

Oracle® Documaker

Enterprise Edition Installation Guide Version 13.0.2



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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](#)
- [Architecture Overview](#)
- [Installation Directories](#)

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	<i>Documaker System Requirements Guide</i>
Installing the system on Linux and Solaris	Installing ODEE in a Linux and Solaris Environment
Customizing the location of Help files	Changing the Help Location
Downloading patches	Downloading Patches
Downloading documentation updates	Downloading the Documentation
Uninstalling the software	Deinstalling the Software

Product Overview

The main components of Oracle Documaker Enterprise Edition (ODEE) are:

- Oracle Documaker Document Factory
- Oracle Documaker Dashboard
- Oracle Documaker Administrator
- Oracle Documaker Web Services (DWS)
- (Optional) Oracle Documaker Interactive (DI)
- Oracle Documaker Docupresentment (to support DI)

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

Oracle Documaker Dashboard

Oracle Documaker Dashboard is a web-based application that provides analytics tracking and insight into the jobs processing within the Document Factory.

Oracle Documaker Administrator

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

Oracle Documaker Web Services

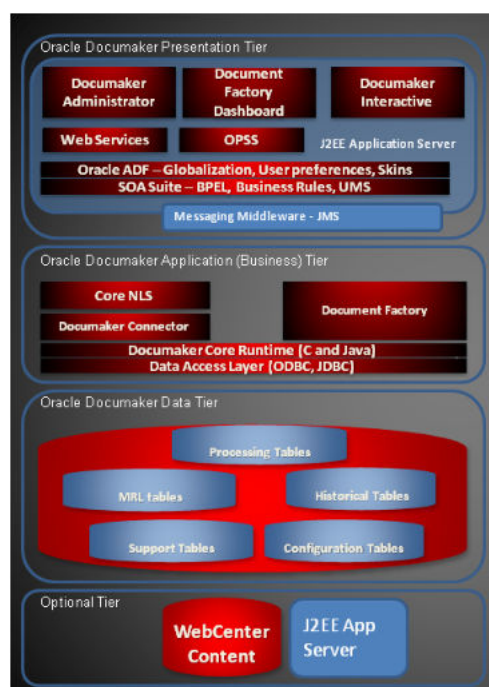
Oracle Documaker Web Services are SOAP web services that can submit jobs and check status of jobs in the Document Factory.

Oracle Documaker Interactive

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

Architecture Overview

This illustration provides an architectural overview of Oracle Documaker Enterprise Edition (ODEE):



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 DSOs, Executables, and Java archive (JAR) files needed for Document Factory processing. The subdirectories are: bin, config, deploy, global, internaldb, lib, logs, and temp.
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, DOCSESV.XML, WIPEDIT.INI (configure auto/default fields), and the following log and debugging files: DPRTRC.LOG, WATCHDOGSTDERR.TXT, and WATCHDOG-STDOUT.TXT.
filesystem-archive	This is the default location for archived documents when using the file system storage destination.
hotdirectory	This is the default location for archived documents when using the file system storage destination. The Receiver monitors this directory for files that it can accept as jobs into the Document Factory. Set up this directory as a networked or shared directory so it can be accessed by applications that submit jobs into the Document Factory. To change the location of the watched directory, update the Receiver's HotDirectories property within the Documaker Administrator web application after you install it
j2ee	The parent directory for web applications and J2EEcomponents that support the Document Factory and Documaker Interactive: Correspondence processes. Contains the scripts used to create the required and sample users and groups.
jre	Contains the Java archive (JAR) files and resources needed to run the Document Factory workers.
mstres	Contains the sample resources, including a master resource library and supporting runtime files used with Document Factory and Documaker Interactive: Correspondence.

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.

documaker\j2ee

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

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

 Note

- 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.

2

Installing ODEE

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

The installation process consists of the following stages:

- Stage 1 : [Pre-Installation Steps](#)
- Stage 2 : [Running ODEE Installer](#)
- Stage 3 : [Post-Setup](#)

Pre-installation Steps

Before you install Oracle Documaker Enterprise Edition (ODEE), 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. If using DB2 you need to have your ODEE Administration and Assembly Line users and passwords preconfigured with the integrated security (Default is OS user).

Note

- Limitation to consider when using DB2 we had a restriction of limiting the schema name to 8 characters.
- OS users for each schema to be created on the host where DB2 is installed

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
 - SQL Server
 - An installed web application server.
 - Oracle Fusion Middleware WebLogic Server and Infrastructure.

Note

WebLogic Server will not install to a path with spaces in directory names.

- Windows Only: Microsoft Visual C++ Redistributable Package for 2015-2022 versions.

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++ 2015-2022 Redistributable Package (x64) 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:
 - a. The location where you will be installing ODEE. Default installation location is:

Windows: c:\oracle\odee_1

Linux/Solaris: /u01/data/domains/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.

- b. The display names for the Document Factory System and Assembly Line.
 - c. 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). For SQL server provide new Database user which does not exist.
4. Make sure you have the necessary web application server connection information including the following:

For	Have this information
WebLogic	Admin User and Password, Host, Oracle Home, Project Path, Domain Name, Admin Server Name, Admin Server Port, Main Managed Server Name, Cluster Name, Machine Name, Coherence Cluster Name

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 Content (WCC) (formerly known as Universal Content Manager -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.
10. Make sure you have obtained and configured the necessary certificates to enable communications with secured services.

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.
2. Sign in with your Oracle account. If you do not have an Oracle account, you can register [here](#).
3. Search for the software by typing in the search bar and selecting it. For example, enter 12.7.1 to search for the list of Release 12.7.1 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.

Note

My Oracle Support also has all releases for download for Oracle Documaker including the most recent Critical Patch Updates (CPU) installations. Installing new deployments using the latest available Cumulative/Critical Patch Updates is recommended as has the latest fixes and vulnerability resolutions

Running ODEE Installer

In this stage, you run the setup application to install ODEE. 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 ODEE 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 are provided. These resources let you deploy the example or Reference Implementation MRL (RI-MRL Correspondence) which the configuration is already setup to function.

Follow these steps to run the Installation:

1. From the installation package, on the Application Tier run.

Windows: setup.exe

Linux/Solaris: ./runInstaller

Note

See Oracle Universal Installer (OUI) User's Guide for Command-Line options

2. On the Welcome installer screen click Next

Note

The first time you run an Oracle Installation it will request the location of the Oracle Inventory via the Specify Inventory Details Window screen. Review the information and modify if necessary and click Next.

3. On the Specify Installation Location installation screen, enter the Installation Path and click Next.
The defaults:

For Windows: c:\oracle\odee_1

For Linux/Solaris: /u01/data/domains/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.

4. On the Specify Administrator Group and User installation screen, enter the data and click Next:

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 populate 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. On the Database Server Details installation screen, indicate the database you will use and click Next:
 - Oracle
 - SQL Server
6. On the Database Server Details window, enter data and click Next:

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*	n/a	n/a

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 installation screen contains settings for configuring the Administration Schema where the configuration date is stored. On this screen enter the data and click Next:

Field	Description
DB Index Folder	The database folder where the physical database index files will be created.
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 user name/schema name. The application will use to connect to the database for the Administration System DB schema. The default is dmkr_admin. In the case of DB2 database, the user name must be less than 8 characters, is case sensitive and must preexist where DB2 server expects it for authentication (e.g. OS user by default).
Password	The password for the user name the application will use to connect to the database. The default is Admin12.
Confirm Password	Re-enter the password to confirm.
System ID	A unique system ID for this Document Factory instance. If other Document Factory instances (not Assembly Lines) are installed, they also require a unique system ID. For initial installations, accept the default of one (1).
System Name	This is the display name for the Document Factory instance within the Documaker Administrator. The default is System 1. Change this name to reflect the Document Factory system in your organization.

8. The Assembly Line Schema Details installation screen contains settings for configuring the Assembly Line schema where the Assembly Line processing (live) tables and historical tables are stored. On this screen enter the required data and click Next:

Field	Description
DB Index Folder	The database folder where the physical database index files will be created.
 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	Enter the user name and schema name. The application will use to connect to the database for the Assembly Line schema. The default is dmkr_admin. In the case of DB2 database, the user name must be less than 8 characters, is case sensitive and must preexist where DB2 server expects it for authentication (e.g. OS user by default). This user name is also used for the: - Database schema/owner - JDBC data source name - ODBC data source name - Name applied to the Docupresentment service (docupresentment dmkr_asline)
Password	This is the password for this assembly line database. The default for Oracle DB and SQL Server is Asline12. 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. 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.

9. The Application Server Details installation screen contains settings for connecting and deploying ODEE web application server resources and applications to WebLogic. The installer provides a weblogic_installation.properties file with this information, for use by the two (convenience) methods pre-configured and provided to deploy to WebLogic Server.

Method 1: wls_extend_clustered_server,

Method 2: wls_create_domain script.

Select WebLogic Server and enter the required data and click Next.

Field	Description
User	Web Application Server admin user.
Password	Web Application Server admin user password.
Confirm Password	Re-enter the password to confirm.
Host	Web Application Server Host.
Oracle Home	Path to the WebLogic Server's Oracle Home (Example: C:\oracle\middleware\wls_home)
Project Path	Path to where the domains are created (Example: c:\oracle\middleware\wls_home\user_projects\domains)

Field	Description
Admin Server/Port	WebLogic Admin Server Name and Port. (typically the Admin SSL port).
Default Server Name	Main Managed Server name to target for the resources and web applications. Will configure in the weblogic_installation.properties file (Defaults to hostname_app_server_1)
Cluster Name	Cluster Name for domain if configured. Required if using wls_extend_clustered_server deployment method. Will configure in the weblogic_installation.properties file. (Defaults to hostname_app_cluster_1)
Machine Name	Machine Name for instance if configured in the domain. Required if using wls_extend_clustered_server deployment method. Will configure in the weblogic_installation.properties file. (Defaults to hostname_node_1)
Coherence Cluster	Coherence Cluster if configured in the domain. Required if using wls_extend_clustered_server deployment method. (Defaults to DataGridConfig)

10. The JMS Details installation screen contains the JMS values. If you need help with these values, contact your web application server administrator.
In this installer screen enter the required data and click Next:

Field	Description
Connection Class	The name of the Java class used to connect to the JMS queues. Normally the default value is correct: <code>oracle.documaker.bus.messaging.jms.JMSJNDIMessageQueueFactory</code>
InitialContextFactory	A Java class used when connecting to the JMS queues. Normally the default value is correct: <code>weblogic.jndi.WLInitialContextFactory</code>
Provider URL	The protocol used to connect to the JMS queues. Normally the default value is correct and should start with protocol t3 or t3s (requiring certificate in Factory JRE from WebLogic), then the host name or IP of the JMS Server and port. Example: <code>t3s://yourhostname:9002</code>
Principal	If JMS is secured then enter the required ID to connect to JMS. Example: <code>weblogic</code>
Credentials	If JMS is secured then enter the password required to connect to JMS. For WebLogic usually the WebLogic Server Admin account.
Confirm Credentials	Re-enter credentials to confirm.

11. On the Hot Directory installation screen enter the HotFolder path and click Next. 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:
Window: ODEE_HOME\documaker\hotdirectory
Linux/Solaris: ODEE_HOME/documaker/hotdirectory

Note

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

12. (Optional) On the SMTP Email Server Details installation screen enter the data and click Next:

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: admin@hostname

13. (Optional) On the WebCenter Information installation screen enter the WebCenter Content settings and click Next:

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: idc://hostname:4444
Document URL	Enter the document URL. Here is the default: http://hostname:16200/cs/groups/secure/documents/document

14. (Optional) On the UMS Details installation screen enter the User Messaging Services settings and click Next:

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

15. On the Installation Summary installation screen review your installation settings, space requirements, and availability. To make any changes, click Back. Click on Save to save your changes.

Note

You can save a OUI response file that contains the data entered (except passwords) to be used as input to run installer silently or with GUI with data pre-filled. Useful for standing up additional ODEE Factory instances on other nodes. You can manually add passwords in response file if desired to be used in subsequent installs silently.

16. Click Install to begin the installation process.
17. The Install Status installation screen indicates the progress of the installation. To stop the installation process, click Cancel.
18. If errors occur during the installation, review the installActions[date_and_time].log file. These are mentioned on the installation screen. This file is usually located in this directory:
Windows: [drive_letter:]\Program Files\Oracle\Inventory\logs\ or in %TEMP%
Linux/Solaris: /tmp/

Note

These standard out files and error logs are also created during the installation process:

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

19. When the installation process has completed, the Installation complete installation screen appears. Click Finish to close the installation program.

Post-Setup

Running Database Scripts and Loading the MRL

The steps you take to run the database scripts and optionally load the Reference Implementation MRL (RI-MRL) - example master resource library 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 Documaker 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. Review and modify the Oracle DB scripts for any changes desired for type of deployment (Dev, Model Office, Staging, Production). The default tablespace and max size is set to SMALLFILE and 2GB for a development type environment. The Assembly Line schema may need to be much larger based on value anticipated and associated storage needs such as larger max size or BIGFILE setting.
2. Run the scripts located in the \docmaker\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 scripts enable advanced compression on certain database columns by default unless you disable Advanced Compression during installation. If you do not have an Advanced Compression Options license for Oracle DB and you did not disable this feature please remove the COMPRESS DEDUPLICATE and COMPRESS HIGH DEDUPLICATE attributes from the DB scripts.

3. (Optional) 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	Follow these steps
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
English (Great Britain)	en_GB
French	fr
German	de
Indonesian	in
Japanese	ja
Polish	pl
Portuguese	pt
Russian	ru
Simplified Chinese	zh
Spanish	es

- c. Make sure the insert statements are committed to the database.
5. 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.
6. Continue with the steps outlined in Creating the Web Environment.
7. 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 MRI : "Did not promote Older resource, Name <TIMESTAMP> ,Type <SYS> , Ver<00001> ,Rev<00001>."

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 DB2 (Example 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. Names are Case sensitive. 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.

1. Add the DB2 JDBC drivers into ODEE Factory the classpath locations below for the application to access:

documaker\bin\lib

documaker\docfactory\lib

documaker\docupresentment\lib

- Example of DB2 LUW jars: db2jcc4.jar and db2jcc_license_cu.jar

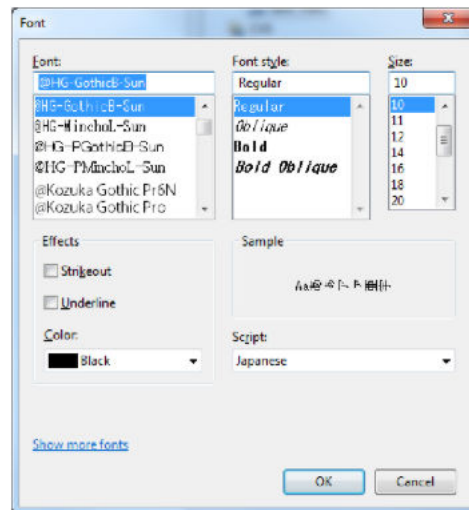
Note

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

2. 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.

Script	Description
dmrk_admin.sql	Creates the Administration schema and populates the default configuration data.
dmrk_asline.sql	Creates the Assembly Line schema.

3. (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)



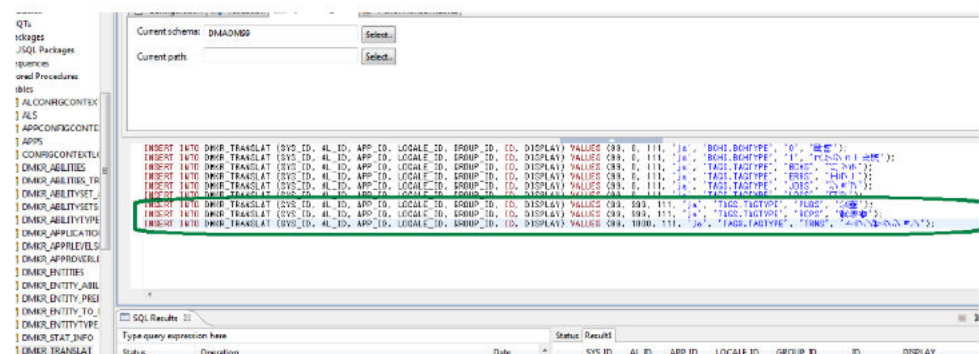
- b. Open the dmkr_admin_xx.sql in a text editor that displays text correctly (in the example below, Notepad properly displayed Japanese text).
- c. Copy and paste the content of the script into IBM Data Studio tool editor for SQL and validate the characters are correct.
Example from Notepad, dmkr_admin_ja.sql:

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

```
INSERT INTO DMKR_TRANSLAT (SYS_ID, AL_ID, APP_ID, LOCALE_ID, GROUP_ID,
ID, DISPLAY) VALUES (99, 999, 111, 'ja', 'TAGS.TAGTYPE', 'RCPS',
'Äèø%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',
'„Èà„É„ËŠ„Ç¹„ÇØ„Ç²„Ëß„ËŠ');
```

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 dmkr_asline schema for inserts.
4. If you are using OS Integrated security for DB2, make sure the Admin and Assembly Line users are also DB2 users.
 5. (Optional) If desiring to deploy the Reference Implementation MRL (RI-MRL) resources then run the deploysamplemrl.bat|.sh batch|script file on the Application Tier server to load MRL into the Assembly Line database schema.
Example:
Windows: ODEE_HOME\documaker\mstrres\dmres\deploysamplemrl.bat
Linux/Solaris: ODEE_HOME/documaker/mstrres/dmres/deploysamplemrl.sh
 6. (Optional) To create sample user accounts for demonstration purposes and/or to test the deployment with the RI-MRL, run the following SQL as the DB Admin:

dmkr_admin_user_examples.sql
 7. Continue with the steps outlined in Creating the Web Environment section.

Note

Keep in mind that the users and sample data referenced in items 5 and 6 above are example data so that you can get a feel for the system and validate that it is installed correctly. Your Identity Management system and Master Library Resources are necessary for implementation of specific 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

Running the SQL Server Database Scripts

Follow these steps to run the SQL Server database scripts:

1. If using SQL Server database then it is necessary to add the JDBC drivers from those products into ODEE Factory the classpath locations below for the application to access:
documaker\bin\lib

documaker\docfactory\lib

documaker\docupresentment\lib

Example of SQL Server jars: sqljdbc4.jar
2. For MS SQL Server, copy the sqljdbc4.jar file under wl_server\server\lib and idocumaker_domain\lib if JDBC Component Schema fails to make connection. In general, 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.
3. 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.

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

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

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

4. To create sample user accounts for demonstration purposes and to test the deployment, run the following as the DB Admin user:
dmkr_admin_user_examples.sql
5. (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 DB Admin user:

- dmkr_admin_xx.sql
- dmkr_asline_xx.sql

Where xx is the abbreviation for the desired language:

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

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

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 Dashboard
 - Documaker Administrator
 - Documaker Web Services
 - Documaker Interactive:Correspondence (Optional)
1. Copy the \documaker\j2ee directory from the application (business) tier to the WebLogic server using the same directory 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)

Example:

```
Windows: c:\oracle\odee_1\documaker\j2ee\weblogic\oracle11g\scripts
```

```
Linux/Solaris: /oracle/odee_1/documaker/j2ee/weblogic/oracle11g/scripts
```

In this file	Make these changes
Windows: set_middleware_env.cmd	Validate the MW_HOME variable's value is set to the full path of your Oracle Middleware Home directory. • Example: SET MW_HOME=c:\oracle\middleware\oracle_home1
Linux/Solaris: set_middleware_env.sh	• Validate the MW_HOME variable's value is set to the full path of your Oracle Middleware Home directory. • Example MW_HOME=/oracle/middleware/oracle_home1

In this file	Make these changes
weblogic_installation.properties	Validate and change if necessary any of the variable values for all the properties in this file and modify the value to the right of the equal sign if necessary. Replace the '<SECURE VALUE>' (removing the single quotes) with the credentials values used on the installation screens, examples: (Note: For Windows values with backslashes (\) directory separators requires escaping with a additional backslash (e.g. \\)). • dirWebLogicTemplates • dirDocumakerHome (full path where the root of the j2ee folder resides on the WebLogic server. • jdbcAdminPassword='<SECURE VALUE>' • jdbcAslinePassword='<SECURE VALUE>' • jmsCredential='<SECURE VALUE>' • adminPasswd='<SECURE VALUE>' • weblogicPassword='<SECURE VALUE>' • Verify WebLogic Domain, Managed Servers, Clusters and Application Names and Port Settings Verify Database Default Settings: jdbcDatabase=<value> jdbcDatabaseHost=<value> jdbcDatabaseName=<value> jdbcDatabasePort=<value> jdbcDatabaseNameType=<value> jdbcAdminUsername=<value> jdbcAslineUsername=<value>

Note

If JMS connection is not secured, then replace with empty value, e.g. jmsCredential =

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.

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.

There are two pre-configured, convenience methods for deploying the ODEE resources (DataSources, JMS Servers and JMS Modules, Persistent Stores) and Deployments.

- **Method #1** will deploy resources and deployments to target WebLogic Clusters in a pre-configure and prepared domain.
This method requires user to have already created a Domain with Managed Servers, Clusters, Coherence Clusters and Machines (Nodes), allowing for WebLogic Clustering.

This method uses the wls_extend_clustered_server(.cmd|.sh)

- **Method #2** will deploy the resources and deployments to a new domain created in processing the script targeting the resources and deployments to Managed Servers instead of Clusters.
This Method uses the `wls_create_domain(.cmd|.sh)` script.

For Method #1 (Preferred, regardless if only one WebLogic instance)

Pre-requisite to have FMW RCU run and a WebLogic Server Domain created before running ODEE Installer with data collected for the WebLogic configuration screen in installer or use values entered in ODEE Installer to create the domain before you process with the `wls_extend_clustered_server` script.

Please refer to Appendix A 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 for "FMW Configuration Wizard" details Notes on WebLogic Server Domain:

- Domain Name and directory noted, e.g. `dmkr_domain`
`/app/oracle/middleware/wls_home/user_projects/domains/dmkr_domain`
- Oracle JRF added for ADF support
- WebLogic Server admin user and password noted,
e.g. `weblogic, @Oracle#1234`
- Admin Server deployed with name and ports noted,
e.g. `dmkr_adminserver, port=7001, sslport=7002, adminport=7003`
- A Managed Server for Web Applications with name and ports noted.
e.g. `dmkr_app_mserver_1 port=8101, sslport=8102, adminport=8103`

Note

If SOA is to be used in tandem with this WLS domain then under server groups drop down select "WSMPM-MAN-SVR" check box.

- A Managed Server for JMS resources
e.g. `dmkr_jms_mserver_1 port=9101, sslport=9102, admin sslport=9103`
- A Cluster for Web Applications with name noted,
e.g. `dmkr_app_cluster_1`
- A Cluster for JMS resources with name noted, e.g. `dmkr_jms_cluster_1`
- Managed Servers associated Clusters app to app and jms to jms
- (Optional) Coherence Cluster with name noted, e.g. `DataGridConfig`
- Machine (Node) configured: e.g. `dmkr_node_1`
- Add all JRF libraries and opss-Datasource to `dmkr_app_cluster`

Run the script to deploy the ODEE resources and applications:

`wls_extended_clustered_server(.cmd|.sh)`. Find the file under below mentioned directory.

Example:

Windows: `C:\oracle_homedir\documaker\j2ee\weblogic\< databasename>\scripts`
Linux/Solaris: `/Oracle_homedir/documaker/j2ee/weblogic/ oracle11g/scripts`

If adding Optional Documaker Interactive: Correspondence run the script: `wls_extend_clustered_server_interactive(.cmd|.sh)`

Go to *Creating WebLogic User Accounts* section.

For Method #2 (Legacy)

1. Run the script: `wls_create_domain(.cmd|.sh)`
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 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 for "Navigating Configuration Wizard Screens to Configure the Domain" details.

2. (Optional) Run the following script if using Documaker Interactive Correspondence web application;
`wls_add_correspondence(.cmd|.sh)`
3. Start the WebLogic AdminServer by running this command from the [MWHOME]
`\user_projects\domains\your_domain_name\bin` directory: `startWebLogic(.cmd|.sh)`
4. 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.

5. If using MS SQL Server, add `EXTRA_JAVA_PROPERTIES` as '`Djbo.SQLBuilder=SQLServer`' in `SetDomainEnv(.cmd|.sh)` file under `Vdomains\your_domain_name\bin`.
6. If using IBM DB2, add `EXTRA_JAVA_PROPERTIES` as '`Djbo.SQLBuilder=DB2`' in `SetDomainEnv(.cmd|.sh)` file under `Vdomains\your_domain_name\bin`.
7. 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 `sqljdbc_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%;
```

Similar on Linux/Solaris.

3. Edit the line by adding the following to the end of it:
%WL_HOME%\server\lib\mssql-jdbc-6.2.1.jre8.jar;

Similar on Linux/Solaris.

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 under the j2ee weblogic dbtype scripts directory location:
create_users_groups(.cmd|.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 example RI-MRL resources for Documaker Interactive: Correspondence, run this command under the j2ee weblogic dbtype scripts directory location:
create_users_groups_correspondence_example(.cmd|.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 the WebLogic Admin Server host and port number and context-root of jpsquery. Example 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|.sh) dmkr_jms_mserver_1

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 (AssemblyLine_Schema_Name:System_ID:AssemblyLine_ID) Example: ODFF (dmkr_asline2:1:2)	The Document Factory Windows service.
Docupresentment (AssemblyLine_Schema_Name:System_ID:AssemblyLine_ID) Example: ODDP (dmkr_asline:1:2)	The Docupresentment Windows service.
Note: 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 D: Starting Documaker Administrator and Dashboard

The steps you take to start the web applications vary, depending on the configuration of the deployment.

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.

Step E: Starting Documaker Interactive (Optional)

If used Method #1 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 WebLogic Domain directory, e.g. `dirWeblogicHome\user_projects\domains\your_domain_name` directory and run this command:
 Windows: `.\bin\startManagedWeblogic.cmd DI_mserver`
 Linux/Solaris: `./bin/startManagedWeblogic.sh DI_mserver`
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 - Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.S QLServerPersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr= oracle.documaker.shared.model.DB2P ersistManagerCustom
dmkr_server	-Djbo.passivationstore=database - Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.S QLServerPersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr= oracle.documaker.shared.model.DB2P ersistManagerCustom
soa_server	-Djbo.passivationstore=database - Djbo.pcoll.mgr=oracle.jbo.pcoll.pmgr.S QLServerPersistManager	-Djbo.passivationstore=database -Djbo.pcoll.mgr= oracle.documaker.shared.model.DB2P ersistManagerCustom

Note: Non-soa users can skip the soa_server row.

Note

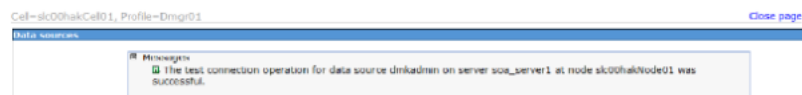
When the WebLogic managed server with JMS resource and server deployed is stopped, the queues are no longer available for Document Factory to access and Document Factory will generate errors that it could not connect to the needed queues.

3. Add SOA to the WebLogic domain:
 - a. From the `[middleware home]\oracle_common\common\bin` directory, run this command:
`Config(.cmd|.sh)`
 - b. Choose Update an existing domain, then click Next.
 - c. Select `<domain_name>_domain` from the WebLogic Domain Directory window, then click Next.
 - d. On the Select Extension Source window, choose Oracle SOA Suite then click Next.
 - e. On Templates page, add template "Oracle WSM Policy Manager [oracle_common]".
 - f. On Advanced Configuration page, select "Topology".
 - g. On Managed Servers page, under the managed server name for the deployed apps "e.g. dmkr_app_mserver_1"/dmkr_idm_mserver_1, add WSMPM-MAN-SVR to server groups.

Note

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

- h. 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.
- i. Copy the sqljdbc4.jar file under wl_server\server\lib, your_domain_name\lib if JDBC Component Schema fails to make connection. This is applicable only for MS SQL Server.
- j. Update the Configure JDBC Component Schema window. This will configure the connections your SOA repository. Click Next.
- k. The connection to the database is tested. When the test finishes, view the results, then click Next.



- l. On the Select Optional Configuration window, click Next.
- m. On the Configuration Summary window, click Extend and then Done.
- n. To deploy the Oracle Business Rules into the SOA extension, run this command:
documaker\j2ee\weblogic\db-type\bpel\antbuild(.cmd|.sh)
4. Start these WebLogic servers (using the same commands as in the previous steps):
 - Oracle Admin Server
 - Managed Servers with ODEE web apps deployed (e.g. dmkr_app_mserver_1)
 - Managed Server with JMS Server and resources deployed (e.g. dmkr_jms_mserver_1)

Note

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

5. From the dirWeblogicHome\user_projects\domains\your_domain_name directory, run this command:

```
Windows: start .\bin\startManagedWeblogic.cmd soa_server1
Linux/Solaris: ./bin/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:adminserverport/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\db-type\scripts\deploy_soa(.cmd|.sh)`

Step F: 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:managedserverport/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 application (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 application 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 12002.
4. Validate your Document Factory installation by the performing 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:managedserverport/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:managedserverport/DocumakerCorrespondence When you access this link, you are redirected to the HTTPS port for a more secure connection.
User name	documaker
Password	The value entered in JMS Credentials during the installation process, unless it has been changed.

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

3

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
- Downloading Patches
- Downloading the Documentation
- Deinstalling the Software

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:

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, such as bug fixes, Cumulative Patch Updates and Critical Patch Updates (CPUs) 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
 - By Patch Name or Number
 - By “Product or Family” (e.g. Product “Oracle Documaker”, version 13.0.2.0.0, and optionally by platform(s)).
- Downloading those patches

To download Oracle software patches, go to the My Oracle Support website: <https://support.oracle.com>

Information on Critical Patch Updates, Security Alerts and Bulletins are available from this web site: <https://www.oracle.com/security-alerts/>

Downloading the Documentation

You can download the latest Oracle Documaker documentation at the Oracle Documents - Help Center (<https://docs.oracle.com>) web site. The process includes:

- • Going to the applicable version on the web site page <https://docs.oracle.com/en/industries/financial-services/documaker>.
- Searching for the documentation you want to download
- Downloading that documentation

Deinstalling 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:

Step A : Remove ODEE Weblogic Server domain server resources

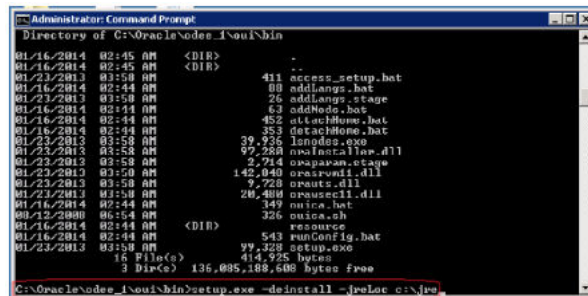
1. Shutdown all the ODEE Services (e.g. Docupresentment, Document Factory).
2. Unlock any WebLogic Server Admin Server Domain locked from user edit sessions.
3. Run `remove_odee_resources_from_clustered_server.cmd` or `remove_odee_resources_from_clustered_server.sh` script. Run this script if the resources are deployed using method 1.
This process removes:
 - The ODEE WebLogic Server domain server resources (e.g. JMS, DataSources, etc)
 - Web apps (e.g. Documaker Administrator, Documaker Dashboard, Documaker Web Services, Documaker Interactive, etc)

Note

ODEE Services will no longer function after completing these steps as they depend on the JMS services but, the domain server components can be redeployed by normal WebLogic Server domain server deployment of the ODEE resources and ODEE Services are restored if needed without full ODEE Services re-installation.

Step B : Stop the following processes

1. Stop DocuPresentation and Supervisor services of ODEE before you start the deinstallation process. If any of the services are running, it may lead to partial deinstallation of ODEE.
2. Stop all application servers before starting deinstallation process of ODEE.
3. From the command prompt access setup.exe to start the deinstall process. e.g C:\Oracle\odee_1\oui\bin\setup.exe -deinstall -jreLoc <path_to_jre>.

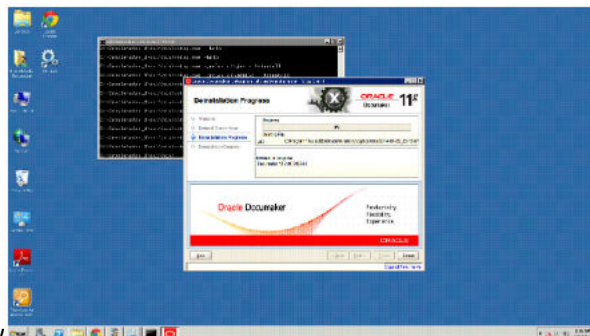


Note

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

Step C: Begin the deinstallation

1. Follow the required steps as shown in the Oracle Documaker Enterprise Edition



Deinstallation window

2. After deinstall, 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).
3. Drop ODEE admin and assembly line schema from the database.

Note

- Refer to WebLogic Server Documentation for removing domain
- Ensure that none of the folder/files within ODEE Home are open while running the deinstall, if open then it will fail to remove the directory.

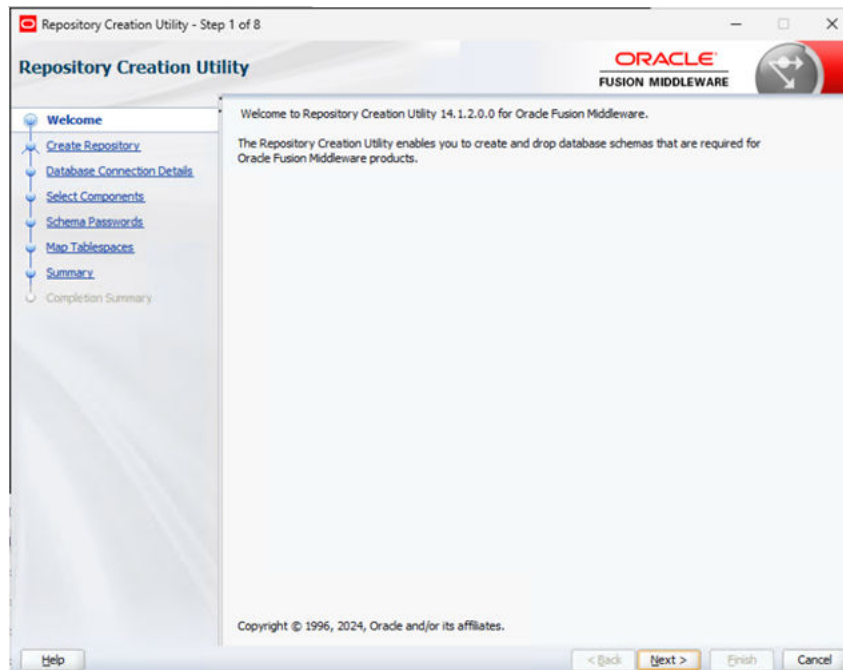
4

Appendix A

Navigating RCU Screens to Create Schemas

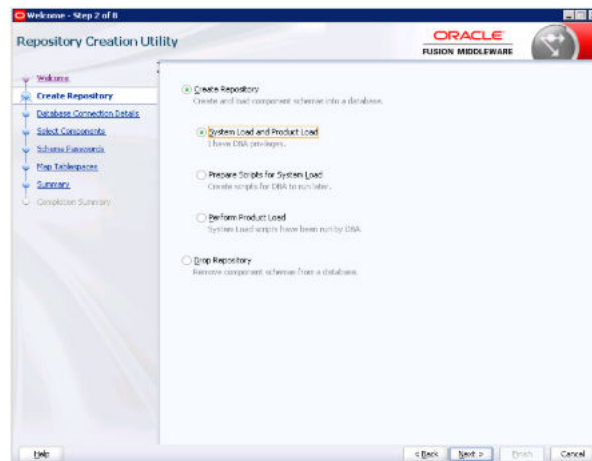
Information on Repository Creation Utility (RCU) is available in the [Installing and Configuring the Oracle Fusion Middleware Infrastructure Release 14.1.2](#) documentation.

Example screen flow (may change):

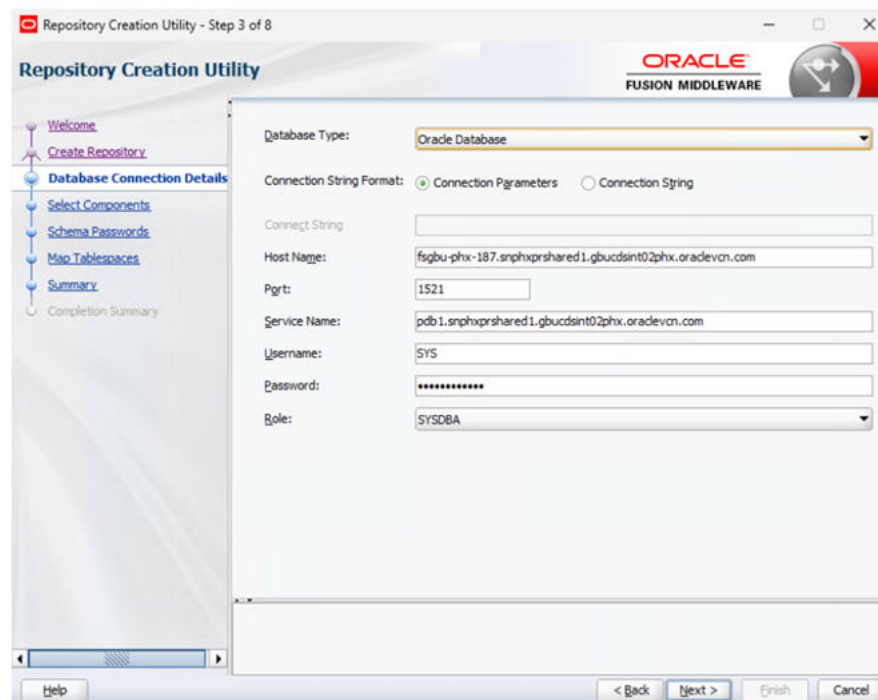


Click 'Next' to continue and follow these steps.

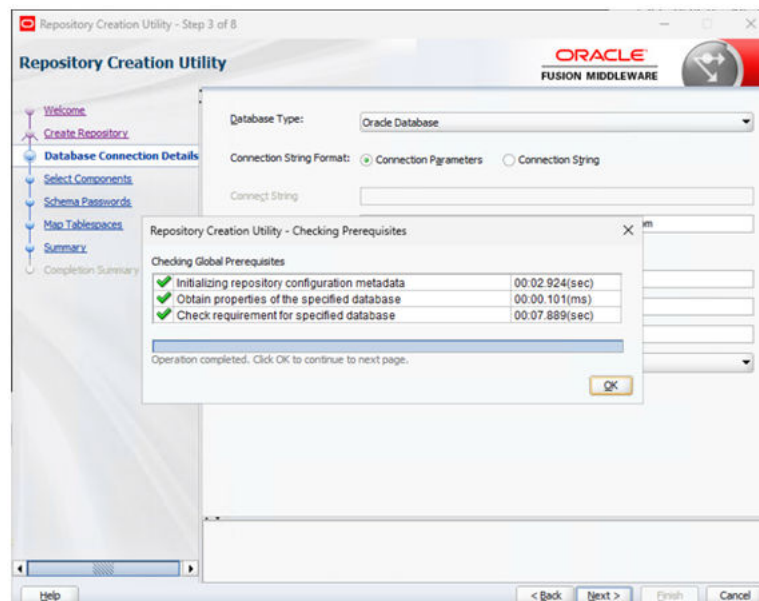
1. Select 'Create Repository' radio button and 'System Load and Product Load' radio button and click Next.



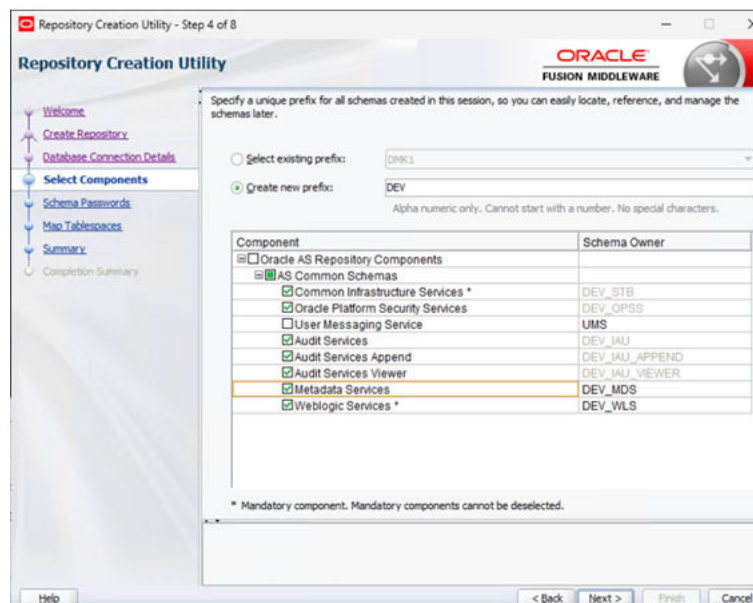
2. Provide database details and click 'Next'.



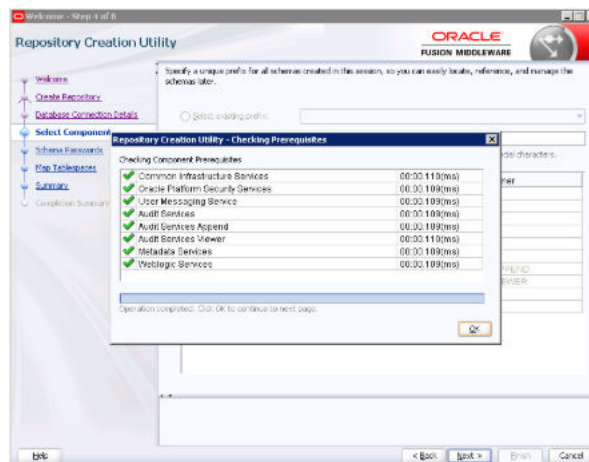
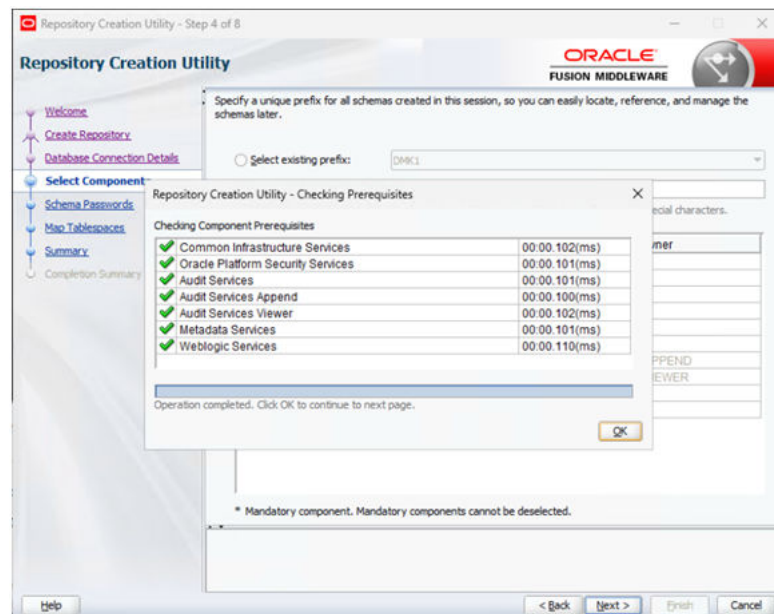
3. Click 'OK'.



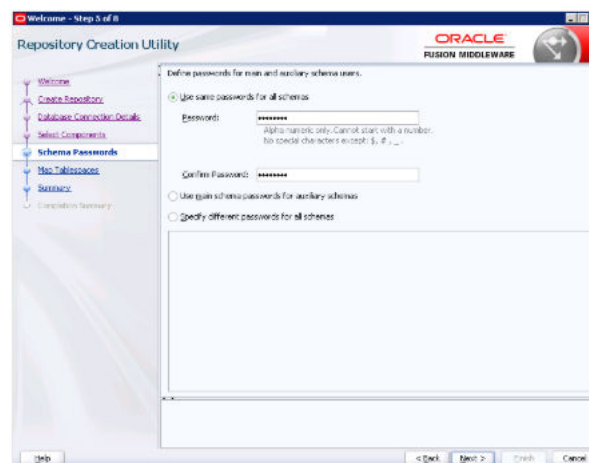
4. Select 'Oracle Platform Security Services' check box, it automatically selects dependent components.



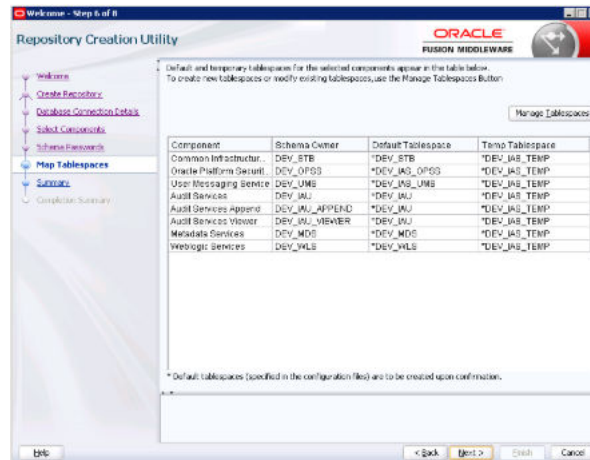
5. Click 'OK' after successful processing as shown in the following screen.



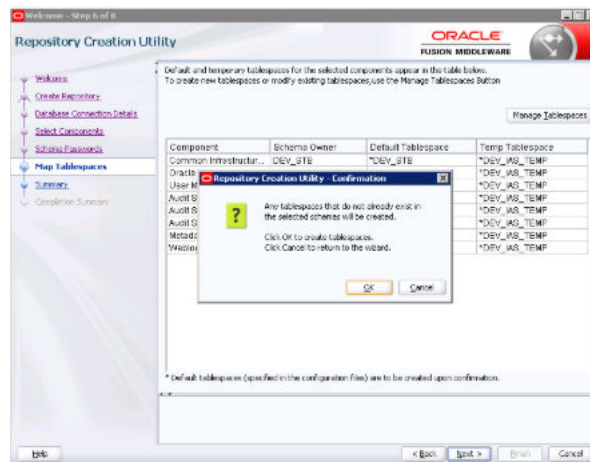
6. Enter password for your schema.



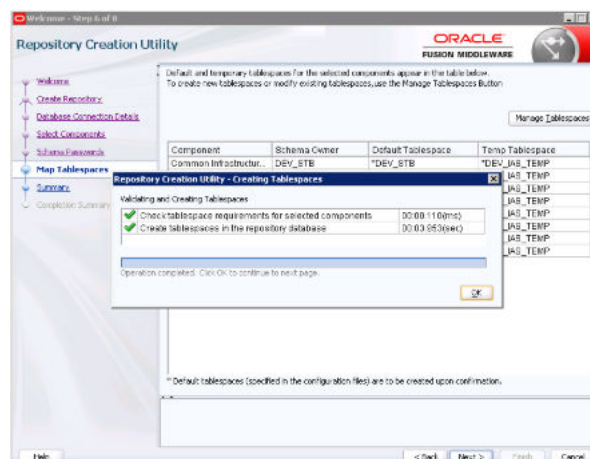
7. Click 'Next'.



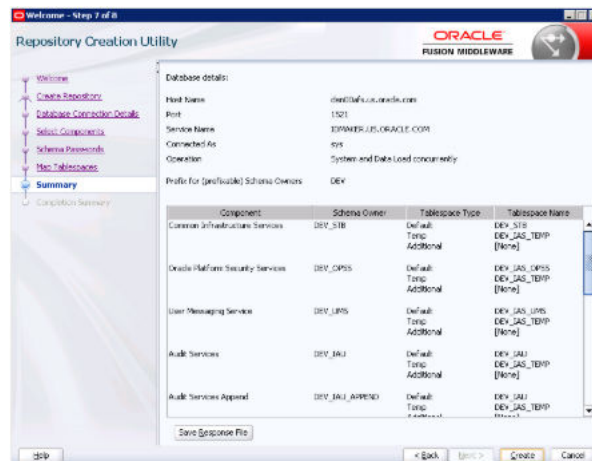
8. Click 'OK'.



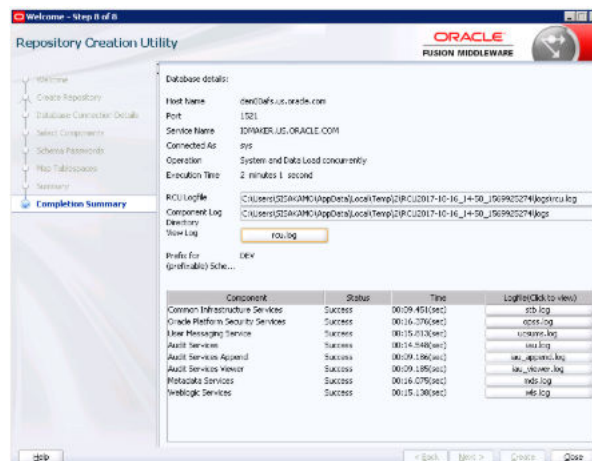
9. Click 'OK' again.



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



11. Database schema is created. Click 'Close'.



5

Appendix B

FMW Configuration Wizard Configure the new Domain

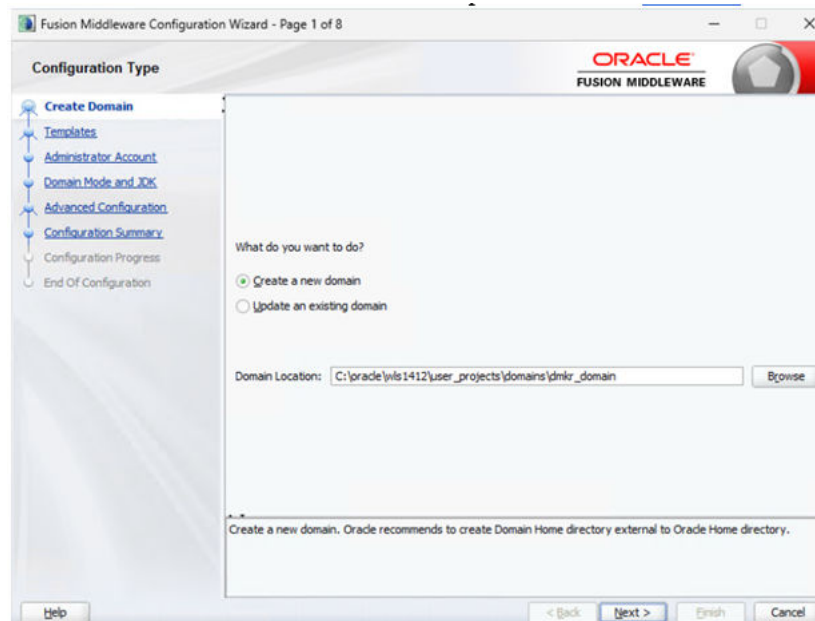
Following the database schema creation, the Fusion Middleware (FMW) Configuration wizard is required to create and setup a domain for Documaker if not using a prepared template.

Information on the Fusion Middleware Configuration Wizard is available in the [Installing and Configuring the Oracle Fusion Middleware Infrastructure Release 14.1.2](#)

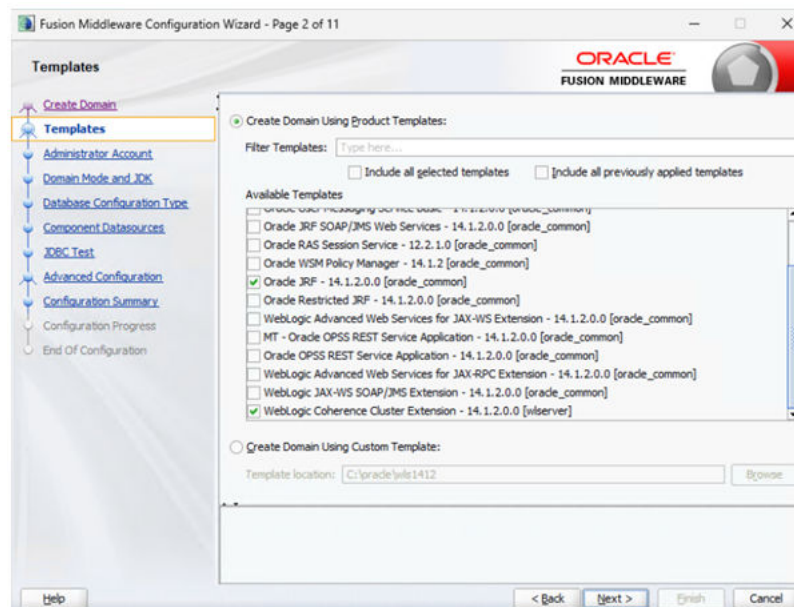
Take note of the values chosen (ports, names, etc.) for later use in synchronization with the weblogic_installation.properties file used for deployment of the Documaker resources to the new domain.

Example screen flow and steps below for Method #1 type deployment. For Method #2 step 10 “Select Administration Server, Node Manager and Topology” can left unselected to skip to the end of the configuration. Note: FMW may change these screens.

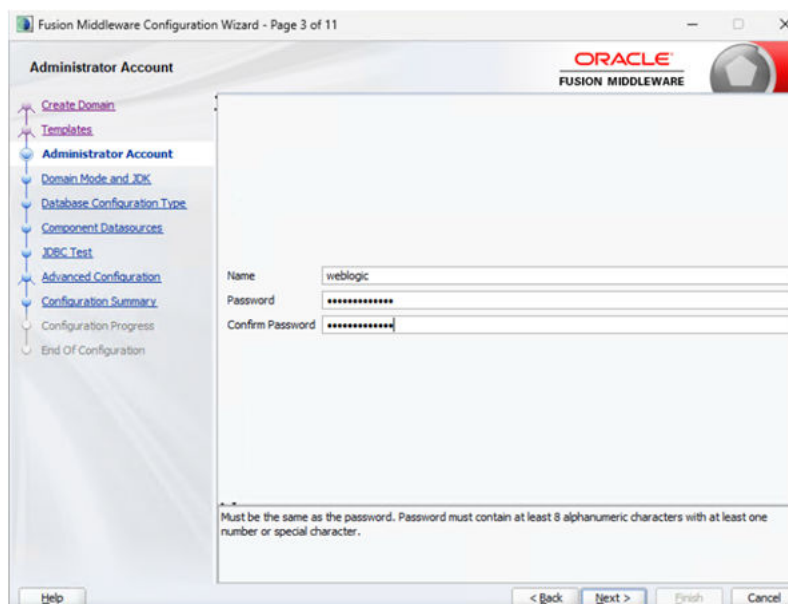
1. Select ‘Create a new domain’ radio button and provide domain location.



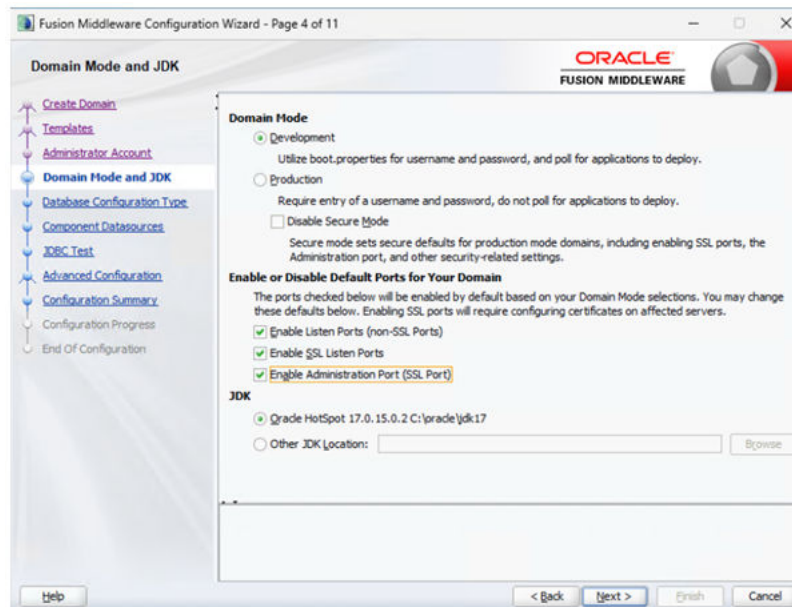
2. Select ‘Oracle JRF [oracle_common]’ check box, it automatically selects dependent component. Click ‘Next’.



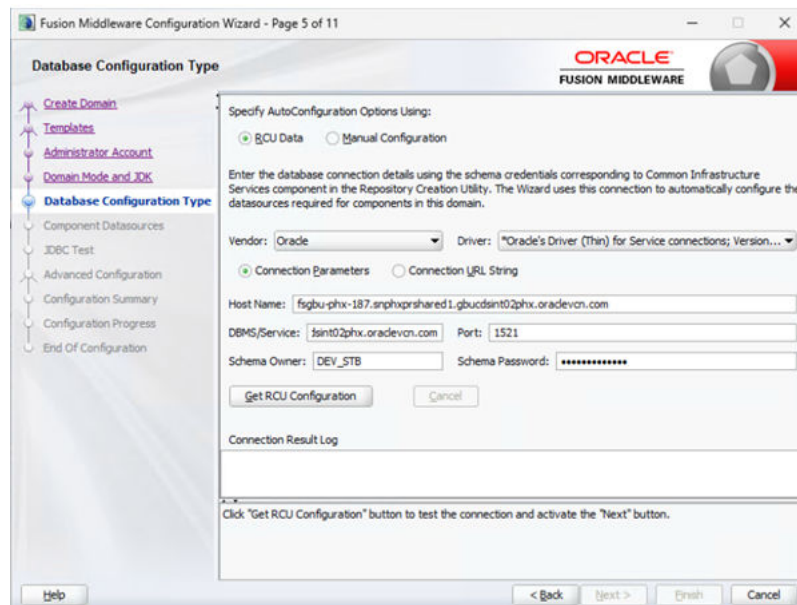
3. Enter weblogic username and password. Click 'Next'.



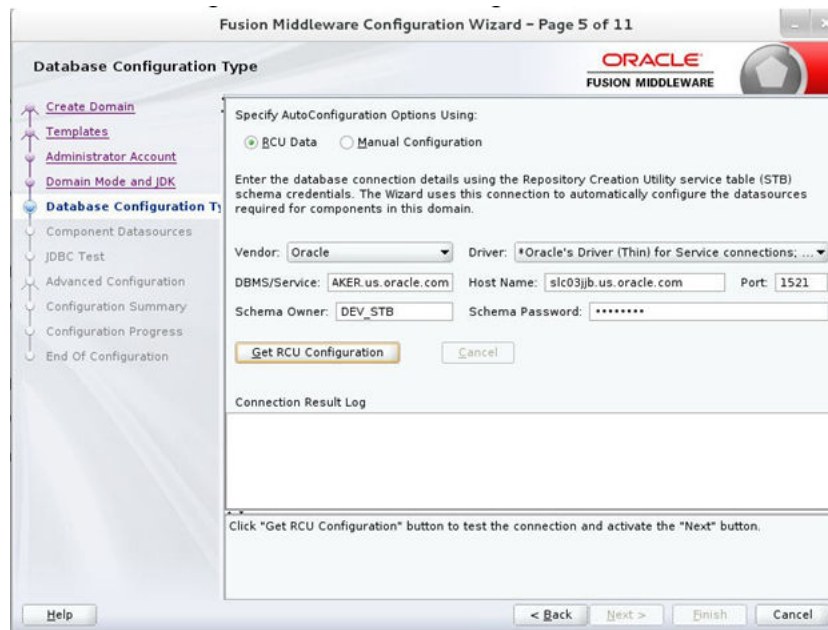
4. Select Development radio button with SSL ports enabled (for sandbox type enviroment) and click 'Next'.



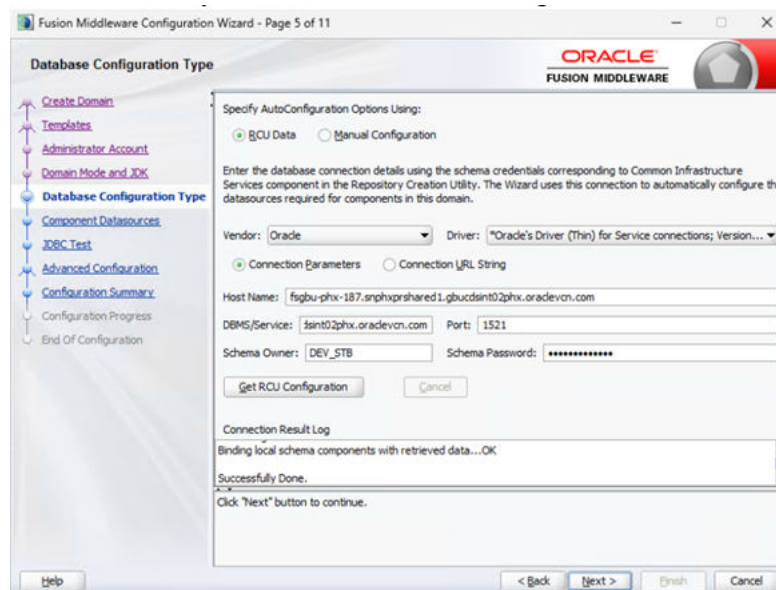
5. Enter database, driver and schema owner details.



6. Click 'Get RCU Configuration' button after filling out RCU data.



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



8. Select all check boxes and click 'Next'.

Fusion Middleware Configuration Wizard - Page 6 of 11

JDBC Component Schema

Vendor: Driver:

☒ Connection Parameters ☐ Connection URL String

Host Name:

DBMS/Service: Port:

Schema Owner: Schema Password:

Oracle RAC configuration for component schemas:

☐ Convert to GridLink ☐ Convert to RAC multi data source ☐ Don't convert

Edits to the data above will affect all checked rows in the table below.

☐	Component Schema	DBMS/Service	Host Name	Port	Schema Owner	Schema Password
☐	LocalSvcTb1 Schema	ord	dbhost.example.o	1521	DEV_STB	
☐	WLS Runtime Schema	ord	dbhost.example.o	1521	DEV_WLS_RUN	
☐	WLS Schema	ord	dbhost.example.o	1521	DEV_WLS	
☐	OPSS Audit Schema	ord	dbhost.example.o	1521	DEV_JAU_APPE	
☐	OPSS Audit Viewer Scher	ord	dbhost.example.o	1521	DEV_JAU_VIEW	
☐	OPSS Schema	ord	dbhost.example.o	1521	DEV_OPSS	

Help < Back Next > Finish Cancel

Fusion Middleware Configuration Wizard - Page 6 of 11

JDBC Component Schema

Vendor: Oracle Driver: (Oracle's Driver (thin) for Service connections, V)

DBMS/Service: ER.US.ORACLE.COM Host Name: slc03jb.us.oracle.com Port: 1521

Schema Owner: (Varies among com) Schema Password: *****

Oracle RAC configuration for component schemas:

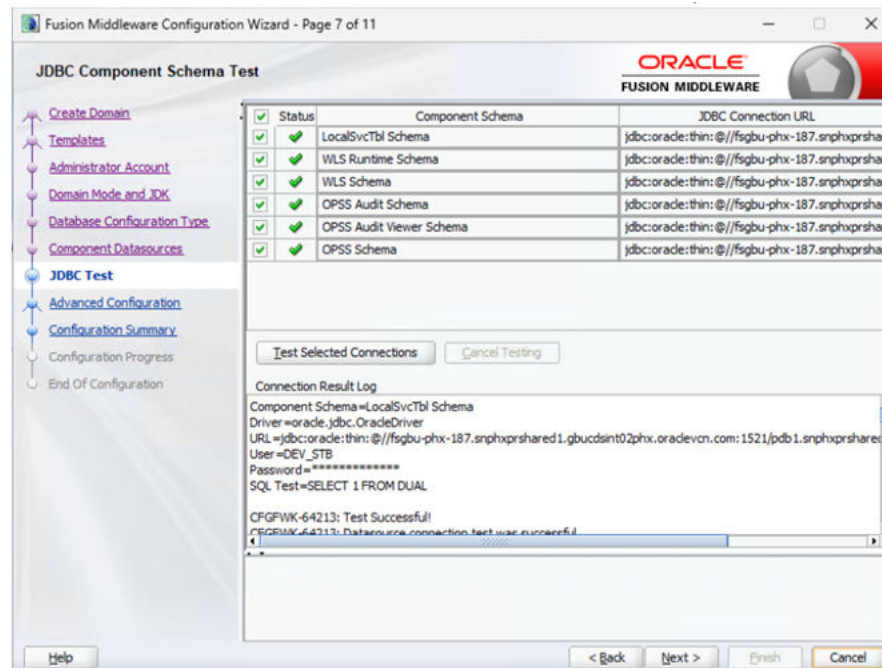
☐ Convert to GridLink ☐ Convert to RAC multi data source ☐ Don't convert

Edits to the data above will affect all checked rows in the table below.

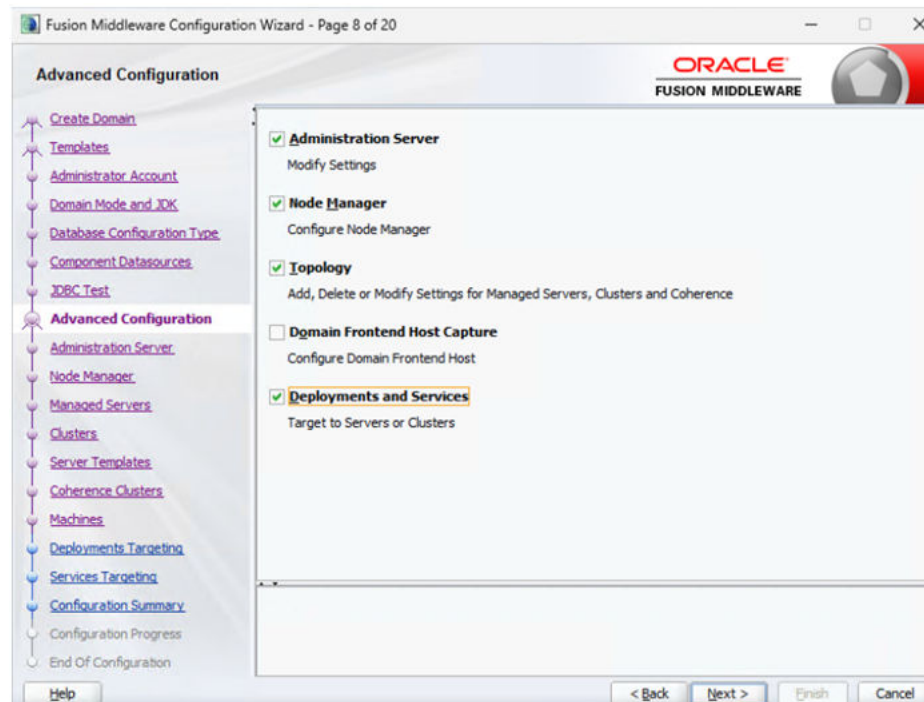
☒	Component Schema	DBMS/Service	Host Name	Port	Schema Ow...	Schema Passw...
☒	LocalSvcTb1 Schema	IDMAKER US (...)	slc03jb.us.ora...	1521	DEV_STB	*****
☒	OPSS Audit Schema	IDMAKER US (...)	slc03jb.us.ora...	1521	DEV_JAU_APPE	*****
☒	OPSS Audit Viewer S...	IDMAKER US (...)	slc03jb.us.ora...	1521	DEV_JAU_VIEW	*****
☒	OPSS Schema	IDMAKER US (...)	slc03jb.us.ora...	1521	DEV_OPSS	*****

Help < Back Next > Finish Cancel

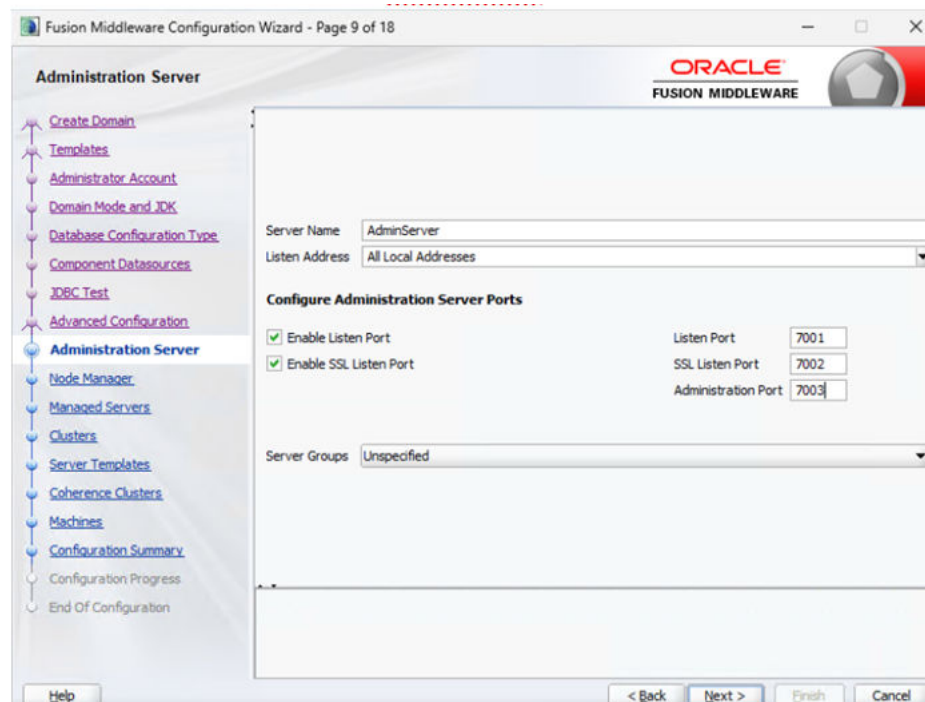
9. Select 'Test Selected Connections' button. If test is successful, then click Next.



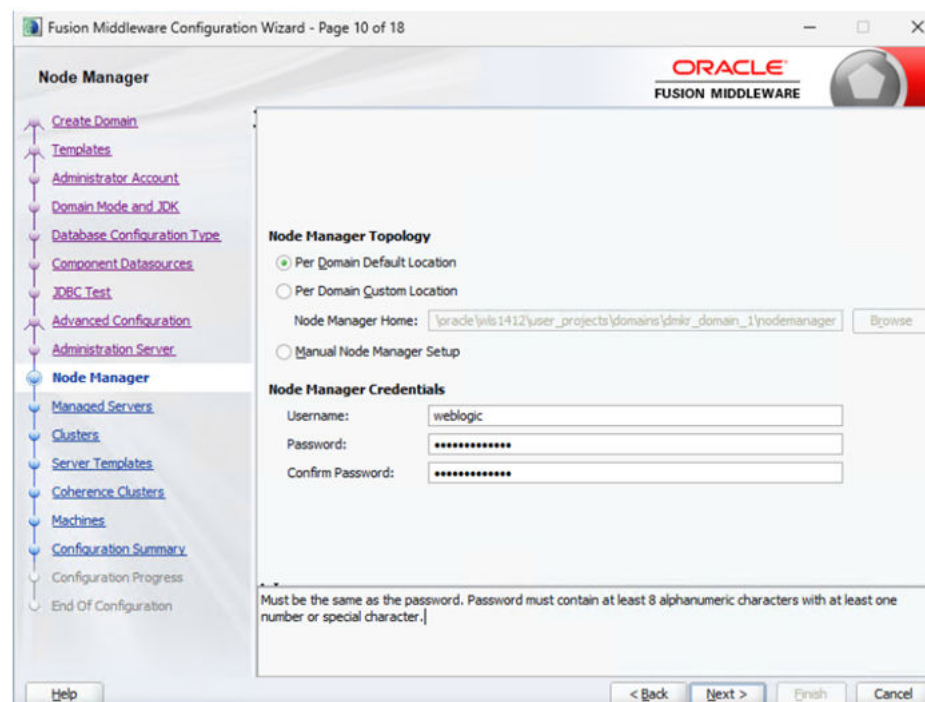
10. Select Administration Server, Node Manager, Topology and Deployments and Services then Click 'Next'.



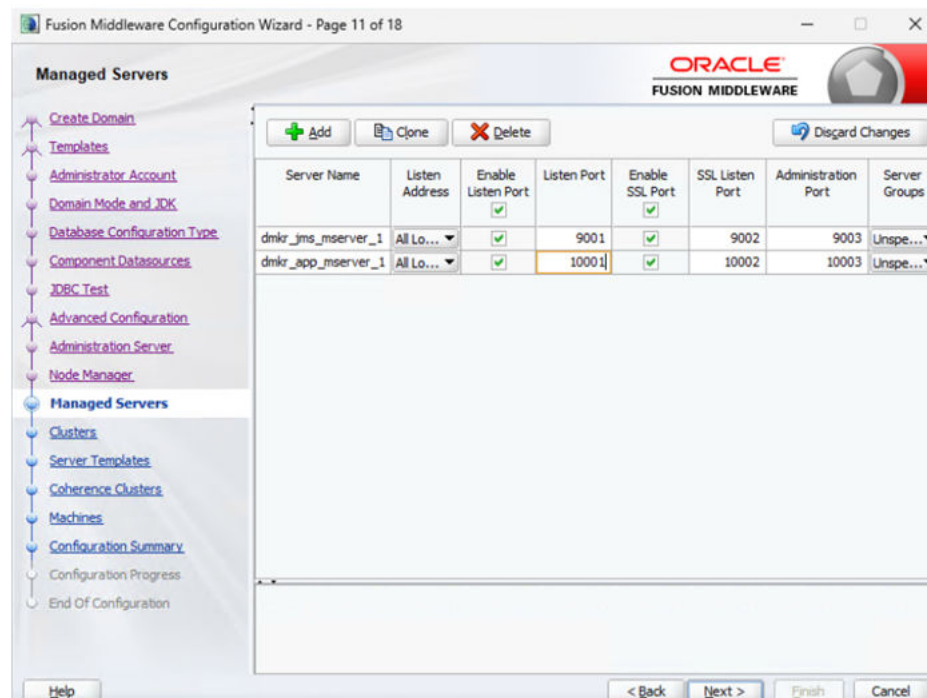
11. Setup Administration Server as AdminServer with Admin SSL port and click 'Next'.



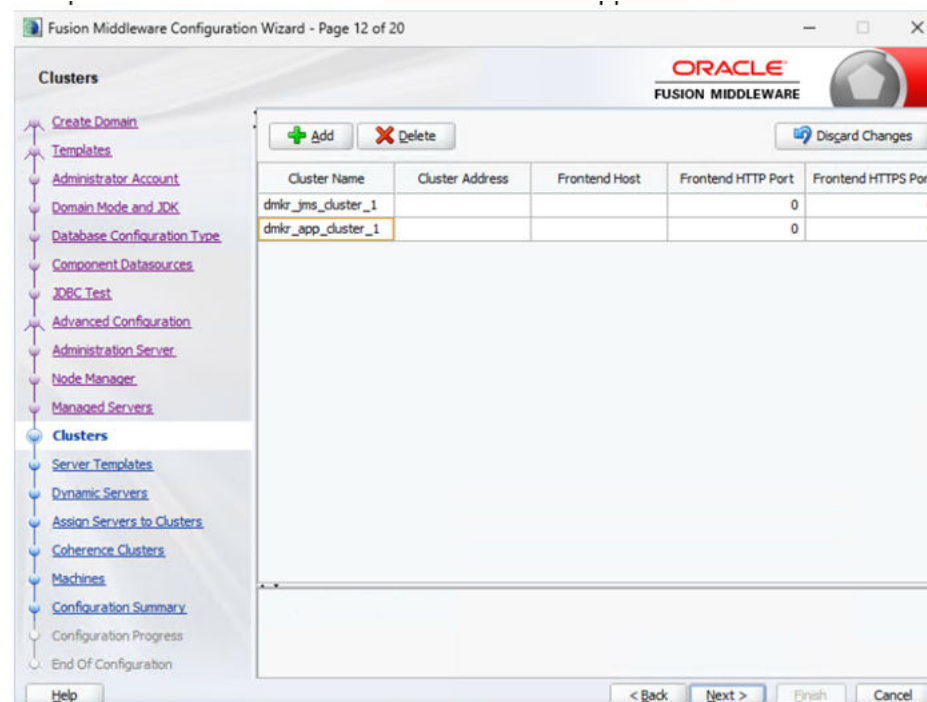
12. Setup Node Manager and click 'Next'.



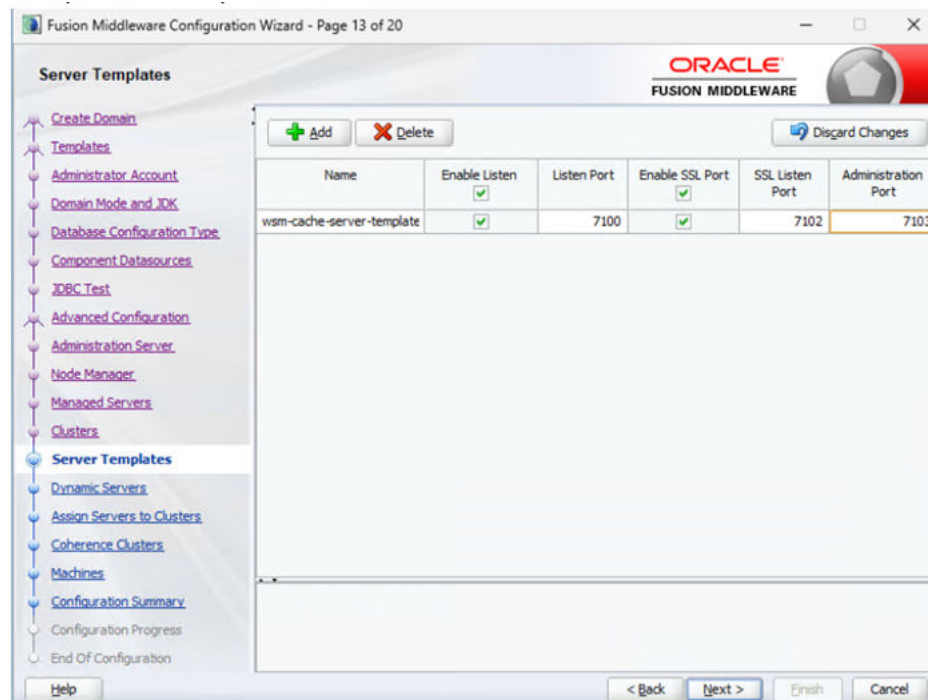
13. Setup the Managed Servers for JMS and Documaker Web apps and click 'Next'.



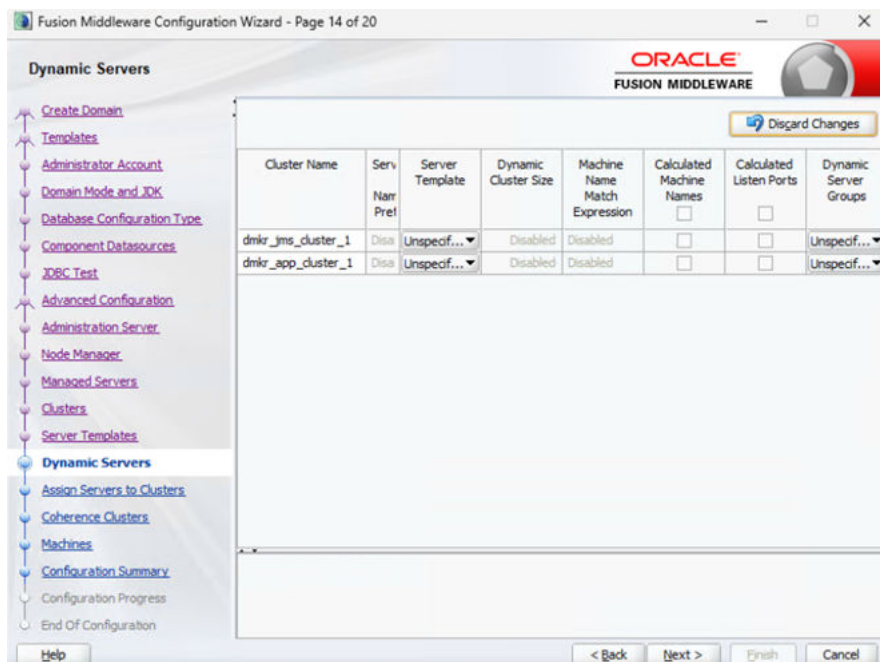
14. 14. Setup the Clusters for JMS and Documaker web apps and click 'Next'.



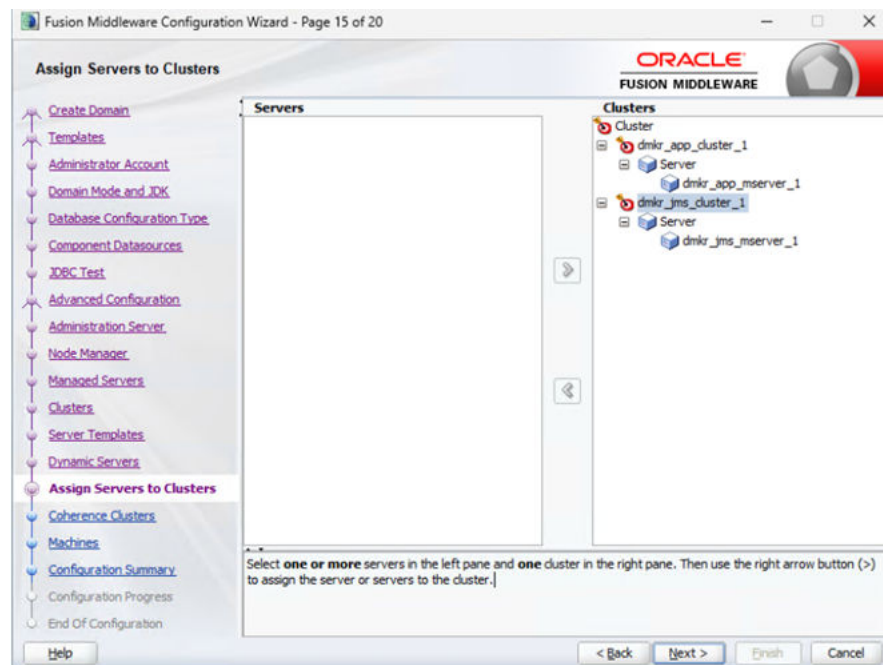
15. Setup Server Template and click 'Next'.



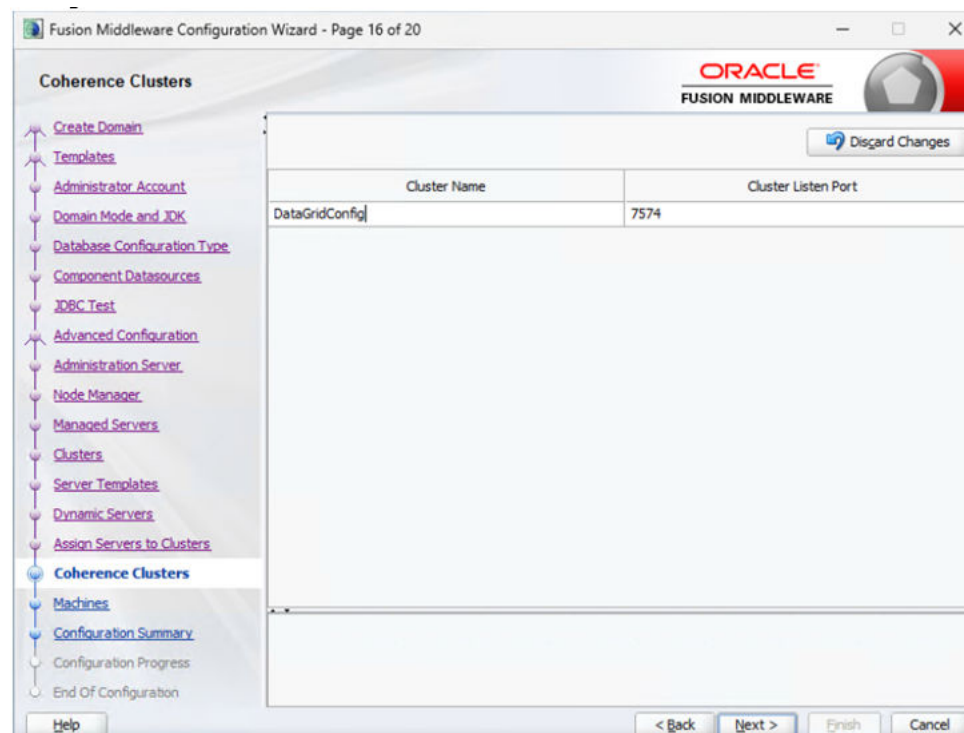
16. Setup Dynamic Servers and click 'Next'.



17. Assign Managed Servers to Clusters and click 'Next'.



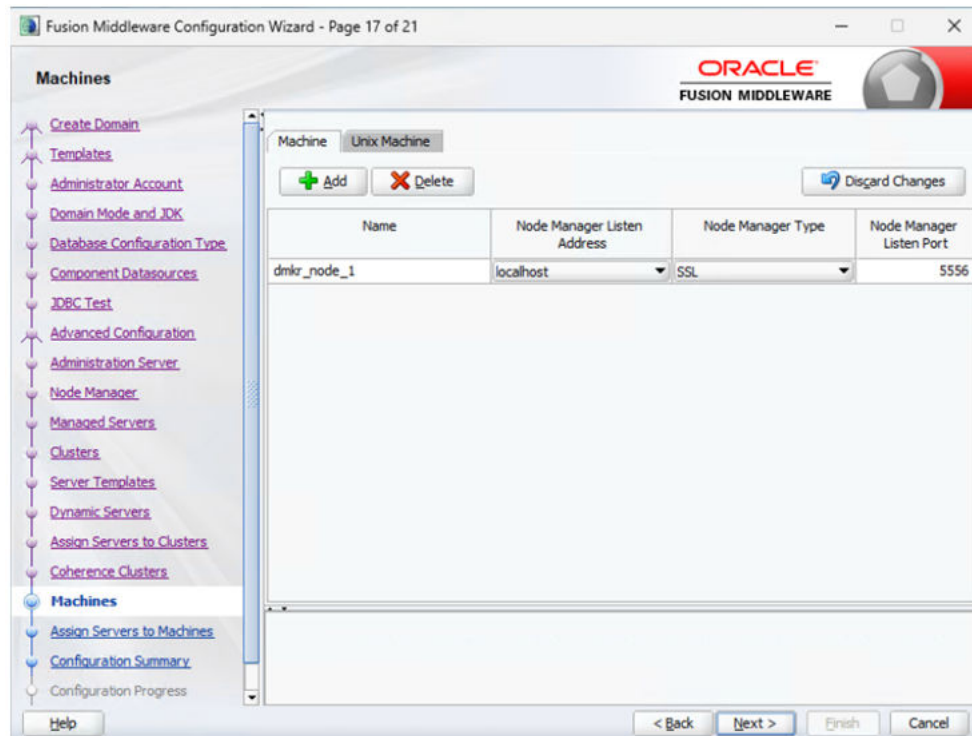
18. Setup Coherence Clusters and click 'Next'.



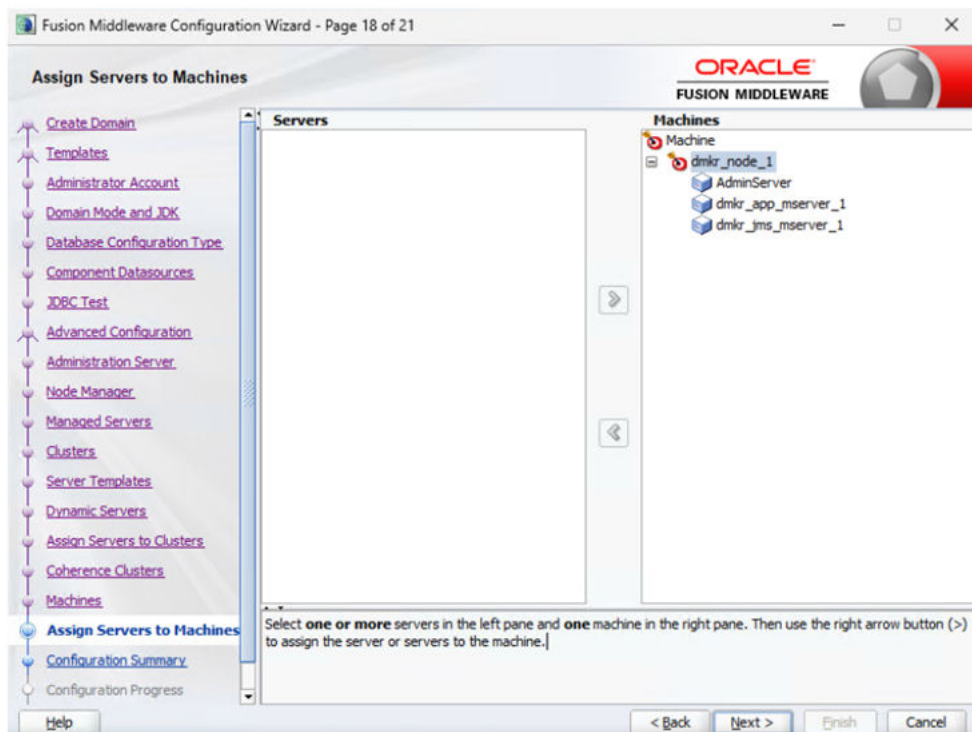
19. Setup Machine Nodes for current server and click 'Next'.

Note

Unix Machine should be used when OS is Linux and UNIX variant.



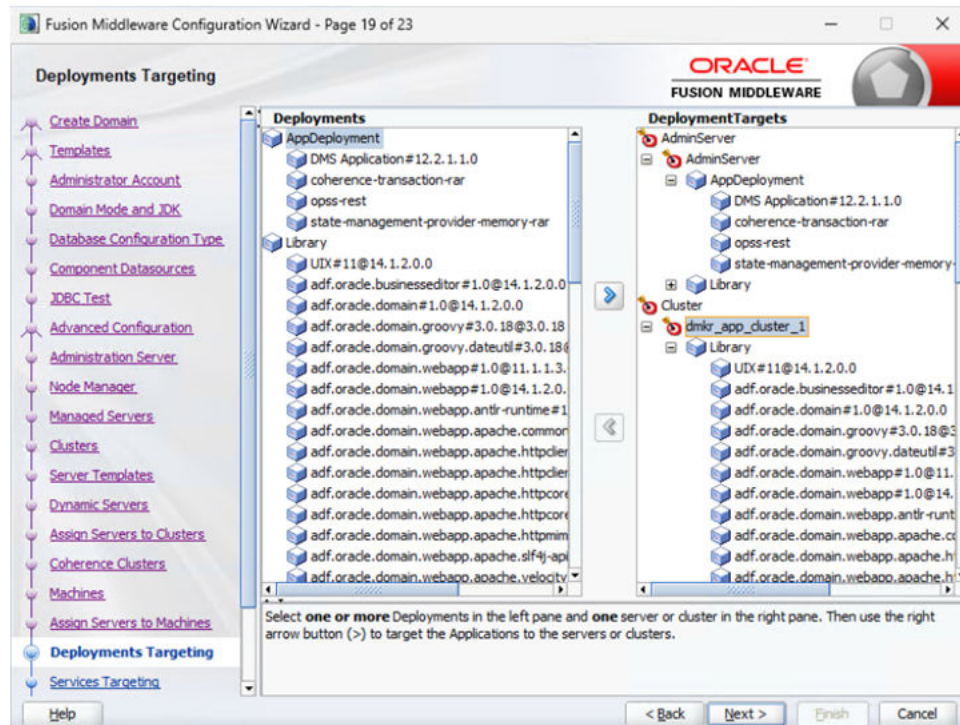
20. Assign Managed Servers to Machine nodes and click 'Next'.



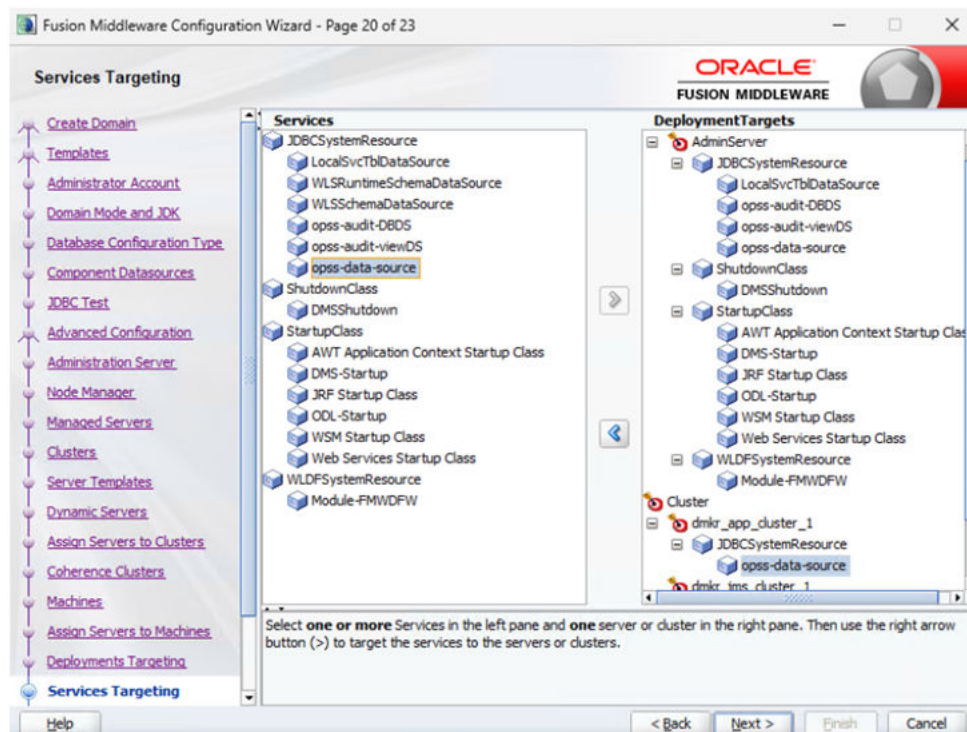
21. Deployment Targeting to associate the base and ADF libraries to the Documaker apps cluster and click 'Next'.

Note

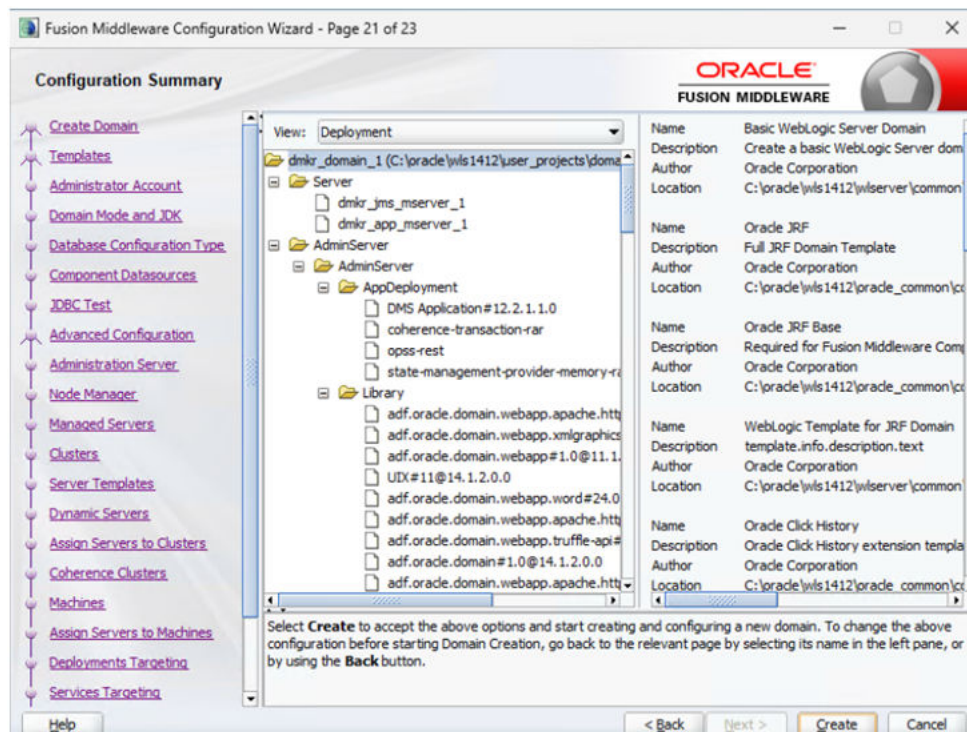
UIX, adf.oracle.*, oracle.adf.*, jsf*, jstl*, odl.*ohw*, oracle.dconfig-infra*, oracle.jrf*, oracle.jsp*, and oraclei18n-adf* libraries are needed in the cluster hosting the Documaker web app EARs. Most all but the oracle.bi.*, oracle.sdp.* and oracle.wsm.*.



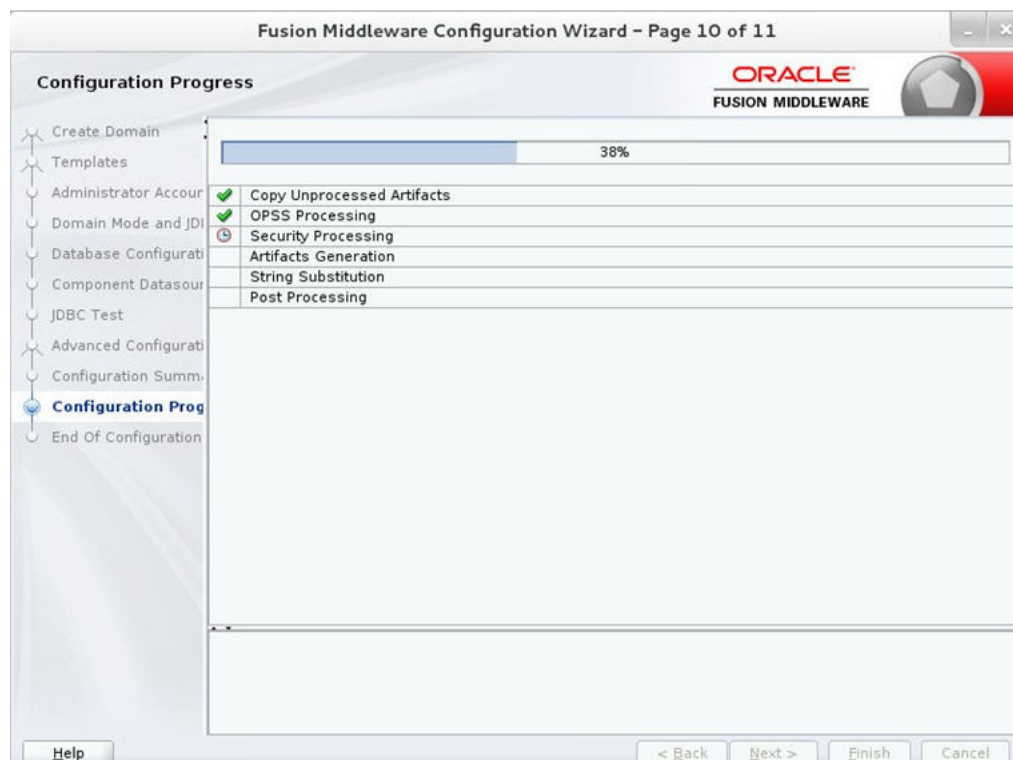
22. Services Targeting, associate the opss-data-source JDBCSystemResource needed by ADF Security (OPSS/JPS) components for the Documaker ADF Runtime (JRF) based web apps and click 'Next'.



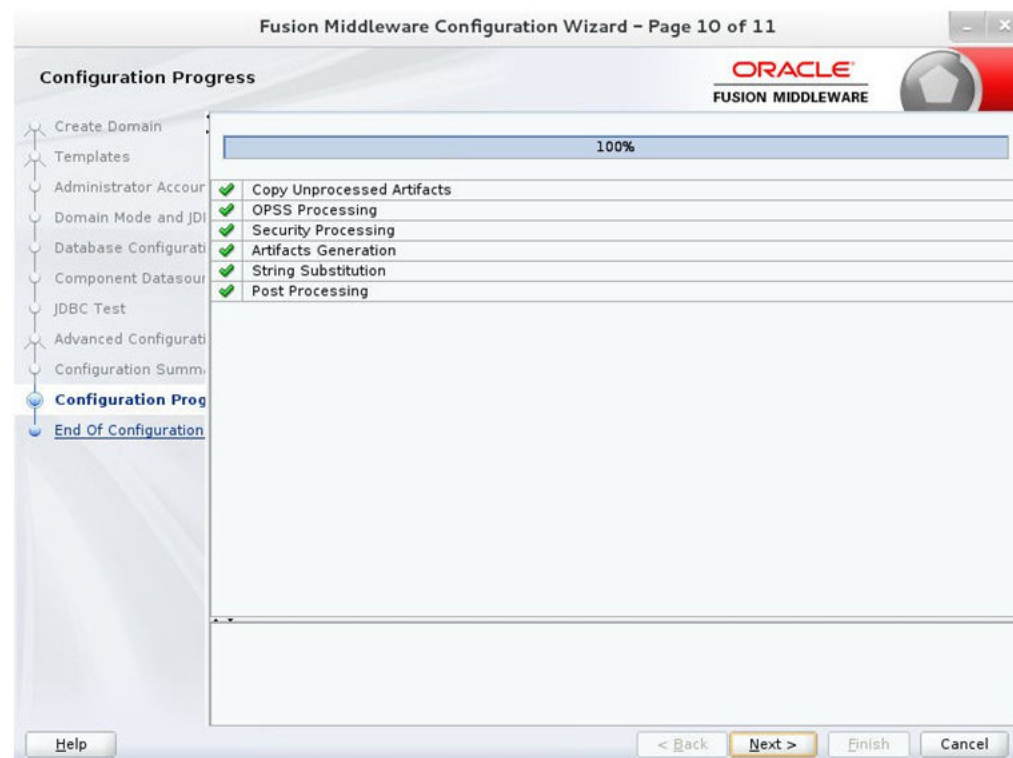
23. Review the Configuration Summary and press 'Create' when done.



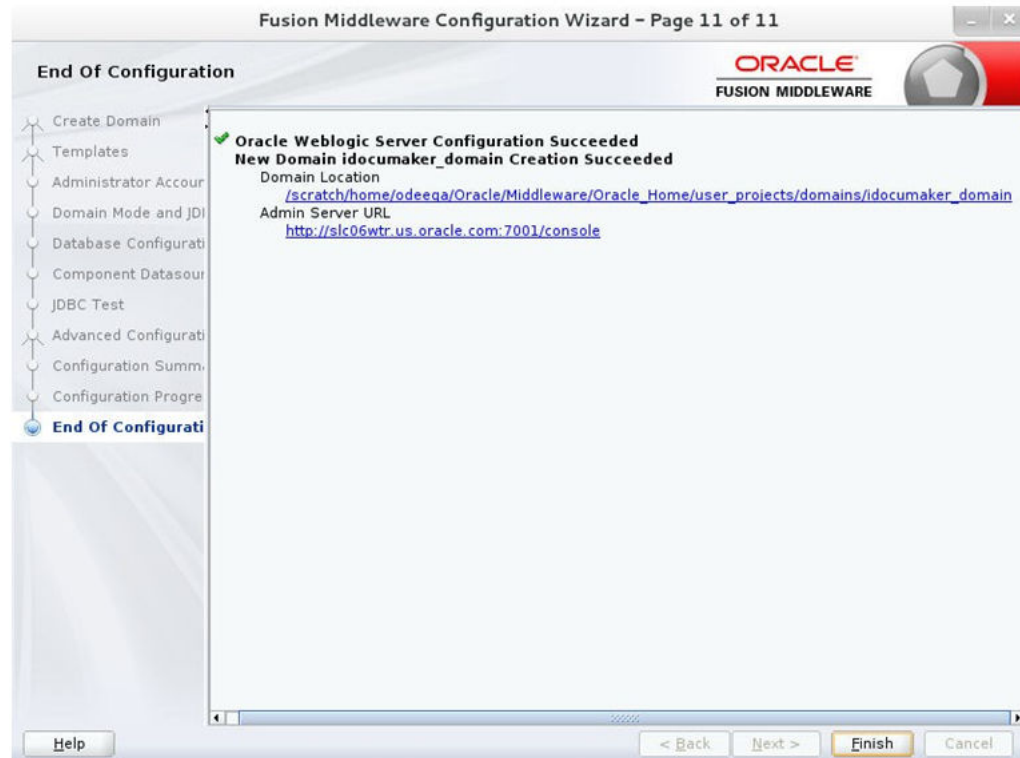
Configuration progress bar and processing list appears.



24. Click 'Next'.



25. Click 'Finish' to complete the configuration.



6

Appendix C

Certificates

Security with Secure Sockets Layer (SSL) or Transport Layer Security (TLS) are based on trust. A computer is allowed to establish a secure connection to a service because the service presents a digital file (certificate) that is digitally "fingerprinted" by a Certificate Authority (CA).

The CA has the responsibility of verifying that applicants for a certificate are who they say they are. A CA uses a private key to sign every certificate they issue (the aforementioned fingerprint), so that every certificate they issue can be traced back to them. This works by using the CA's public key to validate that a certificate is indeed valid. Services are deployed, by default, with demo certificates.

Most browsers have a trust store that is configured with the necessary fingerprints for CAs that you would need.

Note

The demo certificate that ships with Documaker is not a trusted CA; it is self-generated. As such, the hostname of the certificate will not match the hostname on the connection

In order for a browser to connect successfully to websites with SSL, (e.g. using HTTPS scheme in URL), one (or more) of the solutions can be used:

1. All users' browsers must have the trust store configured with the public key of the root certificate used to generate self-signed certificates, and all services secured by SSL must use certificates generated signed this root certificate.
This is usually an acceptable solution when the number of users is small, or the company has desktop configuration via push enabled, or when the company generates their own internal self-signed certificates to use for non-public facing services.
2. All users' trust stores can be modified to trust the demo certificate.
This is usually an acceptable solution in short-lived non-production environments.

It is not recommended to add the demo certificate to user trust stores, as a malicious user could compromise the secure connection by presenting a certificate signed with the same demo root key.
3. Services are configured with certificates issued by CAs that are in the shipping trust store of common browsers. This is usually the solution where services will be public facing. This can be expensive and cumbersome as certificates are issued to specific host names. However, it is almost universally sufficient.

Information on Secure Socket Layer is also available in the [Documaker Enterprise Security Guide](#)

Glossary

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