

Oracle® Insurance IStream

IStream Document Manager Release Notes

Release 6.2

E14878-01

January 2009

Copyright

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

Primary Authors: Andrew Brooke and Ken Weinberg

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

Overview	2
About IStream Document Manager	2
New and Enhanced Features	2
DMS Enhancements	2
IStream Assembly Enhancement	3
Enhanced Application Support	3
New Document Format	4
Recompiling Your Current Documents	4
Installation Considerations	5
InfoSources	5
Supported Product Versions	6
Supported Platforms	6
Server Components	6
Desktop Applications	7
IStream Document Manager End User	7
No Longer Supported	8
Important Considerations for IStream Document Manager	8
Installation and Configuration Considerations	8
Microsoft Word 2007 Considerations	8
IStream Add-Ins for Microsoft Word	8
IStream Author	8
IStream DMS	9
Assorted Considerations	9
IStream Document Manager Documentation	10
Toolkit (SDK)	10
IStream Document Manager 6.1 Enhancements	11
New Document Format for IStream Documents and Model Documents	11
IStream Add-Ins for Microsoft Word	11
IStream Author Enhancements	12
Other IStream Document Manager 6.1 Enhancements	13
Contacting Oracle Customer Support	13

OVERVIEW

These *Release Notes* describe the changes between the IStream Document Manager 6.1 and 6.2 releases. They describe the new and changed features, supported platforms, installation issues and known limitations of this release. For information on a prior release, please see the *Release Notes* or *ReadMe* file for that release.

Note: IStream Document Manager 6.2 is a complete release of the IStream Document Manager software. Please read all of the installation instructions carefully. Please review the IStream Document Manager Guide for New Installations before installing. For additional information, please contact Customer Support.

Important: For Livelink functionality, you need to download Livelink from the OpenText website. The Livelink software is not packaged with this release.

ABOUT ISTREAM DOCUMENT MANAGER

IStream Document Manager is a suite of integrated document capabilities, including document assembly, document management, search, workflow, collaboration and customization that support the entire document lifecycle across the enterprise. It enables organizations to better create, manage and distribute highly personalized, complex, error-free documents.

NEW AND ENHANCED FEATURES

This section describes the new enhancements for IStream Document Manager 6.2. For more information, please review the product manuals or contact Customer Support.

For descriptions of the enhancements made IStream Document Manager 6.1, please see *IStream Document Manager 6.1 Enhancements* on page 11.

DMS Enhancements

The DMS portion of IStream Document Manager includes many new features.

Multiple File Functions

You can **Zip & Email**, **Zip & Download**, or **Print** one or more selected documents.

DMS Search Enhancements

The Searching function has been enhanced to include the ability to:

- search by document types, item types, authors, and when it was recently used
- search based on related words
- sort the results based on relevance, author, document type, name, date and size

Using Search Monitoring, statistics can be used to fine-tune the search engine parameters.

DMS Security Enhancements

DMS security has been enhanced in the following ways:

- accounts are suspended after a specified number of failed login attempts
- each user can log in only from one computer at a time
- SEA (Security Extension Architecture) is supported – this eliminates the need for file system mapping to the Enterprise Server when storing temporary files during file uploads, allowing additional security between network tiers

IStream Assembly Enhancement

We have improved the performance of IStream Assembly by an average of 10%.

Variable IF Processing

This release includes a minor change to variable IF processing so that the negative condition will not be processed.

Previously, both the negative and positive conditions were processed, even though only the positive condition appeared in the document. As a result, sometimes an error was received when processing the negative condition even though the error had no impact on the document. As a result of this change, you will no longer encounter errors like these.

Enhanced Application Support

In this release, we now support:

- Microsoft Windows Vista
- Microsoft Word 2007




New Document Format

IStream Document Manager 6.1 introduced a new document format. The format of IStream documents (known as CLGs, Calligo documents and generated documents) and model documents (known as CMS, CDS, master documents and sections) has changed so that the documents created or updated in 6.x will be saved as Microsoft Word or PDF files.

When you upgrade from earlier versions of Calligo Enterprise to IStream Document Manager 6.x, you can choose to do a mass conversion of documents to the new 6.x file format or not. If you opt not to do a mass conversion, as you create or update files (through IStream Assembly, IStream Author, or IStream Customizer) the files will automatically be converted to the 6.x format. IStream Document Manager 6.x is able to work with a mix of old and new file formats, so a mass conversion of sections is not a requirement.

If you choose to do a mass conversion of your model documents or IStream documents, you can leverage the conversion functionality available in IStream Promoter to convert a number of sections at one time.

Documents that have been updated to the new file format will display **Created by IStream** in Windows Explorer when the comment field is displayed. In the DMS, the updated files will appear with a new icon as follows:

-  model documents (CMS files)
-  sections (CDS files)
-  IStream documents (CLG files)

Recompiling Your Current Documents

Beginning with the IStream Document Manager 6.1 release, model documents that exist in Microsoft Word XP or Microsoft Word 2003 and are from Calligo 5.2 or 5.4 **do not** need to be recompiled.

Documents created in earlier versions of Microsoft Word will need to be upgraded to Microsoft Word XP or Microsoft Word 2003. As part of the Word conversion, the documents will need to be recompiled.

DMS Considerations

Beginning with IStream Document Manager 6.1:

- As a result of the changes to the model document format, we have been able to replace the **Calligo Edit** and **Model Edit** functions with a single **Edit** function. After editing a model document from the DMS, we recommend that you invoke the **Compile** function.
- The **Add Model Document** function has been replaced by an **Add IStream Section** function.
- From the DMS, you can no longer edit CMS or CDS effective and termination dates on section names. This information can be edited from the section properties in Author.
- Storing new format documents in the DMS adds only one file, reducing the space required to save your documents
- It is now much easier to move model documents from the file system to the DMS using Livelink Explorer. For more information, please see the *IStream Document Manager Plug-ins ReadMe*.

Installation Considerations

Beginning with IStream Document Manager 6.1:

- The default installation path for all IStream components is now:
C:\Program Files\Whitehill Technologies\IStream
Furthermore, all .EXE and .DLL files are in the Components subfolder.
- The registry keys are now located in:
HKEY_LOCAL_MACHINE\SOFTWARE\Whitehill Technologies
- IStream Promoter is now an option in the main setup program; it no longer requires a separate installation process.
- The XML InfoSource is now included in the installation of InfoConnector.
- The uninstallation process now allows you to keep your original configuration settings; after reinstalling, these settings will be restored.

InfoSources

Beginning with IStream Document Manager 6.1:

- As a result of improved and more rigorous XML validation, some XML XPath InfoSources that worked previously may now cause the document generation to fail. Therefore, you need to verify the XML mapping file, which is described in the *Preparing the XML File* section of the *IStream Document Manager Technical Guide*.
- A new System InfoSource called DynaFS was added - it is required to generate documents from the IStream Author Add-In for Microsoft Word. Do not use this InfoSource when coding your model documents.

Microsoft Word Support

- Only the versions of Microsoft Word specified in *Supported Product Versions* on page 6 are supported in this release. If you using an earlier version, you will need to upgrade before moving to this release.

Hyper-Threading Support

Intel's Hyper-Threading Technology (HTT) is not supported with IStream Document Manager.

SUPPORTED PRODUCT VERSIONS

IStream Document Manager 6.2, as of its release date, is supported with the following product versions:

- IStream Communicator 2.2 SP1 and Feature Pack 1
- IStream Publisher 3.2 Patch 8
- IStream Publisher 4.1 SP1 and 4.2
- IStream Publisher 4.2
- IStream Writer 1.2.1

Please note:

- IStream Document Manager 6.2 may be supported with future versions of IStream Publisher, Tracker, IStream Communicator or IStream Writer. For further information on future product releases that will be supported with IStream Document Manager 6.2, please review the Release Notes for those releases or contact Customer Support.
- IStream Writer 1.2.1 is not supported with Microsoft Windows Vista or Microsoft Word 2007

SUPPORTED PLATFORMS

This section of the *Release Notes* describes the platforms on which the various IStream Document Manager 6.2 components are supported.

Note: Only 32-bit databases and operating systems are supported.

Server Components

This section describes the supported platforms for these components:

- Database Server for IStream Document Manager
- IStream Assembler
- IStream DMS Server

Operating Systems

- Microsoft Windows Server 2003 SP1
- Microsoft Windows Server 2003 SP2

Databases

- Oracle 9i R2
- Oracle 10g R3
- Microsoft SQL Server 2000 SP4
- Microsoft SQL Server 2005 SP2

Desktop Applications

This section describes the supported platforms and applications for these components:

- IStream Author
- IStream Author Add-In for Word
- IStream Assembler Add-In for Word
- IStream Customizer
- IStream InfoConnector
- IStream Promoter

Operating Systems

- Microsoft Windows XP Pro SP2
- Microsoft Windows Vista¹

Microsoft Word

- Microsoft Word 2003 SP3
- Microsoft Word XP SP2
- Microsoft Word XP SP3
- Microsoft Word 2007²

IStream Document Manager End User

The supported platforms and applications for the end user are:

Operating Systems

- Microsoft Windows XP Pro SP2
- Microsoft Windows Vista¹

Microsoft Word

- Microsoft Word 2003 SP2
- Microsoft Word XP SP2
- Microsoft Word XP SP3
- Microsoft Word 2007²

Web Browser

- Microsoft Internet Explorer 5.5 SP2
- Microsoft Internet Explorer 6.0 SP2
- Microsoft Internet Explorer 7.0

Notes:

¹ Not supported with IStream Writer 1.2.1

² Not supported with IStream Writer 1.2.1

No Longer Supported

- The `LOCATEFOUND`, `LOCATEITEM` and `LOCATENEXT` Mosaic rules are no longer supported under IStream Document Manager 6.x. Instead, use the `QUERY` rule to retrieve the necessary information for your model documents.
- Calligo Dispatcher is not supported under IStream Document Manager 6.x.
- Support for Calligo Enterprise 4.x concluded as of June 30, 2006
- Support for Calligo Enterprise 5.1 concluded as of October 31, 2006.
- Support for Calligo Enterprise 5.2 will conclude as of June 30, 2008.
- Support for Calligo Enterprise 5.4 will conclude as of April 30, 2009.

If you have any questions, please contact your Regional Sales Manager or Customer Support.

IMPORTANT CONSIDERATIONS FOR ISTREAM DOCUMENT MANAGER

Installation and Configuration Considerations

- WebDAV is not supported in this release. Therefore, you should not install the WebDAV module on the Livelink 9.7 server.
- The IStream Plug-In for Adobe is not supported at this time.
- If you select to uninstall an IStream Document Manager component, then click **Cancel** during the process, the component you selected to remove may stop working.

Microsoft Word 2007 Considerations

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 Add-Ins for Microsoft Word

1. 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. This option is available in **Control Panel > Add/Remove Programs > Microsoft Office 2007 > Add or Remove Features > Installation Options > Microsoft Office Word > .NET Programmability Support**.
2. 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**.

IStream Author

1. If you change the path to a file that is referenced in a model document, then reopen the document and generate it, the tree view will not be updated. You need to manually compile the document or refresh the tree view to update it.

IStream DMS

1. Browsing in DMS InfoSources may be slower when using Microsoft Windows Vista compared to Windows XP.
2. When you open a model document in the DMS, it is stored as a temporary file. You will therefore encounter problems if you try to generate directly from this model document using the IStream Author or IStream Assembler Add-Ins for Microsoft Word.
3. DMS Storage rules allow you to store your objects based on criteria such as MIME type, category and file size. For IStream documents, storage rules can be based only on file size. Storage rules based on MIME type and category will be disregarded for IStream documents.
4. If you choose to cancel the regeneration of an IStream generated document while it is being regenerated, the document stays reserved in the DMS. You must manually unreserve the document.
5. The Undelete function in the DMS does not undelete IStream document types (CLG/CMS/CDS).
6. If you are generating documents in the DMS using IStream Publisher, you must use the MQ Series configuration of Publisher, not the OpenJMS configuration.
7. If you add Calligo Enterprise 5.x CDS, CMS or CLG files to the DMS, then the first version of the documents will appear as version 2.
8. If you do not have the Livelink Filter Pack installed on the DMS server, you cannot use the hyperlinked file name to open and edit your model document in Word. You also cannot use the **Open** command beside the file name, or on the function drop-down menu. Microsoft Word will open embedded within Internet Explorer, and the IStream Author Add-In for Microsoft Word will not work properly. To avoid this, use the **Edit** command next to the document name, or use the **Edit** command on the function drop-down menu.
9. The **Zip & Download** feature is not supported for CDS, CMS and CLG files under the previous Calligo 5.x file format.

Assorted Considerations

1. If you save a section in Microsoft Word without the IStream Author Word Add-in, you must wait for one minute before generation will be able to include the latest changes to the file.
2. For the IStream Author Add-In for Word, after clicking the **Edit** link for a document in the DMS, on the **Livelink Edit Instructions** dialog box, select **Don't display these instructions again**, otherwise the IStream Author menu items in Microsoft Word may be incorrectly enabled or grayed out.
3. In IStream Customizer, column breaks in a tagged text block may not be preserved after adding wordings to the tag. You need to reapply the columns when working with wordings that contain columns.
4. When trying to open the ODBC Administrator for a new ODBC database using IStream InfoConnector under Windows Vista, an error occurs. You need to close IStream InfoConnector and then restart it.

IStream Document Manager Documentation

The IStream Document Manager documentation is in the `\Manuals\IStream Document Manager` folder in PDF format:

- IStream Author Guide
- IStream Customizer Guide
- IStream Document Manager DMS Guide for IStream and Model Docs
- IStream Document Manager Glossary
- IStream Document Manager Guide for New Installations
- IStream Document Manager Message Reference
- IStream Document Manager Technical Guide

Note: Some of the documentation and online help, including the contact information, refers to Skywire Software. The correct contact information appears at the end of these Release Notes.

Toolkit (SDK)

The Toolkit guides are installed as part of the IStream Toolkit (SDK) for customers who are licensed for IStream Toolkit (SDK).

The Toolkit guides are

- the IStream Toolkit Assembly Guide
- the IStream Toolkit Extensibility Guide
- the IStream Toolkit SDK Samples Guide

By default, these guides are included in the `\IStream\SDK\Manuals` folder.

Note: IStream Document Manager provides support for a subset of the Livelink functionality. For details on specific functions, please contact Customer Support.

IStream Document Manager 6.1 ENHANCEMENTS

Note: This section describes the enhancements that were made in the IStream Document Manager 6.1 release. The content has been copied here from the *IStream Document Manager 6.1 Release Notes* for ease of reference.

New Document Format for IStream Documents and Model Documents

In IStream Document Manager 6.1, we introduced a new format for IStream documents (also known as *generated documents* or *CLG files*, and previously called *Calligo documents*) and model documents.

In the past, IStream documents and model documents were stored in a proprietary format that included the Microsoft Word version of the document, metadata about the document and other proprietary information. With IStream Document Manager, the document formats created with 6.1 and later will be stored as native Word documents with the metadata and other proprietary information stored within the Microsoft Word container.

As a result of this change, documents created or updated with 6.1 can be opened directly in Word, as well as in the IStream applications. This provides more flexibility for working with your documents, especially for making mass changes across many model document sections.

Another benefit of the file format change is that when storing the files to the DMS, only one file is uploaded. In the past, two files were uploaded for each CLG, CMS and CDS. As a result, IStream files will require less space on the DMS file server.

In addition to supporting a new Word-based file format for IStream documents, we also support a PDF-based file format. Similar to the Word based format, the PDF format saves the metadata and other proprietary information within the PDF file. This allows us to save only the PDF (without saving the Word version of the generated document) and allows regeneration of PDFs.

As a result of the changes to the IStream document and model document formats, IStream Document Manager 6.1 provides the ability to:

- generate from Word using the IStream Author or IStream Assembler Add-Ins for Microsoft Word
- edit model documents and IStream documents from the DMS using the Edit function
- See *IStream Document Manager 6.1 Enhancements* on page 11 for information on how the new file formats will impact your upgrade.

IStream Add-Ins for Microsoft Word

The IStream Assembler and IStream Author Add-ins for Microsoft Word embed IStream Document Manager functionality right into Microsoft Word:

- The IStream Assembler Add-in for Microsoft Word allows you to generate IStream documents (previously known as CLGs or generated documents) and convert them to PDF.
- The IStream Author Add-in for Microsoft Word allows you to convert Word documents to CMS and CDS. This add-in also gives you the option to create new CMS and CDS files directly from Word's user interface. The Author Add-in is always installed with the Assembler Add-in, and includes the ability to generate IStream documents and create IStream PDFs.

Note: Using the add-ins, you can save only to a file system. To save to an InfoSource, you will need to use IStream Author or IStream Assembler.

IStream Author Enhancements

Many enhancements have been made that make IStream Author easier to use. The most significant is the addition of the Model Document Outline. It provides a new way to easily create and maintain your model documents. It allows you to create a tree of the sections that represent your model document. From the Model Document Outline, you can specify effective and termination dates for each section, identify rules for when the section will be included and easily reorder sections by dragging and dropping them on the tree.

The Model Document Outline separates the rules from the text in the documents, allowing the text to be more easily maintained by non-Authors. It also allows you to set up one model document section with multiple effective dates based on different states or other factors.

Another significant enhancement eases debugging of model documents. Now when an error appears in the generation or compile log, it will be prefaced with the word ERROR and an icon. This enhancement will make it easier to locate an issue in the logs. In addition, when possible, errors in the log will include a reference to the line number where the error occurred. As well, any errors that are reported in the compile log will include a hyperlink. When clicking on the link, you will be taken to the location of the error in your model document. This will save a substantial amount of time in debugging.

With IStream Document Manager 6.1, use of XML InfoSources is now included as part of the base product. As a result, you can begin to leverage XML data for the creation of your IStream documents without needing to purchase an add-on module. To help facilitate use of XPath XML data, the IStream Author Wizards have been updated to support referencing XML files.

Other IStream Author enhancements include:

- An auto-naming function has been added to the EasyText feature. With this function enabled, entries are automatically named when you drag text in from a model document into the Entry column.
- You can now include Microsoft Word document files in model documents. Note that included Microsoft Word documents follow the same rules and restrictions as model documents. These documents are compiled on the fly each time they are assembled into an IStream document.
- You can increase the security around your regeneratable PDFs by configuring PDF security settings with your master section in your model document. These settings will be used as the defaults when creating regeneratable PDFs through the DMS.
- By default, when using Author to assemble documents, the IStream document will open directly into Microsoft Word.
- When using text only sections, you can now provide information on the language and bracket style to be used for the section. In addition, you can specify a tag name so that you can customize this section using IStream Customizer.
- A new ELSEIF rule simplifies the coding of IF/ELSE scenarios.
- The new FORCEINCLUDE rule allows you include a section and ignore any effective and termination dates that are set in the section properties.
- You can now define EFFECTDATE as a variable. Effective and termination dates are compared against the EFFECTDATE if it is defined in a model document; otherwise, the system date is used for comparing.
- For debugging purposes, the section name is now written to the exception log.
- On the key data entry UI in IStream Author, an option has been added that allows you to retain leading spaces for string variables.
- You will no longer be prompted to compile model documents when saving them. They will automatically be recompiled.

Other IStream Document Manager 6.1 Enhancements

- Many icons in the various applications have been enhanced.
- In IStream Customizer, to make it easier to work with your whole document, you can now easily open existing wordings or add wordings with the tree view closed.
- You can adjust the default sizes of the minimum horizontal (top and bottom) and vertical (left and right) margins that appear in the PDF files generated by authors; for details, please refer to the PDF *Minimum Margins* section of the *IStream Document Manager Technical Guide*.
- When creating a PDF from the DMS, you can now add a password to the PDF.
- System administrators can configure the system to use the Livelink LLISAPI.DLL instead of the Livelink CGI (livelink.exe). In our testing, we saw improved performance in the range of 3-6% for end users when using LLISAPI.DLL compared to Livelink.exe.
- Administrators can also substitute the Livelink CGI program with LLServlet, a Java servlet that runs on an application server. This servlet allows organizations to provide external access to Livelink without having to run the Livelink CGI outside their firewall. The performance gains are greater than with LLISAPI while providing the flexibility and security of a java servlet. **Note:** The DMS model document compile function is not supported with LLServlet. **XRM00016817**
- The Livelink UNITE and Atlas modules are now supported. These modules provide alternate views of the DMS structure. Some users may find these modules more user-friendly for navigating through the folder structure and adding documents.
- For modest performance improvements, RAM drives are now supported on the DMS server. In our testing improvement ranged from 1% - 8.6%. The greatest improvement was seen when uploading a large amount of documents in a short period of time.

CONTACTING ORACLE CUSTOMER SUPPORT

If you have any questions about the installation or use of IStream Document Manager, please contact Oracle Customer Support:

- Phone: 1-877-467-9727
- Fax: 1-416-642-0315
- Email: markhamsupport-skywire_ww@oracle.com

For updated information on IStream Document Manager and other Oracle products, please check our website at www.oracle.com.