ORACLE

Oracle® Documaker

Enterprise Edition

Installation Guide

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Contents

Preface

This document contains information necessary for the installation and configuration of Oracle Documaker Enterprise onto a server environment. The main components of Oracle Documaker Enterprise are Oracle Documaker Document Factory and Documaker Interactive.

AUDIENCE

This document is intended for users who need to install Document Factory and Documaker Interactive. Familiarity with Oracle Documaker configuration is also beneficial; please see the *ODEE Administration Guide*.

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RELATED DOCUMENTS

The Oracle Documaker documentation set, specifically:

• Documaker Installation Guide

• Documaker Administration Guide

• Documaker Factory Administration Guide.

  To make sure you have the latest documentation, visit the Oracle Technology Network:

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

Conventions

The following text conventions are used in this document:

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

Tips, Notes, Important Notes and Warnings

• A Tip provides a better way to use the software.

• A Note contains special information and reminders.

• An Important Note contains significant information about the use and understanding of the software.

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

Dialog

“Dialog” is the term used to describe windows, screens and other types of user interface elements used to enable reciprocal communication or “dialog” between a computer and its user. It may communicate information to the user, prompt the user for a response, or both.

Chapter 1

Overview

This document describes how to install and configure Oracle Documaker Enterprise onto a server environment.

This chapter includes the following topics:

This table shows you where to go for information on the steps you take to install and maintain Oracle Documaker Enterprise Edition (ODEE):

For information on	Go to
System requirements	Documaker System Requirements Guide
Installing the system on UNIX	*Installing ODEE in a UNIX Environment*
Installing the system on Windows	*Installing ODEE in a Windows Environment*
Customizing the location of Help files	*Maintaining Your System*
Downloading patches	*Maintaining Your System*
Downloading documentation updates	*Maintaining Your System*
Unistalling the software	*Uninstalling the Software*

PRODUCT OVERVIEW

The main components of Oracle Documaker Enterprise are:

- Oracle Documaker Document Factory
- Oracle Documaker Interactive
- Oracle Documaker Administrator

Oracle Documaker Document Factory

Oracle Documaker Document Factory is a document automation system that applies the assembly line concept from factory production to document production, delivery and system monitoring.

Document Factory includes the Document Factory Dashboard, a web-based application that provides analytics tracking and insight into the jobs being processed within the Document Factory.

Oracle Documaker Interactive

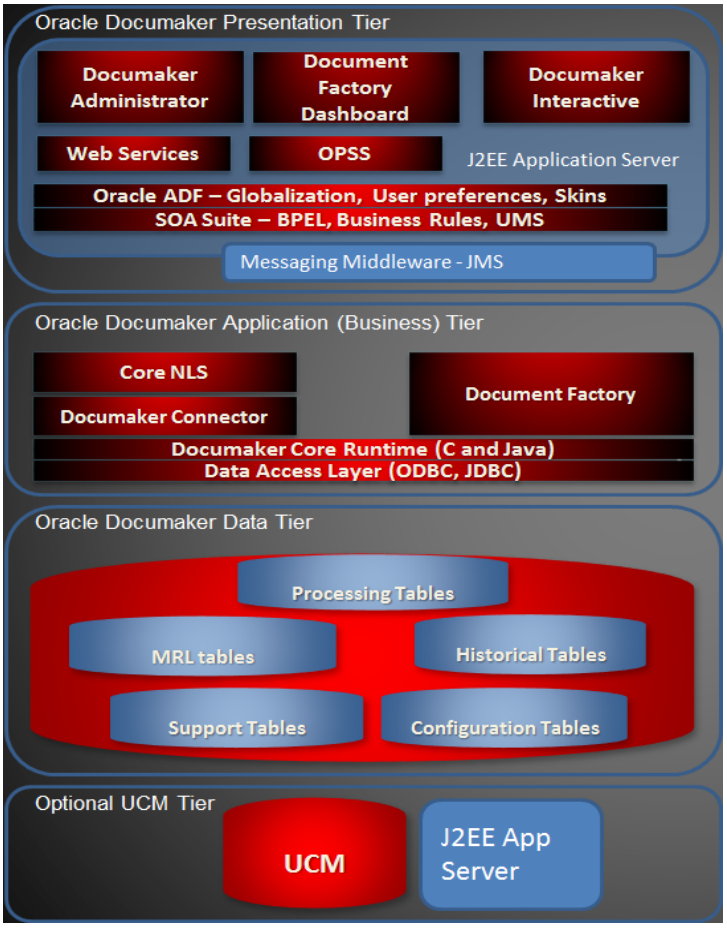
Oracle Documaker Interactive is a workflow-enabled, web-based application that lets you create personalized customer correspondence by choosing content from a pre-approved library of documents graphics and attachments.

Oracle Documaker Administrator

Oracle Documaker Administrator is a web-based application that lets system administers view and edit Documaker Factory and Documaker Interactive configuration settings, and manage assembly lines.

ARCHITECTURE OVERVIEW

This illustration provides an architectural overview of Documaker Enterprise Edition:



INSTALLATION DIRECTORIES

By default Document Factory, Docupresentment and Shared Objects are installed in the following directory structure.

documaker

This directory contains the following subdirectories and files:

Directory	Description
bin	Contains the DLL, EXE, and shared object files for Documaker server processing. Documaker Studio can be used from this location.
database	Contains the SQL script used during the post-setup process that creates the database tables and sample resources which are used to validate the installation.
docfactory	Contains the DLL, EXE, and Java archive (JAR) files needed for Document Factory processing. The subdirectories are: bin, config, deploy, global, internal-db, lib, logs, and temp. **Note:** There is a directory for each worker within the temp directory. You can find the log information for each worker in these directories, including worker activity and errors.
docupresentment	The directory where Docupresentment (IDS) is installed. This directory includes many files and subdirectories to support IDS processing. These include DAP.INI, LONGCONF.XML, DOCSERV.XML, WIPEDIT.INI (configure auto/default fields), and the following log and debugging files: DPRTRC.LOG, WATCHDOG-STDERR.TXT, and WATCHDOG-STDOUT.TXT.
filesystem-archive	This is the default location for archived documents when using the file system storage destination.
hotdirectory	This is the default location for archived documents when using the file system storage destination. The Receiver monitors this directory for files that it can accept as jobs into the Document Factory. Set up this directory as a networked or shared directory so it can be accessed by applications that submit jobs into the Document Factory. To change the location of the watched directory, update the Receiver's HotDirectories property within the Documaker Administrator web application after you install it.
j2ee	The parent directory for web applications and J2EEcomponents that support the Document Factory and Documaker Interactive: Correspondence processes. Contains the scripts used to create the required and sample users and groups.
jre	Contains the Java archive (JAR) files and resources needed to run the Document Factory workers.
mstrres	Contains the sample resources, including a master resource library and supporting runtime files used with Document Factory and Documaker Interactive: Correspondence.
oracle_instantclient_11_2	(Windows only) This directory contains files used to communicate with the database.

documaker\j2ee

This directory contains the following sub directories and files in the WebLogic directory:

Directory	Description
bpel	The web service Java archive (JAR) files for processing Documaker Interactive: Correspondence requests for approval and rejection. It uses Oracle Business Rules to determine the next step in documents submitted within Documaker Interactive: Correspondence. See the *Documaker Enterprise Administration Guide* for more information.
dashboard	Contains the enterprise archive (EAR) file for the Document Factory Dashboard web application.
documaker_administrator	Contains the EAR file for the Documaker Administrator web application.
idocumaker_correspondence	Contains the EAR file for the Documaker Interactive: Correspondence web application. Also contains the pass-through web service that can be used to bypass the BPEL approval workflow within Documaker Interactive: Correspondence.
scripts	Contains the command scripts and associated files used to create the required and sample user accounts and establish the WebLogic/ WebSphere domains.

JAR files are used to distribute Java applications or libraries, in the form of Java class files and associated metadata and resources. JAR files are built on the ZIP file format.

An EAR file is a standard JAR file with an *ear* extension, with entries representing the modules of the application, and a metadata directory called META-INF which contains one or more deployment descriptors.

Chapter 2

Installing ODEE in a Windows Environment

This chapter provides detailed information on how to install and configure Oracle Documaker Enterprise Edition (ODEE) in a Windows environment.

The installation process consists of the following stages:

STAGE 1: PRE-INSTALLATION STEPS

Before you install Oracle Documaker Enterprise Edition, make sure you have completed the following steps. Contact the appropriate system administrator for help with web application server details, database, email, and other connection information. You also need to have your users set up in DB2 with passwords, using integrated security.

- *Checking Requirements on page 21*
- *Downloading the Software on page 24*

STEP A: CHECKING REQUIREMENTS

1. Make sure you have met the required software and hardware as described in the Documaker System Requirements Guide. This includes having the following:

- An installed database.
    - Oracle database 11g
    - IBM DB2
        - LUW
        - ZOS

          For DB2, make sure the buffer space and default page size are set to 32K. Also, if the data files are on the same drive as the database executable, DB2 requires an environment variable to be set via a command prompt. Once set, restart the database.
- An installed web application server.
        - IBM WebSphere 7.0.0.27 Network Deployment (ND)
        - WebLogic 10.3.6

Note
- Fusion Middleware will not install to a path with spaces so WebLogic should be installed in a path without spaces.
- If you plan to adjust the deployment of JMS queues to a managed server hosting Documaker web applications, please ensure this bug #*18329421* is addressed in the prerequisite version of Fusion Middleware.
- Internet Explorer 11 support requires patch #*18277370* to be applied or included within the web application environment.

    - On the web application server, you must have Oracle SOA Suite 11.1.1.7.0

Note: In order to properly deploy the BPEL SOA extension, this must include patch #*16443288*.

- Microsoft Visual C++ Redistributable Package (vcredist_x86.exe)

Note The installation routine checks for Visual C++ before beginning the installation and attempts to install the necessary run-time components if they are missing. If the installation routine is not able to install these run-time components, you must download and install the latest Microsoft Visual C++ 2008 Redistributable Package (x86) from Microsoft's Download Center:

http://www.microsoft.com/downloads/

You can confirm if the necessary Visual C++ run-time components were installed by checking the orainstall*.out log file.

2. Make sure you have the following information available during the installation process:

   - The location where you will be installing ODEE. The default installation location is:

     `c:\oracle\odee_1`

Note This is the default location unless there is already an ORACLE HOME directory, in which case the default is the existing ORACLE HOME location. The location path cannot contain spaces.

   - The display names for the Document Factory System and Assembly Line.
   - The location of the hotfolder directories where extract data files can be picked up by the Document Factory.

3. Make sure you have the necessary the database connection information, including the database host, port, and system ID (SID).
4. Make sure you have the necessary web application server connection information including the following:

For	Have this information
WebLogic	Protocol, host, port, user (principal) and password (credentials)
WebSphere	Protocol, host, port, user (principal) and password (credentials)

5. If you will be using email distribution or notifications, make sure you have the necessary connection information including the host, port, user name, password, and default sender address. The username/password comes from the LDAP system.
6. If you will be using Oracle **WebCenter** formerly known as Universal Content Management (UCM) for attachments, make sure you have the necessary connection information available including the user name, password, connection string, and document URL.
7. If you will be using Short Message System (SMS) notifications, make sure you have the necessary Unified Messaging Service (UMS) connection information including the user name, password, and endpoint.
8. For RCU Schema selection, select the SOA and BPM Infrastructure component from the list. This will automatically select all the product schemas including the dependant schemas; SOA Infrastructure, Business Activity Monitoring (BAM) and User Messaging Service.
9. Make sure you have the appropriate communication ports open between the servers and the appropriate permissions and rights on the servers. System components will use the credentials and ports entered during the installation; these ports may be blocked by default on servers with advanced security.

   In addition, advanced security settings may prevent even administrative users from writing to some directories. Please contact your system administrator and security staff for confirmation.

Note Add a common user group for all Oracle installations so the installer files can be shared and recognized within the installed server. Run the installer as a user within this group.

STEP B: DOWNLOADING THE SOFTWARE

This topic describes how to download ODEE. Keep in mind:

- The media you will download is called the *Oracle Documaker Enterprise Edition media pack* and should be selected based on your target operating system.
- For the Documaker Interactive portion, download the Oracle Documaker WIP Edit plug-in.

Oracle Documaker 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 Documaker applications:
https://edelivery.oracle.com

STAGE 2: RUNNING SETUP

In this stage, you run the setup application to install Documaker Enterprise. You will be prompted to enter the information listed on the previous topic.

During the initial installation, the system creates a registry setting that identifies the Oracle Home directory. This directory is the location of where Documaker Enterprise will be installed.

Note During the installation process:

- You are prompted to enter various required values. If you need help completing these values, contact the appropriate system administrator.
- A set of sample resources will be provided. These resources let you access the sample Correspondence master resource library (MRL) and validate your configuration.

Follow these steps to run the setup application:

1. From the installation package, run the setup.exe file on the application tier. On the Welcome window, click Next.

Note The first time you run the Oracle Installation routine, the Specify Inventory Details Window appears. Review the information and click Next.

2. In the Specify Installation Location window, enter:
    - The complete installation path. Click Browse to select an installation directory. The default is c:\oracle\odee_1.

Note The name of the installation directory cannot exceed 44 characters. The Oracle limit is 64 characters, but Documaker appends 20 characters to the path.

3. Click Next to continue.
4. On the Database Server Details window, indicate the database you will use. Select:
    - Oracle 11g
    - IBM DB2 9.7
    - IBM DB2 zOS 10.1
5. On the Database Server Details window, enter:

Field	For an Oracle database	For a DB2 database	For DB2 zOS
Host	The host name or static IP address of the database server. The default is the computer where the installation is running from.	The host name or static IP address of the database server. The default is the computer where the installation is running from.	The host name or static IP address of the database server. The default is the computer where the installation is running from.

Field	For an Oracle database	For a DB2 database	For DB2 zOS
Port	The port number of the database; the default is 1521.	The port number of the database; the default is 50000	port number of database
Service Name	Select the service you will use	na	na
Database	na	Name of the database to which ODEE will be connected; the default is IDMAKER	Name of the database to which ODEE will be connected; the default is IDMAKER
Advanced Compression	True*	na	na
Location	na	na	DB2 for ZOS subsystem location name Click on advanced Settings and verify that appropriate Buffer Pools and storage volumes are set. Verify the settings and change the settings if it doesn't match the database settings.

Note * The scripts enable advanced compression on certain database columns. If you do not have an Advanced Compression Options license for Oracle 11g, please remove the COMPRESS DEDUPLICATE and COMPRESS HIGH DEDUPLICATE attributes from the scripts in dmkr_asline.sql.

6. The Administration Schema Details window contains settings for the schema where the configuration tables are stored. In this window, enter:

Field	Description
DB Folder	The database folder location where the physical database files will be created. If blank, the database folder (directory) is created in the working directory of the database installation. For an Oracle database, this is honored. For a DB2 database (includes **LUW** and **ZOS**) this is only honored if you uncomment the dmkr_admin schema portion create database section to reference another DB Folder location or enable this setting when the DBA creates the database in DB2.
User	The schema user name the application will use to connect to the database for the administration layer. The default is dmkr_admin. In case of DB2 database, the username should be less than 8 characters.
Password	The password for the user name the application will use to connect to the database. The default is Admin12.
Confirm Password	Re-enter the password to confirm.
System ID	A unique system ID for this Document Factory instance. If other Document Factory instances (not Assembly Lines) are installed, they also require a unique system ID. For initial installations, accept the default of one (1).

Field	Description
System Name	This is the display name for the Document Factory instance within the Documaker Administrator. The default is System 1. Change this name to reflect the Document Factory system in your organization.

Click Next to continue.

7. The Assembly Line Schema Details window contains settings for the schema where the assembly line processing tables are stored. In this window, make these entries:

Field	Description
DB Folder	The location where the physical database files will be created. If you leave this field blank, the database folder is created in the working directory of the database installation.
User	This is the name the application will use to connect to the database. The default is dmkr_asline. In case of DB2 database, the username should be less than 8 characters. This user name is also used for the: • Database schema/owner • JDBC data source name • ODBC data source name • Name applied to the Docupresentment service (docupresentment dmkr_asline)
Password	This is the password for this assembly line database. The default is Asline12. This password is also the Documaker Studio password for the Docucorp user.
Confirm Password	Re-enter password to confirm.
Assembly Line ID	This is the ID for this Assembly Line. If other assembly lines are installed, they require a unique Assembly Line ID. For initial installations, accept the default of one (1).
Assembly Line Name	The display name for the Assembly Line instance within the Documaker Administrator. The default is Assembly Line 1. Change this name to reflect the name of the assembly line in your organization.

When you finish, click Next to continue.

8. On the Application Server Details window, choose the application server you will use. You can choose from these application servers:
   - WebLogic Server 10.3.6
   - IBM WebSphere Application Server ND 7
9. Enter the user value for the web application server that is associated with the domain.
10. The JMS Details window contains the JMS values. If you need help with these values, contact your web application server administrator. In this window, make these entries:

Field	Description	
	Weblogic	WebSphere
Connection Class	The name of the Java class used to connect to the JMS queues. Always accept this default: oracle.documaker.ids.JMSConnection	The name of the Java class used to connect to the JMS queues. Always accept this default: oracle.documaker.ids.JMSConnection
InitialContextFactory	A Java class used when connecting to the JMS queues. Always accept this default: weblogic.jndi.WLInitialContextFactory	A Java class used when connecting to the JMS queues. Always accept this default:com.ibm.websphere.naming.WsnInitialContextFactory
Provider URL Protocol	The protocol used to connect to the JMS queues. Always accept the default of t3. You cannot change this value.	The protocol used to connect to the JMS queues. Default value is: iiop://servername:9502. Update the servername but leave the protocol and port as defaulted.
Principal	The user name required to start the logical server instances. Enter weblogic for WebLogic.	The user name required for JMS connection information.
Credentials	The password for the JMS Principal. Enter a password and use the same while creating the profile.	The password for the JMS Principal. Enter a password and use the same while creating the profile.
Confirm Credentials	Re-enter credentials to confirm.	Re-enter credentials to confirm.

When you finish, click Next to continue.

11. On the Hot Directory window, enter the HotFolder path. This path can include more than one directory, each separated by a comma.

    This Hot Folder path applies to the Assembly Line in the previous window. The default is:

    `[install_root]\documaker\hotdirectory`

Note This directory is monitored for jobs that are waiting to be processed.

Click Next to continue.

12. On the optional SMTP Email Server Details window, make these entries:

Field	Description
Host	Enter the IP address or server name of the SMTP server.
Port	Enter the port number of the SMTP server.
User	Enter the user name for the SMTP server.
Password	Enter the password for the SMTP server.

Field	Description
Confirm Password	Re-enter password to confirm.
Sender	Enter the email address the SMTP server uses as the sender for any email publication from the Documaker Document Factory. The default is shown here: admin@dmdfw2k3ebase.us.oracle.com

When you finish, click Next to continue.

13. In the Optional WebCenter Information window, enter the WebCenter Content Manager settings:

Field	Description
Enable	Select True to enable documents to be archived to the UCM. The default is False.
User	Enter the UCM user name.
Password	Enter the UCM password.
Confirm Password	Re-enter password to confirm.
Connection String	Enter the connection string. Here is an example: idc://hostname:4444
Document URL	Enter the document URL. Here is the default: http://hostname:16200/cs/groups/secure/documents/document

When you finish, click Next to continue.

14. On the Optional UMS details window, enter the User Messaging Services settings:

Field	Description
Enable	Select True to enable user messaging services. The default is False.
User	Enter the UMS server user name.
Password	Enter the UMS server user password.
Confirm Password	Re-enter password to confirm.
Endpoint	Enter the URL of the UMS server used for notifications. The default is: http://ipaddress of host:port/sdpmessaging/parlayx/SendMessageService

When you finish, click Next to continue.

15. On the Documaker Interactive Workflow window, enter these web services settings:

Field	Description
Documaker Web Service Endpoint	The location of the Documaker Composition Web Services. The default is http://hostname:portnumber/DWSV0/AL1CompositionService where *hostname* is the name or IP address of the current server. Change the host name to reference the WebLogic server. *portnumber* is the default port assigned to this web service. Use the default port.
Approval Process Endpoint	The location approval service. Only modify the default host name and port number. The default is http://hostname:portnumber/soa-infra/services/default/iDMkr_Correspondence/correspondenceprocesses_client _ep?WSDL where *hostname* is the name or IP address of the current server. Change the host name to reference the WebLogic server. *portnumber* is the default port assigned to this web service. Use the default port.
Approval Business Rules Endpoint	The location of the approval business rules. Only modify the default host name and port number. The default is http://hostname:portnumber/soa-infra/services/default/iDMkrApprovalRuleProj/iDMkrApprovalRules_ DecisionService_ep where *hostname* is the name or IP address of the current server. Change the host name to reference the WebLogic server. *portnumber* is the default port assigned to this web service. Use the default port.

Note Make sure the default ports entered are free to use. If the default port '8001' is not is use try using '9006'

When you finish, click Next to continue.

16. On the Installation Summary window, review your installation settings, space requirements, and availability. To make any changes, click Back. Click on Save to save your changes.
17. Click Install to begin the installation process.

    The Install Status window indicates the progress of the installation. To stop the installation process, click Cancel.
18. If errors occur during the installation, review the installActions*[date_and_time]*.log file. This file is usually located in this directory:

    ```
    [drive letter (usually C:)]\Program Files\Oracle\Inventory\logs\
    ```

    Note that these standard out files and error logs are also created during the installation process:

    - oraInstall*[date_time]*.out
    - oraInstall*[date_time]*.err
19. When the installation process has completed, the Installation complete window appears. Click Finish to close this window.

STAGE 3: POST-SETUP

STEP A: RUNNING DATABASE SCRIPTS AND LOADING THE MRL

The steps you take to run the database scripts and load the master resource library (MRL) vary, depending on the type of database you are using.

If you are using	Follow these steps
An Oracle database	*Running the Oracle Database Scripts*
A DB2 database	*Running the DB2 Database Scripts*

Note If you are using WebSphere as your application server, you must select the SERVICE_NAME value on the database details.

Running the Oracle Database Scripts

Follow these steps to run the Oracle database scripts:

1. Run the scripts located in the \documaker\database\oracle11g directory. You may need to copy these files to the database server. To run these files, you must have permission to create tables and insert data into the database. These scripts create the required Document Factory administrative and processing database tables. Contact your database administrator (DBA) for assistance.

Script	Description
dmrk_admin.sql	Creates the configuration schema and populates the tables with the entries captured during setup
dmkr_asline.sql	Creates the assembly line schema and the Documaker Studio default user accounts

Note: The names of these scripts are user-defined and may vary.

Note
- To change the Studio user passwords from the Assembly Line schema password, update this script before running it by modifying the Insert commands for the DMRES_DMUSER table.
- The scripts enable advanced compression on certain database columns. If you do not have an Advanced Compression Options license for Oracle 11g, please remove the *COMPRESS DEDUPLICATE* and *COMPRESS HIGH DEDUPLICATE* attributes from the scripts in dmkr_asline.sql.

2. To create sample user accounts for demonstration purposes and to test the deployment, run the following as the dmkr_admin user:

```
dmkr_admin_user_examples.sql
```

3. (Optional) ODEE includes database entries that enable the ODEE web applications to be viewed in other languages. To add support for languages other than English, perform these steps:

   a. Make sure the script is executed using UTF-8 encoding so the Unicode text within the script is put into the database properly.

If you are using	Then
SQL Developer to run the script	Change the file encoding option to UTF-8 by selecting the Tools, Preferences, Environment option and then setting the Encoding option to UTF8.
SQL Plus to run the script	Set this environment variable (for Windows): `NLS_LANG=AL32UTF8`

   b. Run the following scripts as the dmkr_admin user:

   - dmkr_admin_xx.sql
   - dmkr_asline_xx.sql

   Where xx is the two letter abbreviation for the desired language:

Languages	Abbreviation
Dutch	`nl`
French	`fr`
German	`de`
Indonesian	`Id`
Japanese	`ja`
Polish	`pl`
Portuguese	`pt`
Simplified Chinese	`zh`
Spanish	`es`

   c. Make sure the insert statements are committed to the database.

Note Test your connection to the ODBC database to ensure correct configuration by running the c:\windows\syswow64\odbcad32.exe program and then following the prompts.Make sure connection is successful.

4. Run this batch file from the application server to load the Correspondence MRL:

```
\documaker\mstrres\dmres\deploysamplemrl.bat
```

This loads the MRL into the database, deploying the sample resources which are used to validate the Document Factory installation.

Note Ignore this message while running deploy sample MRl : "Did not promote Older resource, Name <TIMESTAMP> ,Type <SYS> , Ver<00001> ,Rev<00001>.

5. Continue with the steps outlined in *Creating the Web Environment on page 36*.

Running the DB2 Database Scripts

Before you run the scripts, you must create the database. Use the below instructions for installing DB2 LUW or DB2 ZOS:

Creating a DB2 database

1. Add a database in the Control Center which has this name:

   `IDMAKER`
2. For this new database, change the default path to be an empty directory such as c:\db2.
3. Set the buffer space and default page size to 32K, then specify where to store the data.

   Next, specify the locale and set the Code to UTF-8.

Running the scripts

Note To run the DB scripts, confirm that 2 users have been created on the DB2 server with the names entered on the Installers database schema screens. These names must be in keeping with the authentication method that will be used by the database and the related length restrictions. For example, if you are using OS authentication for DB2 on AIX, then the schema names are limited to 8 characters. To run the Sql scripts, the user logged in must have required permissions to create and modify tables.

After creating the database in DB2, open Command Line Processor and run the following scripts.

1. Run the scripts located in the \documaker\database\db2 directory. You may need to copy these files to the database server. To run these files, you must have permission to create tables and insert data into the database. These scripts create the required Document Factory administrative and processing database tables.

Contact your database administrator (DBA) for assistance.

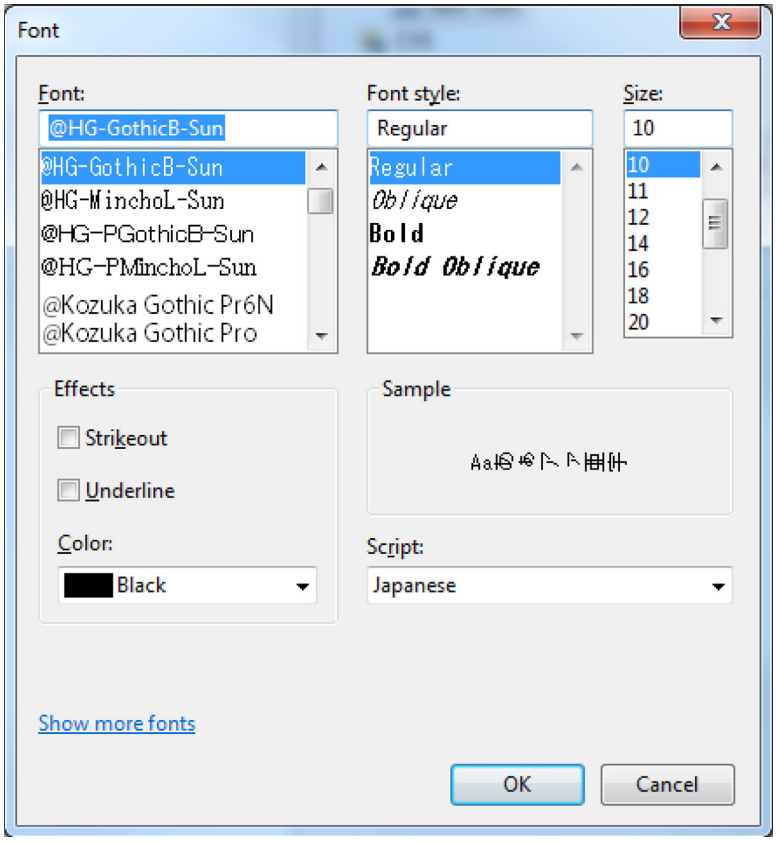
Script	Description
dmrk_admin.sql	Creates the configuration schema and populates the tables with the entries captured during setup

Script	Description
dmkr_asline.sql	Creates the assembly line schema and the Documaker Studio default user accounts.

Note To change the Studio user passwords from the Assembly Line schema password, update this script before running it by modifying the Insert commands for the DMRES_DMUSER table.

2. (Optional) In order to populate the system with alternative language options, do the following:

   a. Open IBM Data Studio and set font in editor for properly displaying Japanese (HG-GothicB-Sun).



   b. Open the dmkr_admin_xx.sql in a text editor that displays text correctly (in the example below, Notepad properly displayed Japanese text).

   c. Copy and paste the content of the script into IBM Data Studio tool editor for SQL and validate the characters are correct.

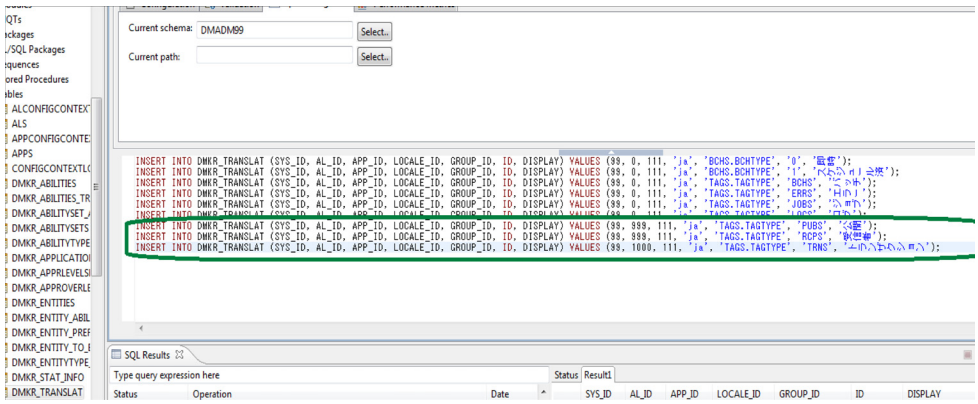
   Example from Notepad, dmkr_admin_ja.sql:

```
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID,
DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE', 'PUBS', '蜈ャ髢・');
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID,
```

DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE', 'RCPS', ' 蜿嶺ソ。閏・');

INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID, DISPLAY) VALUES (99, 1000, 111, 'ja', 'TAGS.TAGTYPE', 'TRNS', ' 纒医 Λ 纒ゥ繧ヵ繧ッ繧ャ纒ァ纒ゥ ');

From IBM Data Studio:



d. Process the DML statements, inserts, to the correct dmkr_admin schema.

e. Validate that the content appear correctly in table by selecting the rows for review.

f. Repeat with the dmkr_asline_xx.sql targeting the dmrk_asline schema for inserts.

3. To create sample user accounts for demonstration purposes, and to test the deployment, run the following as the admin user:

   `dmkr_admin_user_examples. sql`

4. Copy the following files from the DB2 server location to the appropriate locations in the ODEE installed directories, such as documaker\bin\lib, documaker\docfactory\lib, and documaker\docupresentment\lib.

   - If using DB2 LUW, copy db2jcc4.jar and db2jcc_license_cu.jar
   - If using DB2 ZOS, copy db2jcc4.jar and db2jcc_license_cisuz.jar

Note Contact your DBA if you need assistance locating the correct files.

5. If you are using Windows Integrated security for DB2, make sure the dmkr_asline users are also DB2 users. Then define the data source name (DSN)of the Documaker Interactive: Correspondence driver (client):

Note Test your connection to the ODBC database to ensure correct configuration by running the c:\windows\syswow64\odbcad32.exe program and then following the prompts.Make sure connection is successful.

6. Run this batch file from the application server to load the Correspondence MRL:

```
\documaker\mstrres\dmres\deploysamplemrl.bat
```

This loads the MRL into the database, deploying the sample resources which are used to validate the Document Factory installation.

Note Keep in mind that the users and sample data referenced in items 3 and 4 above are example data so that you can get a feel for the system and validate it is installed correctly. Your users and resource library will be needed for deployment and use of the system. Once you have configured to your identity management system, you can safely remove the example users in the entities tables and the sample library in the DMRES_LBY* tables. See the DEAG for more information about the content in each of these tables within the ODEE schemas.

7. Continue with the steps outlined in *Creating the Web Environment* on page 45.

STEP B: CREATING THE WEB ENVIRONMENT

The steps you take to create the web environment vary, depending on the type of database you are using.

If you are using	Follow these steps
WebLogic	Creating WebLogic User Accounts
WebSphere	Creating and Deploying a WebSphere Profile

Creating and Deploying a WebLogic Domain

A WebLogic administrator for the WebLogic server needs to complete the following steps to create the WebLogic domain and deploy these web applications:

- Documaker Document Factory Dashboard
- Documaker Administrator
- Documaker Interactive:Correspondence

1. Copy the \documaker\j2ee directory from the application (business) tier to the WebLogic server using the same structure as on the application tier server, assuming the application tier and weblogic deployment are on separate servers.
2. Set the environment variables to define the location of the WebLogic installation by editing these files in the documaker\j2ee\weblogic\oracle11g\scripts\ directory:

In this file	Make these changes
set_websphere_env.cmd	Update these values: • SET MW_DRIVE=c: where *c:* is the drive letter of your Oracle middleware home • MW_HOME=%MW_DRIVE%\oracle\middleware where *\oracle\middleware* is the path to the Oracle middleware home.
weblogic_installation.properties	Change the following software location values: • dirWeblogicHome=*c:\\oracle\\middleware* where *c:\\oracle\\middleware* is your Oracle middleware home directory • dirDocumakerHome=*c:\\oracle\\odee_1\\documaker* where *c:\\oracle\\odee_1* is the directory where the j2ee folder resides on the WebLogic server. Be sure to include escaped backslashes (\\) for the directory separators.

To create the WebLogic domain for hosting the web applications and the supporting resources such as queues, database connections, and Java Naming and Directory Interface (JNDI) references, run this command from ODEE home:

```
documaker\j2ee\weblogic\oracle11g\scripts\wls_create_domain.cmd
```

Note If you already have a domain on the server and you want to create a new domain, you can still use this script, just update the WebLogic domain name at the bottom of the file.

```
weblogicDomain=
```

3. Run the following script if using Documaker Interactive Correspondence web application;

```
wls_add_correspondence.cmd
```

4. Start the WebLogic AdminServer by running this command from the *[middleware home]*\user_projects\domains\idocumaker_domain\bin directory:

```
startWebLogic.cmd
```

5. Set the following option in the JVM start up process (in WLS console server startup arguments) : `-Djbo.pers.max.active.nodes=-1`

Note This will increase JVM heap usage, so monitor the heap usage as you may need to increase this accordingly,

6. Continue with the steps outlined in *Creating User Accounts on page 42*.

Creating and Deploying a WebSphere Profile

A WebSphere administrator for the WebSphere server needs to complete the following steps to create the WebSphere profile and deploy these web applications:

- Documaker Document Factory Dashboard
- Documaker Administrator
- Documaker Interactive: Correspondence

1. In the documaker\j2ee\websphere*oracle*\scripts\ folder check these settings:

Note This example path assumes you installed WebSphere with an Oracle database. You could also install WebSphere with a DB2 database, in which case the path might look like this: documaker\j2ee\websphere\db2v97\scripts\.

2. Copy the \documaker\j2ee directory from the application (business) tier to the WebSphere server using the same structure as on the application tier server.

3. Set the environment variables to define the location of the WebSphere installation by editing these files in the documaker\j2ee\websphere\scripts\direcory:

In this file	Make these changes
set_websphere_env.cmd	Update these values: • SET MW_DRIVE=c: where *c:* is the drive letter of your IBM middleware home directory. • MW_HOME=%MW_DRIVE%\ibm\middleware where *\ibm\middleware* is the path to the IBM middleware home directory.
websphere_installation.properties	Change the following software location values: • WeblogicHome=*c:\\ibm\\middleware* where *c:\\oracle\\middleware* is your IBM middleware home directory • dirDocumakerHome=*c:\\ibm\\odee_1\\documaker* where *c:\\ibm\\odee_1* is the directory where the j2ee folder resides on the WebSphere server. Be sure to include escaped backslashes (\\) for the directory separators. • dirDB2JDBCJars:This path reflects the location of the db2 jar files.

Note When you are setting up LDAP with the sample script, you can also update the ldap.txt file with your configuration.

4. Edit the websphere_installation.properties and set_websphere_env.cmd files to make sure that the AppServer home, Middleware set properly and check the ldapconfig.txt file to make sure that the user in the set_websphere_ev.cmd file matches if not make both in sync.
5. To create the WebSphere profile for hosting the web applications and the supporting resources such as queues, database connections, and Java Naming and Directory Interface (JNDI) references, make sure there are no other profiles in WebSphere with SOA/Fusion Middleware, then run this command:

   ```
   documaker\j2ee\websphere\db2v97\scripts\was_create_profile.cmd
   ```

   The Fusion Middleware Configuration wizard starts.
6. Select the Configuration Option. Then choose the Create and Configure Cell option and click Next.
7. Specify the following information:

Field	Description
Cell Name	Enter the following: `servernameCell01`

Field	Description
Deployment Manager Profile Name	Enter a name for the deployment manager profile. The default is Dmgr01.
Deployment Manager Node Name:Default	Enter the following: `servernameCellManager01`
Application Server Profile Name	Enter a name for the application server profile. The default is Custom01.
Application Server Node Name: Default	Enter the following: `servernameNode01`

Accept all other defaults. Refer to the Fusion Middleware documentation for more information.

8. Specify the deployment manager information:

Field	Description
Deployment Manager Host Name	Enter a name for the deployment manager host. The default is servername.
Admin User Name	Enter the username which is setup in ldap for websphere. This is from the LDAP account.
Password	Enter the password of the LDAP server where the account is configured.
Confirm Password	Enter the password again to confirm.

The Creating Cell window appears to show you the system's progress as it creates cells. Then the Add Products to Cell window appears.

9. Choose the Oracle JRF for Websphere - 11.1.1.0 [oracle_common] option and click Next.
10. On the Select Optional Configuration window, make sure all options are turned off, then click Next. The Review the Configuration Summary window appears.
11. Review the choices you made, then click Create. Next, click Done.
12. The was_create_profile.cmd will continue to run. When promoted, press any key to continue. The cmd file will run the python script to set up the WebSphere application server users and queues. Once it finishes, press any key to continue.
13. When prompted, press any key to continue. Oracle Platform Security Services (OPSS) are now set up and the system will shut down and restart.
14. Run the following script if using Documaker Interactive Correspondence web application:

    was_add_correspondence.cmd

Starting the WebSphere applications

1. To start the applications, follow these steps:
2. Click the Servers - Websphere Application Servers option. You should see these servers listed:

- Oracle Admin Server
- dmkr_server
- idm_server

Note The assumption is we have configured the dmkr_asline and dmkr_admin datasource max connections to be 3 * the jbo-ampool.maxavailablesize. If this is not done the application may run out of connections. Also if these setting are put in place the database must be configured to support these settings.

3. Start all of these servers to make sure the installation was successful.

Note
- In the Websphere Administration console under the admin and assembly line schema (for all servers), check that the property 'WebSphere Default isolation level' is having level 2 value. Ensure that the property holds the value 2 and if there are two properties of the same name- delete one and ensure the remaining properties have value '2'.
- The -Djbo.poll.mgr value listed is applicable for DB2 LUW and DB2 ZOS. If using Oracle database, the -Djbo.pcoll.mgr value should be oracle.jbo.pcoll.OraclePersistManager. Also note that the values entered in this Step should not exceed the connection pool settings.

4. Update the default heap for both the idm_server:
   a. Set the initial heap to 2 Gig
   b. Set the max heap to 8 Gig
5. Update the default heap for both the dmkr_server:
   a. Set the initial heap to 1 Gig
   b. Set the max heap to 2 Gig

Note Apply this heap size depending on the system specification/memory of the server running WAS. User may need to restart server for the change to take effect.

6. Update the connection pool settings for data sources by navigating to Resources -> JDBC->Data Sources and then select the Cell on which profile is created.
   a. Select the asline datasource
   b. Open the WebSphere Application server data source properties
   c. Set the value of the statement cache to 1000
   d. Select the admin datasource
   e. Open the WebSphere Application server data source properties
   f. Set the value of the statement cache to 1000

STEP C: CREATING USER ACCOUNTS

The steps you take to create user accounts vary, depending on the type of web application server you are using.

If you are using	Follow these steps
WebLogic	*Creating WebLogic User Accounts on page 42*
WebSphere	*Linking WebSphere User Accounts on page 42*

Creating WebLogic User Accounts

When the AdminServer is able to accept connections, the WebLogic server administrator needs to complete these steps:

Note To change the web application user passwords from the WebLogic password, update the py files called by each script before running the script.

1. To install the standard user accounts, run this command:

   documaker\j2ee\weblogic\oracle11g\scripts\create_users_groups.cmd

   This script creates the Documaker user account and the Documaker Administrators group. It adds this user to this group in WebLogic's default authenticator.

2. To install a set of users and groups to be used with the sample resources for Documaker Interactive: Correspondence, run this command:

   ```
   documaker\j2ee\weblogic\oracle11g\scripts\create_users_groups_
   correspondence_example.cmd
   ```

3. Link the new users and groups to the pre-configured entities in the Document Factory Administration registry database by going to the WebLogic server, opening a browser and going to this URL:

   ```
   http://servername:7001/jpsquery
   ```

Note You may need to change *localhost* to the name of your WebLogic server.

Linking WebSphere User Accounts

When the AdminServer is able to accept connections, the WebSphere server administrator needs to complete these steps:

1. For WebSphere, create a dmkr_admin account.
2. Create a dmkr_asline account on the data tier and do this:
3. Link the new users and groups to the pre-configured entities in the Document

Factory Administration registry database by going to the WebSphere server, opening a browser and going to this URL:

```
http://Servername:7001/jpsquery
```

Note You may need to change *servername* to the name of your server where WebSphere server is running.

STEP D: STARTING SERVICES

Before you start the services, if using WebSphere Application Server, copy the following JAR files from the WebSphere Application Server and optionally, the Websphere MQ Server's folder to the folders listed below so that WebSphere can communicate with DB2:

For	Copy these files	To the
WebSphere Application server (appserver/runtime directory)	com.ibm.ws.ejb.thinclinet_7.0.0.0.jar com.ibm.ws.orb_7.0.0.jar com.ibm.ws.sib.client.thin.jms.7.0.0.0.jar	ODEE install folders (documaker\bin\lib, documaker\docfactory\lib, and docupresentment\lib)
If you want to use WebSphere MQ with WebSphere, then copy the same from **websphere mq/java/lib directory**	com.ibm.mq.commonservices.jar com.ibm.ws.messagingClient.jar com.ibm.mq.headers.jar com.ibm.mq.jar com.ibm.mq.jmqi.jar com.ibm.mqjms.jar com.ibm.mq.jms.Nojndi.jar dhbcore.jar	documaker/bin/lib documaker/docfactory/lib documaker/ docupresentment/lib

Note The above list is for WAS 7, check for the IBM per version as the required files may change.

In weblogic, if JMS queues are running on managed server jms_server so Start the jms_server before starting services.

1. Go to the bin directory and run this command:

```
startManagedWebLogic.cmd jms_server
```

To start Windows services, perform these steps on your application (business) tier:

2. Choose the Start, Administrative Tools, Services option.
3. Start these Windows services:

Service	Description
ODDF Supervisor <server_name>_dmkr_asline_ <Assembly Line x> x=assembly line id	The Document Factory Windows service.
Docupresentment <server_name>_dmkr_asline_ <Assembly Line x> x=Assembly Line id	The Docupresentment Windows service.
Where *dmkr_asline* is the schema or user name for the assembly line.	

STEP E: STARTING DOCUMAKER ADMINISTRATOR AND DASHBOARD

The steps you take to start the web applications vary, depending on the type of web application server you are using.

Note A WebLogic administrator should complete this step.

Starting with WebLogic

Start the Documaker Administrator and Documaker Document Factory Dashboard web applications by starting the WebLogic Managed Server (dmkr_server) as follows:

1. Go to the *dirWeblogicHome*\user_projects\domains\idocumaker_domain directory and run this command:

   ```
   start\bin\startManagedWebLogic.cmd dmkr_server
   ```

2. When prompted, enter the WebLogic user name and password.

Note

- If you are using a different assembly line id (Not the Default set ID) run this command: `./startManagedWeblogic.cmd idm_al(assemblylineid)_server`
- The name entered should match the name of idm_server available in weblogic console.

STEP F: STARTING DOCUMAKER INTERACTIVE

The steps you take to start the web applications vary, depending on the type of web application server you are using.

Note A WebLogic administrator should complete this step *only* if deploying Documaker Interactive.

Starting with WebLogic

A WebLogic administrator should complete this step *only* if deploying Documaker Interactive.

1. Go to the *dirWeblogicHome*\user_projects\domains\idocumaker_domain directory and run this command:

   ```
   start\bin\startManagedWeblogic.cmd idm_server
   ```

2. When prompted, enter the WebLogic user name and password.

STEP G: DEPLOYING SOA

Deploying Oracle Service-Oriented Architecture (SOA) for WebLogic servers

Follow these steps to deploy Oracle Service-Oriented Architecture (SOA):

1. Stop these WebLogic servers, in this order:
   - idm_server
   - dmkr_server
   - jms_server
   - Oracle Admin Server

Note When the jms_server is stopped, the queues are no longer available for Document Factory to access and Document Factory will generate errors that it could not connect to the needed queues. So, when you stop the jms_server, be sure to stop the Oracle Documaker Document Factory service as well, and restart when jms_server is available.

2. Add SOA to the WebLogic domain:
   a. From the MW_HOME \wlserver_10.3\common\bin\ directory, run this command:
   ```
   config.cmd
   ```
   b. Choose Extend an existing WebLogic domain, then click Next.
   c. Select idocumaker_domain from the WebLogic Domain Directory window, then click Next.
   d. On the Select Extension Source window, choose Oracle SOA Suite 11.1.1.0, then click Next.

Note SOA may add the Oracle WSM Policy Manager Extension. If so, this is not an error.

   e. View the Configure JDBC Data Sources options (do not change these values), then click Next.

   The connection to the database is tested. When the test finishes, view the results, then click Next.
   f. Update the Configure JDBC Component Schema window. This will configure the connections your SOA repository. Click Next.
   g. The connection to the database is tested. When the test finishes, view the results, then click Next.
   h. On the Select Optional Configuration window, click Next.
   i. On the Configuration Summary window, click Extend and then Done.
   j. To deploy the Oracle Business Rules into the SOA extension, run this command:
   ```
   documaker\j2ee\weblogic\oracle11g\bpel\antbuild.cmd
   ```
3. Start these WebLogic servers (using the same commands as in the previous steps):
   - Oracle Admin Server

- dmkr_server
- idm_server
- jms_server

Note Restart Oracle Documaker Document Factory Service if you had previously stopped it.

4. From the *dirWeblogicHome*\user_projects\domains\idocumaker_ domain directory, run this command:

   ```
   start bin\startManagedWeblogic.cmd soa_server1
   ```

5. Add soa_server1 as a target for the dmkr_admin data source as follows:

   a. Make sure the AdminServer is ready to accept connections. Using a browser, log into the WebLogic console:

   ```
   http://servername:7001/console
   ```

   where *servername* is name of the WebLogic server.

   b. In the Domain Structure panel, expand Services and select Data Sources.

   c. In the Summary section of JDBC Data Sources panel, click the dmkr_admin link. This is the name of the administrator schema.

   d. Select the Targets tab then check the soa_server1 check box and click Save.

6. Once soa_server1 is ready to accept connections, deploy the Oracle Business Rule Composites by running this command:

   ```
   documaker\j2ee\weblogic\oracle11g\scripts\deploy_soa.cmd
   ```

7. In order to prevent generation of files of type BC** include the properties in server start tab as mentioned for each server and then configure WLS to start with node manager.

Server Name	Oracle Database	DB2
idm_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.DB2PersistManager
dmkr_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.DB2PersistManager
soa_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr. DB2PersistManager

Deploying Oracle Service-Oriented Architecture (SOA) for WebSphere servers:

Stop the servers and services in the order:

1. Go to Integrated Solution Console and stop servers in the following order

- idm_server
- dmkr_server

Note When the dmkr_server is stopped, the queues are no longer available for Document Factory to access and Document Factory will generate errors that it could not connect to the needed queues. So, when you stop the dmkr_server, be sure to stop the Oracle Documaker Document Factory service first, and restart only when the dmkr_server is available.

2. Stop the Oracle Admin Server through the Integrated Solution Console.
3. Stop the node and deployment manager.
4. To extend the WAS profile with SOA, run the was_config.cmd from theMW_HOME\oracle_common\common\bin.
5. On the Select Extension Source window, choose Oracle SOA Suite for WebSphere ND -11.1.1.0.

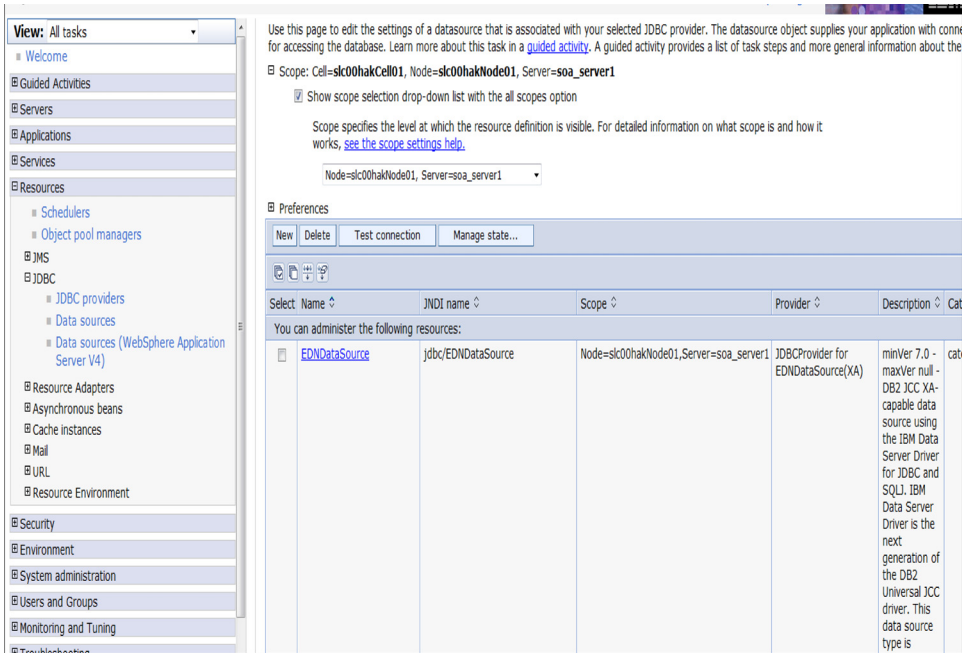
Note The RCU/SOA schema owners should have corresponding OS users.

6. Update Configure JDBC Component Schema window and Click Next.
7. If database is DB2 ensure all credentials and values are correct.
8. In Select Optional Configuration window, Select Next. Click Extend.
9. Ant build is in the location documaker\j2EE\websphere\db2v97\bpel. (A copy of ANT version 1.7.0 or higher.)
10. Environment variable PATH should be configured to the correct ANT location and ANT_HOME also should be configured in the environment variable.
11. Run antbuild.cmd and ensure that the build was successful.

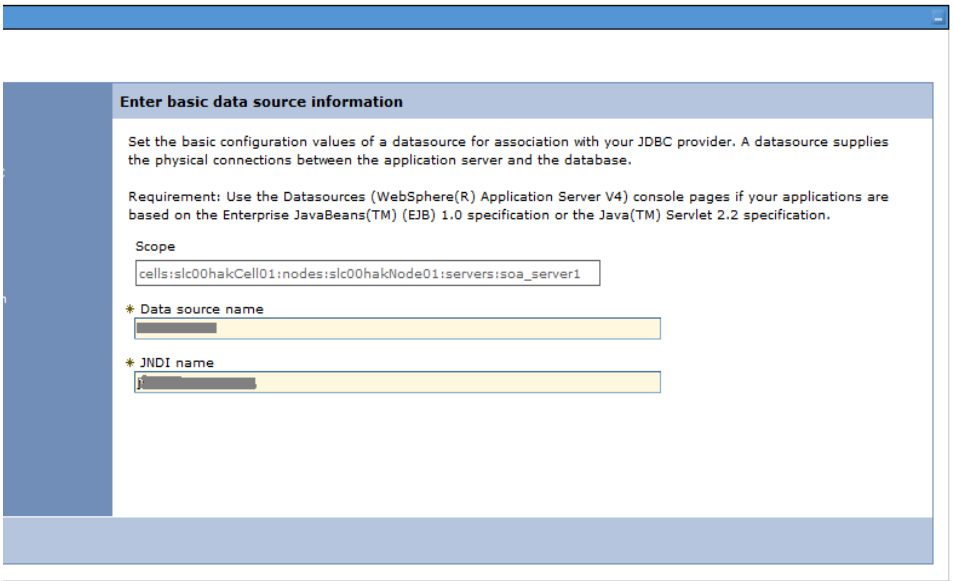
Note For WAS we need to have a copy of ANT configured. Download and extract ANT 1.7.1. Also, Download Ant Contrib 1.0 b2 , extract it and then copy the ant-contrib.jar into the apache-ant-1.7.1\lib directory.

12. Start deployment manager, node, Admin Server, services, dmkr, idm and soa server.
13. Configuring datasources for SOA_SERVER1 is given the following screenshots.

a. Login to WAS console and Click on new after selecting scope cell as soa_server1.

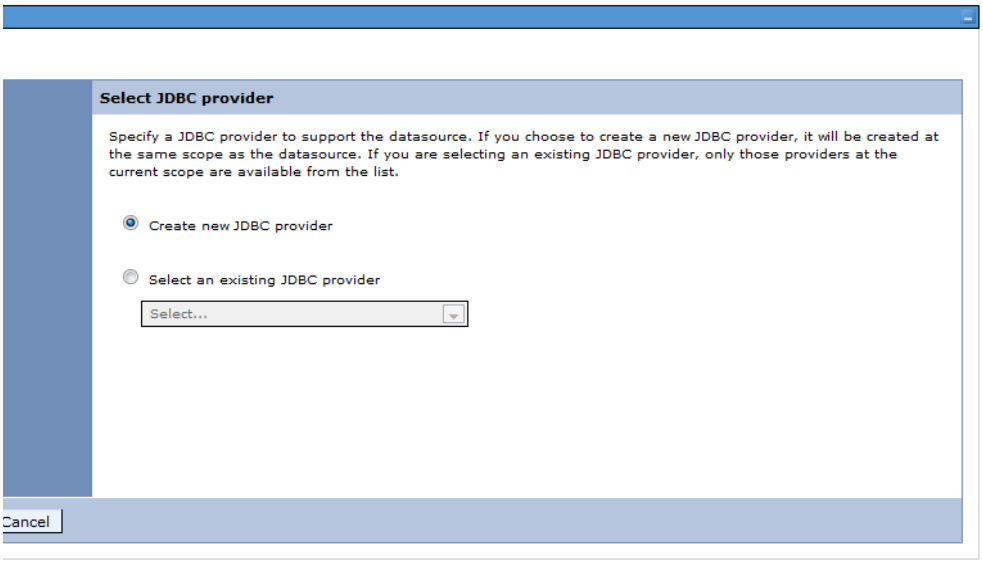


b. In the data source name enter the name of data source to be created(<adminschemaname>), enter the jndi name as jdbc/adminschemaname, click next.

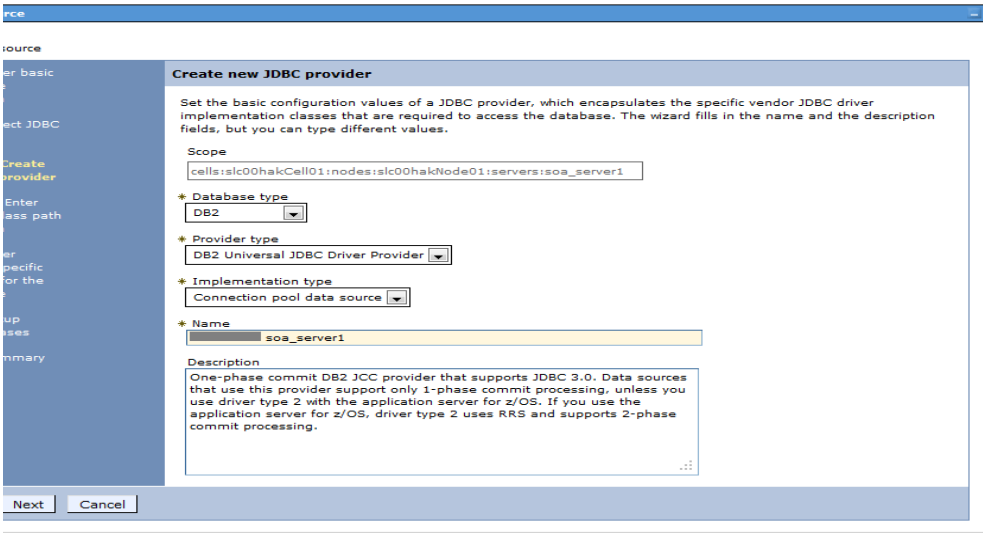


c. If a jdbc provider has been created already then select the existing jdbc provide or if not means select the option create a new jdbc data source.

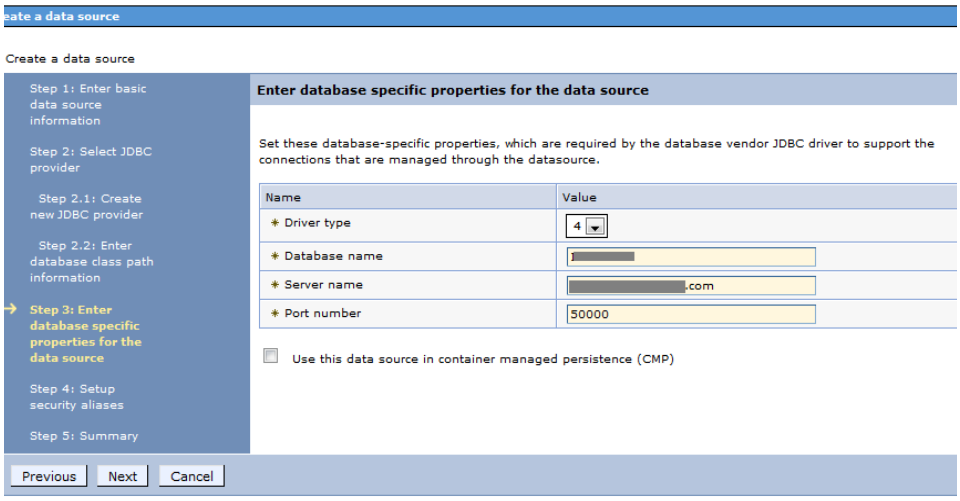
d. Click next. In the create data source page select the database type, provider type, Implementation type and name as shown below. Click next twice.

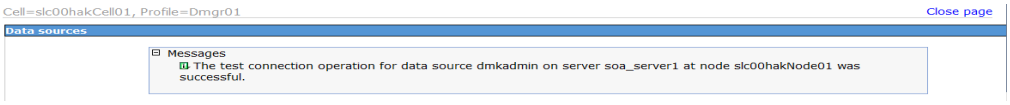


e. In the enter database specific details properties screen enter the database connection details and click next.



f. In the setup security alias screen enter the component managed authentication details and click next.



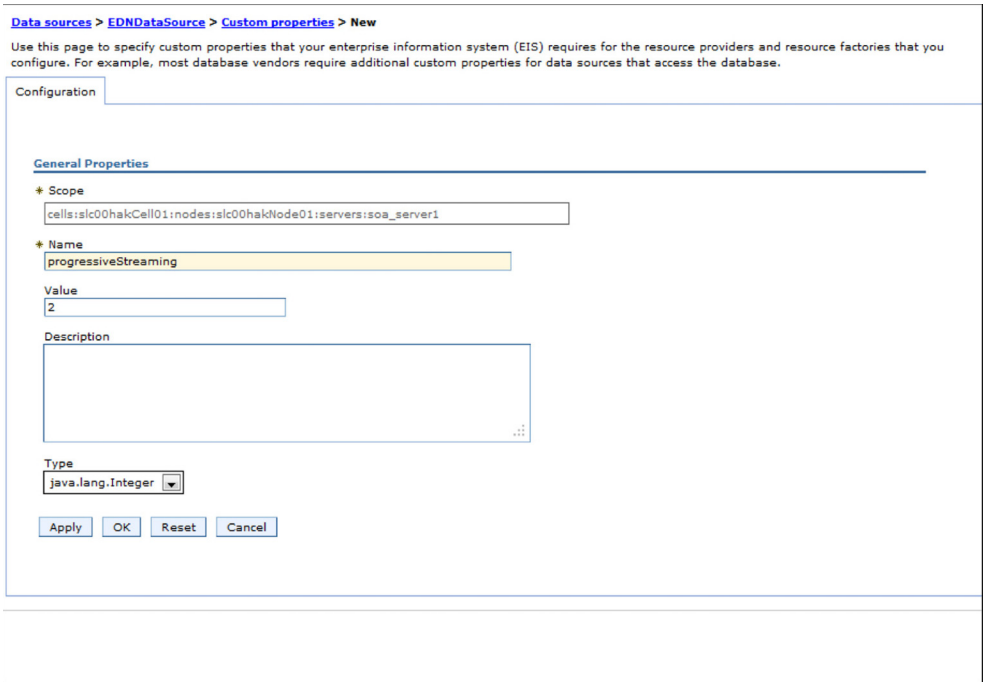


g. In the summary screen verify the data source details entered. Click Finish

and then save it to the master configuration. Select the data source created and click on test connection.

h. In the summary screen verify the data source details entered. Click Finish and then save it to the master configuration. Select the dmkadmin data source created and click on test connection.

i. Go to each of the data sources under soa_server and then go to custom properties for each, search for property ProgressiveStreaming, if its not there create it by clicking new as shown here. Be sure to set the value to 2 and type 'java.lang.String'. Save and synchronize the change with node.



j. By default 2 properties are created and user should only check for a property 'WebsphereDefaultisolation level' with the value 2.

k. For the datasource mds_soa if the property progressive streaming is not there create it the same way as created for admin datasource.

l. Add the property “DisableMultiThreadedServletConnectionMgmt= true” for soa server.

m. Save and restart the soa server for the changes to be in place.

STEP H: FINAL CONFIGURATION AND VALIDATION

Each of the configuration context (SYSCONFIGCONTEXT, ALCONFIGCONTEXT, APPCONFIGCONTEXT) tables has MODIFYTIME, USERTAG1, NOTES, and USER_NAME columns that can be used to determine what has changed following installation or following another collection of changes. This is helpful to follow-up on when a particular item has changed and why. Additionally, this information can be used to track configuration updates that should be carried forward from one tier environment to another. Therefore, when making changes to the configuration during installation processes or subsequent updates for system maintenance always utilize the USERTAG1 column and/or NOTES columns to group these changes in an identifiable manner. For instance, utilize, initial in the USERTAG1 column for any initial configuration changes following the base installation. Once confirmed and tested, any changes can be updated as ,passed or ready for promotion. Likewise use specific as a USERTAG1 value for any settings that include environment specific data like server names and IP addresses that you may not want to promote to a new environment directly.

1. Make sure you have a network accessible printer available for Document Factory publishing that supports the Multipurpose Internet Mail Extensions (MIME) types the system outputs when you are ready to generate printed output. For more information, see the Documaker Enterprise Administration Guide.
2. Validate the installation of Documaker Administrator by accessing Documaker Administrator from the following link:

   `https://servername:10002/DocumakerAdministrator`

   where *servername* is the name of the presentation tier.

   Use these credentials to log in:

For	Enter
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.

3. Download and configure the WIP Edit plug-in.

   To edit documents within Documaker Interactive, you need the WIP Edit plug-in. You can download the plug-in from the Oracle Software Delivery Cloud web site and provide it to users by:

   - Pushing the installation to your end users.
   - Hosting the installation and allow the web application to provide a download link when requested. Make sure the installation is available on a static content server.

   If you are hosting the WIP Edit plug-in installation, use Documaker Administrator to enter the location for the installation:

a. In the left panel, click the Systems link. In the right panel, expand the System node, if it is not already expanded. Expand the Assembly Line node, if it is not already expanded.

b. Select the row containing the newly-installed assembly line. Select the Correspondence application. Click Configure.

c. On the Correspondence tab, select the ENTRY_ACTION_PLUGIN_INIT category within the ENTRY context and then select the group name, ENTRY_ACTION_PLUG_INIT.

d. In the Properties panel, double-click the row containing the property named installer. Change the installer value to be the hosted location for the plug-in installation.

e. In the Properties panel, double-click the row that contains the putURL property. Then change the putURL value to reflect the ipaddress:port of the server for the idm_server web application and click Save. This must be the secure port for Documaker Interactive. The default port is 9002.

4. Validate your Document Factory installation by the preforming these tasks:

a. Create a copy of the extrfile.xml file with the name *extrfile.tmp*. This file is located in the \documaker\mstrres\dmres\input folder.

b. Move the extrfile.tmp file into the hotfolder directory on the Document Factory server.

c. Rename the *extrfile.tmp* file to *extrfile.xml* in the hotfolder directory.

Note This step pushes documents through the system. Moving the file with a *tmp* extension makes sure the file is not processed by the Receiver before the file is copied to the hotfolder directory.

5. Validate the web applications using these credentials:

For	Use
Documaker Document Factory Dashboard	
URL	https://Servername:10002/DocumakerDashboard
User name	documaker
Password	The value entered in JMS Credentials during the installation process unless it has been changed.
Documaker Interactive (if installed)	
URL	http://Servername:9001/DocumakerCorrespondence When you access this link, you are redirected to the HTTPS port for a more secure connection.
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.

Note Use https instead of http if running WebSphere and using IE to access the web applications for Dashboard and Documaker Administrator.

You have completed the installation and configuration of Document Factory and Documaker Interactive: Correspondence.

Note The following error messages are seen in the trace.log of soa server:
1. registration: javax.naming.NameNotFoundException: Name comp/jmx not found in context "java:".

2. oracle.security.idm.ObjectNotFoundException: No Membership Found.

Note For information on customizing the location of Help files, downloading patches, and downloading documentation updates, see *Maintaining Your System on page 94*.

Chapter 3

Installing ODEE in a UNIX Environment

This chapter provides detailed information on how to install and configure Oracle Documaker Enterprise Edition (ODEE) in a UNIX environment.

The installation process consists of the following stages:

STAGE 1: PRE-INSTALLATION STEPS

Before you install Oracle Documaker Enterprise Edition, make sure you have completed the following steps. Contact the appropriate system administrator for help with web application server details, database, email, and other connection information.

- *Checking Requirements on page 57*
- *Downloading the Software on page 60*

STEP A: CHECKING REQUIREMENTS

1. Make sure you have met the required software and hardware as described in the Documaker System Requirements Reference Guide. This includes having the following:

- An installed database
  - Oracle database 11g
  - IBM DB2
    - LUW
    - ZOS

For DB2, make sure the buffer space and default page size are set to 32K. Also, if the data files are on the same drive as the database executable, DB2 requires an environment variable to be set via a command prompt. Once set, restart the database.

An installed web application server.

- WebLogic 10.3.6
- IBM WebSphere 7.0.0.27 Network Deployment (ND)

Note

- Fusion Middleware will not install to a path with spaces so WebLogic/ WebSphere should be installed in a path without spaces.
- If you plan to adjust the deployment of JMS queues to a managed server hosting Documaker web applications, please ensure this bug *#18329421* is addressed in the prerequisite version of Fusion Middleware.
- Internet Explorer 11 support requires patch *#18277370* to be applied or included within the web application environment.

- On the web application server, you must have Oracle SOA Suite 11.1.1.7.0.

Note In order to properly deploy the BPEL SOA extension, this must include patch #16443288.

2. Make sure you have the following information available during the installation process:

- The location where you will be installing Documaker Enterprise. The default installation location is where the home directory is based on the user installing the system.

Note This is the default location unless there is already an ORACLE HOME directory, in which case the default is the existing ORACLE HOME location.

Keep in mind:

- The location path cannot contain spaces.
- The location path must be in lowercase.

- The display names for the Document Factory System and Assembly Line.
- The location of the hot directories where extract data files can be picked up by the Document Factory.

3. Make sure you have the necessary the database connection information, including the database host, port, and system ID (SID).
4. Make sure you have the necessary web application server connection information including the following:

For	Have this information
WebLogic	Protocol, host, port, user (principal) and password (credentials)
WebSphere	Protocol, host, port, user (principal) and password (credentials)

5. If you will be using email distribution or notifications, make sure you have the necessary connection information including the host, port, user name, password, and default sender address. The username/password comes from the LDAP system.
6. If you will be using Oracle **WebCenter** previously known as Universal Content Management (UCM) for attachments, make sure you have the necessary connection information available including the user name, password, connection string, and document URL.
7. If you will be using Short Message System (SMS) notifications, make sure you have the necessary Unified Messaging Service (UMS) connection information including the user name, password, and endpoint.
8. For RCU Schema selection, select the SOA and BPM Infrastructure component from the list. This will automatically select all the product schemas including the dependant schemas; SOA Infrastructure, Business Activity Monitoring(BAM) and User Messaging Service.
9. Make sure you have the appropriate communication ports open between the servers and the appropriate permissions and rights on the servers. System components will use the credentials and ports entered during the installation; these ports may be blocked by default on servers with advanced security.

In addition, advanced security settings may prevent even administrative users from writing to some directories. Please contact your system administrator and security staff for confirmation.

Note Oracle recommends that you add a common user group for all Oracle installations so the installer files can be shared and recognized within the installed server. Run the installer as a user within this group.

STEP B: DOWNLOADING THE SOFTWARE

This section describes how to download Documaker Enterprise. Keep in mind:

- The media you will download is called the *Oracle Documaker Enterprise Edition media pack*. Be sure to select the media pack for the operating system you intend to run Documaker Enterprise on.
- For the Documaker Interactive portion, download the Oracle Documaker WIP Edit plug-in. You will find the plug-in listed under Microsoft Windows (32-bit) OS.
- Oracle Documaker 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 Documaker applications: https://edelivery.oracle.com

STEP C: LOGGING IN AS ROOT

Before you install the Oracle software, you must complete several tasks as the root user. To log in as the root user, complete one of these procedures:

- Installing from an X Window system workstation or terminal
- Installing from a system with X server software

Installing from an X Window system workstation or terminal

If you are installing the software from an X Window system workstation or X terminal, follow these steps:

1. Start a local terminal session, for example, an X terminal (xterm).
2. If you are not installing the software on the local system, then enter the following command to enable the remote host to display X applications on the local X server:

```
$ xhost fully_qualified_remote_host_name
```

Here is an example:

```
$ xhost somehost.us.acme.com
```

3. If you are not installing the software on the local system, then use the ssh, rlogin, or telnet command to connect to the system where you want to install the software:

```
$ telnet fully_qualified_remote_host_name
```

4. If you are not logged in as the root user, then enter the following command to switch user to root:

```
$ sudo sh
password:
#
```

Installing from a system with X server software

If you are installing the software from a PC or other system with X server software installed, follow these steps:

Note Refer to your X server documentation for more information about completing this task. Depending on the X server software you are using, you may need to complete the tasks in a different order.

1. Start the X server software.
2. Configure the security settings of the X server software to permit remote hosts to display X applications on the local system.
3. Connect to the remote system where you want to install the software and start a terminal session on that system, for example, an X terminal (xterm).
4. If you are not logged in as the root user on the remote system, enter this command to switch user to root:

   ```
   $ sudo sh
   password:
   #
   ```

STAGE 2: RUNNING SETUP

In this stage, you run the setup application to install Documaker Enterprise. You will be prompted to enter the information listed on the previous topic.

During the initial installation, the system identifies the Oracle home directory. This directory is the location where Documaker Enterprise will be installed.

Note During the installation process:

- You are prompted to enter various required values. If you need help completing these values, contact the appropriate system administrator.
- A set of sample resources will be provided. These resources let you access the sample Correspondence master resource library (MRL) and validate your configuration.

Follow these steps to run the setup application:

1. From the installation package, copy the ZIP file to the application server. Then unzip it.
2. Go to the disk1 directory and enter this command: `./runInstaller`

for AIX Enter ./runInstaller -jreLoc <location of 64bit jre>

3. The Welcome screen appears. Click Next.
4. In the Specify Inventory directory and on the Credentials window enter:
   - The full path of the inventory directory. Here is the default:

     `/home/username/orainventory`

     This directory houses installer files for all installs created by the Oracle Universal Installer (OUI).

     Choose a shared oracle group and choose the shared location for inventory directory and credentials. If you are creating a directory, update the permissions to include the new oracle installer group.
   - Specify the Operating System group name. The default is the current user GROUP name.

Note This window appears if no other Oracle-based installer using (OUI) has been installed on this application tier.

5. On the Specify Home Details window enter the name of the Oracle Home environment variable. The default is DocumakerHome1. For more information, click the Help button. Then enter the complete installation path. Click Browse to select an installation directory. The default is /home/user name/oracle/odee_1.
6. Click Next to continue.

7. On the Specify Database Type window, indicate the database you will use. Select
   - Oracle 11g
   - IBM DB2 9.7
   - IBM DB2 zOS 10.1
8. On the Database Information window, enter:

Field	For Oracle database	For a DB2 database	Documaker Interactive: Correspondence zOS
Host	The host name or static IP address of the database server. The default is the computer where the installation is running from.	The host name or static IP address of the database server. The default is the computer where the installation is running from.	The host name or static IP address of the database server. The default is the computer where the installation is running from.
Port	The port number of the database; the default is 1521.	The port number of the database; the default is 50000.	The port number of the database
SID	The SID (system identifier).	NA	NA
Database	NA	Name of the database to which ODEE will be connected; the default is IDMAKER	Name of the database to which ODEE will be connected; the default is IDMAKER
Advanced Compression	True * Enter False if you don't have a valid license for use.	NA	NA
Location	NA	NA	DB2 for ZOS subsystem location name Click on advanced Settings and verify that appropriate Buffer Pools and storage volumes are set. Verify the settings and change the settings if it doesn't match the database settings.

Note * The scripts enable advanced compression on certain database columns. If you do not have an Advanced Compression Options license for Oracle 11g, please remove the COMPRESS DEDUPLICATE and COMPRESS HIGH DEDUPLICATE attributes from the scripts in dmkr_asline.sql.

9. The Registration/Administrator Database Schema window contains settings for the schema where the configuration tables are stored. In this window, enter:

Field	Description
DB Folder	The database folder location where the physical database files will be created. If blank, the database folder (directory) is created in the working directory of the database installation. For an Oracle database, this is honored. For a DB2 database, this is only honored if you uncomment the dmkr_admin schema portion create database section to reference another DB Folder location or enable this setting when the DBA creates the database in DB2. For a DB2 database, this is only honored if you uncomment the dmkr_admin schema portion create database section to reference another DB Folder location or enable this setting when the DBA creates the database in DB2.
User	The schema user name the application will use to connect to the database for the administration layer. The default is dmkr_admin. The length limitation of database authentication if using DB2 with AIX OS authentication (default method) this value is limited to a maximum of 8 characters. If using AIX OS then username should be less than 8 characters. **Note**: DB2 also requires OS authentication hence the user name should be existing in OS level if running with that database
Password	The password for the user name the application will use to connect to the database. The default is Admin12.
System ID	A unique system ID for this Document Factory instance. If other Document Factory instances (not Assembly Lines) are installed, they also require a unique system ID. For initial installations, accept the default of one (1).
System Name	This is the display name for the Document Factory instance within the Documaker Administrator. The default is System 1. Change this name to reflect the Document Factory system in your organization.

10. Click Next to continue.
11. The Assembly Line Database Schema window contains settings for the schema where the assembly line processing tables are stored. In this window, make these entries:

Field	Description
DB Folder	The location where the physical database files will be created. If you leave this field blank, the database folder is created in the working directory of the database installation.
User	This is the name the application will use to connect to the database. There is a limit of 8 characters on AIX for userids and since DB2 by default uses system authentication you need to use a Admin and Assembly Line user ids that exist on the AIX server eg:DMKASLIN. The default is dmkr_asline. The length limitation of database authentication if using DB2 with AIX OS authentication (default method) this value is limited to a maximum of 8 characters. This user name is also used for the: • Database schema/owner • JDBC data source name • ODBC data source name • Name applied to the Docupresentment service (docupresentment dmkr_asline)

Field	Description
Password	This is the password for this assembly line database. The default is Asline12. This password is also the Documaker Studio password for the Docucorp user.
Assembly Line ID	This is the ID for this Assembly Line. If other assembly lines are installed, they require a unique Assembly Line ID. For initial installations, accept the default of one (1).
Assembly Line Name	The display name for the Assembly Line instance within the Documaker Administrator. The default is Assembly Line 1. Change this name to reflect the name of the assembly line in your organization.

When you finish, click Next to continue.

12. On the Specify Application Server Type window, choose the application server you will use. Select:
    - WebLogic Server 10.3.6
    - IBM WebSphere Application Server ND 7
13. Enter the user value for the web application server that is associated with the domain.
14. The JMS Setup window contains the JMS values. If you need help with these values, contact your administrator. In this window, make these entries:

Field	Description	
	Weblogic	WebSphere
Connection Class	The name of the Java class used to connect to the JMS queues. Always accept this default: oracle.documaker.ids.WebLogicJMSConnection	The name of the Java class used to connect to the JMS queues. Always accept this default: oracle.documaker.ids.JMSConnection
InitialContextFactory	A Java class used when connecting to the JMS queues. Always accept this default: weblogic.jndi.WLInitialContextFactory	A Java class used when connecting to the JMS queues. Always accept this default:com.ibm.websphere.naming.WsnInitialContextFactory
Provider URL	The URL used to connect to the JMS queues. Default value is: t3://servername:11001. Update the servername but leave the protocol and port as defaulted.	The URL used to connect to the JMS queues. Default value is: iiop://servername:9502. Update the servername but leave the protocol and port as defaulted.
Principal	The user name required to start the logical server instances. Enter weblogic for WebLogic.	The user name required for JMS connection information.
Credentials	The password for the JMS Principal. Enter a password and use the same while creating the domain.	The password for the JMS Principal. Enter a password and use the same while creating the profile.

When you finish, click Next to continue.

15. On the Hot Folder window, enter the HotFolder path. This path can include more than one directory, each separated by a comma.

    This Hot Folder path applies to the Assembly Line in the previous window. The default is:

    ```
    [Install_Root]/documaker/hotdirectory
    ```

Note This directory is monitored for jobs that are waiting to be processed.

Click Next to continue.

16. On the optional SMTP Email Server window, make these entries:

Field	Description
SMTP Host	Enter the IP address or server name of the SMTP server.
SMTP Port	Enter the port number of the SMTP server.
SMTP User	Enter the user name for the SMTP server.
SMTP Password	Enter the password for the SMTP server.
Confirm Password	Re-enter the password to confirm.
SMTP Sender	Enter the email address the SMTP server uses as the sender for any email publication from the Documaker Document Factory. The default is admin@docfactory.com.

When you finish, click Next to continue.

17. In the Optional WebCenter Information window, enter the Universal Content Management settings:

Field	Description
Use UCM	Select True to enable documents to be archived to the UCM. The default is False.
UCM User	Enter the UCM user name.
UCM Password	Enter the UCM password.
Confirm Password	Re-enter the password to confirm.
UCM Connection String	Enter the connection string. Here is an example: idc://hostname:4444
UCM Document URL	Enter the document URL. Here is the default: http//hostname:16200/cs/groups/secure/documents/document

When you finish, click Next to continue.

18. On the Optional Oracle (UMS) Information window, enter the User Messaging Services settings:

Field	Description
Use UMS	Select True to enable user messaging services. The default is False.
UMS User	Enter the UMS server user name.
UMS Password	Enter the UMS server user name.
Confirm Password	Re-enter the password to confirm.
UMS Endpoint	Enter the URL of the UMS server used for notifications.

When you finish, click Next to continue.

19. On the Web Services window, enter these web services settings:

Field	Description
Documaker Web Service Endpoint	The location of the Documaker Composition Web Services. The default is http://hostname:portnumber/DWSV0AL1/CompositionService where *hostname* is the name or IP address of the current server. Change the host name to reference the web application server. *portnumber* is the default port assigned to this web service. Use the default port.
Approval Process Endpoint	The location approval service. Only modify the default host name and port number. The default is http://hostname:portnumber/soa-infra/services/default/iDMkr_Correspondence/correspondenceprocesses_client _ep?WSDL where *hostname* is the name or IP address of the current server. Change the host name to reference the Application server. *portnumber* is the default port assigned to this web service. Use the default port.
Approval Business Rules Endpoint	The location of the approval business rules. Only modify the default host name and port number. The default is http://hostname:portnumber/soa-infra/services/default/iDMkrApprovalRuleProj/iDMkrApprovalRules_ DecisionService_ep where *hostname* is the name or IP address of the current server. Change the host name to reference the Application server. *portnumber* is the default port assigned to this web service. Use the default port.

Note Make sure the default ports entered are free to use. If the default port '8001' is not is use try using '9006'

When you finish, click Next to continue.

20. On the Summary window, review your installation settings, space requirements, and availability. To make any changes, click Back.
21. Click Install to begin the installation process.

The Install Status window indicates the progress of the installation. To stop the installation process, click Stop Installation.

Note The installation routine may display the Execute Configuration Scripts window. This window lists scripts you must run as the root user, specifically the orainstRoot.sh script.

If so, follow the instructions on the screen to run the scripts as a user with root permissions.

If errors occur during the installation, review the installActions*[date_and_ time]*.log file. This file is usually located in this directory:

```
/opt/dmoracle/oraInventory/logs
```

Note that these out files and error logs are also created during the installation process:

- oraInstall*[date_time]*.out
- oraInstall*[date_time]*.err

22. On completion of the installation process, click Next and Finish.

Your ODEE system has now been installed and the initial configuration has been completed. Continue with *Stage 3: Post-Setup on page 69* to finish the implementation of your ODEE system.

STAGE 3: POST-SETUP

STEP A: RUNNING DATABASE SCRIPTS AND LOADING THE MRL

The steps you take to run the database scripts and load the master resource library (MRL) vary, depending on the type of database you are using.

If you are using	Follow these steps
An Oracle database	*Running the Oracle Database Scripts*
A DB2 database	*Running the DB2 Database Scripts*

Note If you are using WebSphere as your application server, you must select the SERVICE_NAME value on the database details.

Running the Oracle Database Scripts

Follow these steps to run the Oracle database scripts:

1. Run the scripts located in the /documaker/database/oracle11g directory. You may need to copy these files to the database server. To run these files, you must have permission to create tables and insert data into the database. These scripts create the required Document Factory administrative and processing database tables. Contact your database administrator (DBA) for assistance.

Script	Description
dmrk_admin.sql	Creates the configuration schema and populates the tables with the entries captured during setup.
dmkr_asline.sql	Creates the assembly line schema and the Documaker Studio default user accounts.

Note
- To change the Studio user passwords from the Assembly Line schema password, update this script before running it by modifying the Insert commands for the DMRES_DMUSER table.
- The scripts enable advanced compression on certain database columns. If you do not have an Advanced Compression Options license for Oracle 11g, please remove the *COMPRESS DEDUPLICATE* and *COMPRESS HIGH DEDUPLICATE* attributes from the scripts in dmkr_asline.sql.

2. To create sample user accounts for demonstration purposes and to test the deployment, run the following as the dmkr_admin user:

```
dmkr_admin_user_examples.sql
```

3. (Optional) ODEE includes database entries that enable the ODEE web applications to be viewed in other languages. To add support for languages other than English, perform these steps:

   a. Make sure the script is executed using UTF-8 encoding so the Unicode text within the script is put into the database properly.

If you are using	Then
SQL Developer to run the script	Change the file encoding option to UTF-8 by selecting the Tools, Preferences, Environment option and then setting the Encoding option to UTF8.
SQL Plus to run the script	Set this environment variable (for Windows): `NLS_LANG=AL32UTF8`

   b. Run the following scripts as the dmkr_admin user:

   - dmkr_admin_xx.sql
   - dmkr_asline_xx.sql

   Where xx is the two letter abbreviation for the desired language:

Languages	Abbreviation
Dutch	`nl`
French	`fr`
German	`de`
Indonesian	`Id`
Japanese	`ja`
Polish	`Pl`
Portuguese	`pt`
Simplified Chinese	`zh`
Spanish	`es`

   c. Make sure the insert statements are committed to the database.

4. Run this script from the application server dmres directory to load the Correspondence MRL:

   ```
   ./deploysamplemrl.sh
   ```

   Typically, this script will be in the \documaker\mstrres\dmres\ directory.

Note Ignore this message while running deploy sample MRl : "Did not promote Older resource, Name <TIMESTAMP> ,Type <SYS> , Ver<00001> ,Rev<00001>

   This loads the MRL into the database, deploying the sample resources which are used to validate your Document Factory installation.

Note You can use SQL Plus and a client connection to validate database connectivity.

5. Continue with the steps outlined in *Creating the Web Environment on page 74*.

Running the DB2 Database Scripts

Before you run the scripts, you must create the database. Use the below instructions for installation on DB2 LUW:

Creating a DB2 database

1. Open the DB2 command line utility and enter this command:

```
db2 CREATE DATABASE database_name USING CODESET UTF-8
TERRITORY US PAGESIZE 32768
```

Running the scripts

Note To run the DB scripts, confirm that 2 users have been created on the DB2 server with the names entered on the Installers database schema screens. These names must be in keeping with the authentication method that will be used by the database and the related length restrictions. For example, if you are using OS authentication for DB2 on AIX, then the schema names are limited to 8 characters. To run the Sql scripts, the user logged in must have required permissions to create and modify tables.

After creating the database in DB2, open your command processing tool and run the following scripts located in the \documaker\database\db2 directory. You may need to copy these files to the database server.

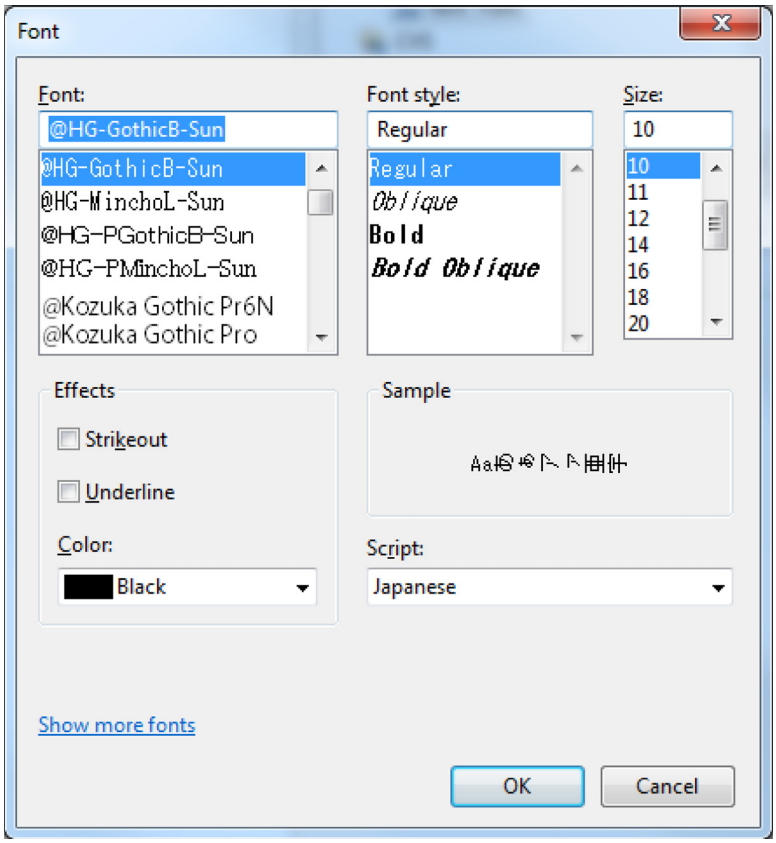
DB Type	Location
DB2ZOS	\documaker\database\db2v10zos
DB2 LUW	\documaker\database\db2v97

Script	Description
dmrk_admin.sql	Creates the configuration schema and populates the tables with the entries captured during setup
dmkr_asline.sql	Creates the assembly line schema and the Documaker Studio default user accounts.

Note To change the Studio user passwords from the Assembly Line schema password, update this script before running it by modifying the Insert commands for the DMRES_DMUSER table.

2. (Optional) In order to populate the system with alternative language options, do the following:

a. Open IBM Data Studio and set font in editor for properly displaying Japanese (HG-GothicB-Sun).



b. Open the dmkr_admin_xx.sql in a text editor that displays text correctly (in the example below, Notepad properly displayed Japanese text).

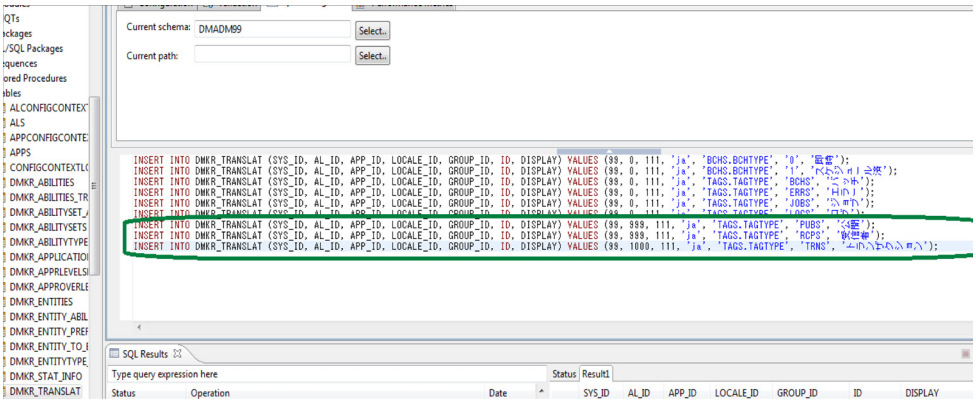
c. Copy and paste the content of the script into IBM Data Studio tool editor for SQL and validate the characters are correct.

Example from Notepad, dmkr_admin_ja.sql:

INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID, DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE', 'PUBS', '蜈ャ髢・');
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID, DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE', 'RCPS', '蜿嶺ソ。閧・');

INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID, ID, DISPLAY) VALUES (99, 1000, 111, 'ja', 'TAGS.TAGTYPE', 'TRNS', '繝医 Λ 繝ｳ繧ｫ繧ｯ繧ｷ繝ｧ繝ｳ');

From IBM Data Studio:



d. Process the DML statements, inserts, to the correct dmkr_admin schema.

e. Validate that the contenxt appear correct in table by selecting the rows for review.

f. Repeat with the dmkr_asline_xx.sql targeting the dmrk_asline schema for inserts.

g. Copy the following files from the DB2 server location to the appropriate locations in the ODEE installed directories, such as \bin\lib,documaker\docfactory\lib, and documaker\docupresentment\lib.

- If using DB2 LUW, copy db2jcc4.jar and db2jcc_license_cu.jar
- If using DB2 ZOS, copy db2jcc4.jar and db2jcc_license_cisuz.jar

Note Contact your DBA if you need assistance locating the correct files.

3. To create sample user accounts for demonstration purposes, and to test the deployment, run the following as the dmkr_admin user: `dmkr_admin_user_examples.sql`
4. Run this batch file from the application to load the Correspondence MRL:`\documaker\mstrres\dmres\deploysamplemrl.sh`.This loads the MRL into the database, deploying the sample resources which are used to validate the Document Factory installation.

Note Keep in mind that the users and sample data referenced in items 3 and 4 above are example data so that you can get a feel for the system and validate it is installed correctly. Your users and resource library will be needed for deployment and use of the system. Once you have configured to your identity management system, you can safely remove the example users in the entities tables and the sample library in the DMRES_LBY* tables. See the DEAG for more information about the content in each of these tables within the ODEE schemas.

5. Continue with the steps outlined in *Creating the Web Environment*.

STEP B: CREATING THE WEB ENVIRONMENT

The steps you take to create the web environment vary, depending on the type of database you are using.

If you are using	Follow these steps
WebLogic	*Creating and Deploying a WebLogic Domain*
WebSphere	*Creating and Deploying a WebSphere Profile*

Creating and Deploying a WebLogic Domain

A WebLogic administrator for the WebLogic server needs to complete the following steps to create the WebLogic domain and deploy these web applications:

- Documaker Document Factory Dashboard
- Documaker Administrator
- Documaker Interactive

1. Copy the [*install_root]*\documaker\j2ee directory from the application (business) tier to the WebLogic server using the same structure as on the application tier server, assuming the application tier and weblogic deployment are on separate servers.
2. Set the environment variables to define the location of the WebLogic installation by editing these files in the documaker\j2ee\weblogic\oracle11g\scripts\ directory.

In this file	Make these changes
set_middleware_env.sh	Update these values:where the path to the Oracle middleware home.
weblogic_installation.properties	Change the following software location values: • dirWeblogicHome=/oracle/middleware where /oracle/middleware is your Oracle middleware home directory • dirDocumakerHome=/oracle/odee_1/documaker where /oracle/odee_1/ is the directory where the j2ee folder resides on the WebLogic server • dirDB2JDBCJars This path reflects the location of the db2 jar files.

3. To create the WebLogic domain for hosting the web applications and the supporting resources such as queues, database connections, and Java Naming and Directory Interface (JNDI) references, run this command from ODEE home:

```
documaker/j2ee/weblogic/oracle11g/scripts/wls_create_domain.sh
```

The script creates the domain with Admin Server, dmkr server and jms server.

Note If you already have a domain on the server and you want to create a new domain, you can still use this script, just update the WebLogic domain name at the bottom of the file.

```
weblogicDomain=
```

4. Run the following script if using Documaker Interactive Correspondence web application;

```
wls_add_correspondence.sh
```

5. Start the WebLogic AdminServer by running this command from the *[middleware home]*\user_projects\domains\idocumaker_domain name\bin directory: ./ ./startWebLogic.sh

Note If ODEE is installed with Assembly line id x then the server name will be idm_alx_server and secure port: 9002+(int(x)*10).

6. Set the following option in the JVM start up process (in WLS console server startup arguments) : `-Djbo.pers.max.active.nodes=-1`

Note This will increase JVM heap usage, so monitor the heap usage as you may need to increase this accordingly,

7. Continue with the steps outlined in Creating User Accounts.

Creating and Deploying a WebSphere Profile

A WebSphere administrator for the WebSphere server needs to complete the following steps to create the WebSphere profile and deploy these web applications:

- Documaker Document Factory Dashboard
- Documaker Administrator
- Documaker Interactive

1. In the documaker\j2ee\websphere*oracle11g*\scripts\ folder check these settings:

Note This example path assumes you installed WebSphere with an Oracle database. You could also install WebSphere with a DB2 database, in which case the path might look like this: documaker\j2ee\websphere*db2v97*\scripts\.

If it is DB2zOS then the path might look like this: /documaker/j2ee/websphere/db2v10zos/scripts

2. Copy the \documaker\j2ee directory from the application (business) tier to the WebSphere server using the same structure as on the application tier server.

3. Set the environment variables to define the location of the WebSphere installation by editing these files in the documaker\j2ee\websphere\oracle\scripts\ direcory:

In this file	Make these changes
set_websphere_env.sh	Update these values: MW_HOME : To reflect the middleware home WAS_HOME: to reflect Websphere home Ensure that WAS_ADMIN_USER and WAS_ADMIN_PASSWORD reflect the correct values
websphere_installation.properties	Change dirWebSphereHome, dirDB2JDBCJars/dirOracleJDBCJars, dirDocumakerHome values to reflect the correct values as per installation. Make sure the other properties set in the file matches.

4. Edit the websphere_installation.properties and set_websphere_env.sh files to make sure that the AppServer home, Middleware set properly and check the ldapconfig.txt file to make sure that the user in the set_websphere_ev.sh file matches if not make both in sync.
5. To create the WebSphere profile for hosting the web applications and the supporting resources such as queues, database connections, and Java Naming and Directory Interface (JNDI) references, make sure there are no other profiles in WebSphere with SOA/Fusion Middleware, then run this command: documaker\j2ee\websphere\oracle\scripts\script to be ran is was_create_profile.sh Configuration wizard starts.
6. Select the Configuration Option. Then choose the Create and Configure Cell option and click Next.
7. Specify the following information:

Field	Description
Cell Name	Enter the following: `servernameCell01`
Deployment Manager Profile Name	Enter a name for the deployment manager profile. The default is Dmgr01.
Deployment Manager Node Name:Default	Enter the following: `servernameCellManager01`
Application Server Profile Name	Enter a name for the application server profile. The default is Custom01.
Application Server Node Name: Default	Enter the following: `servernameNode01`

8. Accept all other defaults. Refer to the Fusion Middleware documentation for more information.
9. Specify the deployment manager information:

Field	Description
Deployment Manager Host Name	Enter a name for the deployment manager host. The default is servername.
Admin User Name	Enter the username which is setup in ldap for websphere. This is from the LDAP account.
Password	Enter the password of the LDAP server where the account is configured, use the password for the account.
Confirm Password	Enter the password again to confirm.

   The Creating Cell window appears to show you the system, progress as it creates cells. Then the Add Products to Cell window appears.
10. Choose the Oracle JRF for Websphere - 11.1.1.0 [oracle_common] option and click Next.
11. On the Select Optional Configuration window, make sure all options are turned off, then click Next. The Review the Configuration Summary window appears.
12. Review the choices you made, then click Create. Next, click Done.
13. The was_create_profile.sh will continue to run. When promoted, press any key to continue. The sh file will run the python script to set up the WebSphere application server users and queues.

Note When you are setting up LDAP with the sample script, you can also update the ldap.txt file with your configuration.

14. Run the following script if using Documaker Interactive Correspondence web application:

```
was_add_correspondence.sh
```

15. When prompted, press any key to continue. Oracle Platform Security Services (OPSS) are now set up and the system will shut down and restart.

Note The logs of profile,server and resource creation will be available in the same script folder. In case of an error and or to create profile again, drop the Custom01 and dmgr01 profile completely.

Starting the WebSphere applications

To start the applications, follow these steps:

1. Launch the WebSphere Integrated Solution Console and log in with userid with which profile was created.

Note Websphere Integrated Solution console url: https://servername:9043/ibm/console Port: 9043(it is the default port)

If port number 9043 is not connecting check if it is assigned to your profile. To know your port number see; *profile/Dmgr01/logs/AboutThisProfile.txt* else conatct your system Administrator.

2. Click the Servers - Websphere Application Servers option. You should see these servers listed:

- Oracle Admin Server
- dmkr_server

The idm_server will be listed only if you are using Documaker Interactive Correspondence webapplication.

Note
- The assumption is we have configured the dmkr_asline and dmkr_admin datasource max connections to be 3 * the jbo-ampool.maxavailablesize. If this is not done the application may run out of connections. Also if these setting are put in place the database must be configured to support these settings.
- If ODEE is installed with Assembly line id x then the server name will be idm_alx_server and port: 9002+(int(x)*10).

3. Start all of these servers to make sure the installation was successful.

Note
- In the Websphere Administration console under the admin and assembly line schema datasources (in the scope of cell),check that the property 'WebSphere Default isolation level' is having level 2 value. Ensure that the property holds the value 2 and if there are two properties of the same name- delete one and ensure that there is only one WebSphere Default isolation property and has value '2'.
- The -Djbo.poll.mgr value listed is applicable for DB2 LUW and DB2 ZOS. If using Oracle database, the -Djbo.pcoll.mgr value should be oracle.jbo.pcoll.OraclePersistManager. Also note that the values entered in this Step should not exceed the connection poolsettings.

4. Update heap sizes for the idm_server:
   a. Set the initial heap to 2 Gig
   b. Set the max heap to 8 Gig
5. Update the heap sizes for the dmkr_server:
   a. Set the initial heap to 1 Gig
   b. Set the max heap to 2 Gig

Note Apply this heap size depending on the system specification/memory of the server running WAS. User may need to restart server for the change to take effect.

6. Update the connection pool settings for data sources by navigating to Resources -> JDBC->Data Sources and then select the Cell on which profile is created
   a. Select the asline datasource
   b. Open the WebSphere Application server data source properties
   c. Set the value of the statement cache to 1000
   d. Select the admin datasource
   e. Open the WebSphere Application server data source properties
   f. Set the value of the statement cache to 1000

STEP C: CREATING USER ACCOUNTS

The steps you take to create user accounts vary, depending on the type of web application server you are using.

If you are using	Follow these steps
WebLogic	*Creating WebLogic User Accounts*
WebSphere	*Linking WebSphere User Accounts*

Creating WebLogic User Accounts

When the AdminServer is able to accept connections, the WebLogic server administrator needs to complete the following steps. You can find the shell scripts in the documaker\j2ee\weblogic\oracle11g\scripts\directory.

Note To change the web application user passwords from the WebLogic password, update the py files called by each script before running the script.

1. To install the standard user accounts, run this command:

   ```
   ./create_users_groups.sh
   ```

   This script creates the Documaker user account and the Documaker Administrators group. It adds this user to this group in WebLogic's default authenticator.

2. To install a set of users and groups to be used with the sample resources for Documaker Interactive: Correspondence, run this command:

   ```
   ./create_users_groups_correspondence_example.sh
   ```

3. Link the new users and groups to the pre-configured entities in the Document Factory Administration registry database by going to the WebLogic server, opening a browser and going to this URL:

   ```
   http://servername:7001/jpsquery
   ```

Note You may need to change *hostname* to the name of your WebLogic server.

Linking WebSphere User Accounts

When the AdminServer is able to accept connections, the WebSphere server administrator needs to complete the following step:

1. For WebSphere, create a dmkr_admin account.
2. Create a dmkr_asline account on the data tier and do this:
3. Link the new users and groups to the pre-configured entities in the Document Factory Administration registry database by going to the WebSphere server, opening a browser and going to this URL:

```
http://servername:7001/jpsquery
```

Note You may need to change *hostname* to the name of your WebSphere server.

STEP D: STARTING SERVICES

Before you start the services, if using WebSphere Application Server, copy the following JAR files from the folders listed below so that WebSphere can communicate with DB2.

From	Copy these files	To the
WebSphere Application server (appserver/runtime directory)	com.ibm.ws.ejb.thinclinet_7.0.0.0.jar com.ibm.ws.orb_7.0.0.jar com.ibm.ws.sib.client.thin.jms.7.0.0.0.jar	ODEE install folders (documaker\bin\lib, documaker\docfactory\lib, and docupresentment\lib)
If you want to use WebSphere MQ with WebSphere, then copy the same from **websphere mq/java/lib directory**	com.ibm.mq.commonservices.jar com.ibm.ws.messagingClient.jar com.ibm.mq.headers.jar com.ibm.mq.jar com.ibm.mq.jmqi.jar com.ibm.mqjms.jar com.ibm.mq.jms.Nojndi.jar dhbcore.jar	documaker/bin/lib documaker/docfactory/lib documaker/ docupresentment/lib

Note The above list is for WAS 7, check for the IBM per version as the required files may change.

If using Weblogic, JMS queues are running on mananged server jms_server and start the jms_server before starting the services.

1. Go to the bin directory and run the following command:

```
./startManagedWebLogic.sh jms_server
```

2. To start services, perform these steps on your application (business) tier:

   a. Go to the docupresentment directory and run this command:

```
./docserver.sh start
```

a. Then go to the docfactory/bin directory and run this command:

```
./docfactory.sh start
```

Note To see if the services are running, run these commands:

```
./docfactory.sh status
./docserver.sh status
```

STEP E: STARTING DOCUMAKER ADMINISTRATOR AND DASHBOARD

The steps you take to start the web applications vary, depending on the type of web application server you are using.

Note A WebLogic administrator should complete this step.

If you are using	Follow these steps
WebLogic	*Starting with WebLogic*

Starting with WebLogic

Start the Documaker Administrator and Documaker Document Factory Dashboard web applications by starting the WebLogic Managed Server (dmkr_server) as follows:

1. Go to the bin directory and run this command:

   ```
   ./startManagedWebLogic.sh dmkr_server
   ```

2. When prompted, enter the WebLogic user name and password

STEP F: STARTING DOCUMAKER INTERACTIVE

The steps you take to start the web applications vary, depending on the type of web application server you are using.

If you are using	Follow these steps
WebLogic	*Starting with WebLogic*

Starting with WebLogic

A WebLogic administrator should complete this step *only* if deploying Documaker Interactive.

1. Go to the bin directory and run this command (optional):

   ```
   ./startManagedWebLogic.sh idm_server
   ```

2. When prompted, enter the WebLogic user name and password.

Note

- If you are using a different assembly line id (Not the Default set ID) run this command: `./startManagedWeblogic.sh idm_al(assemblylineid)_server`
- The name entered should match the name of idm_server available in weblogic console.

STEP G: DEPLOYING SOA

Deploying Oracle Service-Oriented Architecture (SOA) for WebLogic servers:

1. Stop these WebLogic servers, in this order:
   - idm_server
   - dmkr_server
   - jms_server
   - Oracle Admin Server

Note When the jms_server is stopped, the queues are no longer available for Document Factory to access and Document Factory will generate errors that it could not connect to the needed queues. So, when you stop the jms_server, be sure to stop the Oracle Documaker Document Factory service and and docupresentment first, and restart only once the jms_server is available.

2. Add SOA to the WebLogic domain:
   a. From the MW_HOME \wlserver_10.3\common\bin\ directory, run this command:
   ```
   ./config.sh
   ```
   b. Choose Extend an existing WebLogic domain, then click Next.
   c. Select the idocumaker_domain from the WebLogic Domain Directory window, then click Next.
   d. On the Select Extension Source window, choose Oracle SOA Suite 11.1.1.0, then click Next.

Note SOA may add the Oracle WSM Policy Manager Extension. If so, this is not an error.

   e. View the Configure JDBC Data Sources options (do not change these values), then click Next.
   f. The connection to the database is tested. When the test finishes, view the results. Make sure passes with no errors, then click Next.
   g. Update the Configure JDBC Component Schema window. This will configure the connections your SOA repository. Click Next.
   h. The connection to the database is tested. When the test finishes, view the results. Make sure it passed with no errors, then click Next.
   i. On the Select Optional Configuration window, click Next.
   j. On the Configuration Summary window, click Extend and then Done.

k. To deploy the Oracle Business Rules into the SOA extension, run this command from the \documaker\j2ee\weblogic\oracle11g\bpel\ directory:

```
antbuild.sh
```

Note The antbuild.sh script includes the following path:

PATH=$MW_HOME/jdk160_21/bin:$PATH

This should be modified if the default JDK path was not selected.

3. Start these WebLogic servers (using the same commands as in the previous steps):
   - Oracle Admin Server
   - dmkr_server
   - jms_server
   - idm_server

Note Restart Oracle Documaker Document Factory Service if you had previously stopped it.

4. From the bin directory, run this command:

   ```
   ./startManagedWebLogic.sh soa_server1
   ```

5. Add soa_server1 as a target for the dmkr_admin data source as follows:
   a. Make sure the AdminServer is ready to accept connections. Using a browser, log into the WebLogic console:

   ```
   http://servername:7001/console
   ```

   where *hostname* is name of the WebLogic server.
   b. In the Domain Structure panel, expand Services, then JDBC, and select Data Sources.
   c. In the Summary section of the JDBC Data Sources panel, click the Admin schema link.
   d. Select the Targets tab then check the soa_server1 check box and click Save.
6. Once soa_server1 is ready to accept connections, deploy the Oracle Business Rule Composites by running this command from the \documaker\j2ee\weblogic\oracle11g\scripts directory:

   ```
   ./deploy_soa.sh
   ```

7. In order to prevent generation of files of type BC** include the properties in server start tab as mentioned for each server and then configure WLS to start with nodemanager.

Server Name	Oracle Database	DB2
idm_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.DB2PersistManager
dmkr_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.DB2PersistManager
soa_server	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.OraclePersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr. DB2PersistManager

Deploying Oracle Service-Oriented Architecture (SOA) for WebSphere servers:

Stop the servers and services in the order:

1. Go to Integrated Solution Console and stop servers in the following order

   1.idm_server

2. Stop the Factory and Docupresentment services by:
   - ./docfactory.sh stop
   - ./docserver.sh stop
3. Stop the dmkr_server and OracleAdminServer through the Integrated Solution Console.
4. Stop the node and deployment manager.
5. To extend the WAS profile with SOA, run the was_config.sh from the MW_HOME\oracle_common\common\bin.
6. On the Select Extension Source window, choose Oracle SOA Suite for WebSphere ND -11.1.1.0.

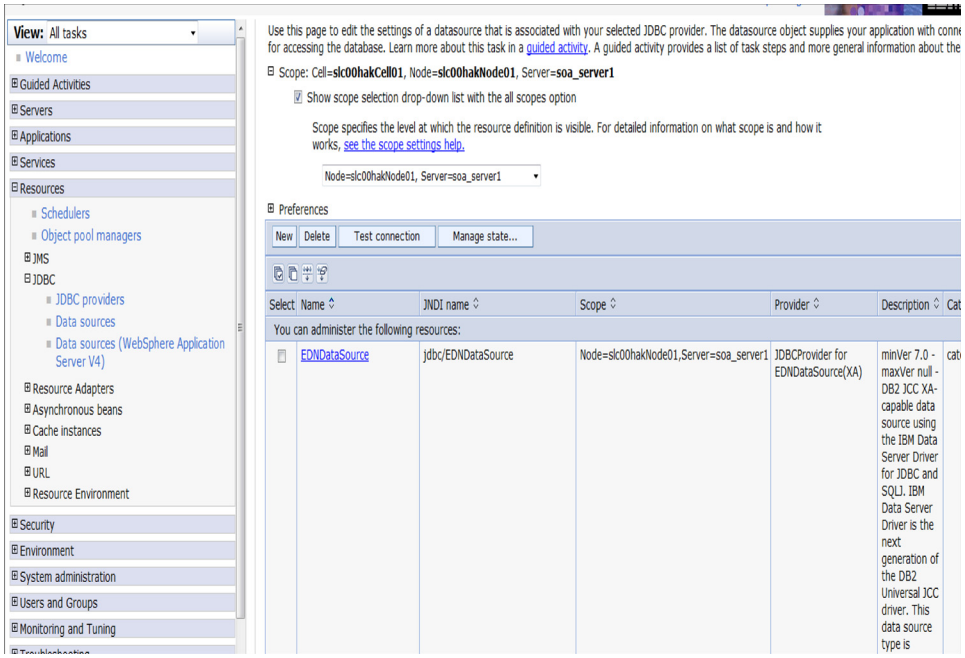
Note The RCU/SOA schema owners should have corresponding OS users.

7. Update Configure JDBC Component Schema window and Click Next. If database is DB2 enure all credentials and values are correct.
8. In Select Optional Configuration window, Select Next. Click Extend.
9. Ant build is in the location documaker\j2EE\websphere\db2v97\bpel. (A copy of ANT version 1.7.0 or higher.)
10. Environment variable PATH should be configured to the correct ANT location and ANT_HOME also should be configured in the environment variable.

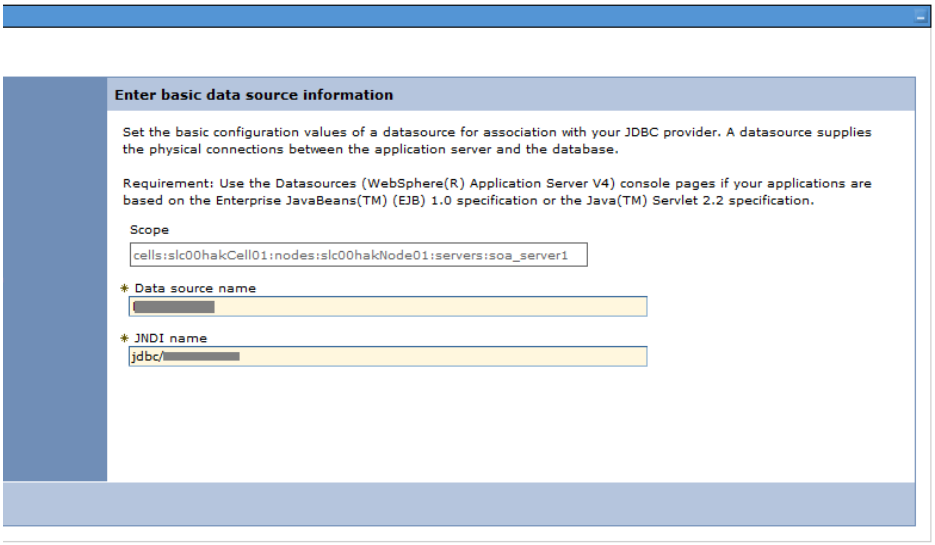
11. Run antbuild.sh and ensure that the build was successful.

Note For WAS we need to have a copy of ANT configured. Download and extract ANT 1.7.1. Also, Download Ant Contrib 1.0 b2 , extract it and then copy the ant-contrib.jar into the apache-ant-1.7.1\lib directory.

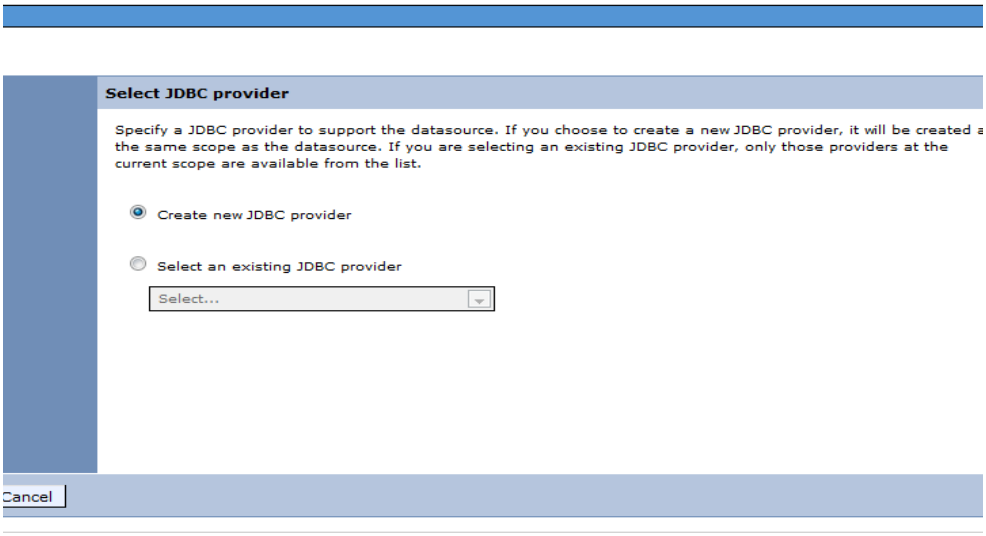
12. Start deployment manager, node, Admin Server, services, dmkr, idm and soa server.
13. Configuring datasources for SOA_SERVER1 is given on the following screenshots.
    a. Login to WAS console and Click on new after selecting scope cell as soa_server1.



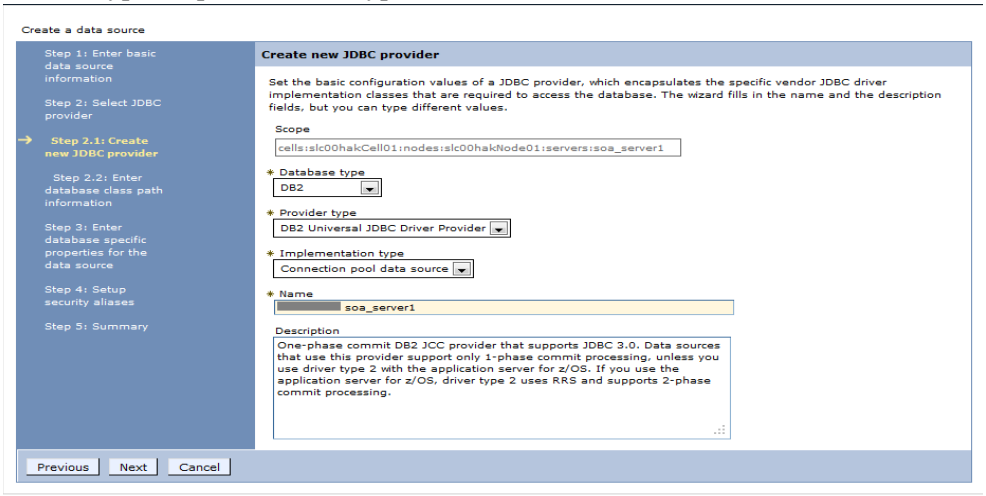
b. In the data source name enter the name of data source to be created (<adminschemaname>), enter the jndi name as jdbc/adminschemaname, click next.



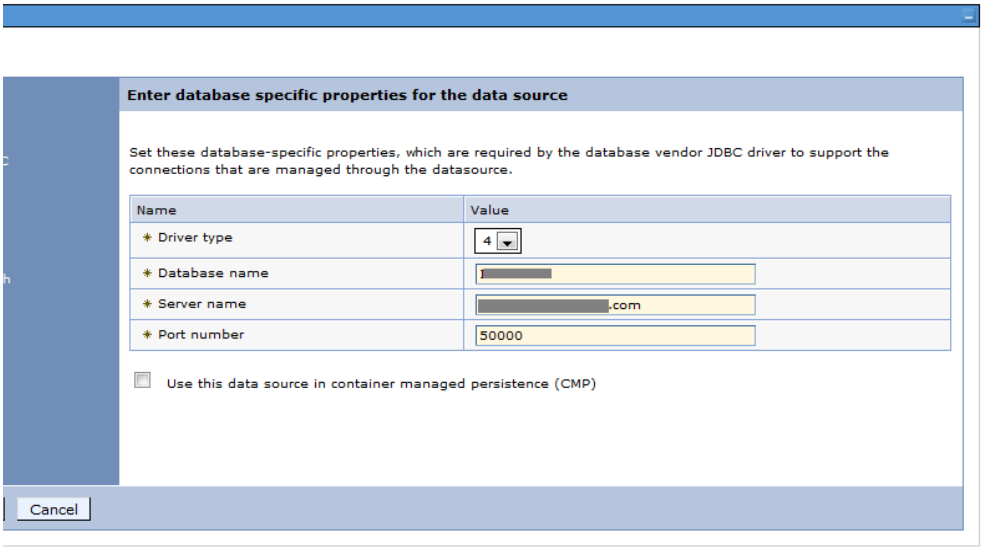
c. If a jdbc provider has been created already then select the existing jdbc provide or if not means select the option create a new jdbc data source.



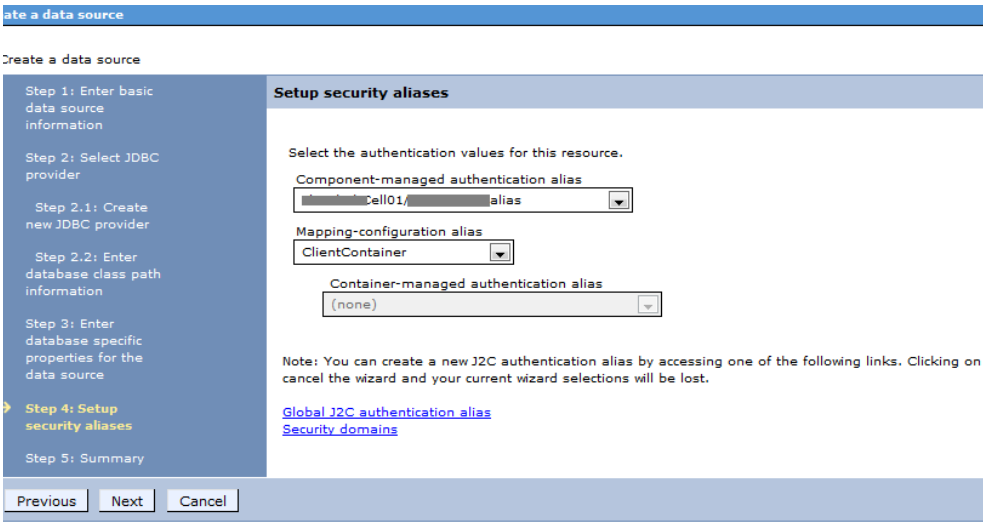
d. Click next. In the create data source page select the database type, provider type, Implementation type and name as shown below. Click next twice.



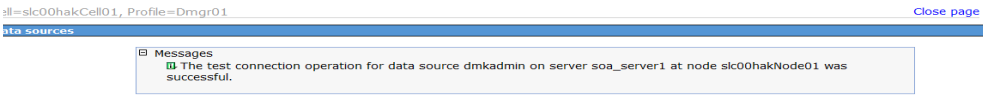
e. In the enter database specific details properties screen enter the database connection details and click next.



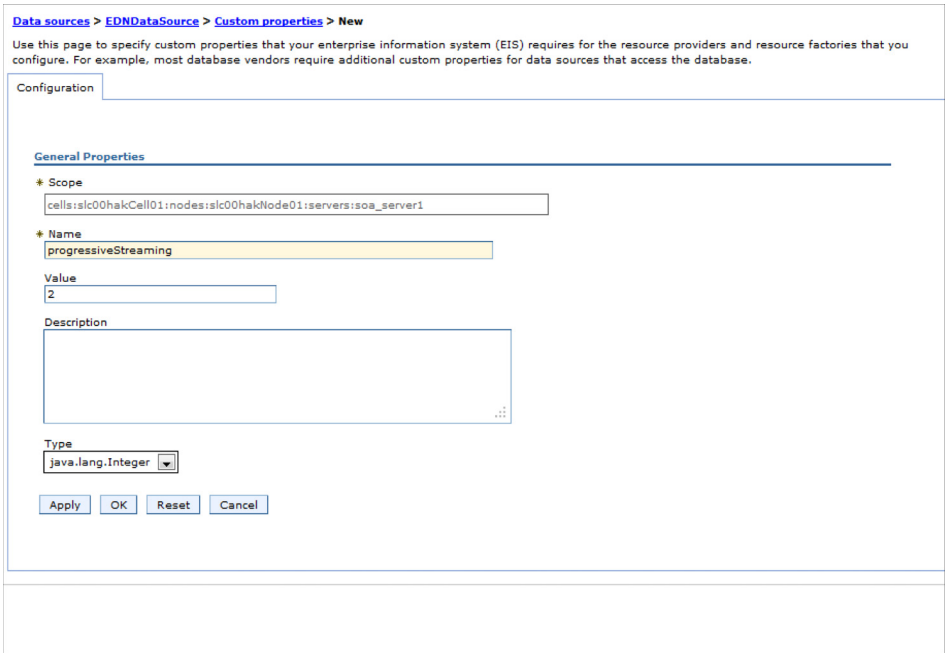
f. In the setup security alias screen enter the component managed authentication details and click next.



g. In the summary screen verify the data source details entered. Click Finish and then save it to the master configuration. Select the data source created and click on test connection.



h. Go to the data sources under soa_server and then go to cusotm properties and search for property ProgressiveStreaming, if its not there create it by clicking new as shown here. Be sure to set the value to 2 and type



'java.lang.String'. Save and synchronize the change with node.

i. By default 2 properties are created and user should check only for a property 'WebsphereDefaultisolation level' with the value 2.

j. Open the WebSphere Application server data source properties and Set the value of the statement cache to 1000.

k. Change the maximum connection pool to 300 and minimum to 10.

l. For the datasource mds_soa if the property progressive streaming is not there create it the same way as created for admin datasource.

m. Add the property “DisableMultiThreadedServletConnectionMgmt”= true for soa server.

n. .Save and restart the soa server for the changes to be in place.

Note Ensure that non-transactional property is unchecked for admin datasource of SOA server.

o. Once the soa_server1 is ready to accept connections, deploy the Oracle Business Rule Composites by running the following command from: \documaker\j2ee\websphere\oracle11g\scripts directory: ./deploy_soa.sh

STEP H: FINAL CONFIGURATION AND VALIDATION

Each of the configuration context (SYSCONFIGCONTEXT, ALCONFIGCONTEXT, APPCONFIGCONTEXT) tables has MODIFYTIME, USERTAG1, NOTES, and USER_NAME columns that can be used to determine what has changed following installation or following another collection of changes. This is helpful to follow-up on when a particular item has changed and why. Additionally, this information can be used to track configuration updates that should be carried forward from one tier environment to another. Therefore, when making changes to the configuration during installation processes or subsequent updates for system maintenance always utilize the USERTAG1 column and/or NOTES columns to group these changes in an identifiable manner. For instance, utilize, initial in the USERTAG1 column for any initial configuration changes following the base installation. Once confirmed and tested, any changes can be updated as ,passed or ready for promotion. Likewise use specifc as a USERTAG1 value for any settings that include environment specific data like server names and IP addresses that you may not want to promote to a new environment directly.

1. Make sure you have a network accessible printer available for Document Factory publishing that supports the Multipurpose Internet Mail Extensions (MIME) types the system outputs when you are ready to generate printed ouput. For more information, see the Documaker Enterprise Administration Guide.
2. Validate the installation of Documaker Administrator by accessing Documaker Administrator from the following link:

   ```
   https://servername:10002/DocumakerAdministrator
   ```

   where *servername* is the name of the web application server.

   Use these credentials to log in:

For	Use
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.

Note Use https instead of http if running WebSphere and using IE to access the web applications for Dashboard and Documaker Administrator.

3. Download and configure the WIP Edit plug-in accessibility.

   To edit documents within Documaker Interactive, you need the WIP Edit plug-in. You can download the plug-in from the Oracle Software Delivery Cloud web site and provide it to users by:

   - Pushing the installation to your end users.
   - Hosting the installation and allow the web application to provide a download link when requested. Make sure the installation is available on a static content server.

   If you are hosting the WIP Edit plug-in installation, use Documaker Administrator to enter the location for the installation:

a. In the left panel, click the Systems link. In the right panel, expand the System node, if it is not already expanded. Expand the Assembly Line node, if it is not already expanded.

b. Select the row containing the newly-installed assembly line. Select the Correspondence application. Click Configure.

Note If changing anything in Correspondence application, restart the idm server to view the changes.

c. On the Correspondence tab, select the ENTRY_ACTION_PLUGIN_INIT category within the ENTRY context and then select the group name, ENTRY_ACTION_PLUG_INIT.

d. In the Properties panel, double-click the row containing the property named installer. Change the installer value to be the hosted location for the plug-in installation.

e. Click Save.

4. Configure the WIP Edit plug-in communication.

   To ensure the plug-in communicates to Documaker Interactive do the following in the Documaker Administrator:

   a. In the left panel, click the Systems link. In the right panel, expand the System node, if it is not already expanded. Expand the Assembly Line node, if it is not already expanded.

   b. Select the row containing the newly-installed assembly line. Select the Correspondence application. Click Configure.

   c. On the Correspondence tab, select the ENTRY_ACTION_PLUGIN_INIT category within the ENTRY context and then select the group name, ENTRY_ACTION_PLUG_INIT.

   d. In the Properties panel, double-click the row that contains the putURL property. Then change the putURL value to reflect the machine name:port or ipaddress:port of the server for the idm_server web application and click Save. This must be the secure port for Documaker Interactive. The default port is 9002.

   e. Click Save.

Note The machine name:port or ipaddress:port must match the browser's address bar when you access the application.

5. (Optional) To enable the Documaker Interactive attachment tab for WebCenter, see the Documaker Enterprise Administrator Guide topic on "Enabling WebCenter".

6. Validate your Document Factory installation by preforming these tasks:

   a. Create a copy of the extrfile.xml file with the name *extrfile.tmp*. This file is located in the \documaker\mstrres\dmres\input folder.

b. Move the extrfile.tmp file into the hotdirectory directory on the Document Factory server.

c. Rename the *extrfile.tmp* file to *extrfile.xml* in the hotdirectory directory.

d. Look at the JOB created in the Document Factory Dashboard application, see that it was created and generated 12 transactions, three of which are staged for Documaker Interactive editing and the other 9 of which are distributed and in a successfully completed state.

Note This step pushes documents through the system. Moving the file with a *tmp* extension makes sure the file is not processed by the Receiver before the file is copied to the hotdirectory directory.

7. Validate the web applications using these credentials:

For	Use
Documaker Document Factory Dashboard	
URL	https://servername:10002/DocumakerDashboard
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.
Documaker Interactive (if installed)	
URL	http://servername:port/DocumakerCorrespondence When you access this link, you are redirected to the HTTPS port for a more secure connection. Note: Port value is the port Correspondence application deployed in the setup
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.

Note Use https instead of http if running WebSphere and using IE to access the web applications for Dashboard and Documaker Administrator.

You have completed the installation and configuration of Document Factory and Documaker Interactive: Correspondence.

Note The following error messages are seen in the trace.log of soa server:
1. registration: javax.naming.NameNotFoundException: Name comp/jmx not found in context "java:".

2. oracle.security.idm.ObjectNotFoundException: No Membership Found.

Note For information on customizing the location of Help files, downloading patches, and downloading documentation updates, see *Maintaining Your System on page 94*.

Chapter 4

Maintaining Your System

This chapter provides information on how to maintain your Oracle Documaker Enterprise Edition (ODEE) implementation.

This chapter describes:

CHANGING THE HELP LOCATION

If you want to access the online Help from a location other than the default WebLogic installation, such as on a static content server or via the Oracle Technology Network (OTN), you can modify the online Help configuration as follows:

Note You can find the various Help files on OTN, on the following Web page:

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

Document Factory Dashboard Help

You must define the new location for the Document Factory Dashboard Help content. The Help content is provided with the installation within this file:

```
documaker\j2ee\weblogic\dashboard\ODDF_Dashboard.ear
```

Within the Administrator, set the helpLink property to the hosted Help location for the Document Factory Dashboard configuration within the All Assembly Line.

Note The configuration within the All Assembly Line applies to the system level applications. Here is the default:

```
http://servername/ODDF_Dashboard_Help/help.html
```

Documaker Interactive: Correspondence Help

You must define the new location for the Documaker Interactive: Correspondence Help content. The Help content is provided with the installation within this file:

```
documaker\j2ee\weblogic\idocumaker_correspondence\idm.ear
```

Within the Administrator, set the helpLink property to the hosted Help location for the SYSTEM_IDS group in the Correspondence application configuration in the deployed Assembly Line. Here is the default:

```
http://servername:port/DocumakerCorrespondence/static/help/
index.html
```

DOWNLOADING PATCHES

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

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

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

https://support.oracle.com

DOWNLOADING THE DOCUMENTATION

You can download the latest Oracle Documaker documentation at the Oracle Technology Network (OTN) web site. The process includes:

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

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

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

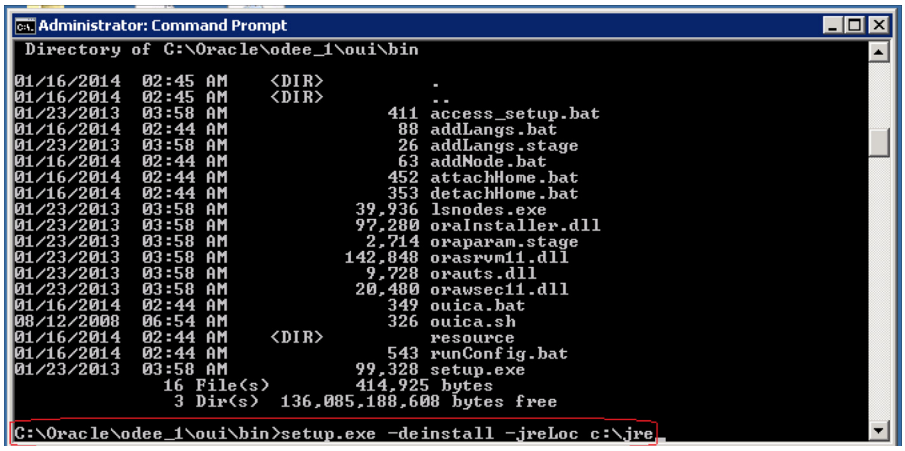
UNINSTALLING THE SOFTWARE

You can uninstall your Documaker software before making your selection of products to install or after a successful install. To remove Documaker software, follow these steps:

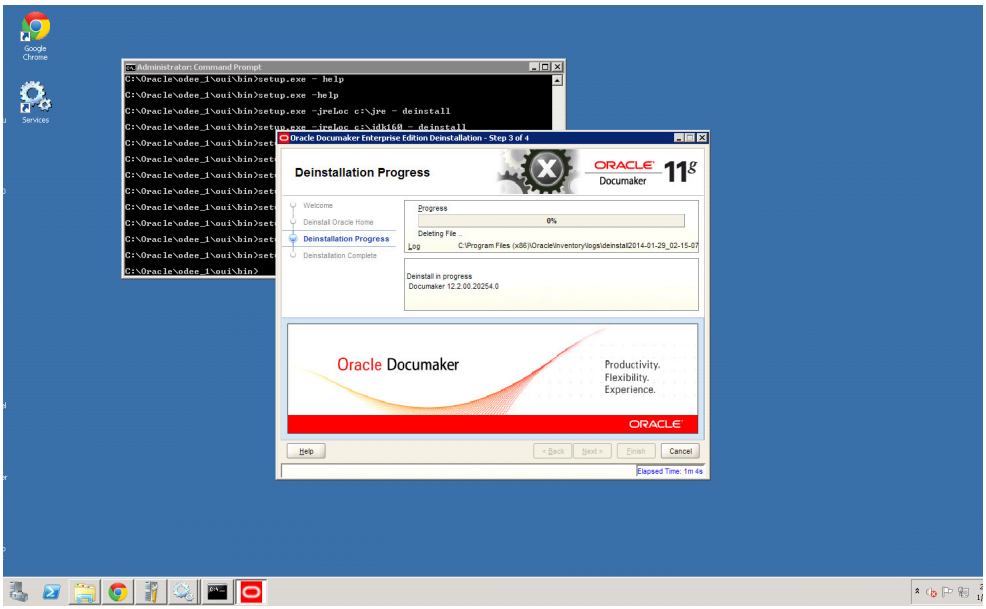
- Stop IDS and Supervisor services of ODEE before you start the uninstallation process. if any of the service is running , it may lead to partial uninstallation of ODEE.
- Stop all application servers before starting uninstallation process of ODEE.

1. From the command prompt access setup.exe to start the uninstall process. e.g c:\> c:\odee_1\oui\bin\setup.exe –deinstall -jreLoc <path_to_jre>.

Note If you run the setup.exe directly from the installed ODEE path , it may leave empty installation direction after uninstallation process. To avoid this, run. so run the setup.exe outside of installation directory.



2. The Deinstallation Process begins and follow the required steps as shown in the Oracle Documaker Enterprise Edition Deinstallation window.



3. Open domain-registry.xml under $Middleware_HOME .Remove the corresponding entry referring to idocumaker_domain.
4. Open nodemanager.domains file under $Middleware_HOME \wlserver_10.3\common\nodemanager\ folder and eemove the corresponding entry referring to idocumaker_domain.
5. Delete the domain folder under domains folder manually. $Middleware_HOME\user_projects\domains\idocumaker_domain
6. Delete the domain folder under applications folder manually. $Middleware_HOME\user_projects\ applications\idocumaker_domain
7. After uninstall, manually delete the ODEE folder: C:\oracle\odee_1. The ODEE folder can be deleted as part of de-installation as well but the de-installation has to be invoked from some other folder (other than ODEE).
8. Drop odee admin and assembly line schemas from the databse.

Note Ensure that none of the folder/files within ODEE Home are open while running the uninstall, if open then it will fail to remove the directory.

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