ORACLE

Oracle® Documaker

Standard Edition

Installation Guide

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Preface

Oracle Documaker is a powerful, adaptive enterprise document automation platform used by insurance, financial and other institutions worldwide to acquire, create, manage, and present structured, on-demand, and interactive customer communications.

It is designed to put power in the hands of users, giving them the flexibility to create effective document templates quickly and with ease. Spanning the entire business lifecycle, Oracle Documaker helps financial institutions manage customer communications enterprise-wide.

Oracle Documaker offers a cost-effective way to address the design, production, and multi-channel distribution of a broad spectrum of customer facing documents — including statements, billing, correspondence, and marketing campaigns that promote new products and/or cross-sell existing products and services. With robust functionality and cutting-edge technical capabilities, it maximizes efficiencies, ensures compliance, and enhances your ability to serve customers.

This guide provides instructions for installing Oracle Documaker Standard Edition products on computers running UNIX, and Windows.

This table will help you find the information you need:

To install Documaker on	See
UNIX	*Installing Documaker Server on UNIX* on page 7
Windows	*Installing Documaker on Windows* on page 17

For information on installing Oracle Documaker Enterprise Edition, see the Oracle Documaker Enterprise Edition Installation Guide.

For a summary of the Documaker Standard Edition system requirements, refer to the Documaker System Requirements Guide.

AUDIENCE

This document is designed for system supervisors and is intended to help you install and set up Oracle Documaker Standard Edition.

DOCUMENTATION ACCESSIBILITY

Accessibility of Links to External websites in

Documentation

This documentation may contain links to websites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these websites.

Customer Support

If you have any questions about the installation or use of our products, please call +1.800.223.1711 or visit the My Oracle Support website:

http://www.oracle.com/us/support/index.html.

Go to My Oracle Support to find answers in the Oracle Support Knowledge Base, submit, update or review your Service Requests, engage the My Oracle Support Community, download software updates, and tap into Oracle proactive support tools and best practices.
Hearing impaired customers in the U.S. who need to speak with an Oracle Support representative may use a telecommunications relay service (TRS); information about TRS is available at http://www.fcc.gov/cgb/consumerfacts/trs.html, and a list of phone numbers is available at http://www.fcc.gov/cgb/dro/trsphonebk.html. International hearing impaired customers should use the TRS at 1.605.224.1837.

Contact

USA: +1.800.223.1711

Canada: 1.800.668.8921 or +1.905.890.6690

Latin America: 877.767.2253

For other regions including Latin America, Europe, Middle East, Africa, and Asia Pacific regions: Visit- http://www.oracle.com/us/support/contact/index.html.

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https://www.linkedin.com/groups?gid=2271161

Related Documents

For more information, refer to the following Oracle resources:

- Documaker Studio User Guide
- Documaker Administration Guide
- Output Management Guide (Earlier known as Printers Reference)
- Fonts Reference
- Rules Reference
- DAL Reference
- Utilities Reference

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.

Chapter 2

Installing Documaker Server on UNIX

This guide provides detailed information on how to install and configure the system on Linux environments.

You will find information on these topics:

- *Overview* on page 8
- *Downloading the Software* on page 9
- *Installing the System* on page 10
- *Checking Your Installation* on page 12
- *Using the Documentation* on page 14
- *Start-Up Tips* on page 15
- *Downloading Patches* on page 16

OVERVIEW

This chapter provides you with steps to install and test the system on your UNIX system. This overview discusses the contents of this chapter.

Note See System Requirements Guide for information about requirements.

Downloading the Software

You can download Documaker Server for UNIX by downloading the Oracle Documaker Standard Edition media pack from the Oracle Technology Network website. A media pack is an electronic version of the software products available to Oracle customers. The media pack contains ZIP files for a suite of related products on a single operating system so you can build a complete solution for your business.

For more information, see *Downloading the Software* on page 9.

Installing the System

This topic explains how to install the system once you have downloaded the media pack. For more information see *Installing the System* on page 10.

Checking Your Installation

After you install your system, use the sample resources to check your installation. For detailed instructions, see *Checking Your Installation* on page 12.

Using the Documentation

This topic describes the documentation and explains how to use it. For more information, see *Using the Documentation* on page 14.

Start-Up Tips

This topic provides additional information on using the system in a UNIX environment. For more information, see *Start-Up Tips* on page 15.

Downloading Patches

This topic tells you how to download the latest patches from Oracle's website. For more information, see *Downloading Patches* on page 16.

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 Oracle Software Delivery Cloud website. http://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.

INSTALLING THE SYSTEM

Follow these steps to install the Oracle Documaker on a computer running Linux (Intel-based). The following fonts are also included in the media pack you download from the Oracle Software Delivery Cloud, see *Downloading the Software* on page 9 for more information.

- PCL and PostScript fonts
- AFP fonts
- Xerox fonts

Note Re-installation of the run time environment *does not* overwrite your INI files.

If you install the system into an existing directory, the current library setup (INI files) is retained. If you install the system into a new directory, you must set up all of your libraries—just as you would for a new installation.

Before you begin

Make sure you have full directory access permissions (read/write/execute) to the directory into which you will be installing Documaker Server.

Any Documaker processes that load the DB2 driver, such as shared objects, GenData, GenPrint, GenWIP, or GenArc, will issue an error similar to the following upon exiting.

```
--- GenData Completed ---
   Illegal instruction(coredump)
```

This occurs because the DB2 client DSO's registered exit function is invalid at the time of exit because the DSO was unloaded. This affects the return code from the Documaker process. If you have customizations that check the exit codes of these processes, those customizations will be affected, even though the Documaker processes were successful within their tasks.

INSTALLATION

Note All paths and file names should be in lowercase.

Follow these steps to install the system:

1. Log onto the UNIX system using the account you want to use for the installation. By default the installation process installs the system into a subdirectory in your home directory with a name based on the release number.

   For example, if you are installing the system using an account named *fap* that has a home directory of */home/fap*. the installation installs the system in the */home/fap/rel125* directory. You can, however, override the default.

2. Unzip the file you downloaded from the Oracle Software Delivery Cloud website. Included in this file is a readme file and an installer. The name of AIX installer is as follows:

   ```
   setuprterp126p00b#####.aix
   ```

   Where 12.6 is the version number, 00 is the patch number, ##### is the build number and aix is the extension.

This extension	Indicates
lnx	Linux x86

3. Run the installer using either a Korn or a Bash shell prompt.

   The initial installation screen describes the type of installation, displays the default directory the installation will use, and lets you override the installation location.

Note In case you encounter a message:

"WARNING: Couldn't flush system prefs: java.util.prefs.BackingStoreException: /etc/.java/.systemPrefs/com create failed." while installing Documaker connector, JAPAC Fonts or the full set of fonts, you can continue without concern.

CHECKING YOUR INSTALLATION

You can also download a sample MRLs (master resource libraries) from the Oracle Software Delivery Cloud website. You will find these sample MRLs with the downloads for Oracle Documaker for the Microsoft Windows platform.

There are several sets of sample resources. The DMS1 sample resources are designed for the insurance market. You can check your installation by processing the resources in the sample resource library. The sample library includes an example directory which you can use to test against the results you get when you run the following tests.

These examples use scripts such as *run.sh* that pre-set the PATH and library PATH environment variables so the Dynamically Shared Objects (DSOs) and executables can be located at run time.

To manually run the programs or utilities (such as gentrn, gendata, genprint, ovlcomp, fap2cfa, and so on) at a shell command prompt, set these environment variables by prepending the PATH and the appropriate library PATH environment variables with the location of these files (such as LD_LIBRARY_PATH for Linux).

The rel121/bin path should be specified during the execution of run.sh.

.

Note For more information about the utilities included with the system, see the Utilities Reference.

Some implementations may set these environment variables using a profile for the shell so they are pre-set automatically when a Korn shell is run. Please check with your system administrator for options.

Here are examples of the command-line shell prompt commands to enter if you install the system into the /home/fap/rel123 directory:

Linux

```
PATH=/home/fap/rel121/bin:$PATH
LD_LIBRARY_PATH=/home/fap/rel121/bin:$LD_LIBRARY_PATH
export PATH LD_LIBRARY_PATH
```

TESTING WITH THE DMS1 SAMPLE RESOURCES

The system includes a shell script file (run.sh) which lets you process the DMS1 sample resources. There are specific options and arguments you can use to select the Documaker Server modules (gentrn, gendata, genprint, and genarc) in single or multiple step mode. The DMS1 sample resources only outputs PCL printer files. To set up other printer types, refer to the Documaker Administration Guide.

The shell script file executes the Documaker Server modules (gentrn, gendata, genprint, and genarc) in the appropriate mode for the PCL printer type and copies the appropriate INI files and printer overlays into the proper directories (see the Documaker Administration Guide for more information).

Processing the DMS1 Sample Resources

To run the system through a processing cycle, follow these steps:

1. Download the Sample MRLs from the Oracle Technology Network (OTN) and install the DMS1 sample resources into the mstrres\ directory.
2. Go to the mstrres/dms1 directory where you installed the MRL examples. At the Korn or Bash shell prompt, enter this command:

   ```
   run.sh
   ```

3. Follow the prompts that appear on your screen.

Printing the DMS1 Output

After running the system, the printer ready files can be found in the./dms1/data directory.

Note See the Documaker Administration Guide for detailed instructions on printing to AFP, Metacode, PCL, or PostScript printers.

Testing WIP with DMS1

The DMS1 library is set up to place two transactions into WIP. Follow these steps to perform the test:

1. At a UNIX Korn or Bash shell prompt, go to the mstrres/dms1 directory, enter genwip command.
2. Prerequisite:

   ODSE12.6.4.b#####W32.exe or higher is installed on a Windows machine, where ##### is the build number.

3. Then copy the entire MRL to your Windows machine and run Documaker Desktop (afemnw32.exe) from the DMS1 root directory.
4. Choose the WIP, WIP List option.
5. Select transaction *2234567* and click OK.

Viewing Archived DMS1 Forms

Optionally, you can archive the bills previously printed by following these steps:

1. At a UNIX Korn or Bash shell prompt, go to the mstrres/dms1 directory and enter this command:

   ```
   genarc
   ```

2. Then copy the entire MRL to your Windows machine and run Documaker Desktop (afemnw32.exe) from the DMS1 root directory.
3. Choose the Retrieve, Formset option to view the archived bills.

USING THE DOCUMENTATION

After you download Oracle Documaker and unzip the file you downloaded, you will find a readme file that provides an overview, late-breaking information, and links to the documentation. For more detailed instructions on downloading the documentation, see the following topic.

The documentation available for this release is typically in Portable Document Format (PDF) files which you can view or print using the Adobe® Acrobat™ Reader™. Other help documents are available as HTML files which can be accessed via the web browser or saved locally to be viewed later. In the documentation file you download from the OTN website, you will find the various documentation that accompanies this release, such as:

- Documaker Administration Guide
- Documaker Studio User Guide
- Utilities Reference
- Rules Reference
- DAL Reference
- Release Notes

For best results, make sure you have the latest version of Acrobat Reader. You can download the free reader at Adobe's website: www.adobe.com.

UPDATING YOUR DOCUMENTATION

You can download the latest Oracle Insurance documentation at the Oracle Technology Network (OTN) website. The process includes:

- Going to the Oracle Insurance Documentation page on the OTN site
- Searching for the application documentation you want to download
- Downloading that documentation

To download Oracle Insurance application documentation, go to the Oracle Insurance Documentation page:

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

START-UP TIPS

Here are some additional tips to help you get your system up and running:

Using long file names

File names in UNIX and Linux can be up to 256 characters long or longer. You should, however, limit the names of resource files, such as FAP and LOG files, to 100 characters or less, excluding the path.

Documaker Server software imposes no limits on the length of the names use for the output files, such as print streams, so you can name those files however you like.

plugin.ttf font file

Make sure the plugin.ttf font file is not in your font directory. This font file is only applicable on Windows platforms.

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

Chapter 3

Installing Documaker on Windows

This chapter provides detailed information on how to install and configure the system in a Windows environment.

You will find information on these topics:

- *Overview* on page 18
- *Downloading the Software* on page 19
- *Installing the System* on page 20
- *Checking Your Installation* on page 29
- *Using the Documentation* on page 32
- *Downloading Patches* on page 33

OVERVIEW

This chapter provides you with steps to install and test the system on your Windows system. This overview discusses the contents of this chapter.

Note See System Requirements for information about system requirements.

Downloading the Software

You can download Documaker Server for Windows by downloading the Oracle Documaker Standard Edition media pack from the Oracle Software Delivery Cloud website. A media pack is an electronic version of the software products available to Oracle customers. The media pack contains ZIP files for a suite of related products on a single operating system so you can build a complete solution for your business.

For more information, see *Downloading the Software* on page 19.

Installing the System

This topic explains how to install the system. For more information see *Installing the System* on page 20.

Checking Your Installation

After you install your system, use the sample resources to check your installation. For detailed instructions, see *Using the Documentation* on page 32.

Using the Documentation

This topic describes the on-line documentation and explains how to use it. For more information, see *Using the Documentation* on page 32.

Downloading Patches

This topic tells you how to download the latest patches from Oracle's website. For more information, see *Downloading Patches* on page 33.

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 Oracle Software Delivery Cloud website.
   http://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.

INSTALLING THE SYSTEM

Follow these steps to install the Oracle Documaker on a personal computer running Windows. The following fonts are also included in the media pack you download from the Oracle Software Delivery Cloud, see *Downloading the Software* on page 19 for more information.

- PCL and PostScript fonts
- AFP fonts
- Xerox fonts

The media pack and sample resources are now available on Oracle Technology Network (OTN) as respective downloads. The DMS1 sample resource library includes sample data.

Note Re-installation *does not* overwrite your INI files.

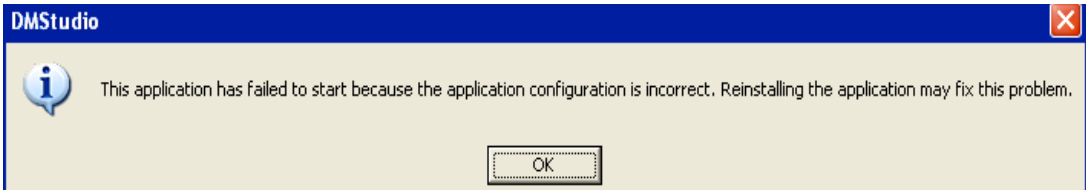
- If you install the system into an existing or a new directory, the current library setup is retained. You simply need to point to the existing library setup after installing the system into a new directory.You must set up all of your libraries only if you have delete them.
- If you install the system into an existing directory which contains a prior version, software components in the prior version that are no longer offered in newer installers will remain in place. To avoid confusion and to take full advantage of all the new system offers, it would be best to install the new release to a different location. However, if you need to install to the same location as the prior version, first save off any needed data, uninstall the older release, then install the newer release to that location.
- If you need to uninstall Oracle Documaker or one of its registered add-ins, such as Oracle Documaker Add-In for Microsoft Word, use Control Panel's Add or Remove Programs option. Uninstall Oracle Documaker Add-in for Microsoft Word prior to uninstalling Oracle Documaker.

Before you begin

Keep in mind...

- Be sure to log onto your computer as *Administrator* and make sure you have full directory access permissions to the \all users folder, as well as to the registry.
- Admin rights and permissions are required to run the installer and uninstaller because of need for ability to modify registry and system.
- When using NTFS drive formats, the logon name must be assigned all privileges and permissions to the Windows operating system folder and all sub-folders within, as well as to make changes to the Windows registry.
- The installation wizard verifies that you have the Microsoft Visual C++ Redistributable Package (vcredist_x86.exe) before beginning the installation.

  This program installs run-time components of the Visual C++ libraries, which are required to run Documaker Studio. If you try to run Studio without the Microsoft Visual C++ Redistributable Package, you will get the following message:



If these run-time components are not installed on your computer, download and install the latest Microsoft Visual C++ 2008 Redistributable Package (x86) from Microsoft's Download Center:

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

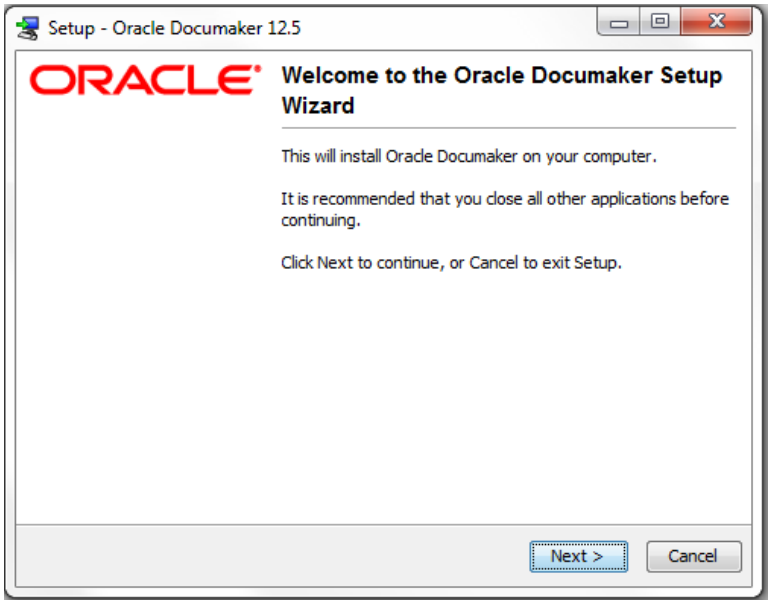
STANDARD INSTALLATION

Follow these steps to install the system:

Note If you plan to install the optional Documaker Add-In for Microsoft Word, review *Installing the Documaker Add-In for Word* on page 23 and make sure Word is closed before you begin.

If you plan to install the optional IStream Migration Utility, review *Installing the IStream Migration Utility* on page 27 and make sure Word is closed before you begin.

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



ODSE12.6.4.#####W32.exe`(version and patch number).exe`
where ##### is the build number. The installation wizard starts.

2. Follow the instructions that appear on your screen to install the software. The installation creates folders on your Start\Programs menu.

   Depending on the operating system, the progress bar may display as a thin gray line. This is because by default, install4j assumes the native look and feel.

Note The shortcut icon for both Documaker Studio and Documaker Desktop are automatically created on the desktop as a part of the installation process. Documaker Desktop and Documaker Studio are also listed under the Start\Program menu unless you check the "Don't create a Start Menu folder" option.

3. At the end of the installation process on a Windows - 64bit environment, the system may display the Microsoft Visual C++ 2008 Redistributable Setup dialog for Maintenance mode.

   Select one of the options below:

   - **Repair** - Repair Microsoft Visual C++ 2008 Redistributable to its original state.
   - **Uninstall** - Uninstall Microsoft Visual C++2008 Redistributable from this computer.

   Choose Repair to go ahead with the installation process.

Note If you uninstall the Microsoft Visual C++ 2008 Redistributable prior to running the Documaker install, you will be prompted to click through the license agreement for the redistributable. However, both the installations finish successfully.

In a scenario when the redistributable is still installed post Documaker Uninstallation, Maintenance: Repair/uninstall screen appears when you re-install Documaker.

After you install the system, restart your computer so the various system settings can take effect. If you install the software on a network, you will need to set up icons and a program group for each user. Refer to your operating system's documentation for information on how to do this.

Installing in Silent Mode

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

```
name=value
```

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

- Using default mode, with no arguments. After the installation finishes, the installer creates a response file named *response.varfile*.

After the installation finishes, the installer creates the response file and stores it in

the .install4j directory. This file contains name = value data captured during the installation process. You can edit this file if necessary to modify the values. Here is an example:

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

Create a copy of *response.varfile* and uninstall the standard installation.

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

ODSE12.6.4.#####W32.exe`(version and patch number).exe -q -varfile x:\response.varfile`

Parameter	Description
-q	Runs the installer in unattended mode.
-varfile	Varfilename specifies the name of the response.varfile to use. You can include a full path.
#####	is the build number

Installing the Documaker Add-In for Word

The Documaker Add-In for Microsoft Word is an optional module that lets you create Documaker documents using Microsoft Word.

Note Before installing the Documaker Add-In for Word, you must make sure Word 2007, Word 2010 or Word 2013 is installed on the computer.

If you have older versions of Word installed on the computer that will run the Add-In, uninstall those versions of Word *before* you install the Add-In.

After you install Studio and the Documaker Add-In, be sure to run Word *before* you import files into Studio, otherwise the Documaker Add-In will not load when Studio starts Word as part of the import process. If the Documaker Add-In does not appear, see *If the Documaker Add-In does not Appear in Word* on page 25 for more information.

Add-In requirements

In addition to the basic Documaker Windows system requirements outlined in System Requirements, you need the following applications to run the Add-In:

Item	Version
Microsoft .NET Framework	Version 3.5. You can have other versions of .NET Framework too, but you must have version 3.5.

Review the Microsoft Download Center site for any additional requirements associated with these applications:

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

Note that the Microsoft .NET Framework must be installed before the VSTO Runtime.

Item	Version
Microsoft Visual Studio 2010 Tools for Office Runtime (x64) Setup	Version 3.0 with Service Pack 1 or higher

Review the Microsoft Download Center site for any additional requirements associated with these applications:

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

Note that the Microsoft .NET Framework must be installed before the VSTO Runtime.

In addition, Microsoft .NET Programmability Support for Word must be enabled. For more information, see *Checking for.NET Programmability Support* on page 27.

Note You can only install one copy of the Documaker Add-in for Word on a computer. For best results, use the same version of Studio and the Add-In. For example, a new feature in version 12.4 of the Add-In might not be recognized in an earlier version of Studio.

Configuring resource options

During installation, the Setup wizard lets you override default resource location options. You can override these locations at this time or you can change the locations as needed while working in the Add-In by choosing Options from the Documaker ribbon.

The Setup wizard lets you set these configuration options:

Option	Description
Workspace Service URL	(Optional) Enter the default web address for the Docupresentment web service. This service can be used to download workspace definition files.
Workspace Definition Folder	Enter the default location for storing workspace definition files (WDF).
Resource File	Enter the name of the local resource file for this installation. This XML file contains all of your locally created resources. The default is: `localresources.xml` If this file is missing, the system generates a new copy of it.
Graphics Folder	Enter the default location for storing graphic files.
Default Graphic	Enter the file name and extension for the default graphic, also called the placeholder image. The Add-In displays this graphic if it cannot find a specified graphic.
Log Folder	Enter the default location for storing log files. These files contain error and other operational messages which can be useful when diagnosing problems.

Updating Microsoft Word

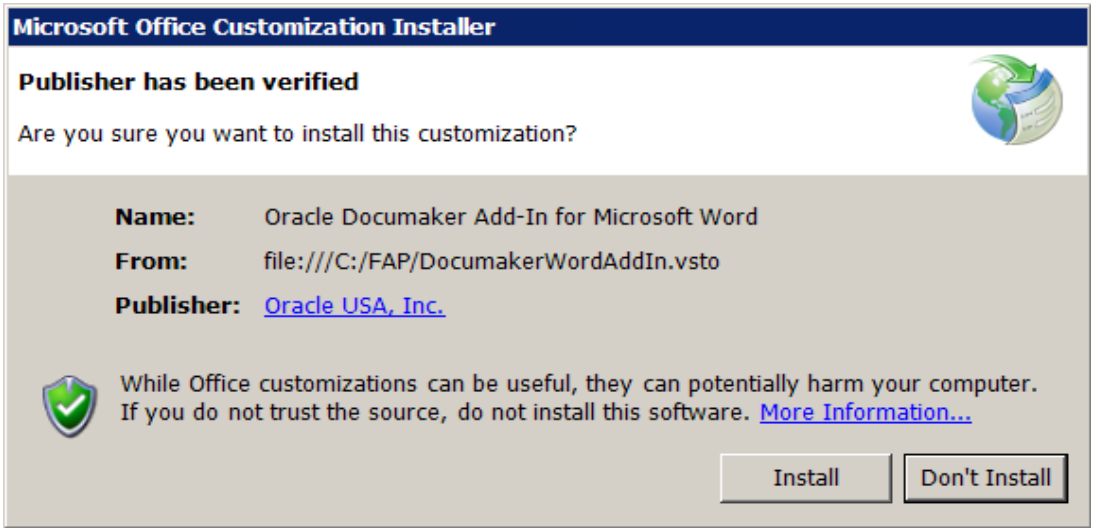
For best results, make sure you have installed the latest updates to your version of Microsoft Word.

To check for updates to	Follow these steps
Word 2007	From the Office menu, click Word Options. On the left pane, click Resources, then click the Check for Updates button.

To check for updates to	Follow these steps
Word 2010	Choose File, Help and then select the Check for Updates option.
Word 2013	Choose File, Account and then select 'Update Options'.

Starting the Documaker Add-In for Word

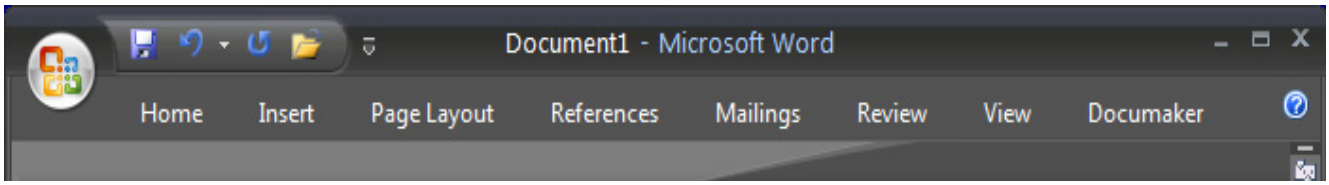
After you install the Documaker Add-In for Microsoft Word, the next time you start Microsoft Word, you will see this message if you have Internet access:



If you do not have Internet access, this message appears instead:

```
Publisher cannot be verified.
Are you sure you want to install this customization?
To continue, click Install.
```

Click Install to continue. Then make sure the Documaker tab appears as the last tab on the Microsoft Word ribbon.

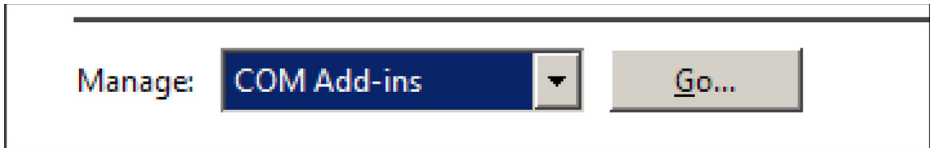


If the Documaker Add-In does not Appear in Word

If the Documaker Add-In does not appear after you install Documaker and open Microsoft Word, you probably need to install the certificate for the Add-In. Follow these steps:

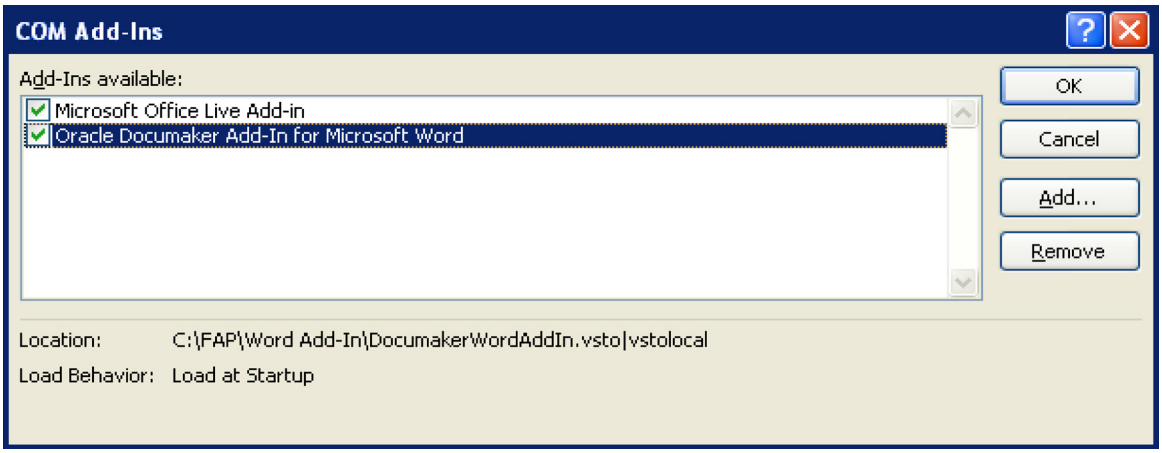
1. Click the Microsoft Office button and select Word Options.
2. On the left pane of the Word Options window, click Add-Ins.

3. At the bottom of the Word Options window, for Manage select COM Add-ins, then click Go.



4. Click the Oracle Documaker Add-In for Microsoft Word entry to enable it. Then click OK.

Note If the Oracle Documaker Add-In for Microsoft Word entry does not appear, see *If the Documaker Add-In does not appear as an inactive add-in* on page 26.



The Documaker tab should now appear in Word. If it does not, close and reopen Word.

If the Documaker Add-In does not appear as an inactive add-in

If Oracle Documaker Add-In for Microsoft Word does not appear in the Inactive Application Add-Ins section follow these steps:

1. Scroll down the list of add-ins until you see the Disabled Application Add-Ins section.

   If Oracle Documaker Add-In for Microsoft Word appears in the Disabled Application Add-Ins section, complete these remaining steps:

2. At the bottom of the Word Options window, on the Manage list, select Disabled Items, then click OK.
3. Click the Oracle Documaker Add-In for Microsoft Word entry to highlight it. Then click Enable.

The Documaker ribbon should now appear in Microsoft Word. If it does not, close and reopen Microsoft Word.

Installing the IStream Migration Utility

The IStream Migration Utility is an optional utility that helps you migrate IStream model documents to Documaker. In addition to the basic Documaker Windows system requirements outlined in System Requirements Guide you need the following applications to run this utility:

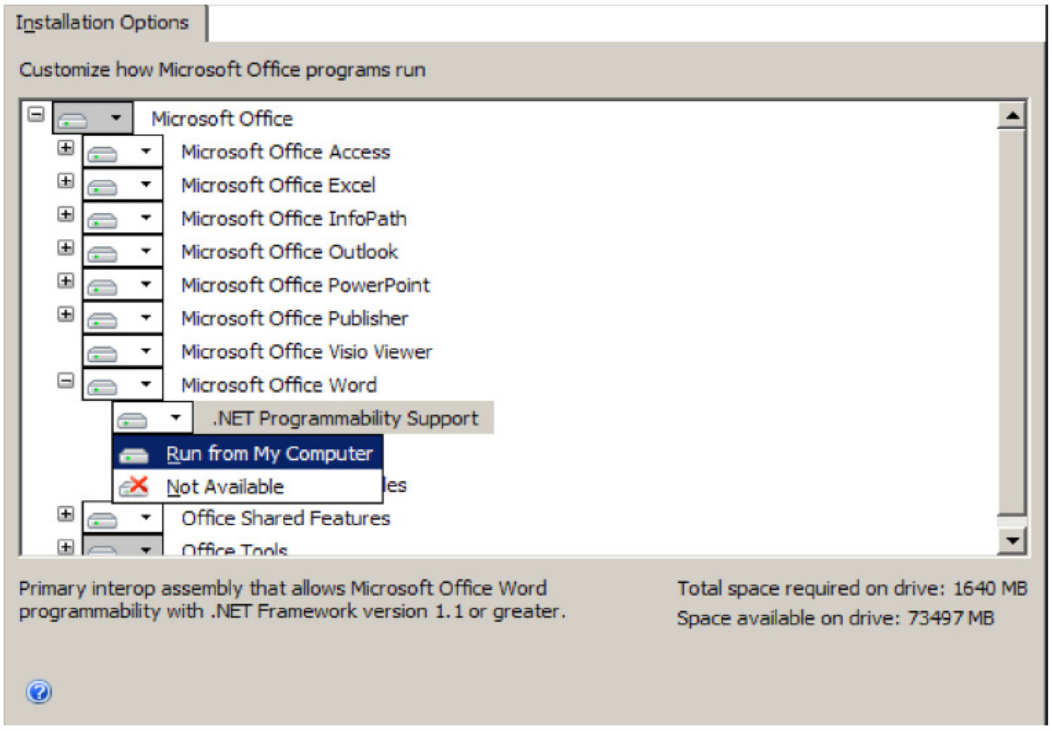
Item	Version
Operating system	Win7 SP1+ (32/64), Win8/8.1 (64) or Win Server 2008
Microsoft Word	Word Version 2010 SP2+ (32), Word Version 2013 & 2013 SP1+ (32); Word Version 2016 (32)
Microsoft .NET Framework	.NET 2.x or 3.x and VSTO 2.x installed

Review the Microsoft Download Center site for any additional requirements associated with these applications:
http://www.microsoft.com/downloads/

In addition, Microsoft .NET Programmability Support for Word must be enabled. For more information, see *Checking for.NET Programmability Support* on page 27. For information on using the IStream Migration Utility, see the Utilities Reference.

Checking for.NET Programmability Support

Both the Documaker Add-In for Word and the IStream Migration Utility require Microsoft .NET Programmability Support for Microsoft Word to be available. This feature is typically installed and enabled when you install Word. If, however, you need to check, follow these steps:



1. From the Control Panel, choose the Add or Remove Programs option, then highlight Microsoft Word or Microsoft Office and click Change.
2. Select the Add or Remove Features option and click Continue.
3. On the Installation Options tab, expand Microsoft Office Word and make sure Microsoft .NET Programmability Support is available, as shown here:

4. Once you make sure the Run from My Computer option is selected, click Continue and exit Control Panel.

CHECKING YOUR INSTALLATION

You can also download a sample MRLs (master resource libraries) from the Oracle Technology Network (OTN). The DMS1 sample resources are designed for the insurance market. You can check your installation by processing the resources in the sample resource library. The sample library includes an example directory which you can use to test against the results you get when you run the following tests.

TESTING WITH THE DMS1 SAMPLE RESOURCES

The system includes several batch files which let you process the DMS1 sample resources. There is a specific batch file that lets you select Documaker Server modules (GenTrn, GenData, GenWip, GenPrint and GenArc) in single or multiple step mode for each type of printer, such as PCL, PostScript, Xerox Metacode and AFP.

The batch files execute the Documaker Server modules (GenTrn, GenData, GenPrint, and GenArc) in the appropriate mode for the specified printer type and copies the appropriate INI files and printer overlays into their proper directories (see the Documaker Administration Guide for more information).

Processing the DMS1 Sample Resources

To run the system through a processing cycle, follow these steps:

1. Download the Sample MRLs from the Oracle Technology Network (OTN) and place the DMS1.ZIP file (which contains the DMS1 sample resources), into the mstrres\ directory.
2. Unzip the contents of DMS1.ZIP into the mstrres\ directory. The resulting directory structure should be mstrres\dms1\. The arc, bdflib, data and the other directories fall a level below.

Note When you unzip the DMS1.ZIP file from the mstrres directory, it will place the DMS1 sample resources in the dms1 directory.

3. Go to the \dms1 directory. At the operating system prompt, enter this command:

```
run.bat
```

This command installs the DMS1 sample resources into the \dms1 directory.

Printing the DMS1 Output

To print the PCL output you generated when you ran the system, follow the instructions below.

Note See the Documaker Administration Guide for detailed instructions on printing to AFP, Metacode, PCL, or PostScript printers.

Copy the REL121.FNT font file located in \mstrres\fmres\deflib directory to the printer along with the PCLBAT1 file, which is located in the \data directory. You can do this by entering the following command from the \dms1 directory:

```
copy /b pclbat1.pcl lpt1
```

Note The LPD Print Service and LPR Port Monitor should be enabled when printing to LPT1.

Where *pclbat1.pcl* is the name of a printstream created when you ran run.bat to install the DMS1 sample resources and *lpt1* is the printer.

Note Run.bat also creates the pclbat2.pcl and pclbat3.pcl printstream files.

Testing WIP with DMS1

The DMS1 library is set up to place two transactions into WIP. Follow these steps to perform the test:

1. At an operating system prompt, go to mstrres\dms1directory and enter this command:

   ```
   genwpw32
   ```

2. Start the Entry module by entering:

   ```
   afemnw32 /mode=wip
   ```

3. Choose the WIP, WIP List option.
4. Select transaction 2234567 and click OK.

Viewing Archived DMS1 Forms

Optionally, you can archive the bills previously printed by following these steps:

Note If you are licensed for Archive Retrieval the following steps apply. If, however, you *are not* licensed for Archive Retrieval, do not perform these steps.

1. At an operating system prompt, go to mstrres\dms1directory and enter this command:

   ```
   genacw32
   ```

2. Start the Entry system by entering this command:

   ```
   afemnw32 /mode=retrieve
   ```

3. Choose the Retrieve, Formset option. The Retrieve Document window appears. Enter **Sampco** in the Company field and click OK to view the archived bills.

USING THE DOCUMENTATION

After you download Oracle Documaker and unzip the file you downloaded, you will find a Readme file that provides an overview, late-breaking information, and links to the documentation. For more detailed instructions on downloading the documentation, see the following topic.

The documentation available for this release is in Portable Document Format (PDF) files which you can view or print using the Adobe® Acrobat™ Reader™. In the documentation file you download from the OTN website, you will find the various documentation that accompanies this release, such as:

- Documaker Administration Guide
- Documaker Studio User Guide
- Utilities Reference
- Rules Reference
- DAL Reference
- Release Notes

For best results, make sure you have the latest version of Acrobat Reader. You can download the free reader at Adobe's website: www.adobe.com.

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- Going to the Oracle Insurance Documentation page on the OTN site
- Searching for the application documentation you want to download
- Downloading that documentation

To download Oracle Insurance application documentation, go to the Oracle Insurance Documentation page:

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

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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)
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- Downloading those patches

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https://support.oracle.com

Appendix A

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