

**Oracle® Insurance IStream**

IStream Document Manager Release Notes

Release 6.3

**E15015-01**

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## Contents

<b>Overview</b> .....	<b>4</b>
<b>About IStream Document Manager</b> .....	<b>4</b>
<b>New and Enhanced Features</b> .....	<b>4</b>
<b>Supported Product Versions</b> .....	<b>6</b>
<b>Supported Products and Platforms</b> .....	<b>6</b>
Server Components .....	6
Assembly Server .....	7
Desktop Applications .....	7
IStream Document Manager End User .....	7
No Longer Supported .....	8
<b>IStream Document Manager Documentation</b> .....	<b>9</b>
<b>Important Considerations for IStream Document Manager</b> .....	<b>9</b>
Installation and Configuration Considerations .....	9
IStream Add-Ins for Microsoft Word .....	9
IStream Author .....	9
IStream Customizer .....	9
IStream DMS .....	9
IStream InfoConnector .....	10
Microsoft Word 2007 Considerations .....	10
Microsoft SharePoint (WebDAV) Considerations .....	10
<b>Oracle Customer Support</b> .....	<b>10</b>

## OVERVIEW

These *Release Notes* describe the changes between the IStream Document Manager 6.2 and 6.3 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.

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**Note:** IStream Document Manager 6.3 is a complete release of the IStream Document Manager software. Please read all of the installation instructions carefully. Please review the *IStream Document Manager 6.3 Guide for New Installations* or the *IStream Document Manager 6.3 Upgrade Installation Guide* before installing. For additional information, please contact us: see *Oracle Customer Support* on page 10.

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## 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 6.3. For more information, please review the product manuals or contact Customer Support.

### WebDAV Support for InfoSources

- Infosources can read to and write from a Microsoft SharePoint WebDAV repository.
- Applications that use InfoSources (IStream Author, IStream Assembler and IStream Customizer) can open and save to a WebDAV InfoSource.
- Applications that do not use InfoSources can also open and save to a WebDAV folder.

### IStream Author Enhancements

- The IStream Author Add-In now allows users to search the generation and compile logs. For more information, see the following sections in the *IStream Author Add-In Online Help*:
  - *Viewing the IStream Document Generation Log*
  - *Modifying and Saving .CMS and .CDS Files in Microsoft Word*
- Using the IStream Author or the IStream Author Add-In, authors can use the `$cDefaultClgName` persistent variable to specify a default .CLG filename for each generation. For more information, see the Persistent Variables section in the *Authoring Reference* chapter of the *IStream Author User Guide* or *Online Help*

### IStream Customizer Enhancements

- After performing a QuickGen, the log from the last generation will still be available through IStream Customizer. QuickGen is described in the *QuickGen* chapter of the *IStream Customizer User Guide* and *Online Help*

- Users can now select **Customizer > View Logs** from the main menu to view the recent QuickGen log, as well as the full generation log. For more information, see the *Displaying Information and Logs* section in the *IStream Customizer User Guide* and *Online Help*.

### Assorted Enhancements

- IStream Document Manager and IStream Writer can be installed through the Microsoft Systems Management Server (SMS) on Microsoft Windows XP or Microsoft Windows 2003, but not on Microsoft Windows Vista.
- The `tinyint` SQL data type is supported as a field type.
- When browsing using an InfoSource, the system will retain the last folder browsed.
- You can use smart quotes (“ ”) in IStream Author rules and functions, which are described in the *IStream Author user Guide* and *Online Help*.
- A property has been added to CLG files that tracks the last action performed. You can view this **Last Action** property from the specific page in the DMS. Last actions include: *IStream Generation or Regeneration*, *Edit in Microsoft Word* and *IStream QuickGen*. Using the DMS is described in the *IStream Document Manager DMS Guide for IStream and Model Documents*
- A date and time stamp has been added to the generation and QuickGen logs.

If you are using Open Text Livelink's MVP Storage Rule 2.2.0 module (Livelink v. 9.7.1), you will need to obtain and apply Open Text's patch `pat08152.txt` (released March 12, 2009). This is required to apply the *Volume Free Space Rule*, provided by the module, to IStream documents (.CMS, .CDS, and .CLG files) that have been uploaded using InfoSources (for IStream Author, Assembler UI, IStream Customizer, and IStream Promoter).

### Other Changes

- All products, screens, and documentation have been rebranded.
- All registry entries and default install paths now use Oracle instead of Skywire Software or Whitehill Technologies.

## SUPPORTED PRODUCT VERSIONS

IStream Document Manager 6.3 is supported with the following product versions:

- IStream Communicator 2.2 FP3
- IStream Publisher 4.1 Patch 3 and higher
- IStream Publisher 4.2 Patch 7 and higher
- IStream Publisher 4.3
- IStream Writer 6.3
- Oracle Insurance Compliance Tracker 6.6

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**Note:** IStream Document Manager 6.3 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, please review the Release Notes for those releases or contact Customer Support.

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## SUPPORTED PRODUCTS AND PLATFORMS

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

**Please note:**

- Only the versions of Microsoft Word specified in this section are supported in this release. If you are using an earlier version, you will need to upgrade before moving to this release.
- Only 32-bit databases and operating systems are supported.
- Only Livelink 9.7.1 is supported.
- Intel's Hyper-Threading Technology (HTT) is *not* supported.

### Server Components

#### Operating Systems

- Microsoft Windows Server 2003 R2
- Microsoft Windows Server 2003 SP2

#### Databases

- Oracle 10g
- Microsoft SQL Server 2000 SP3
- Microsoft SQL Server 2005 – required if you are using Model Documents on the DMS

## **Assembly Server**

### **Operating System (Server)**

- Microsoft Windows Server 2003 R2
- Microsoft Windows Server 2003 SP2

### **Operating System (Client)**

- Windows XP SP2
- Windows Vista

### **Microsoft Word**

- Microsoft Word XP SP2 & SP3
- Microsoft Word 2003 SP2
- Microsoft Word 2007 (compatibility mode)

## **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 (Client)**

- Microsoft Windows XP Pro SP2
- Microsoft Windows Vista

### **Microsoft Word**

- Microsoft Word XP SP2 and XP SP3
- Microsoft Word 2003 SP2
- Microsoft Word 2007 (compatibility mode)

### **.NET Versions**

- Microsoft .NET Framework 2.0

## **IStream Document Manager End User**

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

- DMS End-User
- Livelink Explorer
- Directory Services

## Operating Systems (Client)

- Microsoft Windows XP Pro SP2
- Microsoft Windows Vista

## Microsoft Word

- Microsoft Word XP SP2\* and XP SP3\*
- Microsoft Word 2003 SP2
- Microsoft Word 2007 (compatibility mode)

## Web Browser

- Microsoft Internet Explorer 6.0 SP2
- Microsoft Internet Explorer 7.0

**Note:** \* Not supported with IStream Writer

## Directory Services

- **Operating Systems (Server):** Windows Server 2003

## 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.
- The IStream Plug-In for Adobe is no longer supported.

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**Note:** Please refer to the [Oracle Lifetime Support Policies](#) for more information regarding support timelines for older versions of IStream Document Manager.

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



# IStream Document Manager Documentation

The IStream Document Manager documentation is in PDF format and is described in the *IStream Document Manager Documentation* section within the first chapter of each guide.

The documentation includes the Toolkit (SDK) guides and samples.

## IMPORTANT CONSIDERATIONS FOR ISTREAM DOCUMENT MANAGER

### Installation and Configuration Considerations

- 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.

### 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, 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. The IStream Author and IStream Writer add-ins only work when Microsoft Word has been launched from the file system or a shared drive. If the add-in is launched from the DMS or Sharepoint, the add-in may not function.
3. 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.
4. For the IStream Author Add-In for Word, after clicking the **Edit** link for a document in the DMS, on the **Livelihood 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.

### IStream Author

- 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 Customizer

- 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.

### 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. 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.
8. The **Zip & Download** feature is not supported for CDS, CMS and CLG files under the previous Calligo 5.x file format.

### IStream InfoConnector

- 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.

### 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

### Microsoft SharePoint (WebDAV) Considerations

- IStream documents opened from Microsoft SharePoint will not be checked out or locked. Therefore, to avoid document editing conflicts, ensure that users do not work the same document at the same time.
- If the **Require Check Out** option is enabled in Microsoft SharePoint, an error will appear if users do not manually check out an IStream document before opening it in IStream Author.

## ORACLE CUSTOMER SUPPORT

If you have any questions about the installation or use of our products, please visit the Oracle Customer Support website: [www.oracle.com/support](http://www.oracle.com/support)