

Oracle® Documaker

Installing Docusave Server

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DocuSave Server documentation roadmap

Administrating



Installation
Guide



Server
Administrator
Guide



Server
Help

Programming



Programmer's
Guide

Table of Contents

XII PREFACE

xiii Using this manual

xiii Contents

xiii Conventions

xiv Related documentation

xiv Administrator's Guide

xiv Docusave Server Help

xiv Docusave Queue Systems Guide

xv Programmer's Guide

xv

1 INTRODUCTION

1 In this chapter

2 Getting started

2 Installation requirements

2 User performance requirements

6 Software and hardware requirements

13 Documentation

13 Installation components

14 Installation files for Windows

14 Installation files for UNIX operating systems

15 Sample Code

16 Docusave API Libraries

17 INSTALLATION

17 Introduction

17 Windows Installation

20 UNIX Installation

Preface

Docusave for Oracle offers a comprehensive range of scalable high-performance products for every step in the life cycle of a document. These include Creation Solutions to capture data and create forms, Publishing Solutions to produce large volumes of personalized documents, Archival Solutions to intelligently store and retrieve documents, Management Solutions to control and network documents, and Development Tools to customize your Docusave for Oracle Solutions implementations and interfaces.

Docusave for Oracle Archival Solutions store your documents electronically for intelligent retrieval and viewing. Archival Solutions facilitate immediate access to your documents for such applications as claims processing, enterprise-wide contract or regulatory document lookup, call center statement reference, and other internal and customer service-based functions. You can implement Archival Solutions as standalone systems or integrate them with leading imaging systems.

A key component of Docusave for Oracle Archival Solutions is the Docusave Server™ application. This manual fully describes Docusave Server, and the procedures for using it.

Using this manual

This *Installation Guide* is written for administrators of the Docusave Server application. This guide describes how to install the Docusave Server application on operating systems that it is compatible with.

Contents

Introduction—This chapter describes the Docusave Server components and their functions, the operator, hardware and prerequisite software requirements, the order in which components should be installed, and the installer or package names for Windows and UNIX compatible operating systems.

Installation—The Installation chapter describes how to install Docusave Server on a Windows or a UNIX compatible operating system.

Conventions

The *Installation Guide* provides consistent typographic conventions and keyboard formats to help you locate and interpret information easily. These conventions are listed below.

Convention	Description
<i>Italics</i>	Command, dialog box, button, and field names
Arial font	Directory, folder, and file names
1 Numbered lists	Provide step-by-step procedures for performing an action
◆ Bulleted lists	Provide grouped information, not procedural steps

Related documentation

In addition to this Installation Guide, the related documentation described here is also included with Docusave Server. This documentation includes administrator documentation and programming documentation.

Administrator's Guide

This *Administering Docusave Server* guide is written for administrators of the Docusave Server application. This guide describes how to use Docusave Server on multiple operating systems to automate document filing and document batch retrieval.

Docusave Server Help

The *Docusave Server Help* provides an overview of Docusave Server. It also describes the Job Recognition, Processing and Imaging Libraries, the BldCache and Addres utilities, and the AddResources batch file.

Docusave Queue Systems Guide

The *Docutoolbox Docucorp Queue Systems* guide shows you how to install, configure, and manage the Queue Management Systems. Queues provide a way for other applications to organize jobs for processing in Docusave Server. Docusave Server uses queues as holding areas for jobs awaiting processing. Dedicated queues and file servers improve the throughput processing time for Docusave Server by distributing jobs across multiple computers available on a local area network.

Programmer's Guide

The *Programmer's Guide to Docusave Server* helps you building new job processing, document processing and imaging libraries to customize or extend the functions provided by Docusave Server.

Introduction

This Installation Guide shows you how to install and configure Docusave Server. It describes how to install Docusave Server on Windows machines and on machines that run several different types of UNIX.

To help you determine whether your installation will work properly, this Installation Guide also defines the user and system requirements for Docusave Server.

In this chapter

The information in this chapter will help you answer the following questions:

- What do you do before you install Docusave Server?
- What do I need to know to prepare my system to run Docusave Server successfully?
- What installation requirements (operator skill levels, hardware platforms, and prerequisite software) must be met for support under a Docusave for Oracle maintenance agreement?
- What are the installer or installation packages for Windows and UNIX compatible operating systems and what do they contain?
- What additional software is supplied with Docusave Server and what does it do?

Getting started

Before you install Docusave Server:

- ◆ Review the “Installation requirements” on page 2 and verify that you can support a Docusave Server installation. If these requirements are not met, Docusave for Oracle will be unable to provide you with support.
- ◆ Review the latest information on your software:
 - ▶ The *What's New* document describes new and changed produce features and capabilities.
 - ▶ The *Readme* document highlights last-minute and especially important information on installing the product that could not be included in the PDF documentation at release time.

Installation requirements

The requirements sections that follow define environments eligible for support under Docusave for Oracle maintenance agreements. The requirements include operator skill levels, hardware platforms, and prerequisite software. Minimum and recommended hardware platform configurations are described.

User performance requirements

Docusave Server has two possible types of users: Administrators of Docusave Server and Developers (programmers) of new Docusave Server Libraries.

The roles and requirements of these users differ depending on their responsibilities.

Administrator roles and requirements

Administrators must be able to perform basic operating system tasks and meet entry level requirements, and must also be able to perform intermediate and advanced operating system tasks. Administrators must also be able to perform general hardware tasks. These tasks and requirements include:

Basic operating system tasks and entry level requirements

- ◆ Starting applications
- ◆ Establishing network connections
- ◆ Navigating the Windows desktop using the mouse and keyboard
- ◆ Finding, opening, printing, copying, and moving files in directories, folders and volumes
- ◆ Knowing how to find basic program features
- ◆ Understanding and using online Help files and product documentation
- ◆ Determining the version information of installed software applications
- ◆ Determining hardware configurations and free space on volumes

Intermediate and advanced operating system tasks

- ◆ Installing, removing, and setting up applications
- ◆ Identifying general hardware, application, system, and network errors

Introduction

Installation requirements

- ◆ Accessing, preserving and transmitting log files as requested by Docusave for Oracle Technical Support
- ◆ Determining what software version of the operating system is installed, including what patches or service packs have been applied
- ◆ Determining what application software packages and versions have been installed and which are executing (including unattended processes)
- ◆ Installing, configuring and removing software in system directories and administer user accounts
- ◆ Installing and setting up the operating systems listed under “Software and hardware requirements” on page 6
- ◆ Performing in-depth software and network troubleshooting
- ◆ Administering and configuring networks (TCP/IP, routers, remote access)
- ◆ Performing system backups
- ◆ Installing, starting, stopping, and configuring unattended auto-start processes (UNIX daemons, Windows Services, for example) as required
- ◆ Locating and interpreting errors in application logs and system event logs
- ◆ Locating and modifying initialization (.ini) files
- ◆ Modifying permissions and authorities for files and directories

General hardware tasks

- ◆ Optimizing hardware configurations (installing and formatting hard drives, installing and configuring random access memory (RAM), I/O, Peripheral Component Interconnect (PCI), ASA, and NuBus cards)
- ◆ Removing and replacing major components (hard drives, CD-ROM drives, video boards, RAM cards, power supplies)
- ◆ Performing minor hardware repairs and preventive maintenance
- ◆ Installing and configuring small computer system interface (SCSI) peripherals and terminations

Developer roles and requirements

Developers must be able to perform all of the tasks performed by an Administrator or have access to an Administrator from their organization. They must also be able to perform software development tasks, including:

- ◆ Installing and setting up development tools for supported operating systems
- ◆ Developing moderately complex client-server applications that use TCP/IP networking
- ◆ Using C-language callable subroutine libraries from the language they are using to develop applications
- ◆ Developing application installers for supported operating systems

Requirements for applications and tasks

Personnel qualified to perform each of the roles defined in the preceding paragraphs are required to use Docusave Server applications and to perform related tasks.

Application or Task	Required User
Install and configure of the Docusave Server application.	Administrator
Develop new Docusave Server libraries.	Developer

Software and hardware requirements

The hardware and software described here only includes what is required by the Docusave Server. It does not include the hardware and software required or recommended by the operating system vendor. Docusave for Oracle hardware and software recommendations do not take precedence over operating system vendor recommendations nor do they include allowances for running other application software on the same system.

These hardware recommendations are cumulative. Running multiple software applications on a single system requires that the system support the sum of all of the hardware recommended by all of the software vendors. For example, if each of two software applications require 50 MB of free disk space and 256 MB of available memory, then the required hardware should have 100 MB of free disk space and 512 MB of available memory.

For server products, the required minimum amount of hardware varies depending on the client and/or processing load that it supports, including the type and size of documents being processed.

CAUTION: These recommendations are not intended as guidelines for high-volume production systems. They are for installing and running a minimally loaded server, and they assume that the server is not running other applications. Larger systems should be set up while working with Docusave for Oracle Services and Technical Support. The impact of the number of users and the amount of data on system operation should be considered.

Windows operating systems

Docusave Server applications running on the Microsoft Windows operating system have the following software and hardware requirements.

Windows software requirements:

- ◆ Windows 2000 Professional (NT5), XP Professional (not the Home edition)
- ◆ The latest service packs should be applied.
- ◆ Queues created with **Docucorp Queue Management Systems™ (QMS)** release 10.2 or higher
- ◆ No additional software is required: all software libraries are installed or updated by the Docusave Server installer.

Introduction

Installation requirements

Windows hardware requirements:

Processor	Intel-compatible; 512-MHz or faster Pentium III-or-better processor required; 1-GHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended.
Memory	384 MB available RAM or more (256 MB minimum supported; this may limit performance and the availability of some features)
Hard Disk	At least 500 MB available hard disk space. Requirements vary with the application configuration: <ul style="list-style-type: none">▶ 10 MB for Docusave Server▶ 10 MB for the queue application▶ 50 MB for supporting resources (on average, the size varies with number of fonts.)▶ Space for queue data (Number of jobs times average size of job, i.e., $100 * 2\text{MB} = 200\text{ MB}$)
Networking	Network adapter appropriate for the type of network to which you wish to connect, and access to a network for connection to queues and imaging systems.
Graphics Display	Not required.

Linux operating systems

Docusave Servers running on the Linux operating system have the following software and hardware requirements.

Linux software requirements:

- ◆ Red Hat Advanced Enterprise Server, versions 2.1, 3 and 4 or an equivalent distribution from another vendor
- ◆ All current fixes and patches should be applied.

- ◆ The latest Linux kernel build announcements are available at:
<<http://www.spinics.net/lists/announce-kernel/>>
- ◆ Queues created with **Docucorp Queue Management Systems™** (QMS) release 10.2 or higher
- ◆ The following additional software is required only if you are using the DSISYSDEM Imaging Library:
 - ▶ Free DCE/RPC for Linux is supplied in the libdcerpc.so.0.0.1 file packaged with your installation. It incorporates modifications that allow Docusave Server to run with the latest versions of Linux.
 - ▶ DCE libraries are included in your installation.

Linux hardware requirements:

Processor	Intel-compatible only; 512-MHz or faster Pentium Pro-or-better processor required; 1-GHz Intel Pentium/Celeron family, AMD K6/Athlon/Duron family, or compatible processor recommended
Memory	384 MB available RAM or more recommended (128 MB minimum supported; may limit performance and some features)
Hard Disk	At least 500 MB available hard disk space. Requirements vary with the application and its configuration: <ul style="list-style-type: none">▶ 10 MB for Docusave Server▶ 10 MB for the queue application▶ 50 MB for supporting resources (on average, the size varies with number of fonts.)▶ Space for queue data (Number of jobs times average size of job, i.e., $100 * 2\text{MB} = 200\text{ MB}$)
Networking	Network adapter appropriate for the type of network to which you wish to connect, and access to a network for connection to queues and imaging systems.

Introduction

Installation requirements

Graphics	Not required.
Display	

AIX operating systems

Docusave Servers running on the AIX operating system have the following software and hardware requirements.

AIX software requirements:

- ◆ AIX 5.2 or later (for pSeries processors)
- ◆ All current fixes are recommended.
- ◆ The following additional software is required only if you are using the DSISYSIM Imaging Library:
 - ▶ POSIX Thread Support
(see <http://www.ibm.com/software/awdtools/caix/>)
 - ▶ libpthreads.a (POSIX thread library)
 - ▶ libpthreads_compat.a (POSIX thread additional compatibility layer)

NOTE: Both libraries are included in the bos.rte.libpthreads fileset, which is installed by default.

- ▶ IBM DCE/RPC for AIX
(see <http://www.ibm.com/software/network/dce/>)
 - ▶ libdce.a (IBM DCE main library)
 - ▶ libdcepthreads.a (IBM DCE support library)
 - ▶ libdcelibc_r.a (IBM DCE support library)

- ◆ Queues created with **Docucorp Queue Management Systems™ (QMS)** release 10.2 or higher

AIX hardware requirements:

Processor	IBM pSeries supporting required AIX versions
Memory	384 MB available RAM or more recommended (128 MB minimum supported; may limit performance)
Hard Disk	At least 500 MB available hard disk space. Requirements vary with the application configuration: <ul style="list-style-type: none">▶ 10 MB for Docusave Server▶ 10 MB for the queue application▶ 50 MB for supporting resources (on average, the size varies with number of fonts.)▶ Space for queue data (Number of jobs times average size of job, i.e., $100 * 2\text{MB} = 200\text{ MB}$)
Networking	Network adapter for the type of network to which you wish to connect, and access to an appropriate network
Graphics Display	Not required.

Solaris operating systems

A Docusave Server running on the Solaris operating system has the following software and hardware requirements.

Solaris software requirements:

- ◆ Solaris 8 (SunOS 5.8) or later.
- ◆ All current fixes are recommended.

Introduction

Installation requirements

- ◆ Additional Software Required: IBM DCE/RPC for Solaris; not compatible with Sun's ONC/RPC (see <http://www.ibm.com/software/network/dce/>)
- ◆ Queues created with **Docucorp Queue Management Systems™** (QMS) release 10.2 or higher

Solaris hardware requirements:

Processor	Sun SPARC Server platform only, supporting required SunOS versions.
Memory	384 MB available RAM or more recommended (128 MB minimum supported; may limit performance)
Hard Disk	<p>At least 500 MB available hard disk space. Requirements vary with the application configuration:</p> <ul style="list-style-type: none">▶ 10 MB for Docusave Server▶ 10 MB for the queue application▶ 50 MB for supporting resources (on average, the size varies with number of fonts.)▶ Space for queue data (Number of jobs times average size of job, i.e., $100 * 2\text{MB} = 200\text{ MB}$)
Networking	Network adapter for the type of network to which you wish to connect, and access to an appropriate network
Graphics Display	Not required.

Documentation

The documentation directory in your distribution media contains Acrobat (PDF) files for the Administrator’s Guide and the Programmer’s Guide. “Related documentation” on page xiv describes this documentation.

Installation components

How the Docusave Server application is provided to you, and therefore how you install Docusave Server, varies depending on the operating system that you are installing it on:

Operating System	Component Packaging
Windows	Executables that you run to install applications.
UNIX Compatible	Compressed tape archive (.tar.gz) files which you uncompress (gunzip) and untar (tar -x) into installation directories.

In addition to the primary collections of components, some components are provided as stand-alone files, directories or compressed archives for more convenient installation and distribution. The exact organization of the directories or files depends on the installation media and the operating system platforms for which you have Docusave Server licenses.

If you have a Docusave Server license agreement for Windows, you can import the Docusave Server installation components from a Docusave Installation CD or you can use your account to access Docusave’s support site. The folders on the CD use the same file structure as the one used on the

Introduction

Installation components

support site. The names of the directories and files should enable you to find the individual components being discussed.

Installation files for Windows

If you have a Docusave Server license agreement for Windows, you install Docusave Server from an installation package with the components listed here.

- ◆ Docusave Server Installer _v_v_b.exe installer for the complete Windows version of Docusave Server

Note: v_v are the major and minor version numbers, b is the build number

Installation files for UNIX operating systems

If you have a Docusave Server license agreement for a Linux, Solaris or AIX operating system, you will receive an installation package containing a compressed tar file with its name formatted as shown here.

File Name Format (see Key)	Contents
dsave_v_v_b_b_p.tar.gz	Full-featured Docusave Server application

Key to abbreviations

- ◆ dsave specifies Docusave Server.
- ◆ v_v specifies major and minor version numbers. For example: 3_0 is major version 3, minor version 0.

- ◆ **b_b** specifies major and minor build numbers. For example: 0_6 is build 0.6.
- ◆ **p** specifies the target operating system platform for the build. Operating system abbreviations are:
 - ▶ **s** for Solaris
 - ▶ **a** for AIX
 - ▶ **l** (the letter L) for Linux.

Examples of tar file names

- ▶ **dsave_3_0_0_6_1.tar.gz**—Docusave Server major version 3, minor version 0, build 0.6 for Linux.
- ▶ **dsave_3_0_0_6_a.tar.gz**—Docusave Server major version 3, minor version 0, build 0.6 for AIX

Sample Code

Docusave Server is shipped with sample C++ code to illustrate the implementation of each type of Docusave Server library. This code is an excellent starting point for custom-built libraries. For more information, refer to the “Programmer’s Guide to Docusave Server.”

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Introduction

Docusave API Libraries

Docusave API Libraries

The Docusave Application Programming Interface (DAPI) Libraries contain utility functions, some of which can assemble or disassemble jobs for Docusave Server. In the past, the Docusave API (DAPI) Libraries have been shipped as components with Docusave Server. Many of these libraries either interface with legacy products or are available as part of utility applications such as QCUTIL. As a result, DAPI is no longer supplied with Docusave Server, but continues to be supported across platforms and available to licensed customers by contacting Support. Previously supplied versions of DAPI libraries should also continue to work unchanged with Docusave Server 3.0.

Installation

Introduction

The information in this chapter will help you answer the following question:

→ How do I install Docusave Server?

NOTE: Docusave Server was designed to interface to other applications using Docucorp Queue Systems. You may have to install Docucorp Queue Systems when you install Docusave Server. Refer to the *Docutoolbox Docucorp Queue Systems* guide.

Windows Installation

- 1 **Launch the Docusave Server installation program and click *Next* when the welcome screen opens.**

Be certain that all programs are closed before running the installation program.

- 2 **Select the folder where Docusave Server components will be installed and click *Next*.**

You can select the default location or Browse to a new location.

Installation

Windows Installation

- 3 **Select the Setup type you would like and then click *Next*.**
 - ▶ ***Typical.*** Program is installed with the Application and Source Code (the most common options).
 - ▶ ***Compact.*** Program is installed with only the Application (the minimum required options).
 - ▶ ***Custom.*** User can choose which components to install.
- 4 **Click *Finish* after installation is complete.**

Note for FileNet users:

Docusave Server's FileNet Imaging Library (`DSISYSFN.dll`) requires the `fnet.dll` FileNet support library.

NOTE: These instructions are for a working Microsoft Visual C++ environment.

To generate the FileNet support library; make FileNetBuild the current directory and issue the following command:

```
nmake fnet.mak
```

The result should be the `fnet.dll` library called `fnet.dll` which must be moved to the Docusave Server installation directory before starting Docusave Server.

Upgrading from a prior version of the software

The CRUSHER compression library has been replaced with a comparable library called CDECZLIB. If you are currently using CRUSHER as your compression library, please make a backup copy of `CRUSHER.dll` before uninstalling a previous version of AccessCommander or Docusave Server. After you have installed the current version of Docusave Server, you must copy `CRUSHER.dll` back into the Compression directory.

Docusave Server as a service

Docusave Server can be executed as a service using Srvany.exe. The service version of Docusave Server called DSService.exe is installed in the application directory.

Srvany.exe allows any Windows application to run as a service and is available on the Windows Resource Kit provided by Microsoft. For information on installing and removing a user-defined service, please see the Srvany.wri document provided with the Windows Resource Kit utilities (C:\Reskit\Srvany.wri, for example). This document can also be found on the Windows Resource Kit CD in the Common\Config directory.

Instructions specific to Docusave Server are as follows:

Specifying the application & its parameters:

- ◆ Run the Registry Editor (REGEDT32.EXE):
 - ▶ create a 'Parameters' key under HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\MyService
 - ▶ under the 'Parameters' key, create an 'Application' value of type REG_SZ and specify the full path of the application's executable (including the extension). For example:
Application: REG_SZ: C:\Program Files\Docucorp International\Docusave Server\DSService.exe
 - ▶ under the above key, create an AppDirectory value of type REG_SZ and specify the current directory to use for the application. For example:
AppDirectory: REG_SZ: C:\Program Files\Docucorp International\Docusave Server

UNIX Installation

The software directory contains a tar file for each UNIX compatible operating system. Refer to “Installation files for UNIX operating systems” on page 14 for the naming conventions used for these files.

Installing Docusave Server

Install `dsave_v_v_b_b_p.tar.gz` as follows:

```
cp /<CD-ROM device directory>/dsave_v_v_b_b_p.tar.gz .  
gunzip -c dsave_v_v_b_b_p.tar.gz | tar -xvf -
```

Note for FileNet users

A shared object called `fnets.o` is required by the FileNet Imaging Library (`dsisysfn.so`).

To generate the `fnets.o` shared object:

```
cd docusave/FileNetBuild  
  
make -f fnetshr.mak  
  
cp fnets.o ..
```

Upgrading from an earlier version of the software:

The `crusher` compression library has been replaced with a comparable library called `cdeczlib`. If you are currently using `crusher` as your compression library, please make a backup copy of `crusher.so` before uninstalling a previous version of AccessCommander or Docusave Server. After you have installed the current version of Docusave Server, you must copy `crusher.so` back into the Compression directory.