. It also describes installing and configuring IStream XML InfoSources for interactive and batch generation.
- If you have purchased the IStream Toolkit, the *IStream Assembler* and *Extensibility Toolkit Guides* are installed onto your system. (You can view these guides from the **Start > All Programs > IStream** menu.)

These guides contain detailed descriptions of the components in the IStream Toolkit, or SDK. They are for technical users who need to integrate IStream components with their own or other third party applications.

In addition to the toolkit guides, the *IStream Toolkit SDK Samples Guide* gives an overview of the toolkit samples. The samples are working examples that can help you develop custom applications.

For more information about the toolkit, see the *IStream Document Manager Toolkit ReadMe*.

Contacting Oracle for Help

Customer Support hours are 8:00 AM to 8:00 PM. (Eastern Time), Monday through Friday. Outside of these hours, send us a detailed e-mail message and you will be contacted during regular business hours. Please provide detailed information, as described in the *Support Checklist*.

Contact Information

Mail: Oracle
145 King Street West, Suite 500
Toronto, ON M5H 1J8

Phone: 1-877-467-9727

Fax: 1-416-642-0315

Email: markhamsupport-skywire_ww@oracle.com

Web: www.oracle.com

Support Checklist

When contacting Customer Support, please provide the following information:

- Your name, company name, email address, and phone number
- The exact version number, including any service pack numbers of
 - all your Oracle products
 - your network software
 - your database, including the type
 - Microsoft Windows and Microsoft Word
 - Microsoft .NET Framework
 - your DMS (Document Management System)
- Error messages and the circumstances of their occurrence
- A full description of the problem:
 - What happened? What were the sequence of events that preceded the problem?
 - In which screen or window did the problem occur?
 - Was the problem the result of pressing a key?
 - Did the screen freeze? What functions of the software are affected?
 - How many people are affected?

Chapter 2

Pre-Installation Procedures

This chapter describes the various procedures that you need to complete before actually installing IStream Document Manager.

Stage 1: Check the System Requirements

Ensure that your system meets the software requirements described here.

Assembly Server Requirements

The Assembly Server is used for remote generation of documents. Depending on its use, it should be set up on a separate computer.

Before installing the Assembly Server, ensure it meets the following requirements:

Note: For specific versions and service pack numbers, please refer to the *IStream Document Manager Release Notes*.

Operating system	Microsoft Windows Server
ODBC drivers	ODBC drivers for databases used by InfoSources during generation
Word processor	<p>Microsoft Word must be installed on the Assembly Server computer if Assembler will be used to create PDF files.</p> <p>Proxy is usually installed on the same computer as Assembly Server. If Proxy is installed on a different computer, Microsoft Word must also be installed on the separate Proxy computer.</p>
Java Development Kit	<p>Sun Microsystems Java Development Kit (JDK).</p> <p>The IStream Proxy component requires the Sun Microsystems JDK. Refer to <i>Stage 3: Install the Sun JDK</i> on page 24 for instructions and the supported version.</p>
Livelink Application Programming Interface (LAPI) Version 9.7.0 for Windows	<p>Open Text Livelink Application Programming Interface (LAPI) Version 9.7.0 for Windows</p> <p>The IStreamDM InfoSource requires LAPI to access to the IStream Document Manager server.</p>

Author Workstation Requirements

The Author Workstation is the computer used to create and edit model documents, as well as generate and test these documents. Before installing the Author Workstation, please ensure it meets the following software and other requirements:

- Microsoft Windows
- Microsoft .NET Framework 2.0 (included on the installation package)
- Internet Explorer

- Microsoft Word
- Livelink Application Programming Interface (LAPI) Version 9.7.0 for Windows
- Monitor settings: 800 x 600, 256 colors

For Microsoft Word 2007 only: Visual Studio 2005 Tools for Office – Second Edition Runtime (included on the installation package)

For Microsoft Word 2007 under Microsoft Windows XP: ensure you have enabled .NET Programmability as follows:

Select **Control Panel > Add/Remove Programs > Microsoft Office 2007 > Add or Remove Features > Installation Options > Microsoft Office Word > .NET Programmability Support**.

For the specific version and service pack numbers, please refer to the *IStream Document Manager Release Notes*.

Also ensure that:

- you have TCP/IP connectivity to connect to the Assembly Server
- you have only *one* registered version of Microsoft Word on the Author Workstation; if you have more than one, or if Word is in the registry more than once, you may encounter problems

IStream Document Manager Server

The IStream Document Manager server runs the Document Management System (DMS) server and Web server. You can run other components on this computer as well. Before installing IStream Document Manager Server, ensure that you meet the following requirements:

DMS Software Requirements

Operating System	Microsoft Windows
Database Server	Microsoft SQL or Oracle (Note: The database server should be installed on a separate computer)
Web Server	IIS
Sun Microsystems JDK	The Sun Microsystems JDK (Java Development Kit) must be installed and configured before installing IStream Document Manager. For more information, refer to the installation notes for the Sun Microsystems Java Development Kit.
FTP Site	An FTP server must be set up and running on your IStream DMS web server. Refer to your web server software documentation for instructions on how to set up an FTP site.
Browser	Internet Explorer
Intranet DMS Server	Livelink DMS server
IStream Module for the Livelink installation package	Contains Livelink modules required to provide IStream functionality on the Livelink DMS server

Other Server Considerations

- If the database server is on a separate computer, you need the database client software for that particular server installed on the IStream Document Manager Server.
- The client should have the same service pack as the database server.

Stage 2: Obtain the Server Setup Information

Ensure that you have the following information before trying to deploy IStream Document Manager. This information may also be required if you need to contact us for help.

Operating System

- operating system name and version
- service pack number

Database Server

- Oracle or Microsoft SQL version
- database server name
- service pack number
- administrator login and password

Web Server

- web server and version
- administrator login, password and port

Browser Info

- browser name and version

IStream Server Info

- server name (for example, IStream)
- port number (for example, 2099)
- IP address
- Microsoft SQL database name or Oracle tablespace owner
- service Name (CGI - alias name)

Stage 3: Install the Sun JDK

Before installing IStream Document Manager, ensure that the supported Sun Microsystems Java Development Kit (JDK) version has been installed on the computers where the following IStream components are to be installed:

- IStream Servlet
- IStream Proxy: a subcomponent of Assembly Server

Method: Install the Sun JDK

1. Go to the following URL:
`http://java.sun.com/products/archive/j2se/1.4.2_07/index.html`
2. Download and install the **Offline Installation** file of Windows version of the JDK: `j2sdk-1_4_2_07-windows-i586-p.exe`
3. From the **Control Panel**, double click **System**.
4. In the System Properties dialog, click the **Advanced** tab.
5. Click **Environment Variables**.
6. Create the following new **System Variables**:

Variable name	Variable value
JAVA_HOME	the JDK installation path, usually C:\J2sdk1.4.2_07
CLASSPATH	%JAVA_HOME%\lib\tools.jar

7. Edit the `PATH` **System Variable** adding `%JAVA_HOME%\bin;` to the very beginning of the `PATH` variable. This ensures that IStream Document Manager will use the correct JDK version.
8. Click **OK** to save your changes.

Note: You should also install any required Sun JDK DST updates.

Stage 4: Plan for IStream Promoter

IStream Promoter is a tool that helps automate the promotion of IStream documents and their related sections, and Microsoft Word templates, from one environment (such as development, testing or production) into another.

If you will be using IStream Promoter, please ensure that:

- the user who will be using IStream Promoter has the proper permissions on IStream and the file system
- IStream Author and IStream InfoConnector are installed
- all remote drives are accessible and can be written to
- the account that Promoter is running for has the necessary permissions to write to a destination location for the promoted files
- all DMS servers are running when Promoter is started
- all necessary InfoSources have been set up: Promoter will select from a list of existing InfoSources when it launches. InfoSources that you create *after* Promoter starts will not appear in Promoter - you would have to restart Promoter to display any new InfoSources

Chapter 3

Installing IStream Document Manager

This chapter describes how to perform a new installation of IStream Document Manager.

Please note:

- For IStream Publisher installation instructions, see the *IStream Publisher* installation guides.
- IStream Document Manager is based on Livelink. Therefore, all references to Livelink relate to IStream Document Manager.

Stage 1: Install Livelink

Step A: Install Livelink

IStream Document Manager requires Livelink. For detailed installation instructions, refer to the installation documentation included with Livelink.

1. Install Livelink.

Note: It is assumed that you will install Livelink under the `C:\OPENTEXT` folder.

2. Map the URL prefixes. For details, see the *Livelink First-Time Installation Guide*.

Step B: Instal the Livelink Patches

1. Stop the DMS LiveLink server if it is running.
2. Create a `C:\OPENTEXT\patch\` folder if does not already exist.
3. Install the monthly patch for Livelink. The latest supported patch is from October 2008.
4. Copy `\patch\pat99001.txt` on the IStream Module for the Livelink installation package to:
`C:\OPENTEXT\patch\`.

Step C: Install the Livelink Filter Pack (Optional)

To use the **View as Web Page** function, you will need to install the Livelink filter pack. Obtain the appropriate Livelink filter pack for Livelink 9.7.0 and install it.

Stage 2: Install the IStream Modules and Servlet

Step A: Run Setup

1. On the Livelink Server, stop the Livelink Server service.
2. Run `setup.exe` from the IStream Document Manager folder on the IStream Document Manager installation package. The **InstallShield Wizard** screen is briefly displayed.
3. On the **Installation Location** screen, specify where IStream Document Manager will be installed.
4. To accept the default folder, click **Next**. To select a different folder, click **Browse**, then select the folder to install IStream Document Manager into.
5. On the **Selection Features** screen, select **IStream Document Manager Integration** from the feature selection panel. The **IStream Document Manager Modules Base** and **IStream Document Manager Servlet** features are automatically selected.

Note: The **IStream Document Manager Servlet** must be installed on the same server as IStream Document Manager.

6. If you have more than one Livelink installation on the system, the **Select IStreamDM Server** screen is displayed. Select the Livelink instance you want to use with IStream Document Manager.
7. On the **Ready to Install** screen, click **Install** to begin the installation, or click **Back** to review or change any of your installation settings.

The **Setup Status** screen is displayed. A status bar shows the progress of the installation.

When the installation is finished, the **InstallShield Wizard Complete** screen is displayed.

8. Click **Finish** to exit the Wizard.
9. If you are prompted to restart your computer, click **Yes**.
10. Start the Livelink Server service.

Step B: Integrate IStream Document Manager Module with Livelink

1. Ensure the following services are started:
 - Livelink Admin
 - Livelink Server
2. Copy `\calligo_6_2_0\` and its subfolders from the IStream Module for Livelink installation package to:
`c:\opentext\staging`
3. Open the **Livelink Administration** page.
`http://server_name/service_name/livelink.exe?func=admin.index`
4. Enter the Administrator password, then login.
5. Scroll down to the **Module Administration** section. In this section, click **Install Modules**.
6. Scroll to the **Installable Modules** and select the **Calligo 6.2** check box.
7. Click **Install**.
8. Enter the **Admin User Password** and click **Log-in**.
9. Wait until you see a message appears stating that you need to restart the Livelink server before continuing.
10. Open the **Services** dialog from the **Control Panel**.
11. Stop the Livelink Server service, and then restart it.
12. In the **Livelink Administration** page, click **Continue**.
The IStream Document Manager module is included in the **Installed Modules** list.
13. From the **Livelink Administration** page, select **Configure IStream DM Parameters**.
14. Select the **IStream DM Explorer** check box, then click **Update**.
15. Restart the Livelink Server service.
16. Click **Continue**.
You are returned to the **LiveLink Administration** page. Close your web browser.

Step C: Check Opentext.ini Settings

Security Settings

Ensure that the following lines are in the [Security] section of `C:\OPENTEXT\config\opentext.ini`, with these settings:

```
cookieUserPWD=true
```

```
cookieClientIPAddress=8
```

Warning: Do not use the Livelink administration page to change the `cookieClient` `IPAddress`.

Step D: Customize the Livelink Database

Complete this step to customize the required tables in the Livelink database.

In this procedure you run an application (`tnginfo.install`) that updates certain database tables.

1. Backup your Livelink database.
2. Log in to the DMS.
3. In your web browser, go to:

```
http://server_name/service_name/livelink.exe?  
func=tnginfo.install
```
4. Login to IStream Document Manager if necessary using the Admin account.
The `tnginfo.install` application runs.
5. **Important:** When prompted, restart the Livelink Server service.
6. Click **Update Database Records**.
The system updates certain IStream Document Manager-specific document database records.
7. The final screen lists the items that have been updated.
8. When the update has completed, click **OK**, then close the web browser.
9. **Important:** Stop and restart the Livelink Server service. This is a *critical* step.

Step E: Configure the IStream Servlet

The IStream Servlet provides the connection between IStream Document Manager and the Assembly Server. Complete the following procedure to configure the IStream Servlet on a supported Windows system.

Method: Configure the IStream Servlet

1. Start the Apache Tomcat service.
2. Wait until the following `calligo` subfolder is created:

```
install_folder\3rd Party Components\tomcat\webapps\  
calligo\
```

Note: This can take up to two minutes
3. Stop the Apache Tomcat service.
4. If you are using IStream Publisher:
 - a. Open the following file:

`install_folder\3rd Party Components\tomcat\webapps\calligo\conf\CalligoServlet.configure`

- b. Set the mode parameter to edelivery.
- c. Save and close the configuration file.
- d. Copy and replace the following jar files from any MQ client installation of your WebSphere MQ Server:

- `connector.jar`
- `com.ibm.mq.jar`
- `com.ibm.mqjms.jar`
- `dhbcore.jar`
- `jms.jar`
- `jta.jar`

to:

`\install_folder\3rd Party Components\tomcat\webapps\calligo\WEB-INF\lib\`

Note:

- You need to ensure that the MQ client version matches the MQ server version.
- The default MQ client installation folder is:

`C:\Program Files\IBM\WebSphere MQ\Java\lib`

This is an important step because these .jar files are no longer bundled with the installation package.

- e. To configure IStream Proxy to work with IStream Servlet:

Copy `\lib\lapi.jar` from any LAPI Version 9.7.0 client installation to:

`\install_folder\Components\WEB-INF\lib`

The default LAPI client installation folder is:

`C:\Program Files\Open Text\LAPI`

- 5. In the same folder as in the previous step, open `InteractiveServlet.configure`
- 6. Configure the parameters in this file: for details, see *InteractiveServlet.configure* on page 74 of the *IStream Document Manager Technical Guide*.
- 7. Save and close the configuration file.
In the same folder as in the previous step, open `NonInteractiveServlet.configure`
- 8. Locate the `CalligoRMI.server.hostname` parameter and set it to the name of the server on which the IStream Proxy server is to run.

9. If you are using IStream Publisher, you also need to configure the other parameters in this file: for details, see *NonInteractiveServlet.configure* on page 76 of the *IStream Document Manager Technical Guide*.
 10. Save and close the configuration file.
 11. Set the **Startup** type for the **Apache Tomcat** service to **Automatic** in the **Services Control Panel**.
 12. Start the Apache Tomcat service.
- Configuration of the Servlet is complete.

Step F: Change the Port Number

If you:

- install IStream Server and IStream Assembler on an Oracle system where Tomcat is not integrated with IIS, then
- configure the Assembly Server and try to generate from IStream Document Manager

this may create a port conflict.

To resolve this, you need to change the port number from 8080 to 24000 in two locations:

1. In the `C:\OPENTEXT\config\opentext.ini` file, change the following line: `Calligo_locServlet=:8080/calligo`
to:
`Calligo_locServlet=:24000/calligo`
2. Change the port in `install_folder\3rd Party Components\tomcat\conf\server.xml` from 8080 to 24000.
3. Restart the Tomcat and Livelink Server services.
4. Restart the IStream Proxy server.

Step G: Hide Specific Livelink Modules

IStream Document Manager supports only certain Livelink functions. Specifically, the **My Home** and **Java** modules are not supported. We therefore recommend to hide these modules:

1. From the IStream Document Manager Administration page, click **Administer Java Module**.
 2. Clear the **Configured** check box beside **Application Server**.
 3. Submit the page then restart Livelink Server when prompted.
- The **My Home** links are now hidden from the Enterprise Workspace.



Step H: Configure Searchable Types

Complete the following procedure to add the required IStream document types to the searchable file types




1. From the **Livelihood Administration** page, in the **Search Administration** section, click **Configure Search Options**.
2. In the **Full Text** section, in the **Options** section, click **Configure** next to the **Searchable Types** component.

Component	Show By Default	Component Defaults
Search Mode	<input type="checkbox"/>	All Words
Modifier	<input type="checkbox"/>	Related To
Searchable Types	<input checked="" type="checkbox"/>	Configure

The **Searchable Types** screen opens.

3. Scroll down the page until you see the green button  that is just below the **Available** box in the **Menu Items** section.
4. Click the green button .
5. In the **Edit** section, enter the following values:
 - **Label:** IStream Document
 - **Image:** /calligo/calligodocnewdoc.gif
 - **Indent:** 1
 - **Query:**

OTSubType:7771 and (OTFilterMIMETYPE: qlrange "mword|pdf")

6. Click the green button  again.
The menu item is added to the **Available** list. You can now enter the second type.
7. In the **Edit** section, enter the following values:
 - **Label:** IStream Section
 - **Image:** /calligo/calligotemplatenewdoc.gif
 - **Indent:** 1
 - **Query:** OTSubType:7772 and OTFilterMIMETYPE:mword
8. Click the yellow right arrow  to move the newly created items from the **Available** list to the **Displayed** list.
9. Use the yellow up and down buttons  that are to the right of the **Displayed** list to move the new items.

- Click **Submit** to save your changes.

Step I: Configure DMS for Zip & Download and Print Features

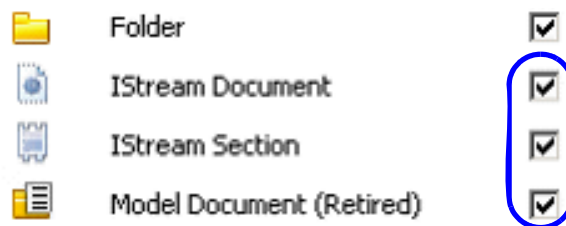
Complete the following procedures to enable the **Zip & Download** and **Print** features in the DMS for IStream documents.

Part 1: Enable Features in the Livelink Administration Page

- From the **Livelink Administration** page, scroll to the **Multi-File Output Administration** section.
- Complete one or both of the following steps, depending on which features you want to enable:

To enable the Zip & Download feature:

- Click **Download Settings**.
- Select the check boxes for all IStream document types:



- Click **Submit**.
- Restart LiveLink service.

To enable the Print feature:

- Complete the previous steps, but in step 2 a., select **Print Settings** instead of **Download Settings**.

Part 2: Apply the Open Text Patch File

- Stop the DMS LiveLink server if it is running.
- Create a `C:\OPENTEXT\patch\` folder if does not already exist.
- Copy `\patch\pat99005.txt` on the IStream Module for Livelink installation package to:

`C:\OPENTEXT\patch\`

- Restart the LiveLink service.

Step J: Configure Security Permissions (Optional)

You can configure the Assembly Server service as either a **Local System** account, or as a specific account.

If you will be using Assembly Server in a Directory Services environment, you cannot run it under a **Local System** account. You must run it under a different user account as described in *Method: Create a User Account for Livelink Authentication* on page 52. This ensures that the Directory Services authentication will succeed.

If you can connect to the Assembly Server and generate documents from it using a **Local System** account, but cannot connect and generate using your specified account, you may need to configure the COM security permissions for the user account you have set up.

Method: Configure security permissions (Windows 2003 Server)

1. Select **Start > Run** and enter `dcomcnfg.exe`.
The **Component Services** window opens.
2. Navigate to **Component Services > Computer > My Computer > DCOM Config > iaegensm**
3. Right-click **iaegensm** and choose **Properties**.
The **iaegensm** properties dialog opens.
4. Click the **Security** tab.
5. Under **Launch and Activation Permissions**, click **Customize, Edit**, and add the user account you created for Livelink Authentication.
6. Under **Access Permissions**, click **Customize, Edit**, and add the user account you created for Livelink Authentication.

Step K: Integrate Tomcat with IIS (Optional)

You should integrate the Microsoft Internet Information Server (IIS) and Java Servlet Engine (Tomcat) on the IStream Server in order to complete any of the following tasks:

- configure a firewall for the web server
- use SSL to secure your web server
- load balance the IStream server

Method: Integrate Tomcat with IIS

1. Switch to run WWW service in IIS 5 isolation mode:
 - a. Start the IIS management console.
 - b. Choose the **Web Sites** container.
 - c. Right-click the container and select **Properties**, then select the **Service** tab.
 - d. Select **Run WWW service in IIS 5.0 isolation mode**.

- e. Click **Apply**.
2. Using the **Internet Information Services Manager**, add a new virtual directory to your IIS web site:
 - a. Right-click the **Default Web Site** item
 - b. Selecting **New >Virtual Directory**.
 - c. The **Virtual Directory Creation Wizard** starts.
 - d. In the **Alias** field, enter `calligo_servlet`.
 - e. In the **Directory** field, enter the physical path of this virtual directory. This is the directory that contains the file `isapi_redirector2.dll`:
`install_folder\3rd Party Components\tomcat\bin\i386`
 - f. Assign the virtual directory **Execute** access permission.
3. Using the IIS management console, add `isapi_redirector2.dll` as a filter in your IIS web site:
 - a. Right-click the **Default Web Site** item and select **Properties**.
 - b. In the **Default Web Site Properties** dialog box, select the **ISAPI Filters** tab.
 - c. Click **Add** to add a new filter with the following information:
 - a name of `calligo_servlet`
 - the filter of the executable must be:
`install_folder\3rd Party Components\tomcat\bin\i386\isapi_redirector2.dll`
4. Update the following entry in `C:\OPENTEXT\config\opentext.ini`
`Calligo_locServlet=/calligo`
5. Restart the Livelink Server service.
6. Back up the Tomcat server configuration file:
`install_folder\3rd Party Components\tomcat\conf\server.xml`
7. In this same folder, delete `server.xml`, then rename `server_int_iis.xml` to `server.xml`.
8. Restart the Tomcat service.
9. Restart IIS by stopping and starting the IIS Admin service.
10. Open the **Internet Information Services Manager**.
11. In the **Default Website Properties** dialog box of the IIS service, select the **ISAPI Filters** tab.
12. Confirm that a green arrow appears in the **Status** column of the `calligo_servlet` filter.

If this arrow does not appear, you can still continue this procedure, but need to check for this arrow again after the final step, when you test the integration.

13. From the IIS management console, select **Web Service Extensions**.
14. Click **Add a New Web Service Extension**.
15. Enter an extension name, for example, Tomcat.
16. Add the following file as a required file:

```
install_folder\3rd Party Components\tomcat\  
bin\i386\isapi_redirector2.dll
```
17. Choose to allow the required file.
18. To test the integration, in your web browser, log on to:

```
http://localhost/calligo/test.do
```

Note: If SSL is enabled, enter `https` in the web address, instead of `http`.

A message like this should display:

```
Assembly Server Servlet Test succeeded on Wed Aug 11  
15:43:53 EST 2008
```

19. If the green arrow did not appear in the **Status** column of the `calligo_servlet` filter (as described in steps 10 to 12), then repeat steps 10 to 12, and then check the status again.

Start the **ITLogServer** service if it is not already started.

Stage 3: Install Assembly Server

Step A: Run Setup

1. Ensure that the Sun JDK is installed. For instructions, see *Stage 3: Install the Sun JDK* on page 24.
2. Run the IStream Document Manager setup program.
3. Select the **IStream Assembly Server** feature. The **IStream Assembly Service** and **Proxy** features will be automatically selected.
4. Select the date format you want to use for the IStream Document Manager CTOD function. (For more information, see *CTOD* on page 97 of the *IStream Author User Guide*.)
 - MM/DD/YYYY (month, day, year)
 - DD/MM/YYYY (day, month, year)

Note:

- The date settings you choose will overwrite the previous date settings.
 - You should use a consistent date format in all deployments.
5. If you are using an IStreamDM InfoSource to access documents in the DMS, enter the following information:
 - **Server** – the name of the IStream Document Manager database server in the field.
 - **Connection -**
 - **for SQL databases:** enter the name of the database where the Livelink database tables were installed
 - **for Oracle databases:** enter the name of the Oracle user that owns the database tables

You can change this information later by editing the IStreamDM InfoSource using the IStream InfoConnector.

6. If you are asked if you want generated IStream documents with tags to be *QuickGen ready*, you should select **Yes**. If you select **No**, documents will have to be regenerated in IStream Customizer before you can use the QuickGen feature.

For more information about the QuickGen feature, see *QuickGen* on page 73 of the *IStream Customizer User Guide*.

7. Complete the installation wizard.
8. Copy all files in `\bin` from any LAPI Version 9.7.0 client installation to:
`\install folder\Components\`
9. Start the following services:
 - IStream Assembly Server
 - IStreamDM Proxy

- ITLogServer

Important: Please note the following important information if you are generating PDFs remotely:

- After installing Assembly Server on a computer with Microsoft Word, remote PDF generation will fail unless Microsoft Word is started and the license agreement is accepted.
- If IStream Proxy is installed with Microsoft Word 2003 SP2, and you are using remote PDF generation, you will need to change the IStream Proxy service to run under an Administrator account. Note that you will have to change the password that the IStream Proxy service uses if the Administrator's password is changed.

Step B: Configure IStream Document Manager for the Assembly Server

Note: Complete this step only if you are using IStream Document Manager with Assembly Server.

This following procedure describes how to configure IStream Document Manager to work with the Assembly Server. You need to create an **Environment** to store a single Assembly Server Environment object. This object indicates to Tomcat where the Assembly Server is located, its port and proxy information.

1. Ensure the following services are started:
 - IStream Assembly Server
 - Livelink Admin
 - Livelink Server
2. In your browser, go to `http://server_name/service_name/livelink.exe`
3. Log on as an administrator.
4. In the **Enterprise Workspace**, click the **Add Item** drop-down box and select **Environment**.
5. In the **Add:Environment** page, enter a descriptive name, for example `Assembly Server Environment`, then click **Add**.
6. In the **Enterprise Workspace**, click your newly created environment link. The environment page opens.
7. Click the **Add Item** drop-down box and select **Assembly Server**.
8. In the **Add:Assembly Server** page, enter a descriptive name, for example `DefaultServer`.
9. Click **Add**.
In the **Assembly Server Environment**, the new item is listed.
10. Click the **Functions** button, then select **Properties** and then select **Specific**.

11. In the **Specific info** page, enter the following information:
 - **Host Address** - the server running the Assembly Server
 - **Port number** - the port of the Assembly Server - this is usually 4300
 - **Enabled** - When selected, the Assembly Server is enabled. Ensure that only one Assembly Server is enabled. For any others, this field must be cleared.
 - **Proxy User** and **Proxy Password** - These fields are used when retrieving data from a database during document generation.
12. Click **Update**.
13. Restart the Tomcat service.

The Assembly Server Service is configured.

Step C: Check the Printer Ports

Ensure that all printers each have their own unique port. The IStream PDF converter might use the same port as another printer. If so, assign it to another port.

Stage 4: Install the Author Workstation

Step A: Run Setup

1. Run the setup application on the client workstation.
2. Select the **Workstation** feature. Other features will be automatically selected.
3. Optionally select the **Customizer** and **SDK** features.
4. Select the date format you want to use for the IStream Document Manager CTOD function. (For more information, see *CTOD* on page 97 of the *IStream Author User Guide*.)
 - MM/DD/YYYY (month, day, year)
 - DD/MM/YYYY (day, month, year)

Note:

- The date settings you choose will overwrite the previous date settings.
 - You should use a consistent date format in all deployments.
5. If you are using an IStreamDM InfoSource, enter the **Server** and **Connection** names. (You can change this information later by editing the IStreamDM InfoSource using IStream InfoConnector.)
 6. If you are asked if you want generated IStream documents with tags to be *QuickGen ready*, you should select **Yes**. If you select **No**, documents will have to be regenerated in IStream Customizer before you can use the QuickGen feature.

For more information about the QuickGen feature, see *QuickGen* on page 73 of the *IStream Customizer User Guide*.

7. Complete the installation wizard.
8. Copy all files in `\bin` from any LAPI Version 9.7.0 client installation to:
`\install folder\Components\`

Step B: Configure Author Custom Settings (Optional)

An administrator can set up all IStream Author workstations to use the same default customized settings. These settings are:

- **PDF bookmark and hyperlinks**
- **IStream Visualizer** (charts and graphs)

Method: Apply the same customized settings to all IStream Author workstations

Warning: This procedure involves editing the Windows registry editor and is therefore for system administrators only. We strongly recommend that you back up your registry before proceeding.

1. On the IStream Author system, enter the default PDF and IStream Visualizer settings if you have not already done so. For details, see the *IStream Document Manager Author User Guide*.
2. On the IStream Author system with the default PDF and IStream Visualizer settings, export the following registry keys:

```
HKEY_CURRENT_USER\Software\Whitehill  
Technologies\authorm\1.0\style_profiles  
  
HKEY_CURRENT_USER\Software\Whitehill  
Technologies\IStream Components\GraphsAndCharts
```
3. On each of the other IStream Author workstations, import these registry keys.
4. In the registry editor, verify that the settings have been imported.

Step C: Delete Custom Default Visualizer Settings (optional)

If IStream Author is reinstalled on the same computer, any changes that were made to the IStream Visualizer (charts and graphs) settings will be retained.

To discard the customized settings and replace them with the default settings, you must delete the following registry key:

```
HKEY_CURRENT_USER\Software\Whitehill Technologies\  
Components\GraphsAndCharts
```

Step D: Check the Printer Ports

Ensure that all printers each have their own unique port. The IStream PDF converter might use the same port as another printer. If so, assign it to another port.

Step E: Exclude Folders from Anti-Virus Scans

To avoid conflicts with IStream Document Manager, configure your anti-virus application so that it will not scan the IStream Document Manager installation and DMS folders and subfolders.

Stage 5: Configure InfoSources

1. Make a list of your data sources and locations.
2. After installing Author Workstation and Assembly Server, launch InfoConnector.
3. The first time InfoConnector launches, it uses the installed `local.idb`. All information about the InfoSource's configuration is stored in this file, normally located in:
`install_folder\Components\Shared`
4. Assembly Server requires InfoSources for certain generation processes. The IStream Document Manager installation process creates and sets up the following required InfoSources:

Note: ODBC DSNs must be System DSNs, not User DSNs.

Name	Type	Description	Configuration Details
system (IStream InfoSource)	ODBC	IStream Document Manager system tables, System InfoSource	Data Source: System Application: None
IStreamDM (IStream InfoSource)	IStreamDM	the root of IStreamDM; a pre-installed InfoSource	The Server Name , Port and Location should be set according to the installation of DMS server. Do not change the Location because this will cause web generation from the DMS to fail. Note: This InfoSource is available only if you have an IStream DMS license. Otherwise, the IStream File System (listed next) will be used.
IStreamFS	File System	the default, pre-installed IStream Document Manager file system InfoSource	Location: <code>[IStream Document Manager install folder]\IStreamDocuments</code>
DynaFS	(Internal use only)	used by IStream Document Manager for internal purposes	

5. Configure any additional InfoSources you plan to use for document generation.

Important: You cannot use mapped drives for InfoSources and model documents. Use UNC paths instead.

6. If you change the InfoSources, you will be prompted to restart the Assembly Server service.

For more information, refer to the *InfoConnector Online Help*.

Stage 6: Install the Required Communicator & Publisher Patches

If you have any of the following products, you will need to install their respective patches:

- IStream Communicator
- IStream Publisher

Please contact customer support to get the latest patches for these products.

Please also see the *IStream Document Manager Release Notes* for the currently supported versions of these products.

Stage 7: Install Livelink Explorer

Note: Complete this stage only if you have purchased the IStream Document Manager Plug-Ins.

Refer to the Livelink documentation installation guides for the Livelink Explorer installation requirements.

To use Livelink Explorer, you need to install it on the Livelink DMS. This requires certain steps in addition to the standard Livelink Explorer installation procedure:

Method: Install Livelink Explorer on IStream Document Manager

1. Install Livelink Explorer 4.8.1 from OpenText. For details, see the Livelink Installation documentation.
2. When the installation is complete, copy the contents of the following folder from the IStream Module for Livelink installation package:

\webexp_4_8_1\

to:

Livelink_folder\staging\webexp_4_8_1

Important: Ensure that you copy the *contents* of this folder (webexp_4_8_1), and not the actual folder itself.

3. Copy pat99002.txt from the installation package to
C:\OPENTEXT\patch\.
4. Open the **Livelink Administration** page:
`http://server_name/service_name/livelink.exe?func=admin.index`
5. Install the **Livelink Explorer Professional, Standard and Download** modules from the available modules list. Refer to the *Livelink First-Time Installation Guide* for details.
6. From the **Administration > Configure IStream DM Parameters** section, ensure that the **IStream DM Explorer** check box is selected. (For information about these parameters, see *Configuring IStream Document Manager Parameters* on page 46 of the *IStream Document Manager Technical Guide*.)
7. Restart Livelink.

Note: You should perform the remaining steps on the client's system if you want Livelink Explorer client installed on this system. If you complete these steps on the IStream Document Manager system, Livelink Explorer will be installed on the Livelink DMS server.

8. In Internet Explorer, from the **Enterprise** menu, select **Livelink Explorer**.

9. Select **Yes** when prompted to download and install the **Livelink Explorer client**.

The Livelink Explorer client installs.

10. In the **Livelink Explorer Professional - Custom Setup** dialog box, expand the **Windows Explorer Integration** feature.

The **Microsoft Word Integration** is displayed just below the **Windows Explorer Integration** feature.

11. Click **Microsoft Word Integration**, then select **This feature will not be available**.

A red 'X' should now appear next to the **Microsoft Word Integration** feature, indicating it is no longer selected.

Click **Next** to continue and complete the Livelink installation.

12. Double-click the **Livelink Explorer** shortcut on your desktop.

You will be prompted to configure the Explorer connection with the DMS. Configure the connection.

13. You will be prompted to configure your Livelink Explorer client to connect to your DMS.

Enter the **machine name** and **URL** for the system on which the DMS with the installed Explorer module is running.

Stage 8: Install Livelink Directory Services

Note: Complete this stage only if you have purchased the *IStream Document Manager Plug-Ins*.

Not all modules and platforms supported by Livelink Directory Services are supported in IStream Document Manager.

If you will be using Livelink Directory Services in your DMS, you will need IIS running on Windows.

Windows 2003 Server is the supported platform for IStream Document Manager. Because Windows 2003 uses NTLM Authentication, LDAP Authentication is not available for IStream Document Manager.

Step A: Install Livelink Directory Services

The following procedure gives an overview of how to install Livelink Directory Services. For more information, see the *Livelink Directory Services Installation and Administration Guide*.

1. Open the **Services** control panel and stop all Livelink services.
2. Follow the prompts to install Livelink Directory Services
LLDIRSRV_234_Win.exe.
3. When the Directory Services installation is complete, open the **Services** control panel and restart all Livelink services.
4. In the **Livelink Administration Page**, click **Continue** and scroll down to **Directory Services Administration**.
5. Click **Choose Directory Services for NTLM Synchronization** options and set the options as follows:

NTLM Synchronization:

- a. Set **Authentication** to NTLM Authentication (Username only).
- b. Set **Synchronization** to NTLM Synchronization.
- c. Set **Livelink CGI Hosts** to:

<Livelink address>,127.0.0.1.

where *Livelink address* is the IP address of the computer that runs the IIS server and Livelink CGI (the Livelink application).

Example: 192.168.0.12,127.0.0.1

For details, refer to **Enabling the Synchronization Feature** in the *Livelink Directory Services Installation and Administrator's Guide*.

6. In the **Livelink Administration Page**, click **Continue** and scroll down to **Password Generation Policy**. Set the options as follows:
 - select the **Hidden** option
 - select the **Lowercase** option

- ensure that **Domain and name** is *not* selected

For details, refer to **Password Generation Options** in the **NTLM Synchronization** section of the *Livelink Directory Services Installation and Administrator's Guide*.

7. After installing Livelink Directory Services, assign permissions to user groups so that users will have proper access to DMS documents.

Step B: Integrate Tomcat with IIS (Optional)

After installing Livelink Directory Services, you should integrate Tomcat with IIS.

Method: Integrate Tomcat with IIS

1. Switch to run WWW service in IIS 5 isolation mode:
 - a. Start the IIS management console.
 - b. Choose the **Web Sites** container.
 - c. Right-click the container and select **Properties**, then select the **Service** tab.
 - d. Select **Run WWW service in IIS 5.0 isolation mode**.
 - e. Click **Apply**.
2. Using the **Internet Information Services Manager**, add a new virtual directory to your IIS web site:
 - a. Right-click the **Default Web Site** item
 - b. Selecting **New >Virtual Directory**.
 - c. The **Virtual Directory Creation Wizard** starts.
 - d. In the **Alias** field, enter `calligo_servlet`.
 - e. In the **Directory** field, enter the physical path of this virtual directory. This is the directory that contains the file `isapi_redirector2.dll`:
`install_folder\3rd Party Components\tomcat\bin\i386`
 - f. Assign the virtual directory **Execute** access permission.
3. Using the IIS management console, add `isapi_redirector2.dll` as a filter in your IIS web site:
 - a. Right-click the **Default Web Site** item and select **Properties**.
 - b. In the **Default Web Site Properties** dialog box, select the **ISAPI Filters** tab.
 - c. Click **Add** to add a new filter with the following information:
 - a name of `calligo_servlet`
 - the filter of the executable must be:

```
install_folder\3rd Party Components\tomcat\bin\  
i386\isapi_redirector2.dll
```

4. Update the following entry in C:\OPENTEXT\config\opentext.ini
Calligo_locServlet=/calligo
5. Restart the Livelink Server service.
6. Back up the Tomcat server configuration file:

```
install_folder\3rd Party Components\tomcat\conf\  
server.xml
```
7. In this same folder, delete server.xml, then rename server_int_iis.xml to server.xml.
8. Restart the Tomcat service.
9. Restart IIS by stopping and starting the IIS Admin service.
10. Open the **Internet Information Services Manager**.
11. In the **Default Website Properties** dialog box of the IIS service, select the **ISAPI Filters** tab.
12. Confirm that a green arrow appears in the **Status** column of the calligo_servlet filter.

If this arrow does not appear, you can still continue this procedure, but need to check for this arrow again after the final step, when you test the integration.
13. From the IIS management console, select **Web Service Extensions**.
14. Click **Add a New Web Service Extension**.
15. Enter an extension name, for example, Tomcat.
16. Add the following file as a required file:

```
install_folder\3rd Party Components\tomcat\  
bin\i386\isapi_redirector2.dll
```
17. Choose to allow the required file.
18. To test the integration, in your web browser, log on to:
<http://localhost/calligo/test.do>

Note: If SSL is enabled, enter https in the web address, instead of http.

A message like this should display:

```
Assembly Server Servlet Test succeeded on Wed Aug 11  
15:43:53 EST 2008
```

19. If the green arrow did not appear in the **Status** column of the calligo_servlet filter (as described in steps 10 to 12), then repeat steps 10 to 12, and then check the status again.

Start the **ITLogServer** service if it is not already started.

Method: Create a User Account for Livelink Authentication

1. Add the following line to the [options] section of
C:\OPENTEXT\config\opentext.ini:
Calligo_AllowTunneling=TRUE
2. Restart the Livelink Server service.
3. Create a new Windows user account. This is a special user account that only Assembly Server and IStream Document Manager Proxy Services will use for Livelink authentication.

Important: For the user name, use only lowercase alphanumeric characters and no special characters, for example: livelink.

4. Important: Add this user account to the Windows **Administrators** group, and also to the group that synchronizes with Directory Services.
5. In the **Directory Services Administration** section, select the **Configure Synchronization Sources** item.
6. Click the **Synchronize now** button to synchronize the Directory Services.
7. Important: Go to the **Users & Group DMS** administration page and give the user account you created system administration rights.
8. Configure IStream Document Manager Proxy and Assembly Server services to run under the user account you have just set up. If you run services as a Local System account, Directory Services will not be able to authenticate it.
9. Restart the IStream Document Manager Proxy and Assembly Server services.

Stage 9: Disable Advanced Versioning

IStream Document Manager does not support the Livelink advanced versioning feature. You therefore need to disable this feature as follows:

1. In your browser, login to IStream Document Manager as an administrator.
2. In the **System Administration Section**, click **Administer Item Control**.
3. Clear the **Enable advanced major/minor versioning for Documents in the system** check box.
4. Click **Save Changes**
5. Restart the Livelink Server service when prompted.

Stage 10: Test the Installation

After you have installed the IStream Document Manager components, you should test your installation and set up your users and groups. For testing, begin with the default users and groups that are installed with IStream Document Manager.

Step A: Create a Test User

The first step in testing is to create a test user.

Method: Create a test user

1. In your browser, login to IStream Document Manager as an administrator.
2. In the **Enterprise Workspace**, from the **Enterprise** menu, select **Users & Groups**.
3. Click **Add User**.
4. In the **Add New User** page, enter `testuser` as the **login** name.
5. Select `DefaultGroup` from the **Department** drop-down list.
6. Enter and verify a password. Ensure that the user has the rights to add and update permissions.
7. Ensure **Log-in enable** is selected.
8. Click **Submit**.
The **Users and Groups** page opens.
9. From the **Enterprise** menu, select **Workspace**.
10. You must now set up `testuser` with write-access to the Enterprise Workspace: continue to the following procedure.

Step B: Configure the Test User

After setting up the test user, you need to configure it so that it has write-access to the Enterprise Workspace.

Method: Set up the test user for write access

1. In the **Enterprise Workspace**, click the **Functions** drop-down list for the Enterprise workspace.
2. From the **Functions** menu, select **Permissions**.
3. On the **Permissions** page, in the **Access List**, click the **Grant Access** button.
4. In the **Find** drop-down box, select **User Log-in**.
5. Enter `testuser` in the **For** text field and click **Find**.

The user name (`testuser`) is listed.

6. Click the **Grant Access** check box, then click **Submit**.
7. On the **Edit User Permission** page, select all the permissions for `testuser`.
8. In the **Apply to** drop-down list, select **This Item & Sub-Items**.
9. Click **Update**. A progress indicator displays.
10. When the **Status** field indicates that the process is finished, click **OK**.
11. Click **Done** in the left frame of the **Permissions** page.

You can now begin testing the IStream Document Manager components using the test user.

Step C: Test IStream Document Manager

Before testing other components of IStream Document Manager, you should first test the IStream Server.

Method: Test IStream Document Manager

1. In your browser, log in to IStream Document Manager as `testuser`: see *Step A: Create a Test User* on page 54.
2. In the **Enterprise Workspace**, click **Add Folder**.
3. In the **Add:Folder** page, name your folder `testfolder` and click **Add**.
Your new folder, `testfolder`, is included in the list of items in the Enterprise Workspace.
4. Click `testfolder` to ensure that you can access this folder. If you can access `testfolder`, IStream Document Manager is working. You can now test the other IStream Document Manager components.

Step D: Test IStream Author

Before testing the Author Workstation, confirm that your InfoSources are configured, and that the `userinfo` and `serverinfo` are set in Author and Assembler.

Method: Test IStream Author

This procedure explains how to author a model document and save it.

1. Open Author.

Note: If you are using Proxy IDs, ensure they are set up correctly. For details, see *Step B: Assign Proxy User IDs* on page 59.

2. The first time you open Author, you are prompted to enter your **User ID** and **Password**. Enter the `testuser` ID and password: see *Step A: Create a Test User* on page 54.
3. To set up the repository, from the **Author** menu, click **Options**.
4. Click **Browse**.
5. Select a repository then click **OK**.
6. In the **Options** window, click **OK**.
7. From the **File** menu, select **New Model Document**.
8. Enter `testmodel` as the **master section** name: this is also the name for the model document.
9. Verify that the repository is selected and click **OK**.
10. Enter a simple rule in the master section of your model document such as:

```
TEXT
This is a test model document
ENDTEXT
```
11. Click the **Save** button to save the model document.
12. Click **Yes** to compile the section as it saves.
13. Name the model document `testmodel`. Keep the name the same as the master section name.
14. Click **Save**.
15. To test the generation in Author, click the **Author** drop-down list, then **Generate**.

This should produce a new IStream document from your model and display it in Microsoft Word.
16. Close Microsoft Word (without saving your changes) and then close Author.

You can now set the permissions for the model document if the document is stored in IStream Document Manager. You can also test the generation of a model document.

Stage 11: Configure and Test Models

Step A: Set the Model Permissions

Before a model document can be generated, permissions must be given to users if the document is stored in IStream Document Manager.

The following procedure explains how to give the test user permissions to generate the model document:

Method: Set model document generation permissions

1. In your browser, login to IStream Document Manager with the `testuser` ID: see *Step A: Create a Test User* on page 1.
2. From the **Function** drop-down list, choose **Permissions** for the `testmodel` model document.
3. Click `testuser` in the left frame.
4. Select the **Generate From Model** permission check box, then click **Update**.
5. Click **Done** in the left pane.

The permissions are set for `testuser` to generate the model document from IStream Document Manager.

Step B: Configure and Test Generation

Once a model document is created and permissions are given to the user, you can generate the model document: see *Step D: Test IStream Author* on page 2 and *Step A: Set the Model Permissions* on page 57.

Method: Configure and Test Generation

1. Ensure that the Assembly Server service is started.
2. If you are not already logged in, login to IStream Document Manager using the `testuser` ID and password: see *Step A: Create a Test User* on page 1.
3. Click **Add IStream Document**.
4. Enter `TestCalligoDocument` as the document name.
5. From the **Select Model** drop-down list, select `testmodel`, which is the model created in Author: (see *Step D: Test IStream Author* on page 2).
6. Click **Add**. The document generates.
7. When it has completed, click **OK**.
8. Locate and open the `TestCalligoDocument` to view the generated document in HTML format.

The installation of IStream Document Manager is now complete. The next, final stage describes how to design your users and groups.

Stage 12: Manage Users and Groups

Once the IStream Document Manager installation is complete, you can design the structure of your users and groups, create base groups and create larger groups out of smaller groups. You need to decide who should have the ability to create and edit users, and what the audit options should be and then set them.

Step A: Manage User Log-ins and Permissions

During the installation of IStream Document Manager, there are a number of user log-ins and permissions that must be managed.

Component	Item
Microsoft Windows	login ID and password for the administrator
SQL Server/Oracle	system administrator login ID and password
IStream Document Manager	administrator login ID and password
List of IStream Document Manager Users	<ul style="list-style-type: none"> • login IDs • passwords • assigned Assembly Server
Assembly Server Service	login accounts under which the Assembly Server service will run
Proxy Users	a proxy User ID and Password for each group and/or user under an Assembly Server
Folder Permissions	choose groups and users which have permissions in each folder for adding, deleting, and so on
Model Documents	choose groups and users that have permission to generate from each model document

During the initial configuration, log in everywhere using the admin user ID (Windows, SQL Server, IStream Document Manager). You may use a different log in at run time, but this log in must have access to the databases, network resources and any local files that will be used by IStream Document Manager.

Step B: Assign Proxy User IDs

IStream Document Manager uses the proxy user ID to access information in databases. You can assign a proxy user ID to groups of users or to individual users. If you do not indicate a proxy user ID for a particular user or group, then IStream Document Manager uses the login user ID.

Tip: For additional information about proxy users, see the *IStream Document Manager Technical Guide*.

Each proxy user ID must have a valid Windows user ID for the domain and must also be set up as a valid user of each database. If proxy users are not used, then the

ID of each user with permission to generate documents must be set up as a valid user of each database. If a proxy user is set up in IStream Document Manager, it must be a valid user created in the IStream Document Manager.

RDBMS

If proxy users generate from model documents that require database access, ensure that the proxy user is set up as a database user.

IStream Document Manager

1. Log in to IStream Document Manager as the Administrator.
2. Set up a list of users for each group, adding groups as necessary.
3. Go to the permissions for each Assembly Server you are using and set up proxy users for each group.
4. Ensure these proxy users are set up as database users on the RDBMS. The group proxy user can be overridden for specific users.
5. Navigate to each folder and assign any specific user permissions such as add, delete and modify, on a group or user level.

Note: Refer to the *IStream Document Manager Technical Guide* for additional information on configuring your deployment.

Troubleshooting the Add-In

This section describes:

- the steps you can take if the Add-In does not appear
- issues you may encounter if you are using Microsoft Word 2007

Add-In Does Not Appear

This section describes steps you can take if the Add-In does not appear. Complete each procedure in the order it appears.

Exit and Reopen Microsoft Word

- Completely exit Microsoft Word, then open it again. If the Add-In still fails to load, continue to the next step.

Check Office Security Settings

1. In Microsoft Word, select **Tools > Macro > Security**.
2. If you are using Word 2003, ensure that the **Security Level** is *not* set to **Very High**.
3. Restart your computer.
4. Open Microsoft Word again. If the Add-In still fails to load, continue to the next step.

Check the Add-In Directory Access

Ensure that the user has “read” access to the Add-In application directory. If the Add-In still fails to load, continue to the next step

Check the Word Startup Switch

If Word is launched using the /a startup switch, then the Add-In will not start.

After removing the switch, open Microsoft Word again. If the Add-In still fails to load, continue to the next step.

Check the Add-In Registry Setting

1. In the Windows Registry, navigate to the following registry key:
`HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Word\Addins\AuthorAddIn.Connect`
2. Ensure that the value for LoadBehavior is 3:
`"LoadBehavior"=dword:00000003`

Open Microsoft Word again. If the Add-In still fails to load, continue to the next step.

Uninstall and Reinstall the Add-In

Uninstall then reinstall the Add-In.

If the add-in still fails to load, continue to the next and final step.

Back Up Log File and Contact Customer Support

1. Back up your last current log file.
2. Contact *Customer Support*: see *Contacting Oracle for Help* on page 18.

Working with Microsoft Word 2007

This section describes how to resolve issues you may encounter if you are using Microsoft Word 2007.

IStream Add-In Initialization Error

If you are using Microsoft Word 2007 under Microsoft Windows XP and you receive an *IStream Add-In initialization failed* error, then ensure you have enabled .NET Programmability. To do this, select:

Control Panel > Add/Remove Programs > Microsoft Office 2007 > Add or Remove Features > Installation Options > Microsoft Office Word > .NET Programmability Support.

Security Warning

In Microsoft Word 2007, in the **Add-Ins** section of the **Trust Center**, if the checkbox for **Require Application Add-ins to be signed by Trusted Publisher** is selected, a security warning may appear when opening Microsoft Word. If so, click **Options**, then select **Enable all code published by this publisher**.

Appendix A

Adding/Removing Components & Uninstalling

This appendix describes:

- *Adding or Removing Components* on page 64
- *Uninstalling IStream Document Manager* on page 65

Adding or Removing Components

You can to add or remove specific IStream Document Manager components from your system. To completely uninstall IStream Document Manager, see *Uninstalling IStream Document Manager* on page 65.

Method: Add or remove IStream Document Manager components

1. From the **Control Panel**, select **Add/Remove Programs > IStream Document Manager**.
2. Click **Change/Remove**.
3. The **InstallShield Wizard** dialog box briefly appears.
4. Click **Modify**, then **Next**.
5. On the **Select Features** screen, select the cleared features you want to install or clear the selected features you want to uninstall.

The system will install the selected features, and remove the cleared features.

When the process is complete, the **Maintenance Complete** summary screen is displayed.

6. Click **Finish** to exit.

Uninstalling IStream Document Manager

This procedure describes how to completely uninstall IStream Document Manager. To add or remove specific components from your system, see *Adding or Removing Components* on page 64.

Method: Uninstall IStream Document Manager

1. From the **Control Panel**, select **Add/Remove Programs > IStream Document Manager**.
2. Click **Change/Remove**.
3. The **InstallShield Wizard** dialog box briefly appears.
4. Click **Remove**, then click **OK** when prompted.
 - all files in `install_folder\3rd Party Components\tomcat\webapps\calligo\conf\`
and the following file
`install_folder\3rd Party Components\tomcat\config\server.xml`
will be backed up to:
`install_folder\3rd Party Components\tomcat_bak\`
5. In all cases, `install_folder` is the full path of your IStream Document Manager installation.
6. Note that the following registry keys are not removed because they belong to third-party applications:
 - HKEY_CURRENT_USER\Software\iTech Software
 - HKEY_LOCAL_MACHINE\SOFTWARE\Apache Software Foundation
 - HKEY_LOCAL_MACHINE\SOFTWARE\iTech Software
 - HKEY_LOCAL_MACHINE\SOFTWARE\SCC
 - HKEY_CLASSES_ROOT\ITLogbook.Document
 - HKEY_CLASSES_ROOT\ITLogServerCom.Application
 - HKEY_CLASSES_ROOT\ITLogServerCom.Application.1
 - HKEY_USERS\.DEFAULT\Software\SCC

Method: Uninstall the IStream Document Manager module

1. Login to the **Livelihood Administration** page:
`http://server_name/service_name/livelihood.exe?func=admin.index`

2. Select **Uninstall Modules > Calligo 6.2 > Uninstall**.
3. When prompted, restart the Livelink Server.
4. Delete the following subfolder:
`Opentext_install_folder/staging/calligo_6_2_0`
After you restart your system, this service will no longer appear.

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