ORACLE

# Oracle® Documaker

# Enterprise Edition

## Installation Guide

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# 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*.

## Documentation Accessibility

### Accessibility of Links to External Web Sites in Documentation

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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:


- *Product Overview* on page 9
- *Architecture Overview* on page 10
- *Installation Directories* on page 11


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

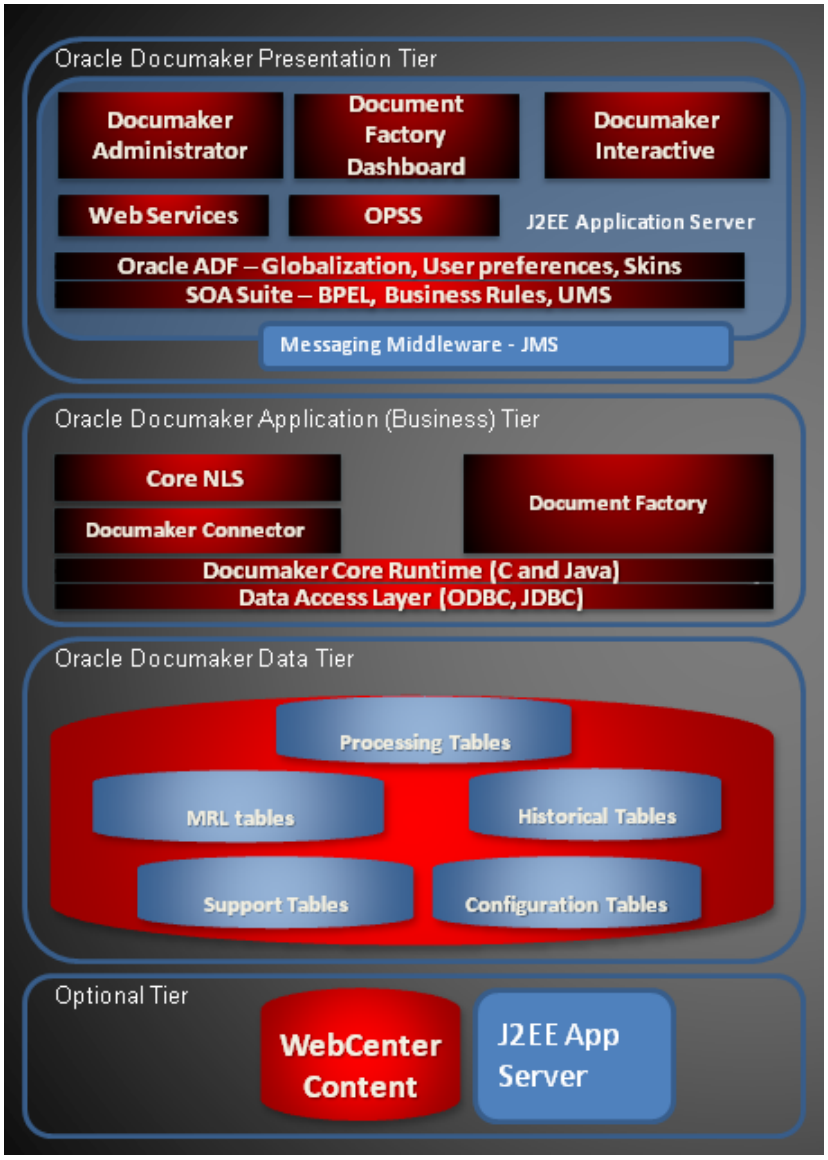
Oracle Documaker Interactive is a workflow-enabled, web-based application that lets you create personalized customer correspondence by choosing content from a pre-approved library of documents graphics and attachments.

### 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.<br>**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.<br>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.<br>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.<br>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 on page 14*
- *Stage 2: Running Setup on page 17*
- *Stage 3: Post-Setup on page 23*

# 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.


- *Step A: Checking Requirements on page 14*
- *Step B: Downloading the Software on page 16*


## 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
    - IBM DB2
        - LUW

          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.
    - SQL Server
- An installed web application server.
        - Oracle Fusion Middleware 12c infrastructure 12.2.1.2.0

**Note**
- Fusion Middleware will not install to a path with spaces so WebLogic should be installed in a path without spaces.

        - 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++ 2013 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) |

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 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. If you will be using Documaker Interactive: Correspondence option and wish to use Oracle SOA BPEL option to process Approval Workflow, make sure you have deployed SOA BPEL and have the necessary connection information. Later you will deploy the BPEL process and Oracle Business Rules to SOA and can configure Documaker Interactive to use those endpoints for approval workflow.
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

The Oracle Software Delivery Cloud (OSDC) site lets you download Oracle software products.

The process of downloading software from OSDC includes following steps:

1. First, go to the Oracle Software Delivery Cloud website:

   https://edelivery.oracle.com

2. Sign in with your Oracle account. If you do not have an Oracle account, you can register for an account here.
3. Search for the software by typing in the search bar and selecting it. For example, enter 12.6 to search for the list of Release 12.6 versions of Oracle Documaker software products.
4. Select the platform from the 'Select platform' drop-down.
5. The selected products are then listed under 'Download Queue'. Click the X (cross) which is adjacent to the product in case you want to remove individual files or click 'Remove All' in the lower left corner of the dialog if you want to remove all the listed items.
6. Click 'Continue' to proceed to next screen; you will see a list of the selected software for downloading.
7. Choose the individual software components for download and click 'Continue' if you wish to proceed or 'Return to Search' to review different software for downloading.
8. Read the license agreement carefully; mark the check box to agree with license agreements, and click 'Continue'.
9. Click 'Download' button to download the software or click the filename to individually download the files.
10. While you can save the file on any machine you choose, we recommend you save the file onto the machine where you plan to run it. You must unzip the file on the platform for which it was intended. The length of time it takes to download an application depends on the size of the download, your connection speed, and the amount of traffic on the site.
11. Once the Download has completed, click 'Return to Search' to search and download additional files or click 'Sign Out' to log off Oracle Software Delivery Cloud.

# 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. In the Specify Administrator Group and User window, enter:

| Field | Description |
|---|---|
| Group | Enter the group name. This provides the installation user with control over initial Administration group and Administration user |
| User | Enter the user name for the Administrator Group. |
| Password | Enter the password for the Administrator Group. |
| Confirm Password | Re-enter password to confirm. |

**Note** With default WebLogic install and steps, we create the WebLogic internal LDAP repository with these values and deploy the example/sample to web app users, so that users can get into Dashboard and Administrator, or optional DI if installation was done without any example users.

5. In the Database Server Details window, indicate the database you will use. Select:
   - Oracle
   - SQL Server
   - DB2 LUW
6. On the Database Server Details window, enter:

| Field | For an Oracle database | For a DB2 database | For SQL Server |
|---|---|---|---|
| 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 database; the default port is 1433. |
| Database | Oracle Database | 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 |

**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.

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

| Field | Description |
|---|---|
| DB Index Folder | The database folder where the physical database index files will be created.<br>**Note: This is applicable only for SQL server DB.** |
| 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 **LUW** database, this is only honored if you uncomment the dmkr_admin schema portion and create database section to reference another DB Folder location or enable this setting when the DBA creates the database in DB2. |
| User | Enter 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. |

| Field | Description |
|---|---|
| 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.<br>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.<br>The default is System 1. Change this name to reflect the Document Factory system in your organization. |

8. Click Next to continue.
9. 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 Index Folder | The database folder where the physical database index files will be created.<br>**Note: This is applicable only for SQL server DB.** |
| 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 connect to the database. The default is dmkr_asline. In case of DB2 database, the username should be less than 8 characters.<br>This user name is also used for the:<br>• Database schema/owner<br>• JDBC data source name<br>• ODBC data source name<br>• Name applied to the Docupresentment service (docupresentment dmkr_asline) |
| Password | This is the password for this assembly line database. The default is Asline12.<br>This password is also the Documaker Studio password for the Docucorp user. |
| Confirm Password | Re-enter the 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.<br>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.

10. On the Application Server Details window, choose the application server you will use. You can choose from these application servers:

    - WebLogic Server 12.2.1.2.0

11. Enter the user value for the web application server that is associated with the domain.

12. 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 |
| Connection Class | The name of the Java class used to connect to the JMS queues. Always accept this default:<br><br>oracle.documaker.ids.JMSConnection |
| InitialContextFactory | A Java class used when connecting to the JMS queues. Always accept this default:<br><br>weblogic.jndi.WLInitialContextFactory |
| Provider URL Protocol | The protocol used to connect to the JMS queues. Always accept the default of t3. You cannot change this value. |
| Principal | The user name required to start the logical server instances. Enter weblogic for WebLogic. |
| Credentials | The password for the JMS Principal. Enter a password and use the same while creating the profile. |
| Confirm Credentials | Re-enter credentials to confirm. |

When you finish, click Next to continue.

13. 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.

14. 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. |
| 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:<br>admin@hostname |

When you finish, click Next to continue.

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

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

When you finish, click Next to continue.

16. 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. |

| Field | Description |
|---|---|
| Endpoint | Enter the URL of the UMS server used for notifications. The default is:<br>http://ipaddress of host:port/sdpmessaging/parlayx/SendMessageService |

When you finish, click Next to continue.

17. 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.
18. Click Install to begin the installation process.
19. The Install Status window indicates the progress of the installation. To stop the installation process, click Cancel.
20. 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
21. When the installation process has completed, the Installation complete window appears. Click Finish to close this window.

# STAGE 3: POST-SETUP

## 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* |
| SQL Server database | *Running the SQL Server Database Scripts* |

**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.

### 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 |
|---|---|
| dmkr_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** 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 abbreviation for the desired language:

| Languages | Abbreviation |
|---|---|
| Dutch | `nl` |
| French | `fr` |
| German | `de` |
| Indonesian | `in` |
| Japanese | `ja` |
| Polish | `pl` |
| Portuguese | `pt` |
| Simplified Chinese | `zh` |
| Spanish | `es` |
| Russian | `ru` |
| English (Great Britain) | `en_GB` |

   **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*.

## Running the DB2 Database Scripts

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

### 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 operating system such as AIX, 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.

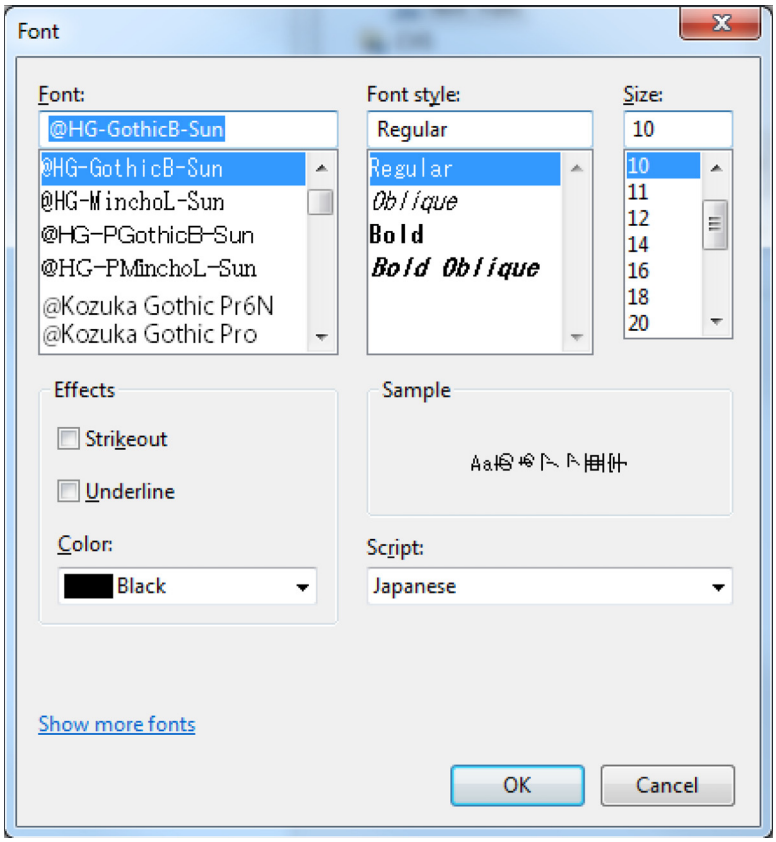
1. Run the scripts located in the \documaker\database\db2 directory. You may need to copy these files to the database server. To run these files, you must have permission to create tables and insert data into the database. These scripts create the required Document Factory administrative and processing 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 |
| dmkr_asline.sql | Creates the assembly line schema and the Documaker Studio default user accounts. |

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).

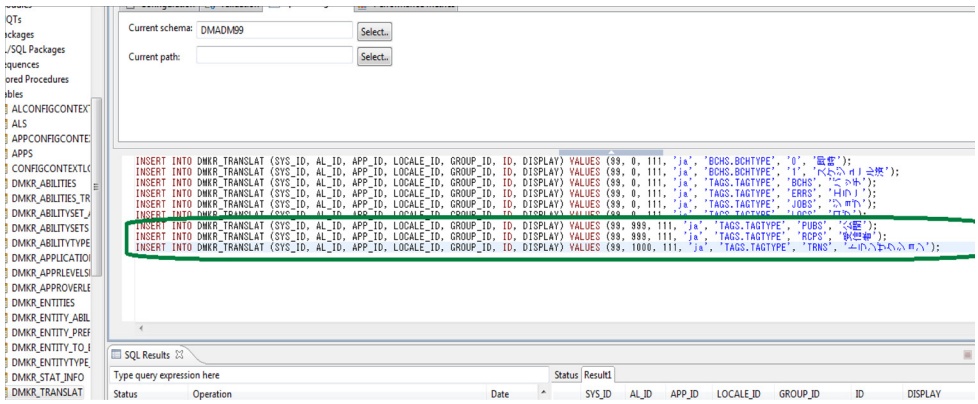
   **c.** Copy and paste the content of the script into IBM Data Studio tool editor for SQL and validate the characters are correct.

   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', 'ÂÖ¨Èñã');
```

```
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID,
GROUP_ID, ID, DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE',
'RCPS', 'Âèó‰ø°ËÄÖ');

INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID,
GROUP_ID, ID, DISPLAY) VALUES (99, 1000, 111, 'ja', 'TAGS.TAGTYPE',
'TRNS', '„Éà„É©„ÉŠ„Ç¹„ÇØ„Ç²„Éß„ÉŠ');
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

**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.*

## Running the SQL Server Database Scripts

Follow these steps to run the SQL Server database scripts:

1. Run the scripts located in the \documaker\database\sqlserver2012 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.

**Note** Installer sets the default index and non index File Group values(SIZE,MAXSIZE, FILEGROWTH) in the admin and asline scripts. User may need to update these values as per requirement prior to the sql file execution.

| Script | Description |
|---|---|
| dmkr_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.

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 |
|---|---|
| Microsoft SQL Server Management Studio | Change the file encoding option to UTF-8 by selecting the Tools, Preferences, Environment option and then setting the Encoding option to UTF8. |

**b.** Run the following scripts as the dmkr_admin user:

- dmkr_admin_xx.sql
- dmkr_asline_xx.sql

Where xx is the abbreviation for the desired language:

| Languages | Abbreviation |
|---|---|
| Dutch | nl |
| French | fr |
| German | de |
| Indonesian | in |
| Japanese | ja |
| Polish | pl |
| Portuguese | pt |
| Simplified Chinese | zh |
| Spanish | es |
| Russian | ru |
| English (Great Britain) | en_GB |

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

4. Copy the sqljdbc4.jar file under wl_server\server\lib and idocumaker_domain\lib if JDBC Component Schema fails to make connection. This is applicable only for MS SQL Server.
5. Copy the sqljdbc4.jar file to the appropriate locations in the ODEE installed directories, such as documaker\bin\lib, documaker\docfactory\lib, and documaker\docupresentment\lib.
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.

7. Continue with the steps outlined in *Creating the Web Environment on page 29*.

## 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 |

## 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 (Optional)

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 variables specific to your environment by editing these files within the `\documaker\j2ee\weblogic\databasetype\scripts directory` (where databasetype is the type of database chosen during installation)

   (e.g. `\documaker\j2ee\weblogic\oracle11g\scripts`):

| In this file | Make these changes |
|---|---|
| set_middleware_env.cmd | Update these values:<br>• SET MW_DRIVE=c:<br>(where *c:* is the drive letter of your Oracle middleware home)<br>• c:\\oracle\\middleware\\oracle_home |
| weblogic_installation.properties | Change the variable values for these properties. (Modify the value to the right of the equal sign).<br>• c:\\oracle\\middleware\\oracle_home<br>• dirDocumakerHome=c:\\oracle\\odee_1\\documaker where c:\\oracle\\odee_1\\ is the directory<br>(where the j2ee folder resides on the WebLogic server. Be sure to include escaped backslashes (\\) for the directory separators.)<br>Replace the '<SECURE VALUE>' (including the single quotes) with the credentials values used on the installation screens for<br>• jdbcAdminPassword='<SECURE VALUE>'<br>• jdbcAslinePassword='<SECURE VALUE>'<br>• jmsCredential='<SECURE VALUE>'<br>• adminPasswd='<SECURE VALUE>'<br>• weblogicPassword='<SECURE VALUE>'<br>**Note:** If JMS connection is not secured, then replace with empty value, e.g. jmsCredential =<br>**Note:** Installer does not set the secure value credentials for security reasons, so they have to be manually entered and secured by the resource deploying the web app.<br>All secure values replaced should be removed from any deployment properties file or the file should be deleted from all locations after web apps are successfully deployed and tested. |

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\databasetype\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=
```

The program will ask to run the Repository Creation Utility (RCU) to create the Database schema for Middleware. Answer "y" if RCU has not been run or the new schema is required.

Please refer to *Appendix A on page 73* for "Navigating RCU Screens to Create Schemas" details.

Answer “n” after the RCU has been run. The program will continue to run the Fusion Middleware (FMW) Configuration wizard.

Please refer to *Appendix B on page 80* for "Navigating Configuration Wizard Screens to Configure the Domain" details.

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

   ```
   wls_add_correspondence.cmd
   ```

4. Start “Fusion Middleware Configuration Wizard” by running this command from the [middleware home]\oracle_common\common\bin directory:Config.cmd
   a. Select “Update an existing domain”
   b. On Templates page, add template "Oracle WSM Policy Manager - 12.2.1.2 [oracle_common]”.
   c. On Advanced Configuration page, select “Topology”.
   d. On Managed Servers page, under “idm_server”, add WSMPM-MAN-SVR to server groups.
   e. Update changes.
5. Start the WebLogic AdminServer by running this command from the *[middleware home]*\user_projects\domains\idocumaker_domain\bin directory:

   ```
   startWebLogic.cmd
   ```

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. If using MS SQL Server, add the following option in [WLS_HOME]/user_projects/domains/idocumaker_domain/bin/SetDomainEnv.cmd (or SetDomainEnv.sh):
   `-Djbo.SQLBuilder=SQLServer`
8. If using IBM DB2, add the following option in [WLS_HOME]/user_projects/domains/idocumaker_domain/bin/SetDomainEnv.cmd (or SetDomainEnv.sh):
   `-Djbo.SQLBuilder=DB2`
9. Continue with the steps outlined in *Creating WebLogic User Accounts*.

## Adding MS SQL JDBC jar file to the WebLogic classpath

1. Open a browser to obtain the MS-SQL JDBC Type 4 driver from Microsoft. Click the Download button and select *sqljdb_6.2.1.0_enu.exe*, then click Next. After the file downloads, run the EXE to extract the files into a directory of your choice. Locate the *enu\mssql-jdbc-6.2.1.jre8.jar* file, and copy this file into the following directories:
   **a.** <ODEE_HOME>\documaker\bin\lib
   **b.** <ODEE_HOME>\documaker\docfactory\lib
   **c.** <ODEE_HOME>\documaker\docupresentment\lib
   **d.** <WLS_HOME>\wlserver\server\lib
2. Edit the *<WLS_HOME>\oracle_common\common\bin\commExtEnv.cmd* file and locate this line:
   set
   `WEBLOGIC_CLASSPATH=%JAVA_HOME%\lib\tools.jar;%PROFILE_CLASSPATH%;%ANT_CONTRIB% \ant-contrib-1.0b3.jar;%CAM_NODEMANAGER_JAR_PATH%;`
3. Edit the line by adding the following to the end of it:
   `%WL_HOME%\server\lib\mssql-jdbc-6.2.1.jre8.jar;`
4. Save the file.

## 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/databasetype/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/databasetype/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.

## STEP C: STARTING SERVICES

If the weblogic managed server named 'jms_server' is not started, start it before starting ODEE Factory 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<br>(AssemblyLine_Schema_Name:System_ID:AssemblyLine_ID)<br>Example: ODFF (dmkr_asline2:1:2) | The Document Factory Windows service. |
| Docupresentment<br>(AssemblyLine_Schema_Name:System_ID:AssemblyLine_ID)<br>Example: ODDP (dmkr_asline:1:2) | The Docupresentment Windows service. |

Where *dmkr_asline* is the schema or user name for the assembly line.

**Note** If the Supervisor fails to start one of the Workers, it renames that Worker's JAR file in the docfactory\deploy directory with the suffix "_bad". For example, if the Supervisor is unable to start the Assembler worker, it renames the "assembler.jar" file to "assembler.jar_bad". This kind of failure can occur in the following scenarios:

a. The Worker's JAR file is opened, but a valid configuration is not found.

b. The Worker process fails to locate the executable, or the executable fails to start (missing exe, dll, etc.).

c. A monitor is started on the Worker process, but the monitor fails to detect that the process is running, or the process is unresponsive.

d. The set of information about the Worker process is invalid.

In such scenarios, examine the "startup.log" file located in the docfactory\logs folder, for additional information or to know the cause of the problem.

## STEP C: 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 D: STARTING DOCUMAKER INTERACTIVE (OPTIONAL)

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.

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<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **dmkr_server** | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **soa_server** | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **Note:** Non-soa users can skip the soa_server row. | | |

**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.

3. Add SOA to the WebLogic domain:

   **a.** From the MW_HOME \wlserver\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 12.2.1.2.0 then click Next.

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

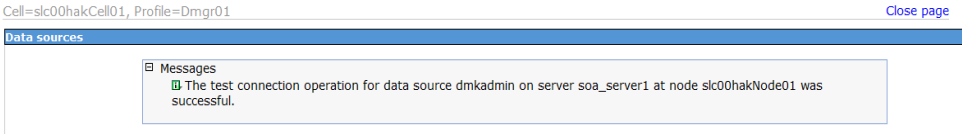
   **e.** View the Configure JDBC Data Sources options (do not change these values), then click Next.

   The connection to the database is tested. When the test finishes, view the results, then click Next.

   **f.** Copy the sqljdbc4.jar file under wl_server\server\lib, idocumaker_domain\lib if JDBC Component Schema fails to make connection. This is applicable only for MS SQL Server.

   **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, 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:

```
documaker\j2ee\weblogic\databasetype\bpel\antbuild.cmd
```

4. 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.

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

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

6. 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.

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

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

## STEP E: 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 (if using Documaker Interactive).

   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<br>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. |

You have completed the installation and initial configuration of Oracle Documaker Enterprise Edition.

**Note** For information on customizing the location of Help files, downloading patches, and downloading documentation updates, see *Maintaining Your System on page 67*.

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 on page 41*
- *Stage 2: Running Setup on page 45*
- *Stage 3: Post-Setup on page 51*

# 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.


- *Step A: Checking Requirements on page 41*
- *Step B: Downloading the Software on page 43*


## 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
    - IBM DB2
        - LUW

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.

    - SQL Server
- An installed web application server.
        - Oracle Fusion Middleware 12c infrastructure 12.2.1.2.0

**Note** •Fusion Middleware will not install to a path with spaces so WebLogic/ WebSphere should be installed in a path without spaces.

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) |

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 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. If you will be using Documaker Interactive: Correspondence option and wish to use Oracle SOA BPEL option to process Approval Workflow, make sure you have deployed SOA BPEL and have the necessary connection information. Later you will deploy the BPEL process and Oracle Business Rules to SOA and can configure Documaker Interactive to use those endpoints for approval workflow.
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

The Oracle Software Delivery Cloud (OSDC) site lets you download Oracle software products.

The process of downloading software from OSDC includes following steps:

1. First, go to the Oracle Software Delivery Cloud website:

   https://edelivery.oracle.com

2. Sign in with your Oracle account. If you do not have an Oracle account, you can register for an account here.
3. Search for the software by typing in the search bar and selecting it. For example, enter 12.6 to search for the list of Release 12.6 versions of Oracle Documaker software products.
4. Select the platform from the 'Select platform' drop-down.
5. The selected products are then listed under 'Download Queue'. Click the X (cross) which is adjacent to the product in case you want to remove individual files or click 'Remove All' in the lower left corner of the dialog if you want to remove all the listed items.
6. Click 'Continue' to proceed to next screen; you will see a list of the selected software for downloading.
7. Choose the individual software components for download and click 'Continue' if you wish to proceed or 'Return to Search' to review different software for downloading.
8. Read the license agreement carefully; mark the check box to agree with license agreements, and click 'Continue'.
9. Click 'Download' button to download the software or click the filename to individually download the files.
10. While you can save the file on any machine you choose, we recommend you save the file onto the machine where you plan to run it. You must unzip the file on the platform for which it was intended. The length of time it takes to download an application depends on the size of the download, your connection speed, and the amount of traffic on the site.
11. Once the Download has completed, click 'Return to Search' to search and download additional files or click 'Sign Out' to log off Oracle Software Delivery Cloud.

## 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`
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. In the Specify Administrator Group and User window, enter:

| Field | Description |
|---|---|
| Group | Enter the group name. This provides the installation user with control over initial Administration group and Administration user |

| Field | Description |
|---|---|
| User | Enter the user name for the Administrator Group. |
| Password | Enter the password for the Administrator Group. |
| Confirm Password | Re-enter password to confirm. |

8. On the Specify Database Type window, indicate the database you will use. Select
   - Oracle
   - SQL Server
   - DB2 LUW
9. On the Database Information window, enter:

| Field | For an Oracle database | For a DB2 database | For SQL Server |
|---|---|---|---|
| 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 database; the default port is 1433. |
| Database | Oracle Database | 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*<br>Enter False if you don't have a valid license for use. | na | na |

**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.

10. The Administration Database Schema window contains settings for the schema where the configuration tables are stored. In this window, enter

| Field | Description |
|---|---|
| DB Index Folder | The database folder where the physical database index files will be created.<br>**Note: This is applicable only for SQL server DB.** |
| 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 **LUW** database, this is only honored if you uncomment the dmkr_admin schema portion and create database section to reference another DB Folder location or enable this setting when the DBA creates the database in DB2. |
| User | Enter 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.<br>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.<br>The default is System 1. Change this name to reflect the Document Factory system in your organization. |

11. Click Next to continue.
12. 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 Index Folder | The database folder where the physical database index files will be created.<br>**Note: This is applicable only for SQL server DB.** |
| 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. |

| Field | Description |
|---|---|
| User | This is the name the application connect to the database. The default is dmkr_asline. In case of DB2 database, the username should be less than 8 characters.<br>This user name is also used for the:<br>• Database schema/owner<br>• JDBC data source name<br>• ODBC data source name<br>• Name applied to the Docupresentment service (docupresentment dmkr_asline) |
| Password | This is the password for this assembly line database. The default is Asline12.<br>This password is also the Documaker Studio password for the Docucorp user. |
| Confirm Password | Re-enter the 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.<br>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.

13. On the Specify Application Server Type window, choose the application server you will use. Select:
    - WebLogic Server 12.2.1.2.0
14. Enter the user value for the web application server that is associated with the domain.
15. 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 |
| Connection Class | The name of the Java class used to connect to the JMS queues. Always accept this default:<br>oracle.documaker.ids.WebLogicJMSConnection |
| InitialContextFactory | A Java class used when connecting to the JMS queues. Always accept this default:<br>weblogic.jndi.WLInitialContextFactory |
| 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. |

| Field | Description |
|---|---|
| Principal | The user name required to start the logical server instances. Enter weblogic for WebLogic. |
| Credentials | The password for the JMS Principal. Enter a password and use the same while creating the domain. |
| Confirm Credentials | Re-enter credentials to confirm. |

When you finish, click Next to continue.

16. 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.

17. 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.

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

| Field | Description |
|---|---|
| Use WebCenter | Select True to enable documents to be archived to WebCenter. The default is False. |
| WebCenter User | Enter the WebCenter user name. |

| Field | Description |
|---|---|
| WebCenter Password | Enter the WebCenter password. |
| Confirm Password | Re-enter the password to confirm. |
| WebCenter Connection String | Enter the connection string. Here is an example: idc://hostname:4444 |
| WebCenter 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.

19. 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.

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 51* to finish the implementation of your ODEE system.

# STAGE 3: POST-SETUP

## 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* |
| SQL Server database | *Running the SQL Server Database Scripts* |

**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.

### 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 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 abbreviation for the desired language:

| Languages | Abbreviation |
|---|---|
| Dutch | `nl` |
| French | `fr` |
| German | `de` |
| Indonesian | `in` |
| Japanese | `ja` |
| Polish | `Pl` |
| Portuguese | `pt` |
| Simplified Chinese | `zh` |
| Spanish | `es` |
| Russian | `ru` |
| English (Great Britain) | `en_GB` |

   **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*.

## 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 operating system such as AIX, 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.

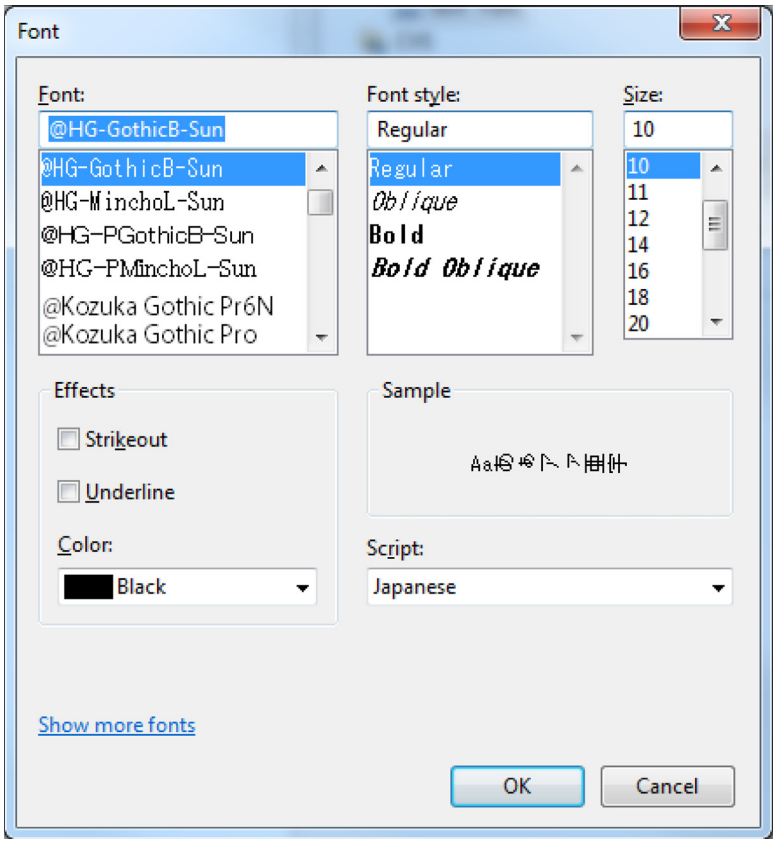
After creating the database in DB2, open your command processing tool and run the following scripts located in the \documaker\database\db2 directory. You may need to copy these files to the database server.

| DB Type | Location |
|---|---|
| DB2 LUW | \documaker\database\db2v97 |

| Script | Description |
|---|---|
| dmkr_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. |

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).



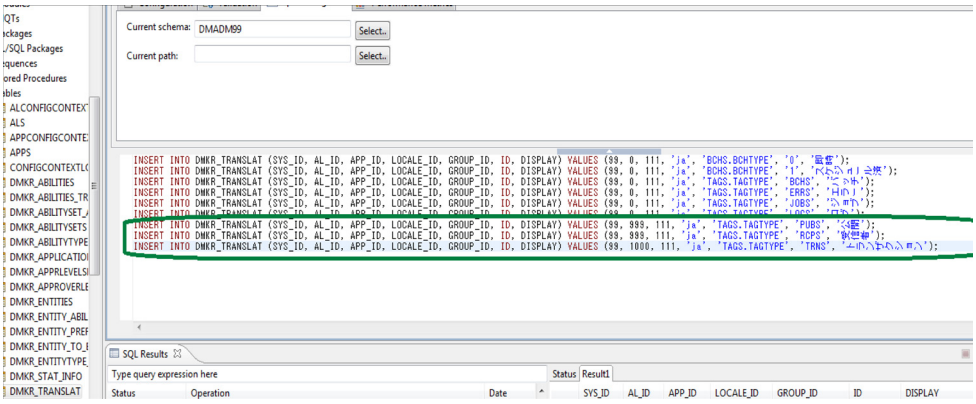

**b.** Open the dmkr_admin_xx.sql in a text editor that displays text correctly (in the example below, Notepad properly displayed Japanese text).

**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', 'ÂÖ¨Èñã');
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID,
GROUP_ID, ID, DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE',
'RCPS', 'Âèó‰ø°ËÄÖ');


INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID,
GROUP_ID, ID, DISPLAY) VALUES (99, 1000, 111, 'ja', 'TAGS.TAGTYPE',
'TRNS', '„Éà„É©„ÉŠ„Ç¹„ÇØ„Ç²„Éß„ÉŠ');
From IBM Data Studio:
```




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

**e.** Validate that the context 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

**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.*

## Running the SQL Server Database Scripts

Follow these steps to run the SQL Server database scripts:

1. Run the scripts located in the \documaker\database\sqlserver2012 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.

**Note** Installer sets the default index and non index File Group values(SIZE,MAXSIZE, FILEGROWTH) in the admin and asline scripts. User may need to update these values as per requirement prior to the sql file execution.

2. database tables. Contact your database administrator (DBA) for assistance.

| Script | Description |
|---|---|
| dmkr_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.

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. (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 |
|---|---|
| Microsoft SQL Server Management Studio | Change the file encoding option to UTF-8 by selecting the Tools, Preferences, Environment option and then setting the Encoding option to UTF8. |

   **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` |

| Languages | Abbreviation |
|---|---|
| Indonesian | in |
| Japanese | ja |
| Polish | pl |
| Portuguese | pt |
| Simplified Chinese | zh |
| Spanish | es |
| Russian | ru |
| English (Great Britain) | en_GB |

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

5. Copy the sqljdbc4.jar file to the appropriate locations in the ODEE installed directories, such as documaker/bin/lib, documaker/docfactory/lib, and documaker/docupresentment/lib
6. Run this batch file from the application server 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.
7. Continue with the steps outlined in *Creating the Web Environment on page 57*.

# 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* |

## 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 (Optional)

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 variables specific to your environment by editing these files within the `\documaker\j2ee\weblogic\databasetype\scripts directory` (where databasetype is the type of database chosen during installation)

   (e.g. `\documaker\j2ee\weblogic\oracle11g\scripts`).

| In this file | Make these changes |
|---|---|
| set_middleware_env.sh | Update these values:where the path to the Oracle middleware home.<br>• "MW_HOME=/home/oracle/middleware |
| weblogic_installation.properties | Change the variable values for these properties. (Modify the value to the right of the equal sign).<br>• c:\\oracle\\middleware\\oracle_home<br>• 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.)<br>Replace the '<SECURE VALUE>' (including the single quotes) with the credentials values used on the installation screen listed" for<br>• jdbcAdminPassword='<SECURE VALUE>'<br>• jdbcAslinePassword='<SECURE VALUE>'<br>• jmsCredential='<SECURE VALUE>'<br>• adminPasswd='<SECURE VALUE>'<br>• weblogicPassword='<SECURE VALUE>'<br>**Note:** If JMS connection is not secured, then replace with empty value, e.g. jmsCredential =<br>**Note:** Installer does not set the secure value credentials for security reasons, so they have to be manually entered and secured by the resource deploying the web app.<br>All secure values replaced should be removed from any deployment properties file or the file should be deleted from all locations after web apps are successfully deployed and tested. |

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/databasetype/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=
```

The program will ask to run the Repository Creation Utility (RCU) to create the Database schema for Middleware. Answer "y" if RCU has not been run or the new schema is required.

Please refer to *Appendix A on page 73* for "Navigating RCU Screens to Create Schemas" details.

Answer “n” after the RCU has been run. The program will continue to run the Fusion Middleware (FMW) Configuration wizard.

Please refer to *Appendix B on page 80* for "Navigating Configuration Wizard Screens to Configure the Domain" details.

4. Run the following script if using Documaker Interactive Correspondence web application;
   `wls_add_correspondence.sh`
5. If using MS SQL Server, add the following option in [WLS_HOME]/user_projects/domains/idocumaker_domain/bin/SetDomainEnv.cmd (or SetDomainEnv.sh):
   `-Djbo.SQLBuilder=SQLServer`
6. If using IBM DB2, add the following option in [WLS_HOME]/user_projects/domains/idocumaker_domain/bin/SetDomainEnv.cmd (or SetDomainEnv.sh):
   `-Djbo.SQLBuilder=DB2`
7. Start the WebLogic AdminServer by running this command from the [middleware home]/user_projects/domains/idocumaker_domain/bindirectory:
   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).

8. 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,

9. Continue with the steps outlined in *Creating WebLogic User Accounts on page 59*.

## 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.

## STEP D: STARTING SERVICES

If the weblogic managed server named 'jms_server' is not started, start it before starting ODEE Factory 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
```

If the Supervisor fails to start one of the Workers, it renames that Worker's JAR file in the `docfactory/deploy` directory with the suffix "_bad". For instance, if the Supervisor is unable to start the Assembler worker, it renames the "assembler.jar" file to "assembler.jar_bad". This kind of failure can occur in the following scenarios.

**a.** The Worker's JAR file is opened, but a valid configuration is not found.

**b.** The Worker process fails to locate the executable, or the executable fails to start (missing exe, dll, etc.).

**c.** A monitor is started on the Worker process, but the monitor fails to detect that the process is running, or the process is unresponsive.

**d.** The set of information about the Worker process is invalid.

In such scenarios, examine the "startup.log" file located in the `docfactory/logs` folder, for additional information or to know the cause of the problem.

# 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 (OPTIONAL)

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.

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<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **dmkr_server** | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **soa_server** | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.SQLServerPersistManager | -Djbo.passivationstore=database<br>-Djbo.pcoll.mgr=<br>oracle.documaker.shared.model.DB2PersistManagerCustom |
| **Note:** Non-soa users can skip the soa_server row. | | |

**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 docupresentment first, and restart only once the jms_server is available.

3. Add SOA to the WebLogic domain:
   **a.** From the MW_HOME/wlserver/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 12.2.1.2.0, 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
```

**l.** In SetDomainEnv.sh file under /domains/idocumaker_domain/bin, add EXTRA_JAVA_PROPERTIES as'-Djbo.SQLBuilder=SQLServer'to work with SQLServer JDBC Datasource.

**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.

4. 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.

5. From the bin directory, run this command:
   ```
   ./startManagedWebLogic.sh soa_server1
   ```
6. 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.
7. Once soa_server1 is ready to accept connections, deploy the Oracle Business Rule Composites by running this command from the /documaker/j2ee/weblogic/databasetype/scripts directory:

```
./deploy_soa.sh
```

## STEP G: 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 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. |

3. Download and configure the WIP Edit plug-in accessibility (if using Documaker Interactive).

   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<br>When you access this link, you are redirected to the HTTPS port for a more secure connection.<br>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. |

You have completed the installation and initial configuration of Oracle Documaker Enterprise Edition.

**Note** For information on customizing the location of Help files, downloading patches, and downloading documentation updates, see *Maintaining Your System on page 67*.

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* on page 68
- *Downloading Patches* on page 69
- *Downloading the Documentation* on page 70
- *Uninstalling the Software* on page 71

# 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 website. 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 website:

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:

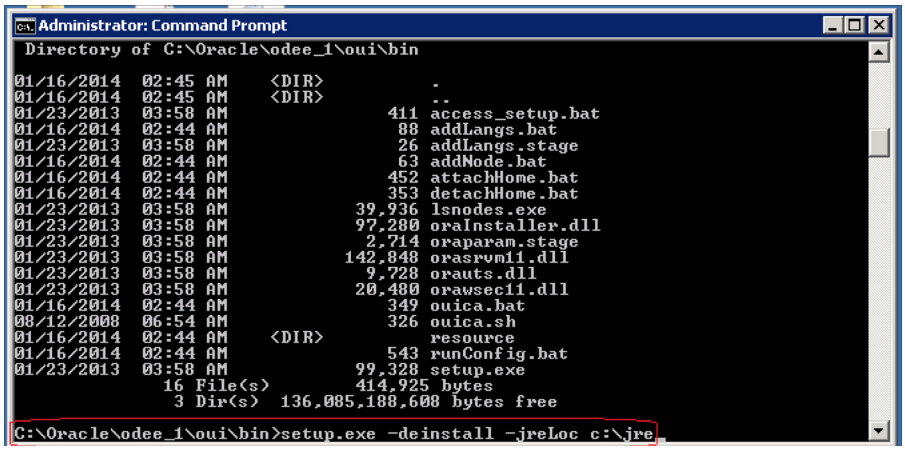
http://www.oracle.com/technetwork/documentation/insurance-097481.html

# UNINSTALLING THE SOFTWARE

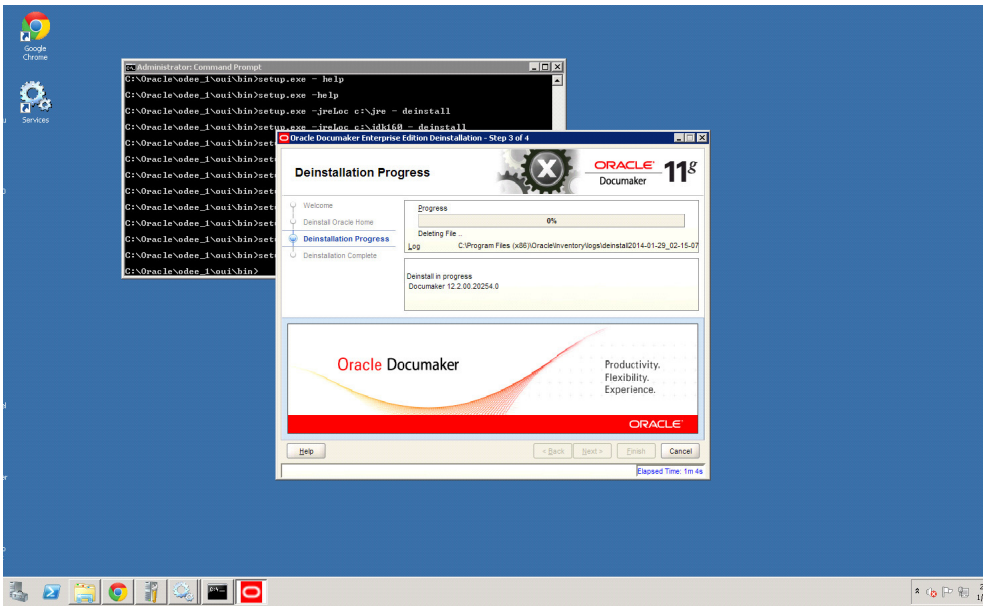
You can uninstall your Documaker software before making your selection of products to install or after a successful install. To remove Documaker software, follow these steps:

- 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.
- 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.




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



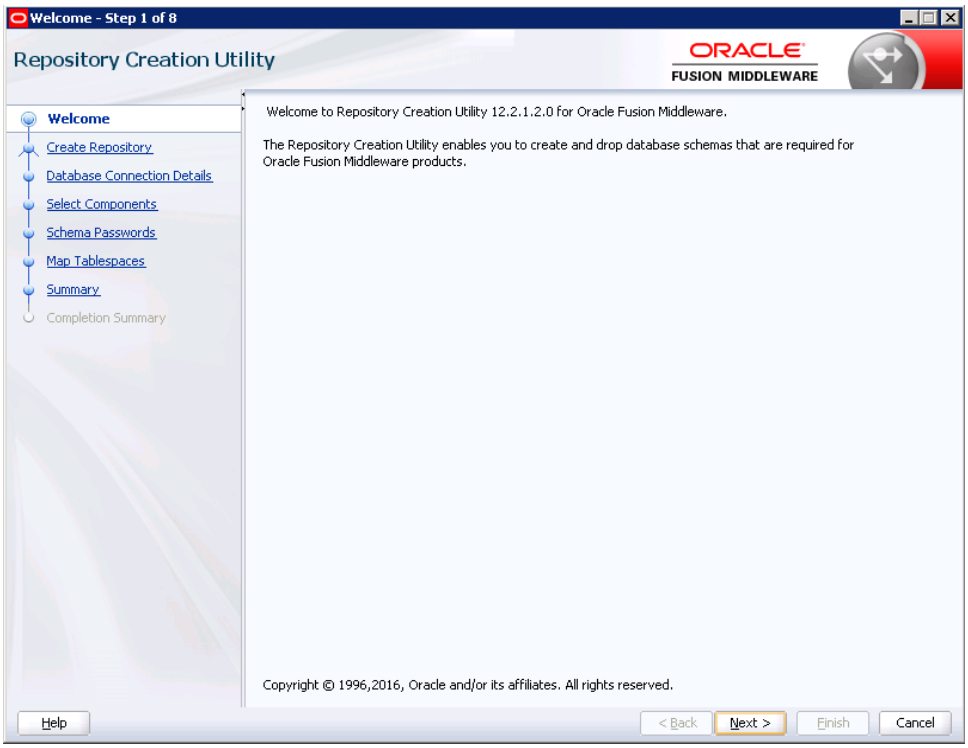

9. Open domain-registry.xml under $Middleware_HOME .Remove the corresponding entry referring to idocumaker_domain.
10. Open nodemanager.domains file under $Middleware_HOME \wlserver_10.3\common\nodemanager\ folder and eemove the corresponding entry referring to idocumaker_domain.
11. Delete the domain folder under domains folder manually. $Middleware_HOME\user_projects\domains\idocumaker_domain
12. Delete the domain folder under applications folder manually. $Middleware_HOME\user_projects\ applications\idocumaker_domain
13. 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).
14. 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.

# Appendix A

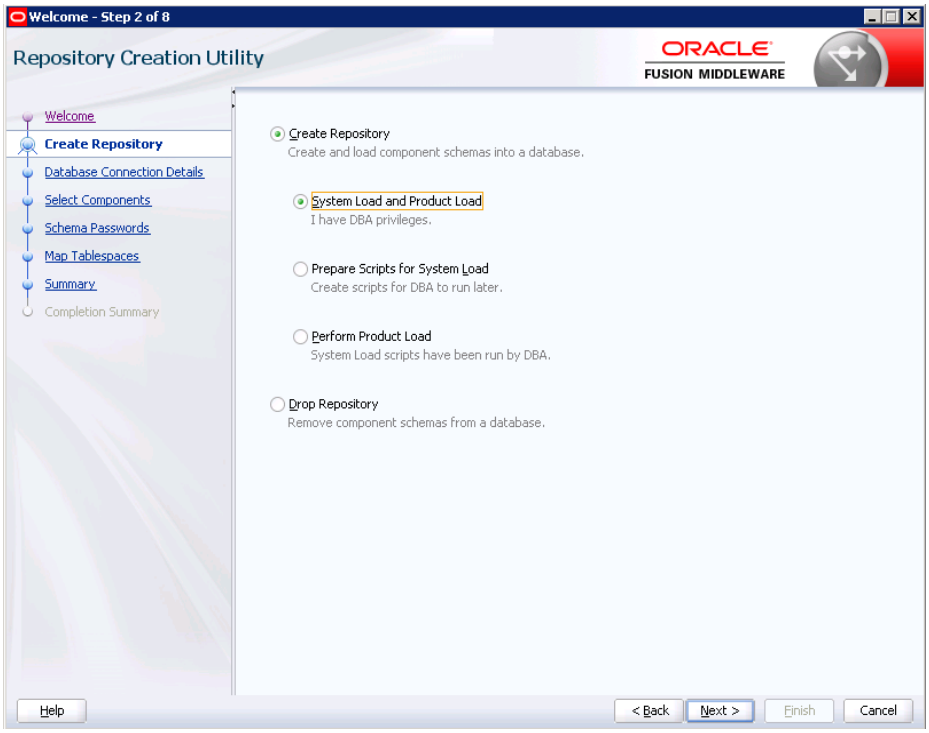
## Navigating RCU Screens to Create Schemas

Once the program has started, you will see following RCU screen.

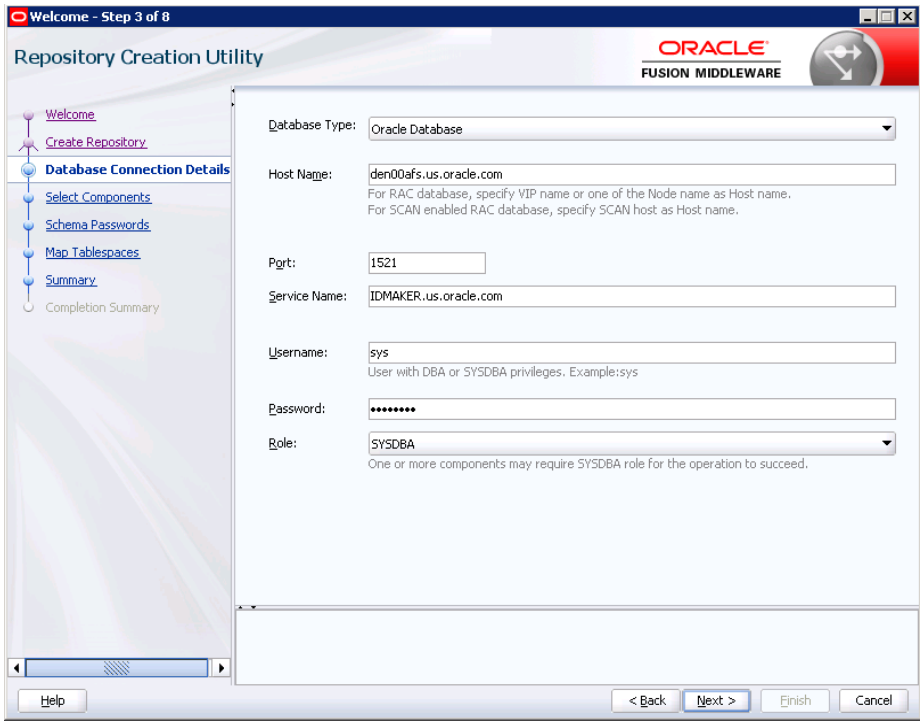



Click ‘Next’ to continue and follow these steps.

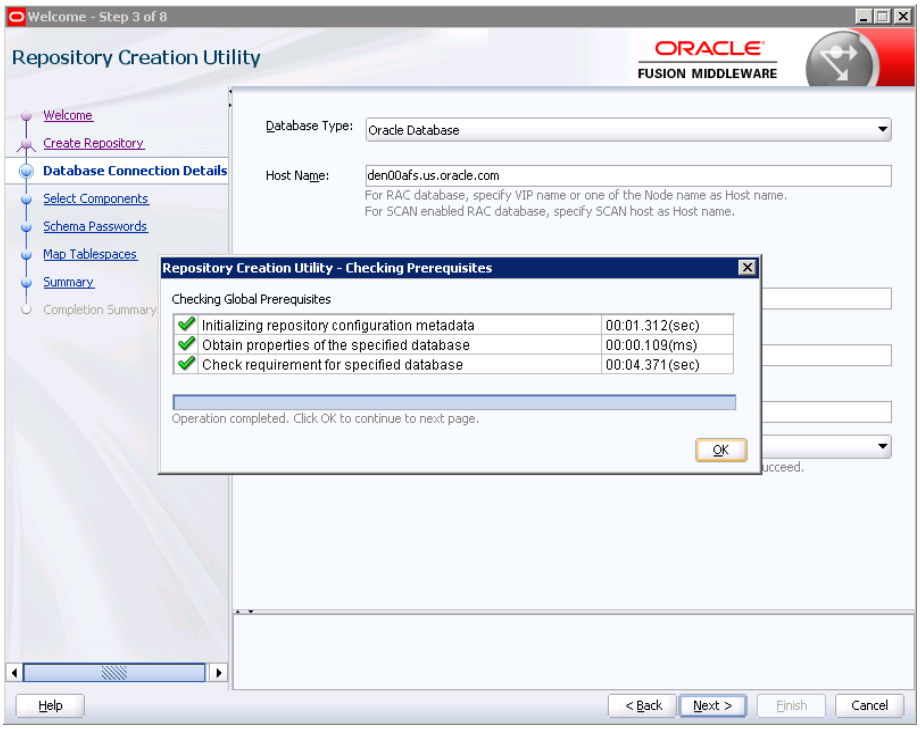
1. Select ‘Create Repository’ radio button and ‘System Load and Product Load’ radio button and click Next.



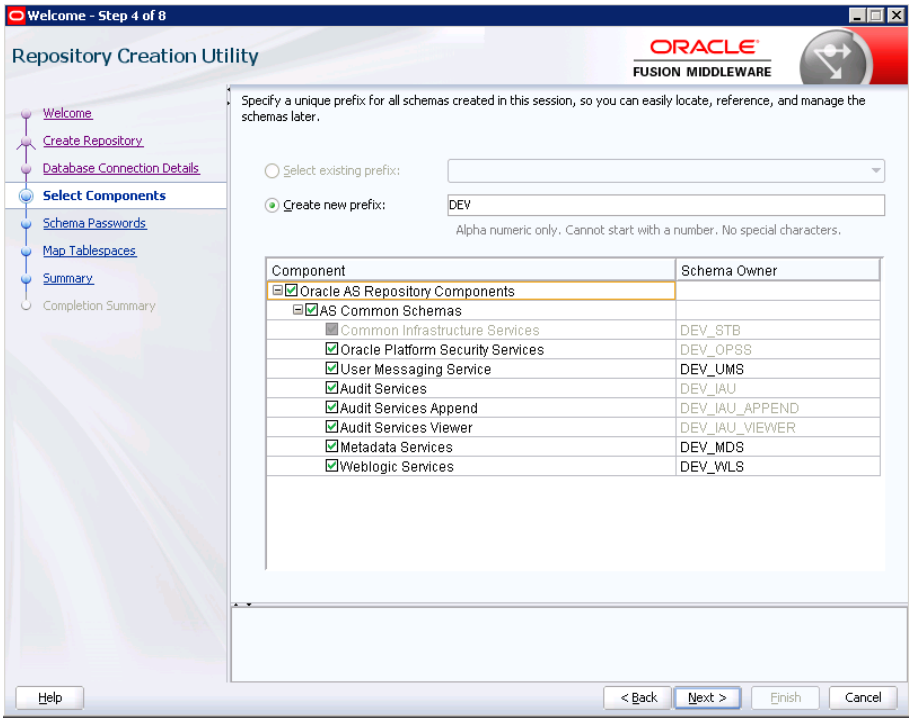

2. Provide database details and click ‘Next’.



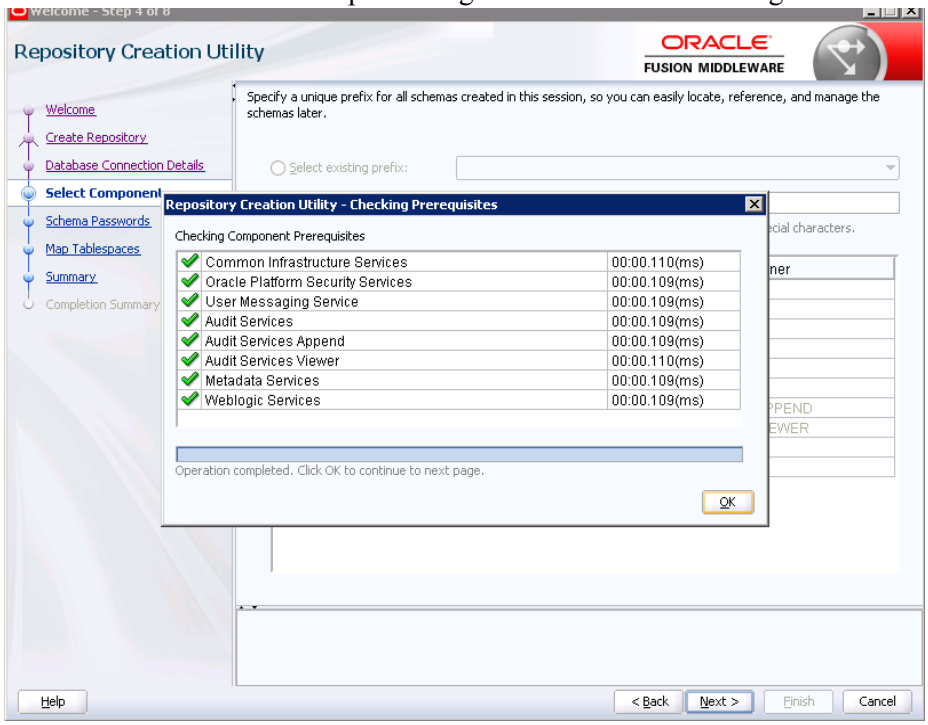
3. Click ‘OK’.



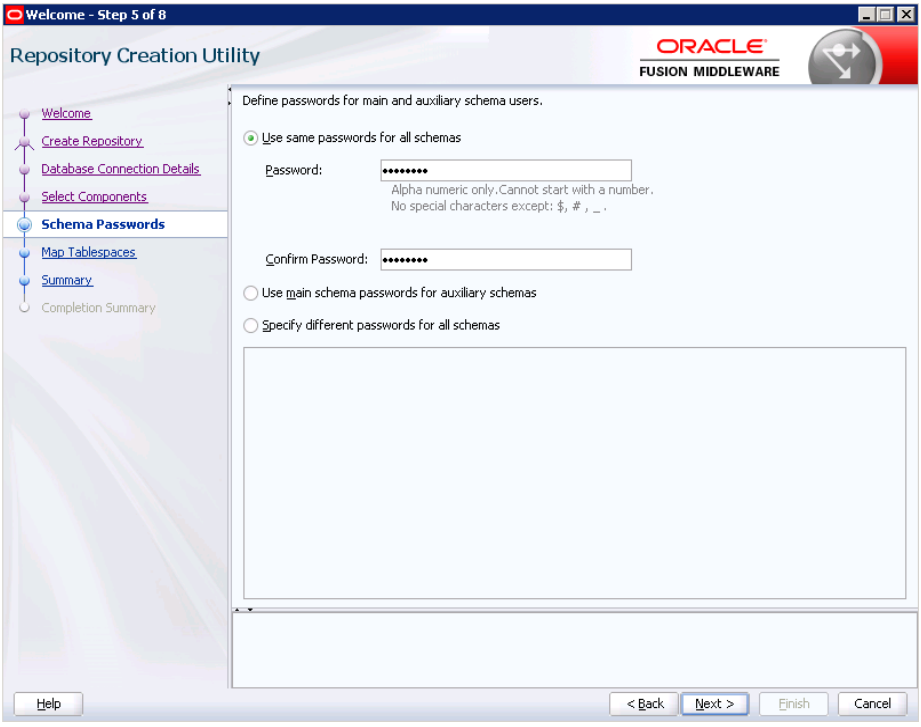

4. Select ‘Oracle Platform Security Services’ check box, it automatically selects dependent components.



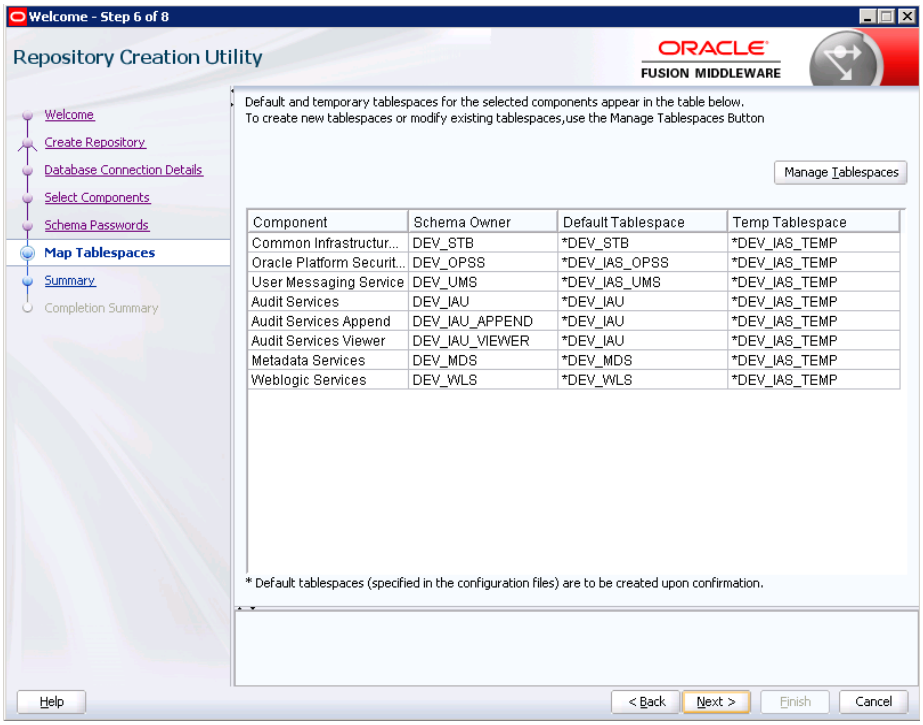
5. Click ‘OK’ after successful processing as shown in the following screen.



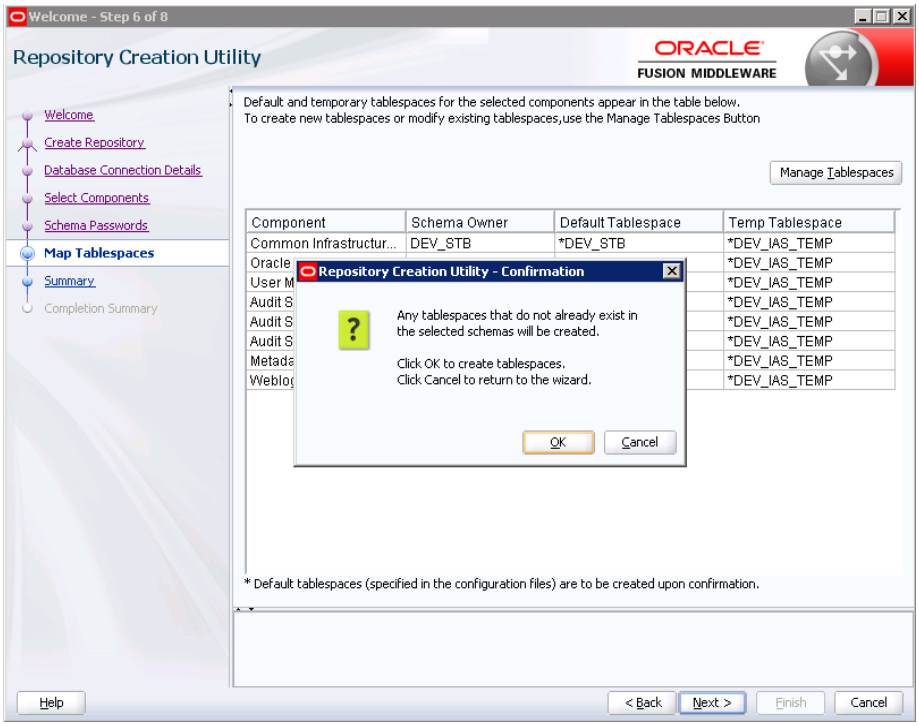

6. Enter password for your schema.



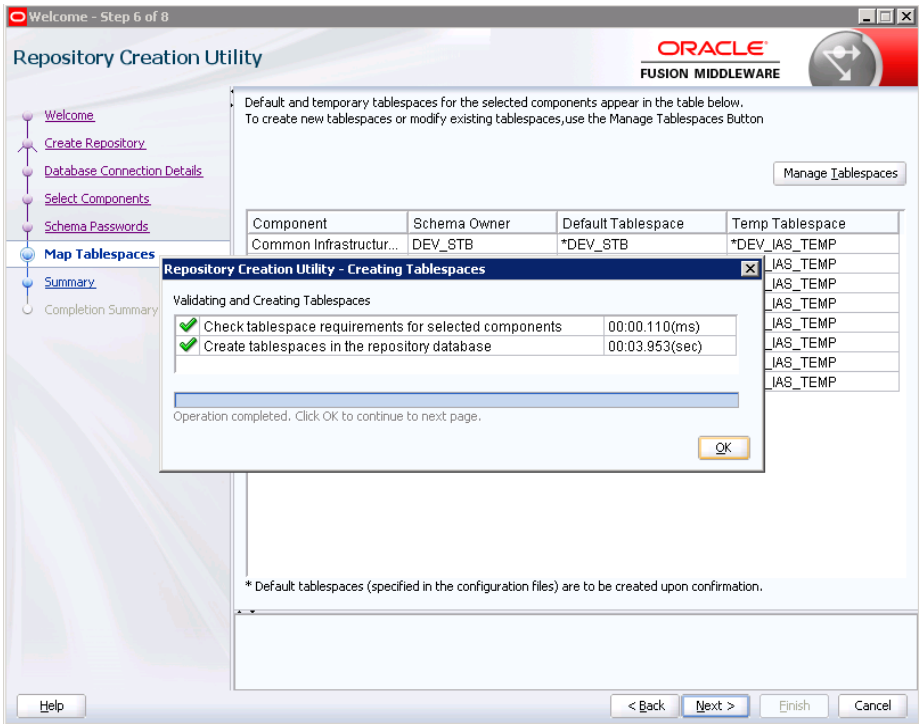
7. Click ‘Next’.



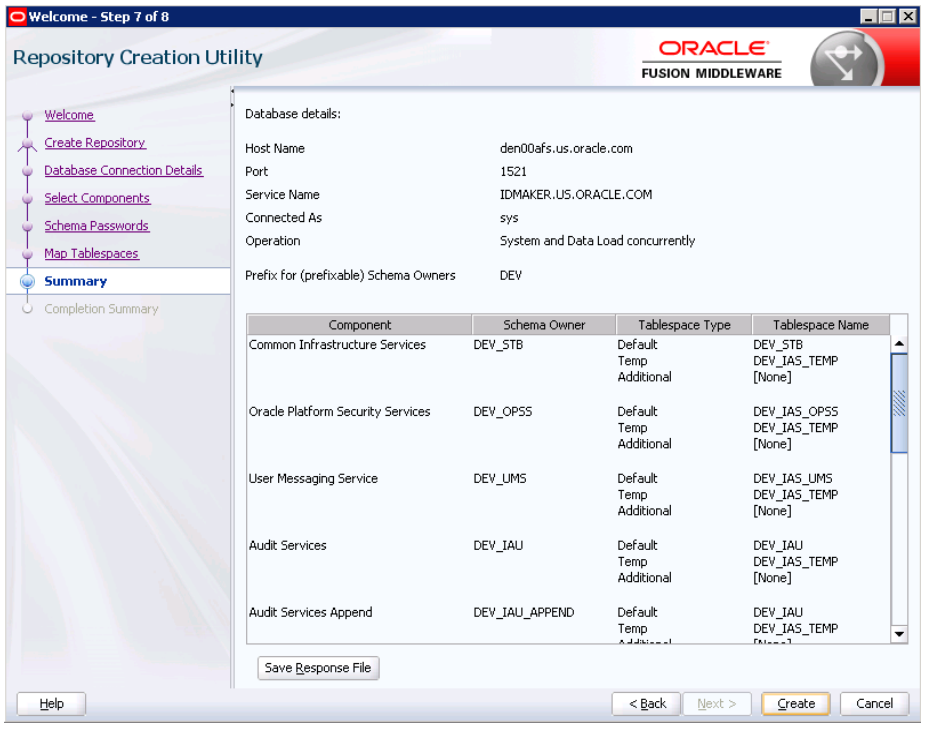

8. Click ‘OK’.



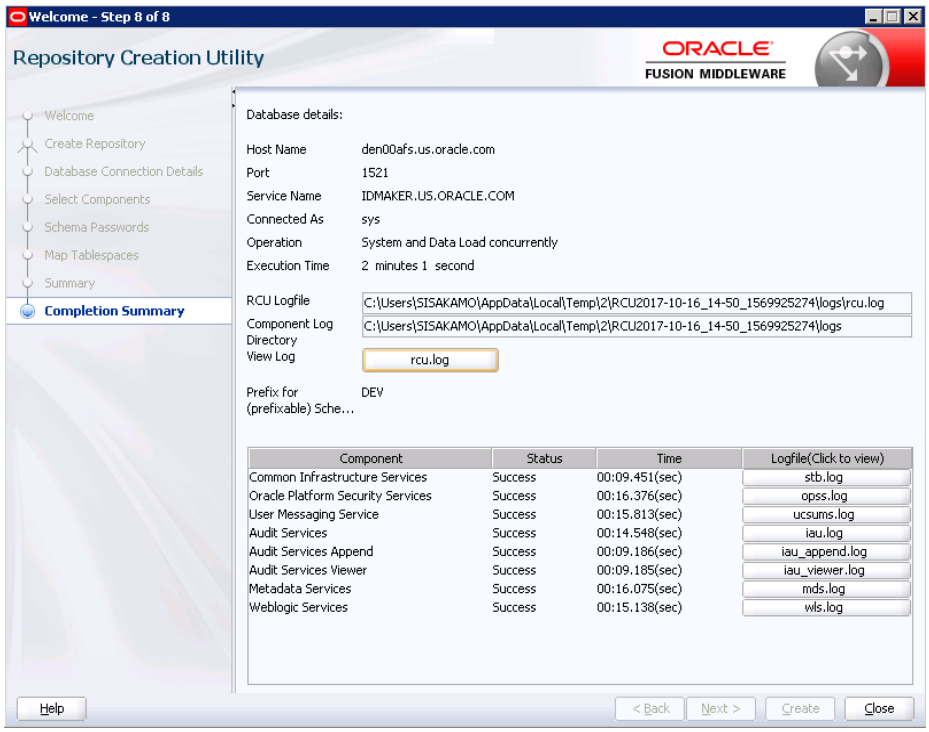
9. Click ‘OK’ again.




10. Click ‘Save Response File’ to save the installation information and click ‘Create’.



11. Database schema is created. Click ‘Close’.




Information on Repository Creation Utility (RCU) is also available on

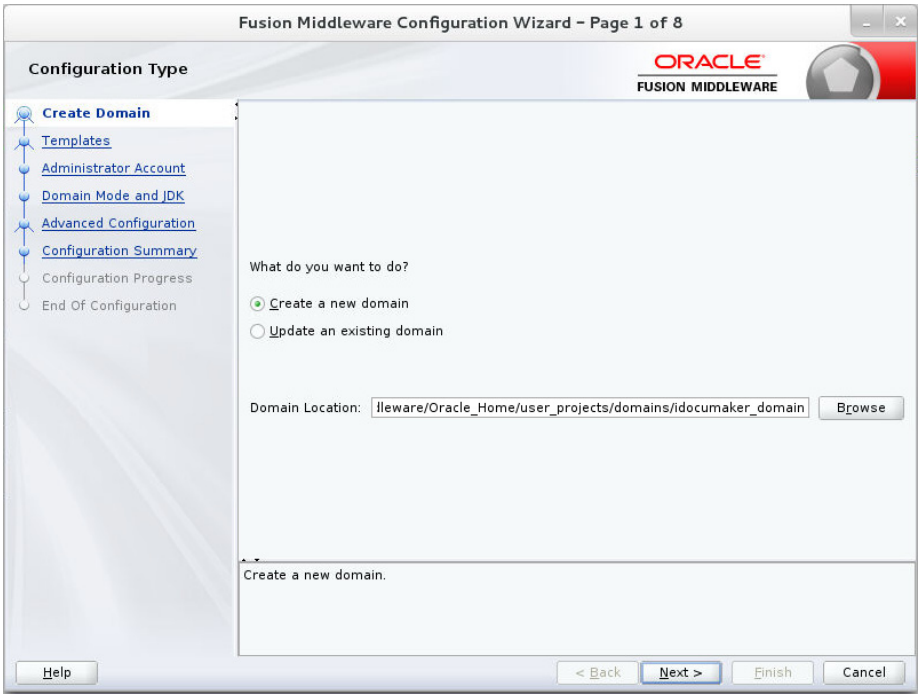
https://docs.oracle.com/middleware/12212/lcm/INFIN/GUID-CA80A6E9-8903-4E19-81D7-A3647A11D0A6.htm#INFIN358

# Appendix B

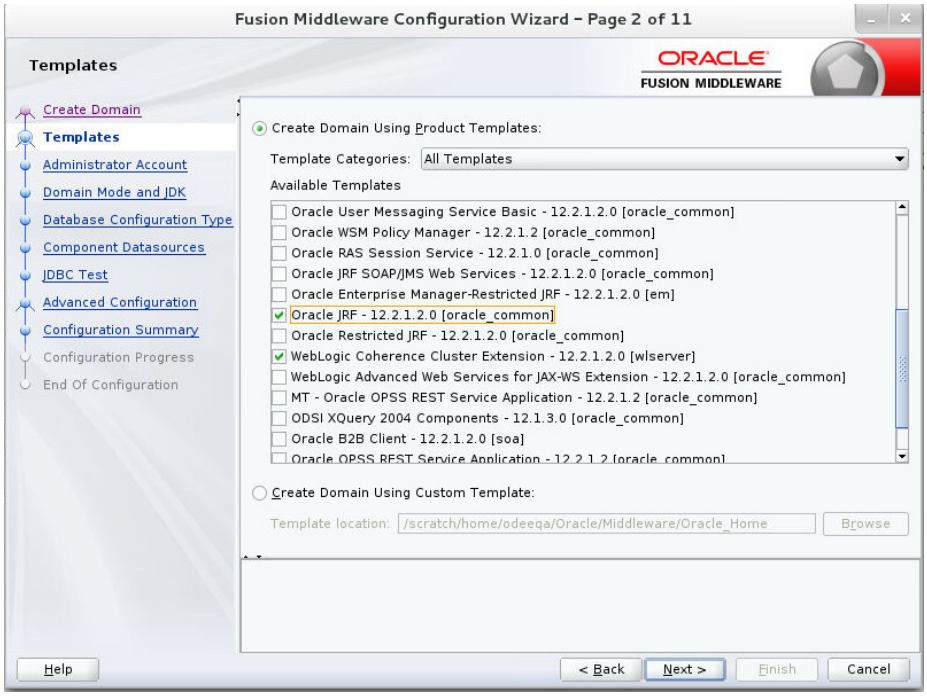
## Navigating Configuration Wizard Screens to Configure the Domain

Following the database schema creation, the Fusion Middleware (FMU) Configuration wizard screen displays. Follow the steps to continue with the FMU configuration:

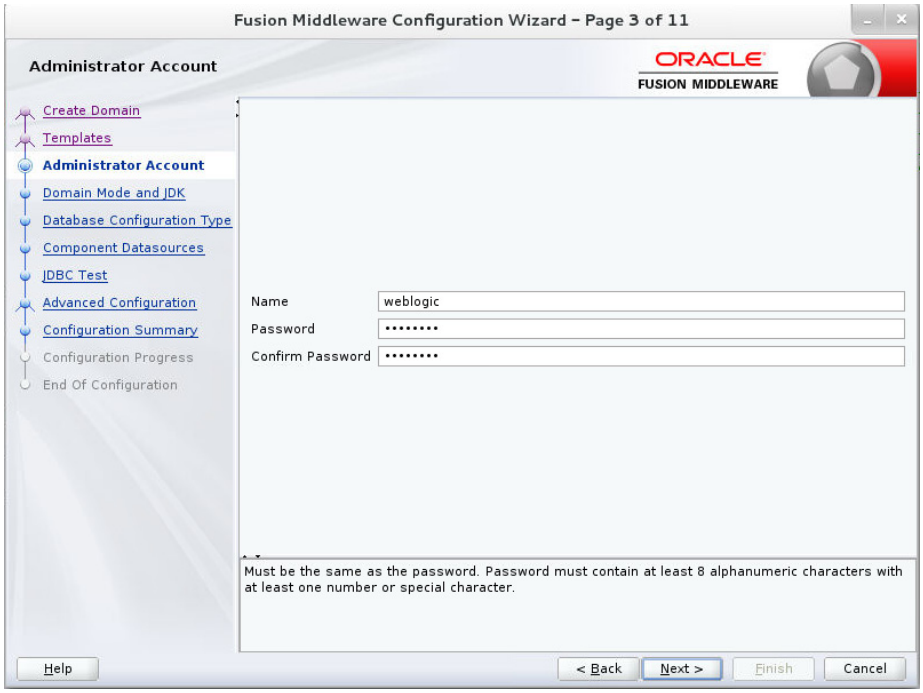
1. Select ‘Create a new domain’ radio button and provide domain location..



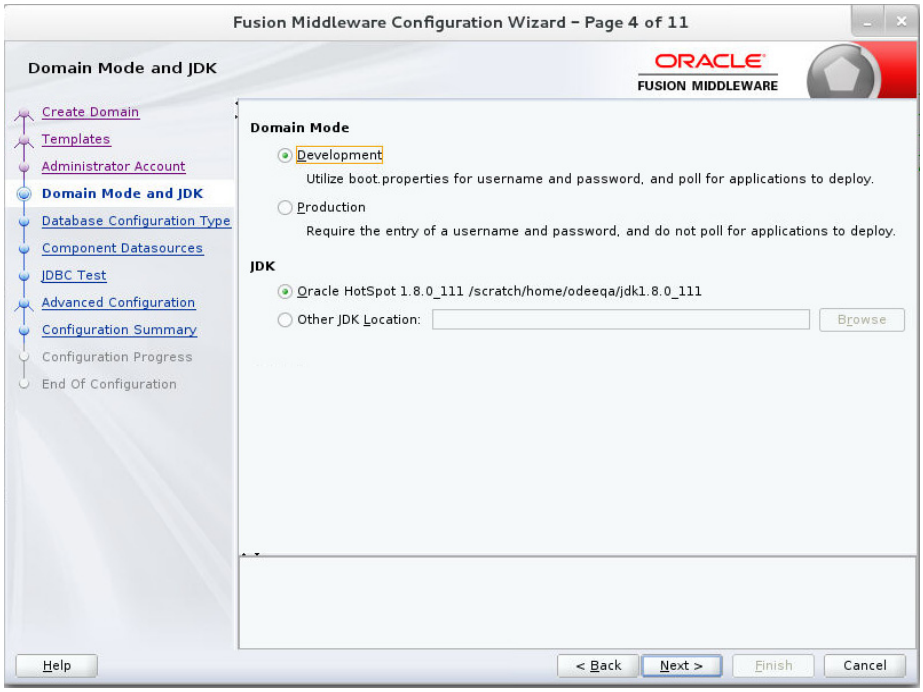
2. Select ‘Oracle JRF - 12.2.1.2.0 [oracle_common]’ check box, it automatically selects dependent component. Click ‘Next’.



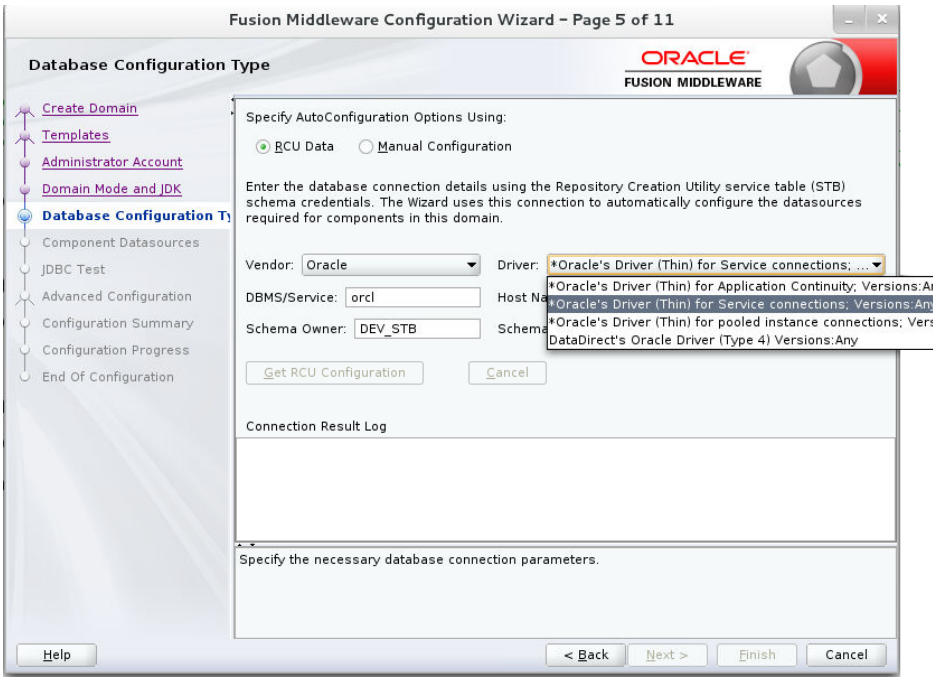

3. Enter weblogic username and password. Click ‘Next’.



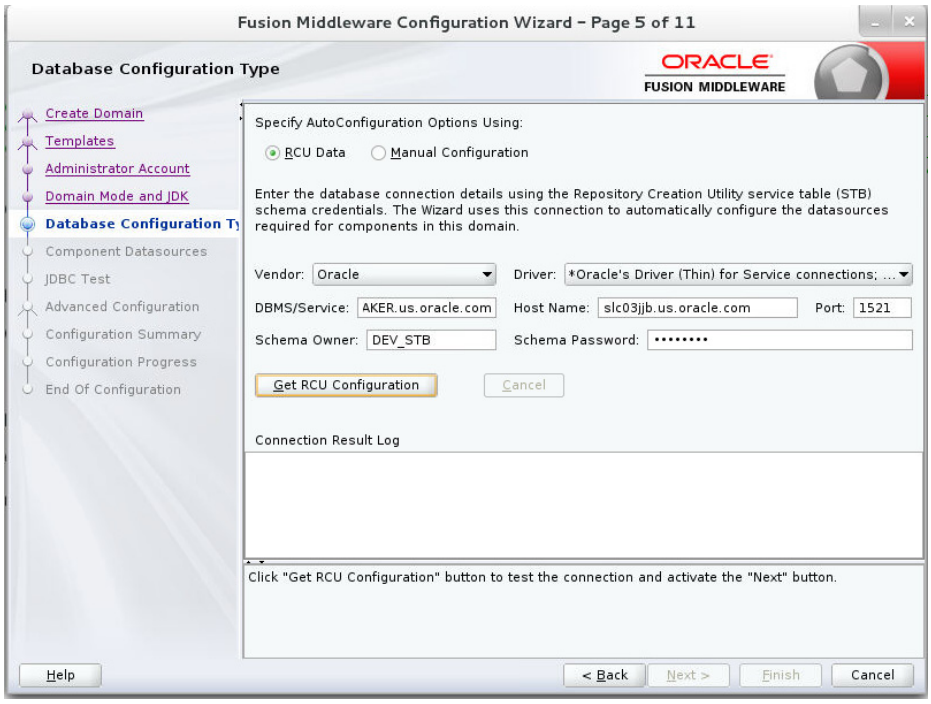
4. Select Development radio button and click ‘Next’.



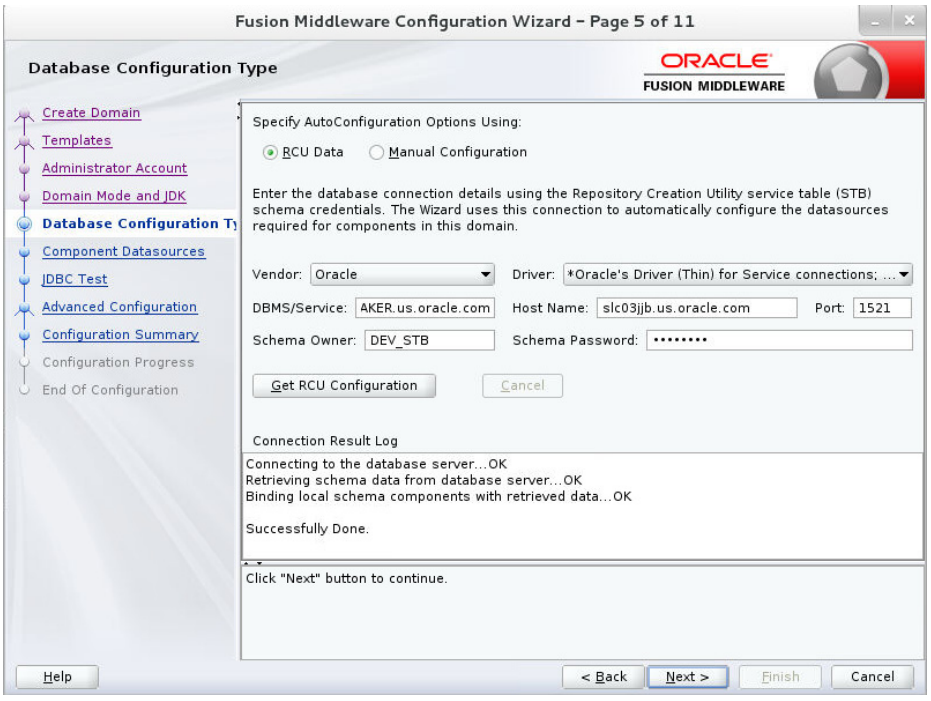

5. Enter database, driver and schema owner details.



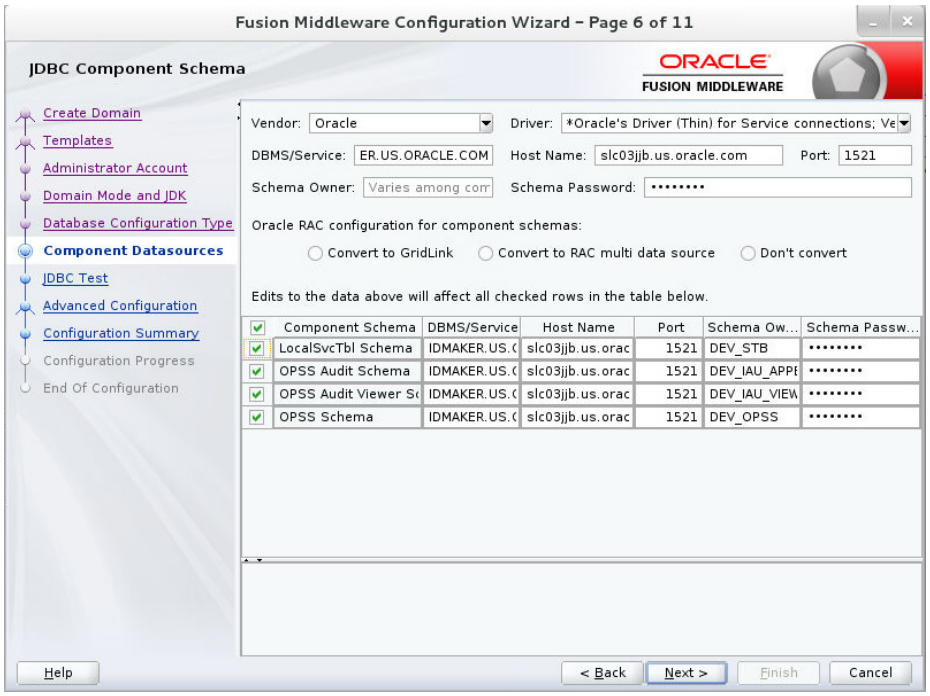
6. Enter ‘Get RCU Configuration’ button.



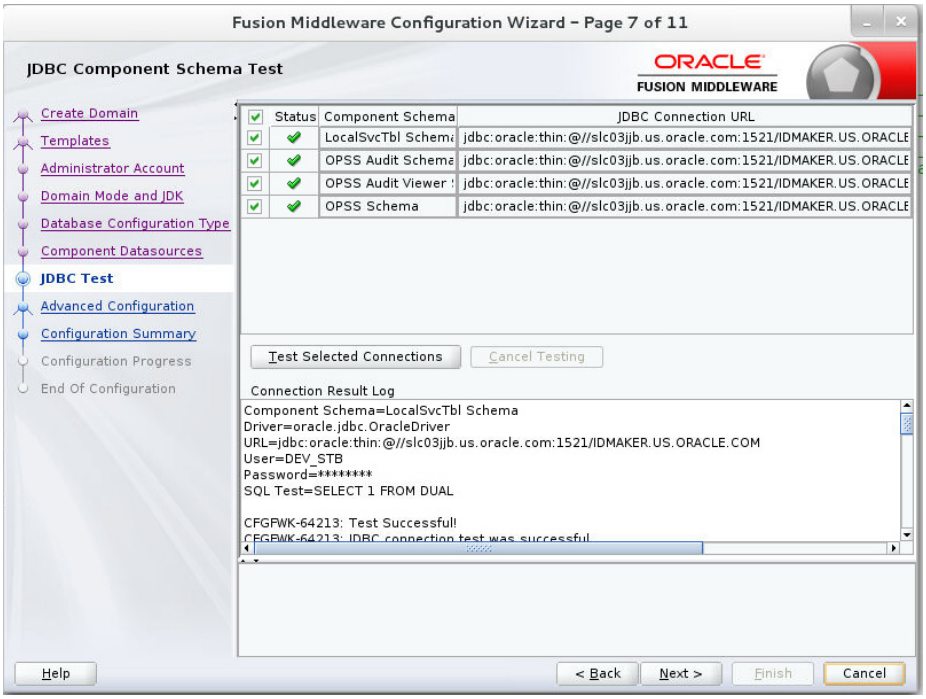

7. If you see Successfully Done in ‘Connection result log’ click ‘Next’.



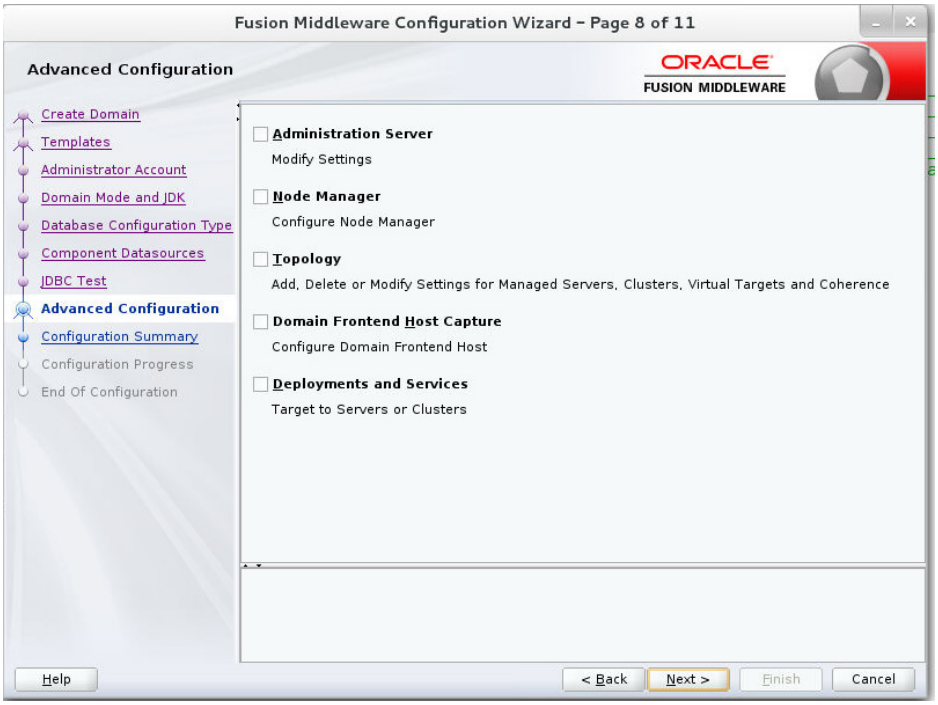
8. Select all check boxes and click ‘Next’.



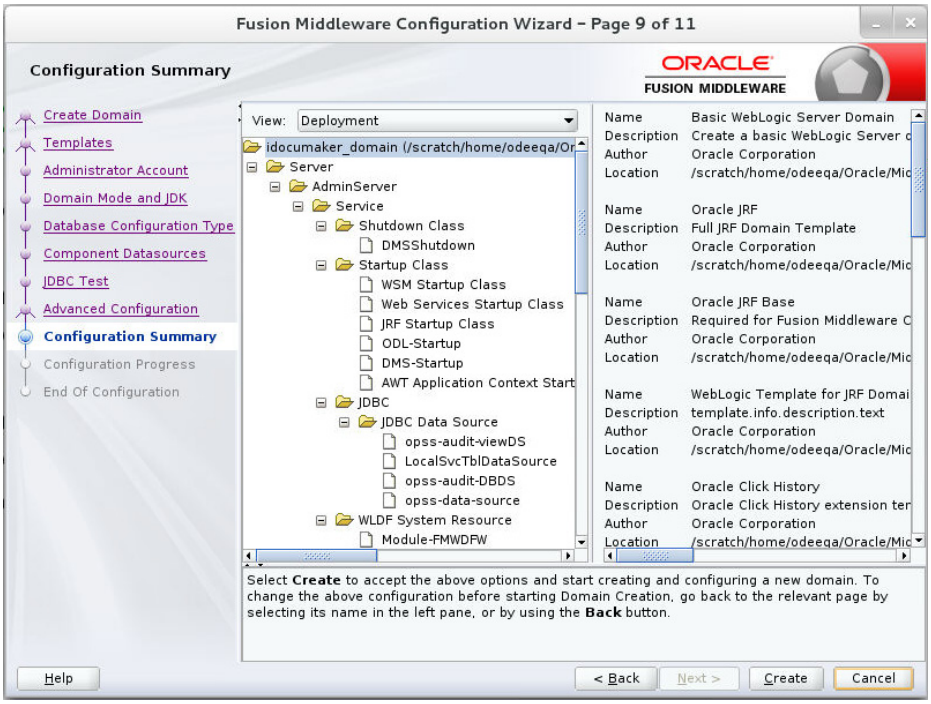

9. Select ‘Test Selected Connections’ button. If test is successful, then click Next.



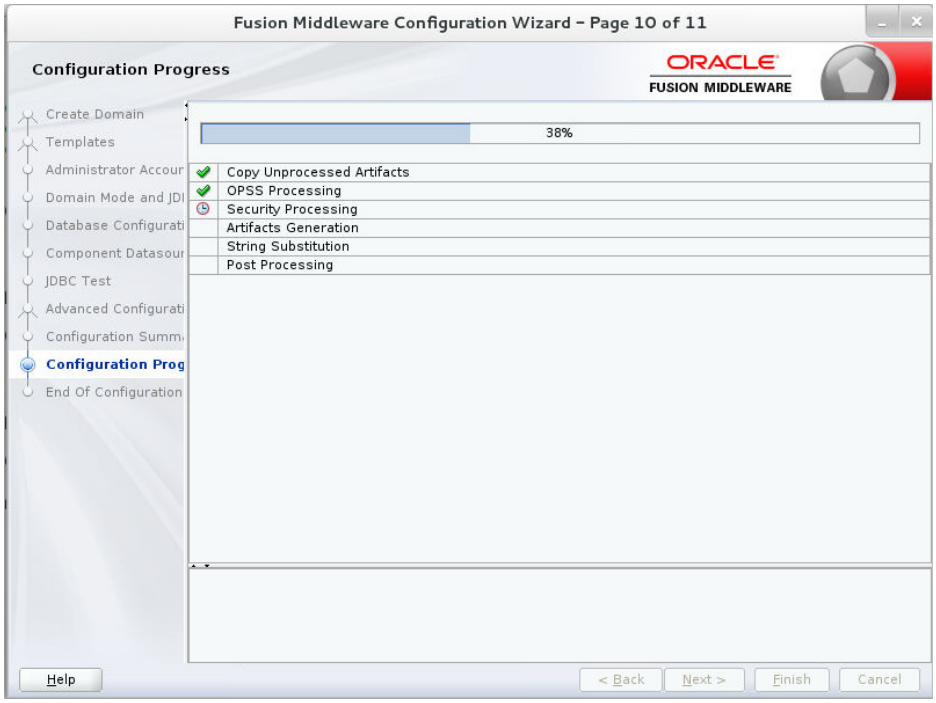
10. Click ‘Next’.



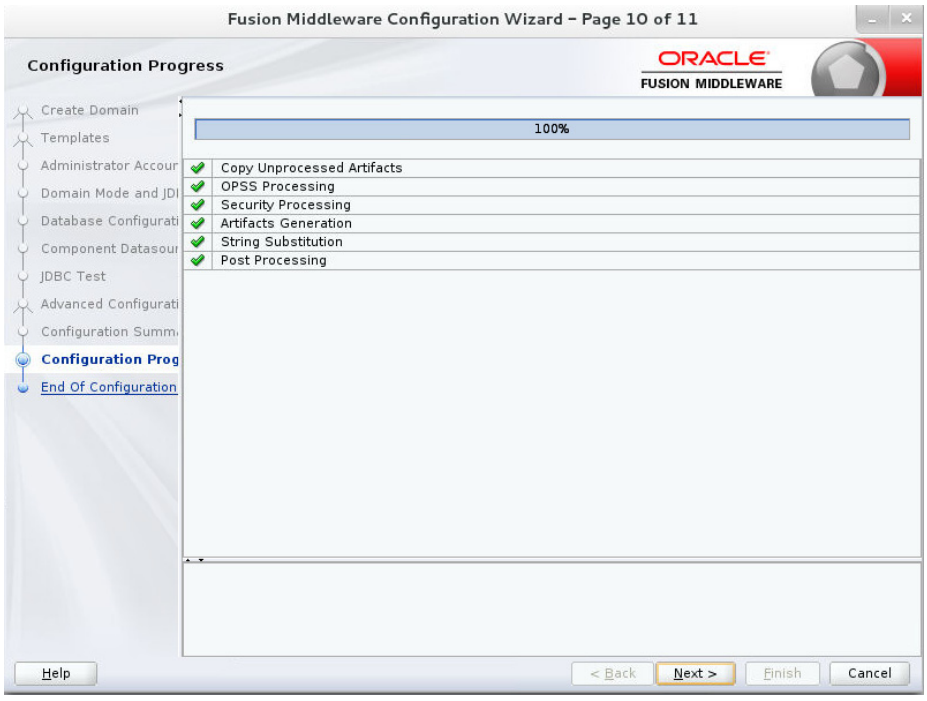

11. Click ‘Create’.



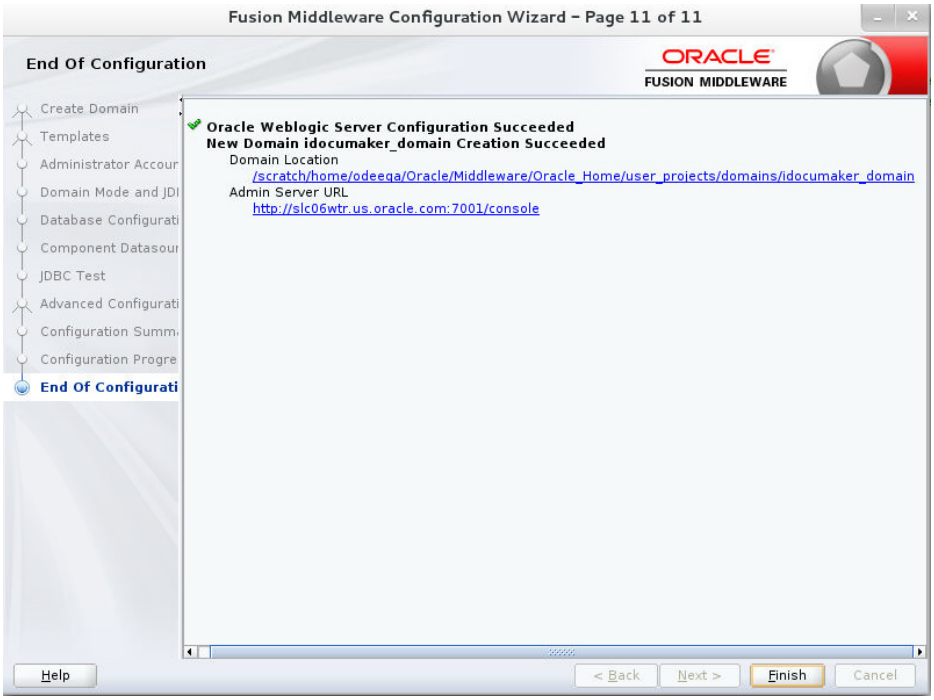
Configuration progress bar appears.




12. Click ‘Next’.



13. Click ‘Finish’ to complete the configuration.




Information on Navigating Configuration Wizard Screens to Configure the Domain is also available on

https://docs.oracle.com/middleware/12212/lcm/INFIN/GUID-CA80A6E9-8903-4E19-81D7-A3647A11D0A6.htm#INFIN293

# Appendix C

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