

Oracle® Documaker

Documaker Connector

Installation Guide

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Preface

This document contains information necessary for the installation of Oracle Documaker Connector.

AUDIENCE

This document is intended for users who want to install Documaker Connector. Experience installing Oracle Documaker and experience as a system administrator is necessary.

In addition to this guide, implementation of Documaker Connector with the Documaker document source requires familiarity with Oracle Documaker configuration and Document Automation Language (DAL) scripting.

Familiarity with configuration of the content management system you choose is also required. This guide is not a substitute for understanding those products and their documentation. You must have the necessary skills in both Oracle Documaker and your content management system to configure those products to work with the Documaker Connector.

Once familiar with the material in this guide and other prerequisite background information, an administrator should be able to plan and execute an implementation of Documaker Connector and manage day-to-day operation.

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RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Documaker documentation set, specifically:
 - Documaker Connector Administration Guide
 - Documaker Connector Developer's Guide
 - Documaker Installation Guide
 - Documaker Administration Guide
 - DAL Reference
- The Oracle WebCenter Content Core Capabilities, previously known as the Oracle Universal Content Management (UCM), documentation set, specifically:
 - Oracle Universal Content Management Product Overview
 - Getting Started with Content Server
 - Oracle Universal Content Management Content Server Installation Guide for (*your specific platform*)
 - Managing Repository Content

CONVENTIONS

The following text conventions are used in this document:

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

Note The screen shots and interface examples presented in this document may differ slightly from the actual software you receive. Late-breaking software modifications and interim patches may change the look of the interface, but should not detract from your ability to use the software with this document.

Chapter 1

Introduction

Oracle Documaker Connector works with Oracle Documaker to archive Documaker output documents into content management repositories, such as Oracle WebCenter Content Core Capabilities, previously known as Oracle Universal Document Manager (UCM).

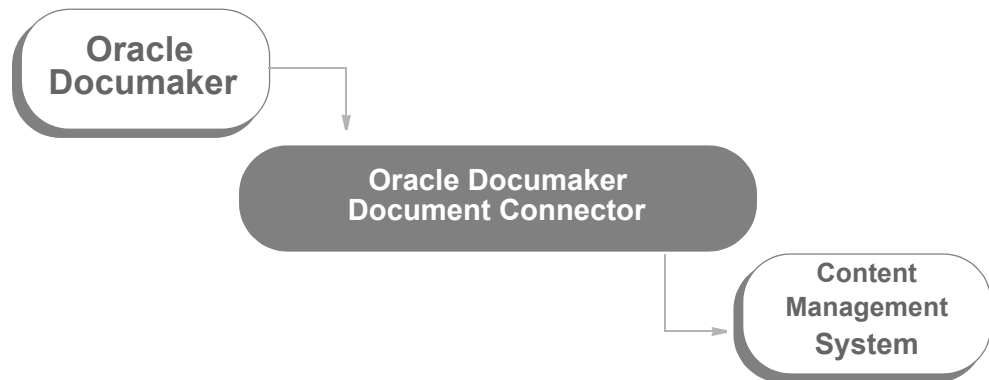
Documaker Connector is also the technology underlying the Archiver function in Documaker Enterprise Edition Document Factory. It is an extremely flexible and adaptable utility. You can find out more about how to customize Documaker Connector in the Documaker Connector Developer Guide.

This chapter provides an introduction to Documaker Connector and covers these topics:

- *Overview* on page 2
- *Compatibility* on page 4

OVERVIEW

Documaker Connector works with Oracle Documaker or other sources of documents to archive output documents into content management repositories:



Creating document sets with Oracle Documaker

Oracle Documaker is a document publishing solution which is driven by input transactions to produce output document sets. Documaker combines input transaction data and a repository of forms with a powerful rules engine and composes custom documents based on the incoming transaction data.

Each transaction is a set of variable data field values and other form-selection criteria. Oracle Documaker applies the variable data to choose forms, create presentation graphics such as pie charts or bar graphs, and fill in fields on the forms, optionally performing formatting and/or calculations on the data before using it as text on the forms.

Because the output documents were often originally designed to be printed, the output documents and the files containing them are sometimes called *print streams*.

The print streams are not only printed and delivered to the recipients, but are also sent via various forms of electronic delivery such as email or downloaded via the Internet. Once published, the documents also usually need to be retained in that form for reference by customer service or other agents. Electronic filing in a content management system is the job of the Documaker Connector, or in the Documaker Enterprise Edition Document Factory the job of the Archiver component, using Documaker Connector destinations.

Using Documaker Connector

When used with Documaker Connector and the Documaker source component, Documaker's DAL (Document Automation Language) scripting is used to place each output document in a file system directory and insert a matching record containing the variable data and indexing information, also called *metadata*, into a database table.

Documaker Connector monitors the database table for new records and then processes those records by sending the document and indexing data into a destination document management system. You can run Documaker Connector continuously, as a system service, or periodically, such as after a batch run of Documaker.

You configure Documaker Connector with the connection information for the source database table and the connection information for the document management system. The columns of the database table and the corresponding configuration of the content management metadata varies with the implementation. To configure these items, you need knowledge of both Documaker and the content management system administration. For instance, you must...

- Set up the database table columns to hold the metadata you want to use in your document management system so it can be transferred by Documaker Connector.
- Set up Documaker to fill in those columns for each document record it will insert in the table, using Documaker DAL scripts.
- Create metadata fields in your content management system to receive the data from Documaker Connector.

There are also performance and volume-related configuration parameters.

Setting up Documaker Connector

Documaker Connector is highly customizable and comes with content management destinations for both Oracle's WebCenter Content, Core Capabilities (formerly Oracle Universal Content Management) and WebCenter Content, Imaging (formerly Oracle Imaging and Process Management). It also comes with several testing and general utility connectors, described later.

You can also create destination components for other content management systems so they work with Documaker Connector. It can also be used as a framework for creating new applications which draw documents from sources other than Documaker — you can customize both sides of Documaker Connector.

Note For more information about configuring and running Documaker Connector, see the [Documaker Connector Administration Guide](#).

For more information about writing custom components for Documaker Connector, both source and destination interfaces, see the [Documaker Connector Developer Guide](#).

Although you can customize the source and destination sides of Documaker Connector, this guide is primarily concerned with the Documaker source, which reads metadata records from a database table and document contents from files in a directly accessible directory.

Index data (metadata) is read from the database table and referenced by the column names in the table. The metadata is then available to the configured destination as a name-value pair of data, named after the database table column and with the value of that column in the row for the document being processed. It is this set of name-value pairs that Documaker Connector processes and passes to the content management system to use to index the document.

COMPATIBILITY

Documaker Connector is tested with the following:

Application	Version
Oracle Documaker	Version 11.3 and is compatible with Documaker versions 11.2 and newer
WebCenter Content Client interface	WebCenter Content release 10gR3, version 10.1.3 WebCenter Content release 11g, version 11.1.1.3g
Oracle WebCenter Content, Imaging	WebCenter Content release 11g, version 11.1.1.5

There are additional compatibility requirements for these applications. Consult the product documentation for those products, and in particular the specific versions you plan to run as a part of your system planning.

Chapter 2

Installing Documaker Connector

The installation of Documaker Connector places the necessary program files and supporting software on the target system at the selected location. This chapter guides you through installing the software and prepares you for configuring the system to meet your requirements.

This chapter discusses these topics:

- *Software Requirements* on page 6
- *Downloading the Software* on page 7
- *Installing Documaker Connector* on page 8
 - *Using the Setup Wizard* on page 9
 - *Installing from the UNIX Command Line* on page 12
 - *Running the Installer with a Response File* on page 14
- *Checking Your Installation* on page 16
- *Using the Task Tray Controller* on page 20
- *Downloading Patches* on page 21
- *Removing Documaker Connector* on page 22

Note Depending on the database system you chose and the content management system, you may require underlying supporting software which is not provided as part of the Documaker Connector installation. See the documentation about your chosen document source and destination interfaces for specific requirements.

SOFTWARE REQUIREMENTS

To use Documaker Connector, you need the following:

- Platform support of Java 6 (compatible JVM), including JDBC database connectivity.

Note On Windows, Linux, and Solaris, the installer installs a compatible JVM (Java Virtual Machine) for you.

- Connection to a SQL database and file system directory which are both also accessible to Oracle Documaker, for use with the Documaker source.
- A connection to the configured destination system, such as Oracle WebCenter Content.

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

DOWNLOADING THE SOFTWARE

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

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

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

<https://edelivery.oracle.com>

INSTALLING DOCUMAKER CONNECTOR

Documaker Connector is installed using platform-specific setup wizards which place the program and supporting files on the target system and perform the initial configuration of the target system to run Documaker Connector.

For instance, on Microsoft Windows systems, this includes installation of Documaker Connector as a Windows Service and installation of a task bar notification icon which you can use to control the running of the service.

To install on	Required user privileges	See
Windows	You must log in as the Administrator to install the Windows Service. You must also have write-permission to the disk directory where Documaker Connector will be installed. A non-Administrator can run the Setup wizard, however, the installation of the Windows service will fail. The program files will be installed and you can run the program as a command-line program, but it will not be added to the Services list in the Services control panel.	on page 8
UNIX (in GUI mode)	You must have write-access to the target directory. No special privileges are required.	on page 8
UNIX (via the command line)	You must have write-access to the target directory. No special privileges are required.	<i>Installing from the UNIX Command Line</i> on page 12

USING THE SETUP WIZARD

Running the Setup wizard is similar across all platforms. These steps are from Microsoft Windows, but should be easily used as a guideline in other environments.

Note On UNIX systems (AIX, Linux, and Solaris), to optionally run the installation in GUI mode you must have an X11 server running. You must also set the DISPLAY environment variable to point to the X11 server, otherwise it will run in a console mode. For more information, see *Installing from the UNIX Command Line* on page 12.

Follow these steps to run the X11 Java Swing-based GUI:

1. Start the X11 server on your computer or use the existing X11 hosted Linux desktop environment.
2. Set the DISPLAY environment variable to point to the X11 server. Here is an example:

```
DISPLAY=IPADDRESSOFX11Server:DisplayNumber
```

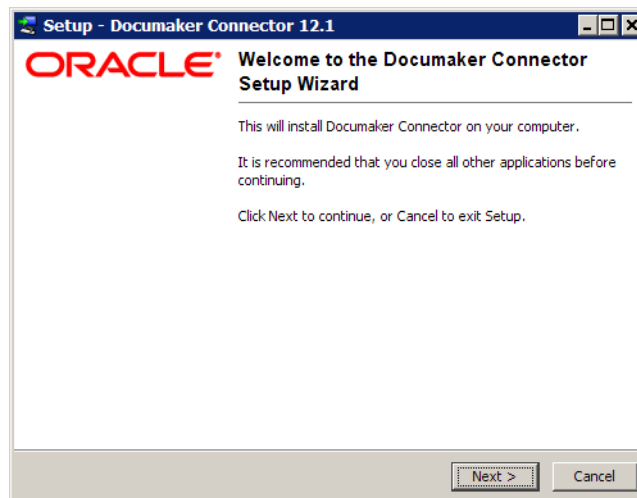
3. Run the Setup wizard.

From the directory into which you downloaded the Oracle Documaker Connector media pack, unzip the media pack, locate and double click on the following program:

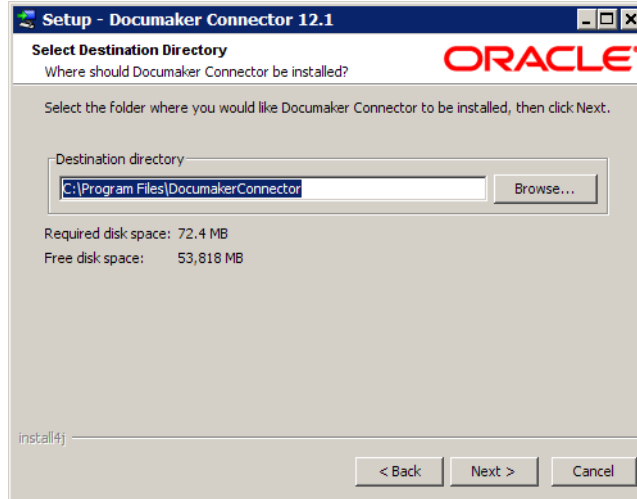
```
documakerconnectorrel(version and patch number).exe
```

The installation wizard starts. Follow these steps to install Documaker Connector:

1. When the Welcome window appears, click Next.



The Select Destination Directory window lets you choose the installation target directory.

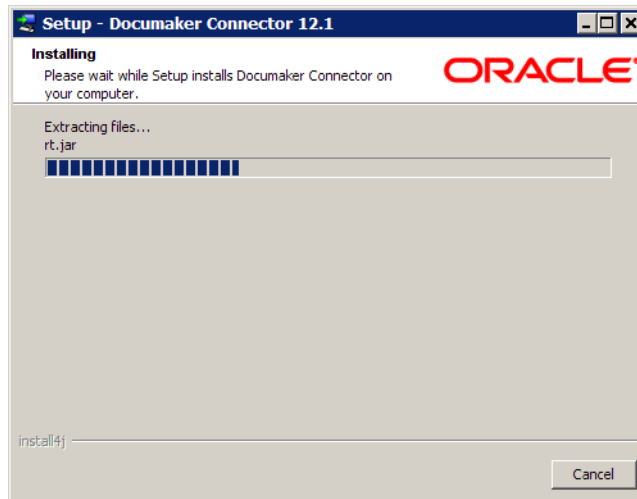


2. Enter a directory or click Next to accept the default directory. On Windows, the default directory is under the Program Files directory. The directory you choose is referred to throughout this document as the installation target directory.

Once you click Next, the Setup wizard begins to install Documaker Connector. As part of this process, the Setup wizard...

- Puts a Java run-time environment (JRE) in a subdirectory of the target directory called *jre*. On Microsoft Windows, the Setup wizard installs the Visual C++ 2008 run time if it is not already on the machine.
- Sets the `service.path` in the `dm_connector.svc.properties` file to the JRE that was installed.
- (On Windows) Runs the `dm_connector_svc.exe` program with an *install* parameter to install the Windows Service. Running this program later with a parameter of *uninstall* removes the Windows Service.

This window shows its progress:



When finished, this window appears:



3. Click Finish to complete the installation.

INSTALLING FROM THE UNIX COMMAND LINE

Running the installer from the UNIX command line avoids the requirement of having a windowing or GUI environment. All interaction with the installer is handled via the text console. The installer is packaged as a shell script. Here is an example:

```
DocumakerConnectorRel121p01b15380Linuxx86.sh
```

Note This example is for Linux on x86, but other UNIX platforms are very similar. The name of the file you download for your platform or software version may differ from the exact name shown in the example.

Follow these steps to install the software from a UNIX command line:

1. Once the script is copied into your UNIX directory, it must be made executable if it is not already. Use the `chmod` command to set the appropriate read and executable attributes. Here is an example:

```
~> chmod 555 DocumakerConnectorRel121p01b15380Linuxx86.sh
```

2. After you set the read and executable mode of the file, run the script:

```
~> ./DocumakerConnectorRel121p01b15380Linuxx86.sh
```

The script takes a few seconds to start and begin unpacking the compressed files contained within it. Here is an example of the text that appears on your console:

```
~> ./DocumakerConnectorRel121p01b15380Linuxx86.sh
Unpacking JRE ...
Preparing JRE ...
Starting Installer ...
This will install Documaker Connector on your computer.
OK [o, Enter], Cancel [c]
```

3. Press Enter to continue with the installation. Here is an example of the text that appears on your console:

```
Where should Documaker Connector be installed?
[/home/example/DocumakerConnector]
```

4. Enter a different location if necessary or press Enter to accept default location and continue with the installation. Here is an example of the text that appears on your console:

```
Preparing to copy files...
Extracting files...
Downloading ...
Extracting files...
COPYRIGHT
README
THIRDPARTYLICENSEREADME.txt
Welcome.html
bin/
bin/tnameserv
... (the complete list of installed files is omitted here)
lib/oracle-ridc-client-11g.jar
.install4j/
.install4j/uninstall.png
uninstall
Finishing installation...
~> cd DocumakerConnector
~> ls
total 41
```

```
-rw-r--r-- 1 example users 2930 2011-03-08 21:37 batch-file-conn.properties
-rw-r--r-- 1 example users 1330 2011-03-17 12:55 dm_connector_svc.properties
-rw-r--r-- 1 example users 3746 2011-03-08 21:37 dmkr-ucm-conn.properties
drwxr-xr-x 4 example users 232 2011-03-17 12:55 jre
drwxr-xr-x 2 example users 1128 2011-03-17 12:55 lib
-rw-r--r-- 1 example users 2888 2011-03-08 21:37 mock-file-conn.properties
-rw-r--r-- 1 example users 3042 2011-03-08 21:37 mock-ftp-conn.properties
-rw-r--r-- 1 example users 2758 2011-03-08 21:37 mock-mock-conn.properties
-rw-r--r-- 1 example users 3154 2011-03-08 21:37 mock-ucm-conn.properties
-rwx----- 1 example users 10337 2011-03-09 18:53 uninstall
```

Note During the installation on UNIX, you may see a warning message regarding the Java system preferences store at `/etc/.java/.systemPrefs/com`. This warning should not affect your installation.

RUNNING THE INSTALLER WITH A RESPONSE FILE

You can run the installer in unattended mode from the command line. To do this you must create a response file to provide the information the installer needs. A response file is a text file which contains the information a user would typically provide while running the Setup wizard or responding to command-line prompts. This information is in this format:

```
name=value
```

To create a response file that contains the necessary data, first run the command-line installer in one of these ways:

- Using default mode, with no arguments. After the installation finishes, the installer creates a response file named *response.varfile*.
- Using the command-line installation with the *-console* parameter. This lets you specify the name you want to assign to the response file.

After the installation finishes, the installer creates the response file and stores it in the *.install4j* directory. This file contains *name=value* data captured during the installation process. You can edit this file if necessary to modify the values. Here is an example:

```
#install4j response file for (application/version)
#Wed Mar 16 16:53:12 EDT 2011
sys.languageId=en
sys.installationDir=d:\\(application/version)
```

You can then pass the response file to the installer using the *-varfile* parameter. For example, to run the installer in unattended mode using a response file, include these parameters:

```
-q -console -c -varfile varfilename
```

Parameter	Description
-q	Runs the installer in unattended mode.
-console	If the installer is executed in unattended installation mode (-q) and you include -console as the second parameter, a console is allocated on Windows that displays the output of the installer.
-c	Runs the installer in the console mode.
-varfile	<i>Varfilename</i> specifies the name of the response.varfile to use. You can include a full path.

Note You can use a response file on both Windows and UNIX/Linux installations. For more information about response files and install4j installations, go to this web site:

<http://resources.ej-technologies.com/install4j/help/doc/>

Here is an example:

```
(application/version).exe -q -console -c -varfile
response.varfile
```

Here is an example of the output you will see:

```
Extracting files...  
Downloading ...  
Extracting files...  
Finishing installation...
```

CHECKING YOUR INSTALLATION

Although there are slight differences by platform, most of the installed files are the same regardless of the target system. The following example is from a Windows-based installation.

Setup wizard files

The Setup wizard places its own support files in the `.install4j` subdirectory. This directory should not be disturbed, as it contains information used if you decide to remove Documaker Connector. For more information, see *Removing Documaker Connector* on page 22.

Java run-time files

The Setup wizard places a Java 6 run-time environment (JRE) for the correct platform in the `jre` subfolder of the installation target directory. The configuration files for Documaker Connector are set up to use this JRE. If you need to use another JRE, you can reconfigure the properties and script files to use another JRE in the same or different location.

Java application and support files

All the Java JAR files for the application and the required support code are installed in the `lib` subdirectory. These JAR files must be in the Java classpath for the Documaker Connector to run (either from the command line or as a service). All of these files are installed as part of the normal installation process, but the list is provided here for information useful in troubleshooting or customizing the install.

The default logging properties file `log4j.xml` is installed in the `lib` folder, with the `.jar` file listed in this table. Some of the files are 3rd-party libraries which are available via the Internet. For these files, the URL you can use to download the file is provided, in case you need it.

Name	URL
<code>commons-beanutils.jar</code>	http://commons.apache.org/beanutils/
<code>commons-codec-1.6.jar</code>	http://commons.apache.org/codecs/
<code>commons-collections-3.2.jar</code>	http://commons.apache.org/collections/
<code>commons-dbcp-1.2.2.jar</code>	http://commons.apache.org/dbcp/
<code>commons-httpclient-3.1.jar</code>	http://hc.apache.org/httpclient-3.x/
<code>commons-lang-2.3.jar</code>	http://commons.apache.org/lang/
<code>commons-logging-1.1.1.jar</code>	http://commons.apache.org/logging/
<code>commons-net-2.2.jar</code>	http://commons.apache.org/net/
<code>commons-pool-1.3.jar</code>	http://commons.apache.org/pool/
<code>DdlUtils-1.0.jar</code>	http://db.apache.org/ddlutils/

Name	URL
jakarta-oro-2.0.8.jar	http://jakarta.apache.org/oro/
log4j-1.2.15.jar	http://logging.apache.org/log4j/1.2/
ojdbc14.jar	http://www.oracle.com/technetwork/database/enterprise-edition/jdbc-10201-088211.html or http://www.oracle.com/technetwork/database/enterprise-edition/jdbc-112010-090769.html
oracle-dmkr-conn-assuresigndestination.jar	Oracle proprietary file
oracle-dmkr-conn-batchloadersource.jar	Oracle proprietary file
oracle-dmkr-conn-documakersource.jar	Oracle proprietary file
oracle-dmkr-conn-documentdatasource.jar	Oracle proprietary file
oracle-dmkr-connector.jar	Oracle proprietary file
oracle-dmkr-connectorapi.jar	Oracle proprietary file
oracle-dmkr-conn-filedestination.jar	Oracle proprietary file
oracle-dmkr-conn-fileplusdestination.jar	Oracle proprietary file
oracle-dmkr-conn-ftpdestination.jar	Oracle proprietary file
oracle-dmkr-conn-ipmdestination.jar	Oracle proprietary file
oracle-dmkr-conn-mockdestination.jar	Oracle proprietary file
oracle-dmkr-conn-mockperiodicprocess.jar	Oracle proprietary file
oracle-dmkr-conn-mockreporter.jar	Oracle proprietary file
oracle-dmkr-conn-mocksource.jar	Oracle proprietary file
oracle-dmkr-conn-pdfburster.jar	Oracle proprietary file
oracle-dmkr-conn-ucmdestination.jar	Oracle proprietary file
oracle-dmkr-ezridc.jar	Oracle proprietary file
oracle-dmkr-scrambler.jar	Oracle proprietary file
oracle.ucm.ridc-11.1.1.jar	Get this file from your UCM installation in the directory: <Middleware Home>\<ECM Home>\ucm\Distribution\RIDC

Table 1: Required Java Library Support Files (JARs)

Note In addition to the files supplied with the application, you must make sure the appropriate JAR files for your database provider are also included in the classpath. These files are not included in the installation of the Documaker Connector — with the exception of the Oracle JDBC JAR file.

Here are some examples of the JAR files required for the JDBC connectivity for various databases:

Database	JAR file
Oracle	ojdbc14.jar (included with the application)
IBM DB2	db2jcc.jar
MySQL	mysql-connector-java-5.1.5-bin.jar
Microsoft SQL Server	sqljdbc.jar

Note: Vendors may revise these names with new versions of their products.

Table 2: JDBC Library Support Files (JARs)

Configuration and script files and Windows utility programs

At the root of the target installation folder, scripts, and configuration property files for Documaker Connector are placed along with utility programs useful on Microsoft Windows. These files are described here:

File	Description
dm_connector_agent.exe (Windows only)	This program creates the Task Tray Agent and provides convenient control of the Documaker Connector Windows Service
dm_connector_svc.exe (Windows only)	This program can be run as a Windows service and configured to run a Java program, like Documaker Connector, as the actual service program.
dm_connector_svc.properties Windows only)	The configuration file for dm_connector_svc.exe which causes it to run Documaker Connector as the real service and sets the CLASSPATH for the Documaker Connector program as well as the Documaker Connector properties file. It includes the path to the JVM and the Documaker Connector mode to be run as a service.
ecmconnector.bat (Windows only)	Batch script which may be useful to run Documaker Connector in a command prompt window. This file is described more later.
uninstall.exe (Windows only)	Lets you uninstall Documaker Connector.
source-dest-conn.properties	Series of example files providing a starting point for configuration of Documaker Connector with specific combinations of a source and a destination. The specific files are: <ul style="list-style-type: none"> • batch-file-... - Oracle WebCenter Content-batchloader source to a file-system folder destination • batch-ucm-... - Oracle WebCenter Content-batchloader source to Oracle WebCenter Content destination • dmkr-ucm... - Oracle Documaker source to Oracle WebCenter Content destination • mock-file... - Test data source to file-system folder destination • mock-ftp... - Test data source to FTP-server destination • mock-mock... - Test data source to Test data (null) destination • mock-ucm... - Test data source to Oracle WebCenter Content destination

File	Description
ecmconnector.sh	A UNIX shell script useful to run Documaker Connector.
vcredist_x86.exe (Windows only)	Microsoft installer for run-time support for the above applications. Provided in case the target install computer does not have the required support files.

Table 3: Configuration and script files and Windows utility programs

Setting Up Documaker Connector as a Windows Service

The `dm_connector_svc.exe` application runs Documaker Connector as a Windows Service. For more information, see *Windows Service Application* on page 72.

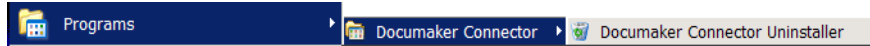
The `dm_connector_agent.exe` program places the Task Tray Agent icon in the Windows task bar:



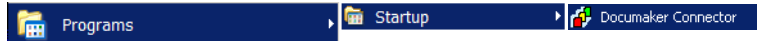
This icon shows the status of the Documaker Connector Windows service. Right-click on the icon to open the log file and start and stop the Windows service without opening the Services Control Panel.

USING THE TASK TRAY CONTROLLER

When the Setup wizard finishes, you will find a Documaker Connector Start menu folder with an uninstall option:



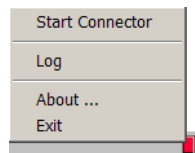
It also places the Documaker Connector Task Tray Agent in your Startup folder:



Select this option to start Documaker Connector Task Tray Agent. The Task Tray Agent appears in your task bar. Here is an example:



You can start the Task Tray Agent and then use it to start the service. Right click on the Task Tray Agent and choose the Start Connector option to start Documaker Connector:



The icon is yellow while starting up and then turns green while running normally.

Note The default configuration of the service is to run Documaker Connector with the Documaker Source and the WebCenter Content destination. Before running the service, you must complete the configuration so the Documaker Source can connect to the database and the WebCenter Content destination can reach the WebCenter Content system. For more information, see *Configuring an Archive Solution with Documaker Connector* on page 27.

DOWNLOADING PATCHES

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

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

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

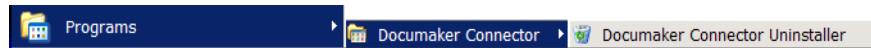
<https://support.oracle.com>

REMOVING DOCUMAKER CONNECTOR

Before removing Documaker Connector on a Windows system, be sure the application is not running as a Windows Service. To do so, first check the task tray controller or open the Services administrative tool (select Control Panel, Administrative Tools, Services) and stop the service if it is running. Then run the service program with the *uninstall* parameter to remove the registration of Documaker Connector as a Windows Service:

```
dm_connector_svc uninstall
```

To uninstall Documaker Connector, choose the Documaker Connector Uninstaller option from the Start menu:



On UNIX, the installer places an *uninstall* shell script in the installation target directory. To uninstall Documaker Connector, run the script from the parent directory of the installation target:

```
./DocumakerConnector/uninstall
```